### CalSAWS | JPA Board of Directors Meeting



November 17, 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 ClearBest Change Order No. 8, which exercises an extension of one (1) optional year, and includes additional scope and costs for client correspondence, transition to new contracts for Maintenance and Enhancements (M&E) and Infrastructure, and an allowance for future work orders.

Cost Summary	
Total Baseline Through Change Order 7	\$32,125,233
Change Order 8 – One-Year M&O Extension	
- M&O Deliverables	\$3,683,945
- Client Correspondence	\$1,294,128
- QA M&O/M&E Transition Services	\$1,574,388
- QA Professional Services	\$3,525,000
CO 8 Total	\$10,077,461
Revised Total Contract Value	\$42,202,694

## Action Items

- 5. Approval of Consent Items
  - a. Approval of the Minutes and review of the Action Items from the October 20, 2023, JPA Board of Directors Meeting.
  - Approval of Accenture Change Notice No. 30, which includes a request to add seven (7) premise items, administrative adjustments to address State Fiscal Year (SFY) shifts and update WAN and technical infrastructure hours, and one (1) county purchase.
  - c. Approval of ClearBest Change Order No. 7 Work Order No. 7, which includes a request to add five (5) premise items.
  - Approval of Deloitte Portal Mobile contract Change Order No. 5 Work Order No. 14, which includes a request to add one (1) premise item.

## Informational Items



## Wave 6 Go-Live Debrief

Production Update



## Wave 6 Go-Live Production Update

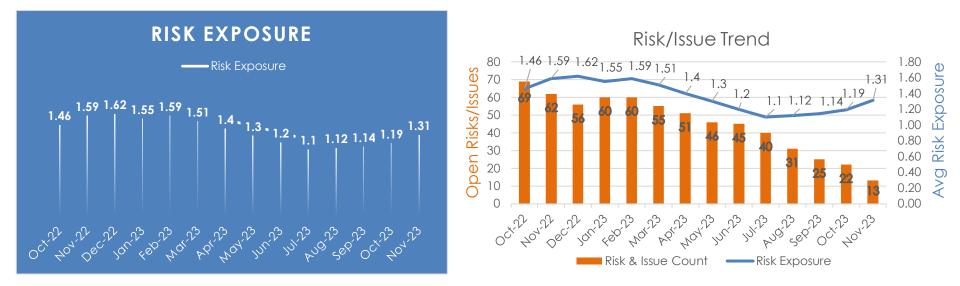
- Cutover:
  - Wave 6B cutover activities completed 5 hours ahead of schedule
  - Wave 6C cutover activities completed 3 hours ahead of schedule
  - Automated Case Review set all time high of 72% match
- Post Go-Live:
  - Batch and online performance remains within SLAs
  - San Francisco:
    - + Changed from 2-day to same day warrant processing, changed 10/31
    - GAGR Corrections: Earned Income Disregard calculation errors (resolved 10/31), missing periodic reports (target 11/13), Setting incorrect reporting type (target 11/21)
  - Contact Centers:
    - Firewall connection limits impacted connectivity to Enhanced Call Control Panel (eCCP) in Sacramento and San Francisco. Resolved 10/30 mid-morning.
    - Sacramento calls identified as spam by carriers and count network configuration causing dropped calls. As of 11/13, continue to work with T-Mobile and Metro PCS to pass spam filters

## Project Risks

- Migration Risks
- M&O Risks
- Reports Risks



### CalSAWS Project Risks Risk Exposure Trend



#### Updated as of 11/3/23

## Wave 6 Risk Summary

### CalWIN Counties Cutover Readiness Needs Risks

Risk	Risk Name	Wave 6
269	CalWIN Counties may not have enough development and testing timeline to	
	Refactor their Ad-hoc Reports and Ancillary System before Go-Live	Low

### Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk	Risk Name	Wave 6
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
	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 11/1/23 non-RMG Weekly Status Meeting

# M&O Risk & Issue Summary

### M&O Production Risks

Risk	Risk Name	Level
201	Pace of policy changes may exceed capacity of the project teams, resulting in	
	less automation	Medium
239	Lack of consistent State language translation approach may cause schedule	
	delays and rework	Medium
290	Recently released ROI policy lacks clarity which may create privacy and liability	
	exposure for counties and customers	Medium
296	Counties may not be prepared to reconcile Fiscal Reports and submit State	
	Reports, timely	Medium
297	Counties may face challenges in adopting management and ad hoc reports if	
	additional support is not provided	Medium
295	WelcomeBot and AutheticationBot Customer Experience	lssue

### CalSAWS Project Management Risks

Risk	Risk Name	Level
203	Project communications must be enhanced, otherwise stakeholder / audience	
	needs will not be met	Medium

## M&O Production Risks

NEW - 296: Counties may not be prepared to reconcile Fiscal Reports and submit State Reports, timely

Risk #296	Risk Description & Mitigation Plan
	Given the distinct challenges tied to data validation, data conversion that CalSAWS and CalWIN counties face, they may not be prepared to reconcile and submit timely Fiscal and State Reports, as they migrate to CalSAWS. Additional project support is required to assist CalSAWS and CalWIN counties with State and Fiscal reports reconciliation and submission
	<ol> <li>The following mitigation plan will be actioned to address these concerns:</li> <li>Gather county feedback on report concerns through Report Discovery sessions, Wave-specific Fiscal/State Report Support meetings, and Bi-Weekly Fiscal/State Report meetings</li> <li>Address questions/tickets/defects affecting the submission of State Reports and County CEC reports</li> <li>Improve communication on available resources and existing reporting concerns/questions</li> </ol>
	Refer to Retired Risk #279 for additional information on risk status and history.

## M&O Production Risks

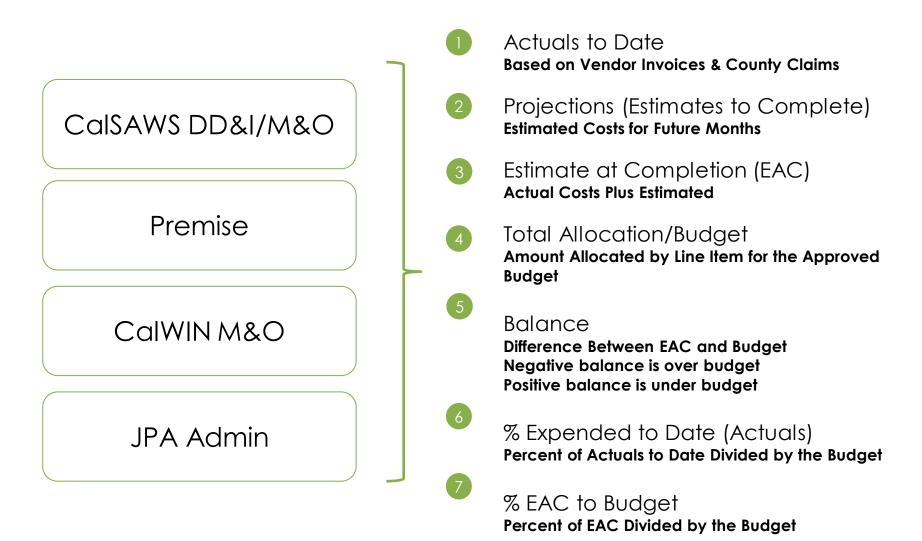
NEW - 297: Counties may face challenges in adopting management and ad hoc reports if additional support is not provided

Risk #297	Risk Description & Mitigation Plan
	Counties may face challenges in adopting management and ad hoc reports if additional support is not provided. As specific challenges are currently unknown, the themes may need to be further investigated. A multi-phased solution to gain insight into county concerns will be issues to pinpoint common challenges regionally and address potential user needs more effectively.
	In effort to improve communication on available resources, a CIT will be issued as a first step to inform counties of available ad hoc reports resources. Consequently, the mitigation strategy below will take place to address specific concerns across case management and ad hoc reports
	<ul> <li>Phase 1 - Meet with Regional Managers</li> <li>Phase 2 - Distribute Survey to all 58 Counties</li> <li>Phase 3 - Meet Regionally with LA/C-IV Counties and in small groups with CalWIN Counties to address areas of concern</li> <li>Phase 4 - Leverage feedback and collaboration with counties to continuously improve communication on available resources and existing reporting functionality and issues</li> </ul>

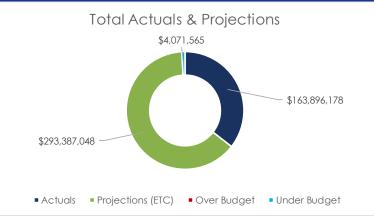
### Quarterly Fiscal Report

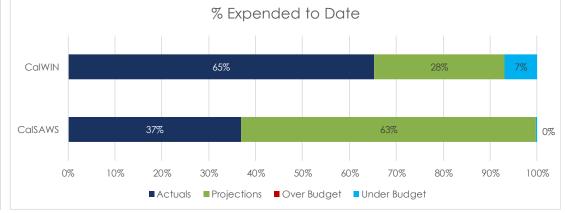


### CalSAWS Financial Update Overview



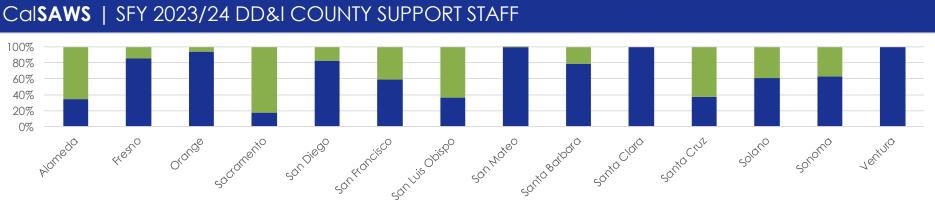
#### CalSAWS | SFY 2023/24 FINANCIAL DASHBOARD - November 9, 2023





Category	Actuals to Date <sup>1</sup>	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
CalSAWS	\$128,455,393	\$218,098,515	\$346,553,908	\$347,459,194	\$905,286	37.0%	<b>99.7</b> %	
DD&I Non-App. Dev.	\$18,901,866	\$12,466,267	\$31,368,133	\$32,050,115	\$681,982	59.0%	97.9%	Facilities and Travel less than planned
DD&I Training	\$526,350	\$1,902,666	\$2,429,016	\$2,652,320	\$223,304	19.8%	91.6%	Travel less than planned
CalSAWS M&O	\$105,237,550	\$197,892,635	\$303,130,185	\$303,130,185	\$0	34.7%	100.0%	
M&O Procurement	\$628,396	\$618,372	\$1,246,768	\$1,246,768	\$0	50.4%	100.0%	
OCAT M&O	\$994,323	\$1,205,096	\$2,199,419	\$2,199,419	\$0	45.2%	100.0%	
CalHEERS Interface	\$1,842,520	\$3,147,831	\$4,990,351	\$4,990,351	\$0	36.9%	100.0%	
Covered CA CSC	\$324,388	\$865,648	\$1,190,036	\$1,190,036	\$0	27.3%	100.0%	
CalSAWS Premise	\$8,038,273	\$63,237,003	\$71,275,276	\$71,532,342	\$257,066	11.2%	99.6%	
CalSAWS Premise	\$8,038,273	\$63,237,003	\$71,275,276	\$71,532,342	\$257,066	11.2%	99.6%	Staff and QA costs less than planned
CalWIN M&O	\$27,203,395	\$11,599,080	\$38,802,475	\$41,711,688	\$2,909,213	65.2%	93.0%	
CalWIN M&O	\$23,878,301	\$11,497,288	\$35,375,589	\$37,788,796	\$2,413,207	63.2%	93.6%	
CalHEERS Interface	\$2,712,600	\$82,458	\$2,795,058	\$3,070,178	\$275,120	88.4%	91.0%	Costs less than planned
CalHEERS CSCN	\$612,494	\$19,334	\$631,828	\$852,714	\$220,886	71.8%	74.1%	
JPA Admin. Budget	\$199,117	\$452,450	\$651,567	\$651,567	\$0	30.6%	100.0%	
CalSAWS 58 Counties	\$199,117	\$452,450	\$651,567	\$651,567	\$0	30.6%	100.0%	
Total	\$163,896,178	\$293,387,048	\$457,283,226	\$461,354,791	\$4,071,565	35.5%	<b>99</b> .1%	

1. Actuals are based on planned invoices through December (partial) payment month



COMBINED Total	<b>\$ 3.4 M</b> Actuals to Date	<b>\$ 2.8 M</b> Projections	<b>\$ 6.2 M</b> Estimate At Completion	<b>\$ 6.2 M</b> Total Allocation	<b>\$ .0 M</b> Balance (+Under/-Over)	<b>55%</b> % Expended to Date	<b>100%</b> % EAC to Budget
Alameda	\$318,159	\$599,802	\$917,961	\$917,961	\$0	35%	100%
Fresno	\$864,836	\$146,586	\$1,011,422	\$1,011,422	\$0	86%	100%
Orange	\$370,141	\$23,346	\$393,487	\$393,487	\$0	94%	100%
Sacramento	\$304,887	\$1,440,502	\$1,745,389	\$1,745,389	\$0	17%	100%
San Diego	\$824,192	\$177,913	\$1,002,105	\$1,002,105	\$0	82%	100%
San Francisco	\$165,324	\$113,876	\$279,200	\$279,200	\$0	59%	100%
San Luis Obispo	\$61,155	\$107,364	\$168,519	\$168,519	\$0	36%	100%
San Mateo	\$156,867	\$48	\$156,915	\$156,915	\$0	100%	100%
Santa Barbara	\$41,818	\$11,321	\$53,139	\$53,139	\$0	79%	100%
Santa Clara	\$61,248	\$0	\$61,248	\$61,248	\$0	100%	100%
Santa Cruz	\$37,016	\$61,753	\$98,769	\$98,769	\$0	37%	100%
Solano	\$52,475	\$33,133	\$85,608	\$85,608	\$0	61%	100%
Sonoma	\$68,892	\$40,645	\$109,537	\$109,537	\$0	63%	100%
Ventura	\$80,353	\$0	\$80,353	\$80,353	\$0	100%	100%

### Cal**SAWS** | SFY 2023/24 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS	\$11,815,752	\$19,282,114	\$31,097,866	\$31,127,757	\$29,891	38.0%	<b>99.9</b> %
Consortium Personnel - County <sup>1</sup>	\$3,224,085	\$9,623,669	\$12,847,754	\$12,847,754	\$O	25.1%	100.0%
Consortium Personnel - Contractor <sup>2,3</sup>	\$8,591,667	\$9,658,445	\$18,250,112	\$18,280,003	\$29,891	47.0%	99.8%
CalWIN M&O	\$1,333,308	\$428,780	\$1,762,088	\$1,872,074	\$109,986	71.2%	<b>94</b> .1%
Consortium Personnel - County <sup>1</sup>	\$37,908	\$31,287	\$69,195	\$69,195	\$O	54.8%	100.0%
Consortium Personnel - Contractor <sup>2,3</sup>	\$1,295,400	\$397,493	\$1,692,893	\$1,802,879	\$109,986	71.9%	93.9%
CalSAWS Premise	\$37,751	\$37,79 <b>4</b>	\$75,545	\$332,611	\$257,066	11. <b>3</b> %	22.7%
Consortium Personnel - County	\$37,751	\$37,794	\$75,545	\$332,611	\$257,066	11.3%	22.7%
Consortium Personnel - Contractor <sup>2</sup>	\$0	\$O	\$O	\$0	\$O	0.0%	0.0%
Total	\$13,186,811	\$19,748,688	\$32,935,499	\$33,332,442	\$396,943	39.6%	<b>98.8</b> %

SFY 2022/23 - Consortium Personnel FTE Counts	FTE
CalSAWS DD&I and M&O	168
Consortium Personnel - County <sup>1</sup>	71
Consortium Personnel - Contractor <sup>2</sup>	73
Consortium Personnel - Contractor Limited Term <sup>3</sup>	17
TBD <sup>4</sup>	7
CalWIN M&O	16
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	10
Consortium Personnel - Contractor Limited Term <sup>3</sup>	5
TBD <sup>4</sup>	0
Premise	1
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	0
Total	185

<sup>1</sup>Includes only Consortium Staff, does not include County Support Staff <sup>2</sup>Includes RGS and CSAC employees

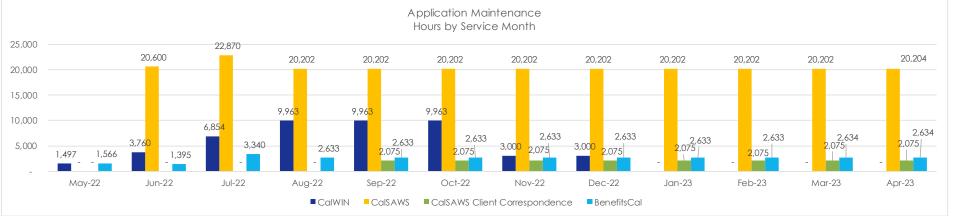
<sup>3</sup>Includes RGS, CSAC, and First Data Staff (Non-Employees)

<sup>4</sup>Does not account for backfill considerations

### Cal**SAWS** | SFY 2023/24 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalWIN M&O	\$5,605,182	\$2,241,575	\$7,846,757	\$8,054,010	\$207,253	69.6%	97.4%
CalWIN M&O	\$5,098,259	\$1,739,953	\$6,838,212	\$6,838,212	\$O	74.6%	100.0%
CalHEERS Interface Change Budget	\$437,687	\$82,458	\$520,145	\$602,604	\$82,459	72.6%	86.3%
CalHEERS CSCN Change Budget	\$0	<b>\$</b> 0	\$O	\$124,794	\$124,794	0.0%	0.0%
CalWIN Premise	\$69,236	\$419,164	\$488,400	\$488,400	\$O	14.2%	100.0%
CalSAWS M&O	\$20,058,370	\$23,576,977	\$43,635,347	\$43,635,347	\$0	46.0%	100.0%
CalSAWS M&E	\$12,211,499	\$14,688,379	\$26,899,878	\$26,899,878	\$O	45.4%	100.0%
CalHEERS Interface Change Budget	\$1,162,386	\$2,003,658	\$3,166,044	\$3,166,044	\$O	36.7%	100.0%
BenefitsCal	\$2,160,404	\$1,542,037	\$3,702,441	\$3,702,441	\$O	58.4%	100.0%
CalSAWS Premise	\$4,524,081	\$5,342,903	\$9,866,984	\$9,866,984	<b>\$</b> 0	45.9%	100.0%
TOTAL	\$25,663,552	\$25,818,552	\$51,482,104	\$51,689,357	\$207,253	49.6%	99.6%

#### Cal**SAWS** | SFY 2023/24 APPLICATION MAINTENANCE HOURS BY MONTH & SYSTEM



Change Budget Category May-23 Jun-23 Jul-23 Aug-23 Sep-23 Oct-23 Nov-23 Dec-23 Jan-24 Feb-24 Mar-24 Apr-24 Mav-24 Total CalWIN M&O 1,497 3,760 6,854 9,963 9,963 9,963 3,000 3,000 48,000 ---194 54 248 Design & Build \_ \_ \_ \_ \_ \_ -\_ \_ -\_ Test 517 899 86 1.502 --\_ \_ --\_ \_ -Management & Other Support 786 2.807 6.768 10.361 \_ -\_ -\_ \_ \_ -Projection 9.963 9.963 9.963 3.000 3.000 35.889 -----\_ -CalSAWS M&O 20,600 22.870 20.202 20.202 20.202 20.202 20.202 20.202 20.202 20,204 225.290 20,202 -Design & Build 13,704 16,991 30,695 -----------Test 3.829 3.332 7,161 \_ --------\_ -Management & Other Support 3.067 2.547 5.614 \_ \_ \_ \_ \_ \_ \_ \_ \_ -Projection 20,202 20,202 20,202 20,202 20.202 20,202 20,202 20,202 20,204 181.820 ----CalSAWS Client Correspondence 2,075 2,075 2,075 2.075 2,075 2.075 2,075 2.075 16,600 -----Client Corresondence \_ \_ \_ --------\_ --Projection \_ \_ \_ \_ 2,075 2,075 2,075 2,075 2,075 2,075 2,075 2,075 -16,600 1.395 **BenefitsCal** 1.566 3.340 2.633 2.633 2.633 2.633 2.633 2.633 2.634 2.634 30,000 2.633 -Design & Build 861 770 1,837 3,468 \_ -------\_ -Test 391 350 835 1,576 -\_ \_ -\_ -\_ \_ \_ 275 Management & Other Support 314 668 1,257 \_ -\_ -\_ \_ \_ \_ \_ \_ Projection -2,633 2,633 2,633 2,633 2,633 2,633 2,633 2,634 2,634 23,699 \_ --33,064 COMBINED TOTAL 25,755 32,798 32,798 32,798 25,835 25,835 22,835 22,835 22,836 22,838 303,290 -

#### NOTES:

May 2023 hours were partially paid in June 2023 and therefore reflected in SFY 22/23 report.

CalWIN shut-down will occur November-December 2023 and may result in utilization of change hours.

CaISAWS includes approved shift from CaIHEERS, offshore "no-cost" hours, and additional client correspondence hours.

### Cal**SAWS** | SFY 2023/24 CONTRACT OBLIGATIONS

Warranty & Liquidated Damages Detail						
Category	Contract	Service Month	Amount	Invoice Month	Invoice #	
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	April-23	\$5,000	September-23	1100942377	
SLA - Release Quality within User Acceptance Test	CalWIN	May-23	\$3,000	August-23	80011313	
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	June-23	\$10,000	September-23	1100942377	
Hyland - Delay in document processing	CalSAWS	June-22	\$79,564	October-23	1100948204	
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	June-23	\$10,000	September-23	1100942377	
Deficiency Service Ticket Resolution Performance	CalWIN	July-23	\$34,000	November-23	TBD	
CalSAWS System Daily Batch Production	CalSAWS	July-23	\$5,000	October-23	1100948269	
Prime EDBC Response Time	CalSAWS	August-23	\$2,000	December-23	TBD	
CalSAWS System Daily Batch Production	CalSAWS	August-23	\$5,000	December-23	TBD	
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	August-23	\$5,000	December-23	TBD	
Total			\$158,564			

Hours & Credits					
Category	Actuals	Projections (ETC)	EAC	Allowance	BALANCE +Under / (-Over)
CalWIN Modernization ("Modification") Hours	\$10,033,825	\$0	\$10,033,825	\$10,033,825	\$0
CalWIN Business Intelligence (BI)	\$3,971,215	\$0	\$3,971,215	\$3,971,215	<b>\$</b> 0
CalWIN IDMS	\$1,500,000	\$O	\$1,500,000	\$1,500,000	<b>\$</b> 0
CalWIN Business Rules Engine (BRE)	\$3,131,450	\$368,550	\$3,500,000	\$3,500,000	<b>\$</b> 0
Total	\$18,636,490	\$368,550	\$19,005,039	\$19,005,040	\$0

Notes:

Modernization Hours include hours for Contract Years 1-7 plus partial Contract Year 8.

Modernation Hours are leveraged for BenefitsCal Technical Help Desk.

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

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

#### Cal**SAWS** | SFY 2023/24 CHANGE NOTICE TRACKING

CalSAWS Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 30)	\$92,000,000	
Previously Approved through June 2022	\$41,748,853	FIVE - EIGHTEEN
Functional Support, Technical Help Desk, Premise, Portal	\$5,519,866	NINETEEN - TWENTY ONE
Various Premise Items	\$2,219,022	TWENTY TWO
Various Premise Items	\$1,995,667	TWENTY THREE
Various Premise Items (Incl ARPA)	\$2,462,894	TWENTY FOUR
Various Enhancements and Premise Items	\$6,131,532	TWENTY FIVE
Various Premise Items	\$2,973,504	SEVEN
Various Premise Items	\$1,836,762	TWENTY EIGHT
Various Premise Items	\$1,541,846	TWENTY NINE
Various Premise Items	\$20,546,025	THIRTY**
Total Allocated Amounts	\$86,975,971	
Total Remaining Allocation	\$5,024,029	

CalSAWS Contract (County Purchases)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 23)	\$20,000,000	
Approved County Purchases	\$1,702,883	FIFTEEN
Approved County Purchases	\$5,112,800	TWENTY
Approved County Purchases	\$552,126	TWENTY TWO
Approved County Purchases	\$6,672,844	SEVEN
Approved County Purchases	\$581,873	TWENTY EIGHT
Approved County Purchases	\$245,232	TWENTY NINE
Approved County Purchases	\$80,147	THIRTY**
Total Allocated Amounts	\$14,947,905	
Total Remaining Allocation	\$5,052,095	

ClearBest	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 7)	\$7,600,000	
Previously Approved	\$3,104,596	ONE - THIRTEEN
Various Premise Items	\$660,484	FOURTEEN-NINETEEN
Various Premise Items	\$193,065	TWENTY-TWENTY ONE
Transitional Nutrition Benefits Recer / MEDS Transactions	\$41,745	THREE
Various Premise Items	\$794,680	CO 7 ONE
Implementation Support Staff Augmentation	\$693,450	CO7TWO
Various Premise Items	\$215,139	CO 7 THREE
Maintenance & Operations (11/1/2023 - 1/1/2024)	\$920,987	CO 7 FOUR
Various Premise Items	\$270,333	CO 7 FIVE
Various Premise Items	\$163,523	CO 7 SIX
Various Premise Items	\$527,781	CO 7 SEVEN**
Total Allocated Amounts	\$7,585,783	
Total Remaining Allocation	\$14,217	

CalWIN Contract (Premise/App Maint. Services)Total AmountChange Order Ref.Total Baseline Allocation\$6,010,749Projects 60584, 61307, 58079, and 61073\$1,500,000BenefitsCal Technical Help Desk Support\$1,367,616Total Allocated Amounts\$2,867,616Total Remaining Allocation\$3,143,133

CalWIN Contract (County Purchases)	Total Amount	Change Order Ref.
Total Baseline Allocation	\$3,900,000	
Previously Approved	\$2,021,592	N/A
Projects 60548 and 60549	\$177,419	FOUR
Projects 60858, 60859, 61078 and 61377	\$262,105	FIVE
Projects 62909, 63220, 62955, and 62287	\$158,426	SIX
Projects 61624, 60975, 61785, 61472, 62259, 62910	\$121,752	SIX
Projects 62197, 63468, 63,600, and 63655	\$42,034	SEVEN
Project 64149	\$9,160	EIGHT
Project 64340, 63833, 64394	\$202,073	NINE
Total Allocated Amounts	\$2,994,561	
Total Remaining Allocation	\$905,439	

Deloitte Portal/Mobile	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 5)	\$13,000,000	
Various Premise Items	\$1,112,377	ONE - THREE
American Recovery Plan Act (ARPA)	\$2,226,023	FOUR-FIVE, SEVEN
Get CalFresh (Code for America) - Security Monitori	\$50,001	SIX
CW Time Clocks	\$71,000	EIGHT
ARPA - Release of Information (ROI)	\$2,074,391	NINE
ARPA - SAR7/7A UCD Phase 3	\$216,910	TEN
Additional Enhancements	\$92,890	ELEVEN
ARPA - Communication and Marketing Campaign	\$1,472,000	TWELVE
ARPA - CalFresh App "Joint Processing" by SSA	\$530,664	THIRTEEN
BenefitsCal CalFresh Parity Work	\$1,949,536	FOURTEEN**
Total Allocated Amounts	\$9,795,792	
Total Remaining Allocation	\$3,204,208	
Deloitte CalWIN ISS (County Purchases)	Total Amount	Work Order Ref.
Total Baseline Allocation (Amendment 2)	\$8,000,000	
San Francisco County	\$615,250	ONE
San Diego	\$256,117	TWO
Santa Clara	\$183,236	THREE
Total Allocated Amounts	\$1,054,603	

\$6,945,397

**Total Remaining Allocation** 

\* Infosys and First Data removed due to end of contract term

\*\*Pending Board Approval

### Release and Policy Update/Communications

- Continuous Coverage Unwinding Status
- CalSAWS Release Highlights



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

- On October 24, the Centers for Medicare & Medicaid Services (CMS) approved DHCS' request for a flexibility to temporarily accept the self-attestation of income at renewal when a member returns a renewal form with an attestation of income but fails to include documentation or a reasonable explanation of the discrepancy.
  - The policy guidance is included in <u>MEDIL I 23-49E</u> which is an errata to MEDIL 23-49: Approval of Additional Unwinding Flexibilities During the Unwinding- Annual Redetermination Packets.
- DHCS conducted a targeted session on strategies for processing outstanding renewals during the 10/31 county support call
  - DHCS will place the recorded session in county SFTP folders (DHCS-PDB/COUNTIES/[your county name]) the week of November 7
  - DHCS and CalSAWS are collaborating to identify CalSAWS reports that can be leveraged in the strategies included in the session.

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

- Final ACWDLs released on the following topics connected to asset elimination:
  - <u>ACWDL 23-20</u>: Treatment of Income-Producing Assets after January 1, 2024.
  - <u>ACWDL 23-21</u>: Treatment of Interest/Dividend Payments from Assets after January 1, 2024.
  - <u>ACWDL 23-22</u>: Treatment of Trusts after the January 1, 2024, Elimination of Assets.
- The ACWDL regarding Transfers of Assets beginning January1, 2024 is out for stakeholder review and the targeted publishing date is November 20<sup>th</sup>.
- Asset Elimination Training on November 14 during the bi-weekly county support call.

### CalSAWS Release and Policy Update CalSAWS Release Highlights – Medi-Cal

Wave 6b Wave 6c **November** December **Stable Adult Expansion** Income 11/21/2023: - CA-251569: NOA Updates Waiver - CA-251565: Batch MAGI EDR 11/08/2023: requests sent to CalHEERS to - CA-267897: transition in scope individuals from Interim restricted scope to full scope MC. process for Batch EDBC will run nightly to Stable process DERs received from Income CalHEERS. This is anticipated to run auto-renewal up through 11/30/2023. Non MAGI for January MC batch will run on 11/22/2023 2024 RE

### Elimination of Assets 11/02/2023:

 CA-252364: State form updates. Non MAGI and Mixed MAGI RE packet updates. Update Forms API to remove resources and property sections

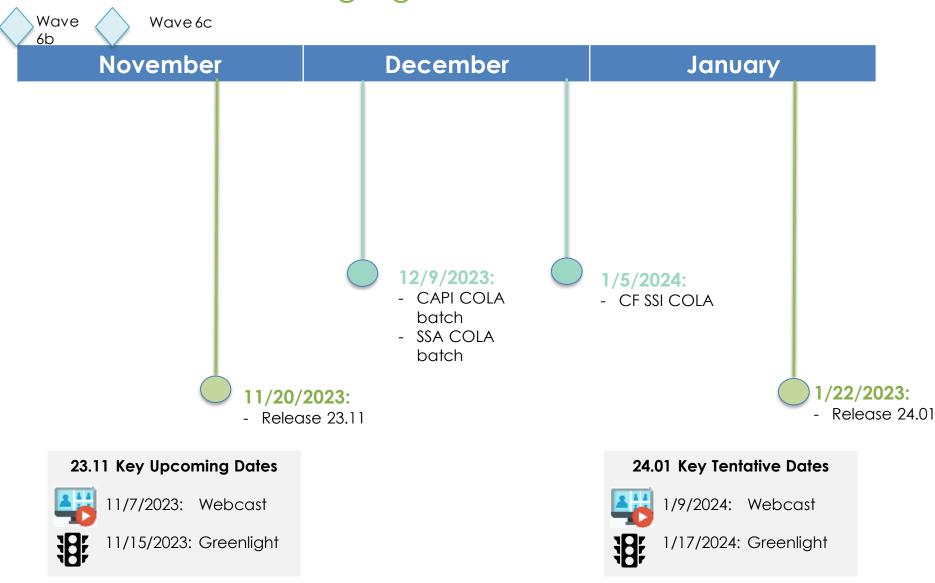
## Elimination of Assets 11/20/2023:

- CA-251329: Rules and NOA updates. Update the Medi-Cal EDBC Rules to no longer display or count property in the eligibility determination for Non-MAGI Medi-Cal, including LTC, and Medicare Savings Programs

## Elimination of Assets ~12/10/2023:

 CA-262850: State form updates. Non MAGI and Mixed MAGI RE packet updates – threshold languages

## CalSAWS Release and Policy Update CalSAWS Release Highlights



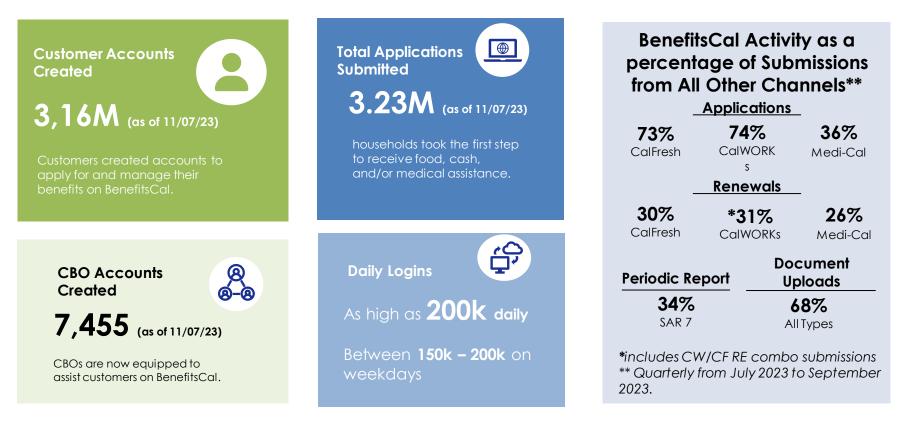
### BenefitsCal Update

- BenefitsCal Metrics Update
- BenefitsCal Roadmap and Release
   Highlights
- ROI Update
- Collaboration Model (CM) Update
- Feasibility of QR codes on client correspondence
- Options for ensuring customers know what types of information will and will not be shared via text messages and email

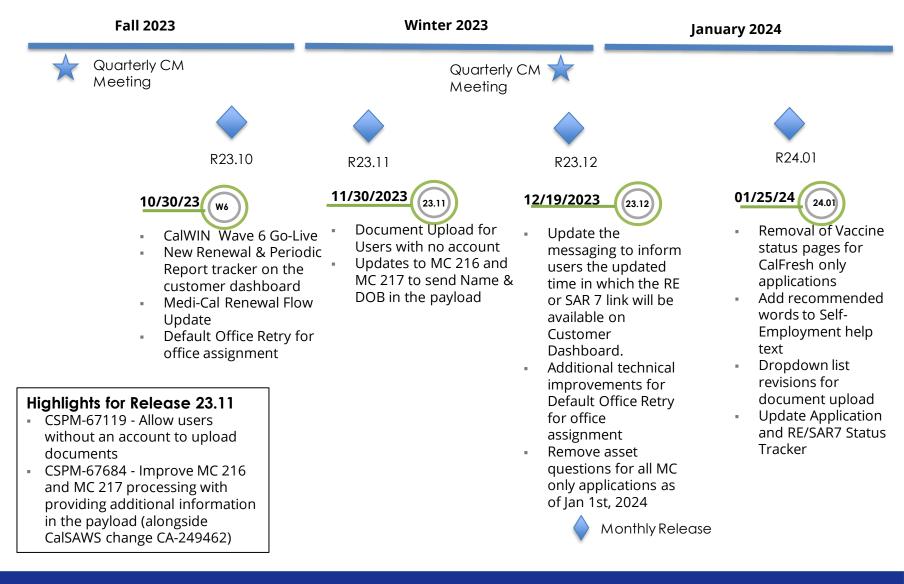


### BenefitsCal Updates Highlights & Metrics

CalWIN Counties Sacramento, San Francisco, and San Luis Obispo county customer joined BenefitsCal through the October Wave 6 rollout. As of 11/10 over 9k application received and over 40k customer accounts created and linked to CalSAWS cases.



### Release Calendar



### Recent Release Highlights

Кеу	
CM Enhancements	📃 CM Research 🗹 Completed
Other Updates	Other Research Bundled Update

October Release 23.10	CSPM-43163: Implement a Renewal & Periodic Report tracker on the customer dashboard to prevent duplicate periodic and annual	November Release 23.11	<ul> <li>CSPM-67119: Allow anonymous users to upload documents.</li> <li>CSPM-67684: Updates to MC 216 and</li> </ul>
	✓ <b>CSPM-67041:</b> Medi-Cal Renewal Flow Update to remove assets per policy.		MC 217 to send Name & DOB in payload to CalSAWS
	✓2 Technical Updates: Including displaying renewal cards on customer dashboard real-time and default office retry for office assignment	November Research Activities	<ul> <li>CSPM-67104: Research E-mail Notifications to be sent from BenefitsCal.</li> <li>CSPM-67189: Research Display of Primary Applicant Status on a case</li> </ul>
October Research Activities	<ul> <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>	December Release 23.12	<ul> <li>CSPM-66846: Update the messaging to inform users the updated time in which the RE or SAR 7 link will be available.</li> <li>2 Policy Updates - Remove the Property Assessment Statement of Easts (MC 210 PA) downloadable.</li> </ul>
			<ul> <li>Facts (MC 210 PA) downloadable form from BenefitsCal effective 1/1/2024. Remove asset questions for all MC only applications</li> <li>CSPM-67881: Technical Improvement for Office Mapping retry mechanism</li> </ul>

### Upcoming Release Roadmap

Кеу	
CM Enhancements	📃 CM Research 🗹 Completed
Other Updates	Other Research Bundled Update

January Release 24.01	<ul> <li>CSPM-67656: Remove Vaccine status pages for CalFresh only applications</li> <li>CSPM-67657: Self-Employment help text</li> </ul>	Feb Rele 24.0
	<ul> <li>CSPM-67746: Do not display the future RE/PR due date if the program is denied or discontinued.</li> <li>CSPM-67784: Dropdown list for document upload</li> <li>CSPM-67745 and CSPM-4611: 2 technical updates</li> </ul>	Feb Rese Activ
<b>January</b> Research Activities	<ul> <li>CSPM-68109: Disability Accommodation</li> <li>CSPM-68111: Case Linking</li> </ul>	

February	<ul> <li>CSPM-67761: Update Application and</li></ul>
Release	RE/SAR7 Status Tracker <li>CSPM-67785: Update Document</li>
24.02	Type/Upload feature
February Research Activities	<ul> <li>CSPM-68110: Card Replacement Tracker</li> <li>CSPM-68112: Customer Dashboard</li> </ul>

### 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 Other Updates	CM Research Completed Other Research Bundled Update

### **Collaboration Model Update**

In Calendar Year 2023, 4 Collaboration Model Meetings have been held. Next meeting is on December 1<sup>st</sup>, 2023.

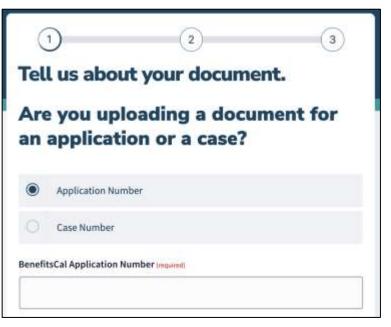


 Added a status tracker for Renewals and Periodic Reports on customer dashboards, which allows customers to see the status of their report and feel confident that the county received it and is actively working on it.

#### 13

Implemented Continuous Care Unwinding Enhancements

## Upload Documents Without an Account (November 2023)



 Allow customers to upload documents securely via BenefitsCal without having to create a BenefitsCal account.

## BenefitsCal ROI Update

- Draft applicant/recipient roles/responsibilities (e.g., Authorized Representatives, Power of Attorney, CBOs, etc.) matrix in progress. Addresses Medi-Cal, CalFresh and CalWORKs programs.
- Next meeting dates scheduled
  - 11/13
  - Future dates TBD

# BenefitsCal/CalSAWS Action Item Updates

- 1. Feasibility of QR codes on client correspondence
- 2. Options for ensuring customer know what types of information will and will not be shared via text messages and email

### Overview of the Release when Ready process



# Release When Ready Background

In 2020 during the pandemic the project implemented the Release When Ready (RWR) to support retaining customer benefits and manage small system changes that could be implemented quicker than the bimonthly release.

The goal was to shorten the System Development Life Cycle (SDLC) while maintaining quality for simpler changes that can take advantage of an abbreviated design and development period.

Release When Ready:

- Independent in scope
- Implemented when testing is complete versus waiting until a predefined date
- Leverages the existing proven priority release and testing processes utilized at CalSAWS today

# **Release When Ready**

Examples of RWR changes include:

- Adding forms/NOAs to template repository
- Adding form/NOA language translations
- Data Change Requests (DCR)

Any functional area within CalSAWS, excluding Analytics and functional areas listed below where services in the respective environments have yet to be enabled in Release when Ready environments:

- Imaging
- Reports
- Mobile Device
- Lobby (Kiosk/FACT)
- On-line interfaces where coordinated testing is required (CalHEERS, BenefitsCal)

# Release When Ready

RWR has proven to be very successful:

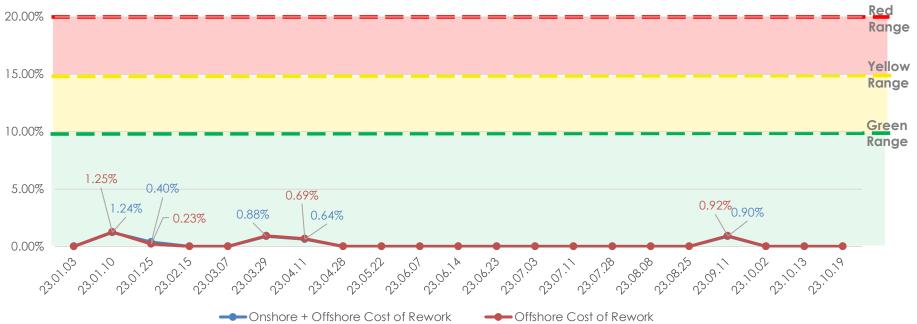
Team	SCRs	Total Hours
Client Correspondence	315	106123
Batch/Interfaces	20	7453
Online	16	9745
Reports	2	202
Fiscal	1	195
Eligibility	1	67
Grand Total	355	123,785

Team	Resolved Defects
Online	225
Fiscal	134
Client Correspondence	84
Eligibility	46
Batch/Interfaces	44
CalHEERS	11
Performance	2
Special Project	1
Tech Ops	1
Reports	1
Grand Total	549

CalSAWS will continue to seek opportunities to utilize RWR, when appropriate, to implement changes quicker.

# Release When Ready CalSAWS Application Release Quality Metrics

Cost of ReWork: Release When Ready (RWR) 2023



#### **TYPICAL RANGES**

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

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

Cost of Rework (CoR ) is the ratio of effort spent performing rework on deliverables to the total effort to Date

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

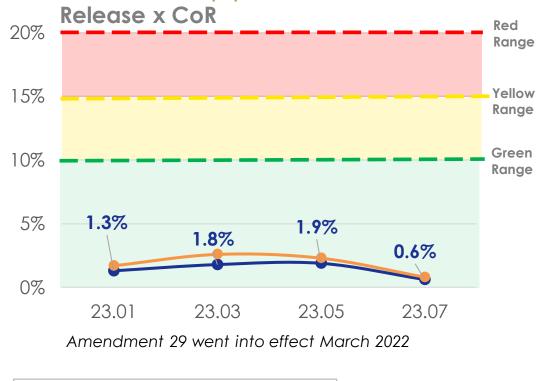
The CoR line graph may increase for the releases if additional defects are found in the future

# Quarterly Statistics Update

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



# CalSAWS Quality, Defect, Stability, Tickets Stats CalSAWS Application Release Quality Metrics



Legend:

Onshore + Offshore Offshore

#### **TYPICAL RANGES**

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

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

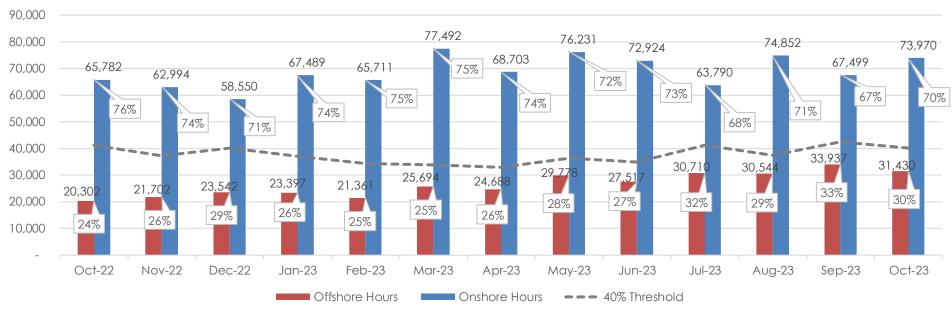
Cost of Rework (CoR) is the ratio of effort spent performing rework on deliverables to the total effort to Date (Actual Rework effort Hours/ Actuals To Date Hours)\*100

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

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

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

# CalSAWS Quality, Defect, Stability, Tickets Stats GDN Workload Balance



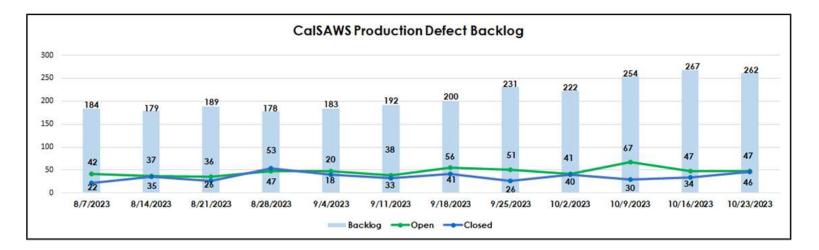
Onshore vs. Offshore (GDN) Hours Across All Teams

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

# CalSAWS Quality, Defect, Stability, Tickets Stats Production Defects Backlog

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

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



# CalSAWS Quality, Defect, Stability, Tickets Stats Production SLA Metrics

Perf Req #	LD Applies	Performance Requirement Title	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct *
1		Monthly Off Prime Business Hours Availability	<b>S</b>	$\mathbf{\mathbf{C}}$							$\bigcirc$
2		Monthly $\ensuremath{Prime}$ Business Hours $\ensuremath{Availability}$ of CalSAWS Non-Production Environments	<b>e</b>		<b>S</b>	0	0	Ø			
3		Monthly Deficiency Notification Response Time									
4		Monthly Helpdesk Diagnosis Time					8				
5	$\bigcirc$	Daily Peak Usage Hours Availability	×	×							
6		Daily Prime Business Hours Availability	×	×	×				×		
7	$\bigcirc$	Daily Peak Usage Hours ED/BC Response Time							×		
8		Daily Prime Business Hours ED/BC Response Time									
9	$\bigcirc$	Daily Peak Usage Hours Screen to Screen Navigation Response Time	$\bigcirc$	<b>e</b>	<b>e</b>		0	Ø	0		
10		Daily Prime Business Hours Screen to Screen Navigation Response Time			<b>S</b>		0	<b>e</b>			
11		Daily Batch Production Jobs Completion									8
12		Daily Off Prime Business Hours ED/BC Response Time	<b>e</b>								
13		Daily Off Prime Business Hours Screen to Screen Navigation Response Time		8	<b>S</b>		0	0	<b>e</b>		
14		Daily Unbounded Search Response Time	$\mathbf{\mathbf{C}}$							$\bigcirc$	
15		Daily Prime Business Hours Availability of CalSAWS Training Environments		<b>e</b>			8	0	0		
16		Daily Peak Usage Hours Standard Report Response Time									
17	$\mathbf{\mathbf{O}}$	Security Incident Notification		$\mathbf{i}$							$\bigcirc$
18		Security Incident Reporting						Ø			$\bigcirc$
19	$\bigcirc$	Security Incident Negligence									
20		Disaster Recovery Response Time									

- July 31, 2023 Batch Delayed due to high volume of super trigger records created incorrectly by DCR for CA-264539
- August 1, 2023 Prime EDBC missed the SLA at 99.80 due to an application concurrency issue due to database contention. Issue occurred between 5:27pm 5:47pm
- August 4, 2023 Prime Availability not met from 7:46pm to 8:35pm due to an OTP issue
- August 11, 2023 Batch Delayed due to account locked for Fiscal files. Account was rotated for Fiscal WIS jobs but not QNA and IEVS.
- October 20, 2023 Batch Delayed due to an EDBC job running long at the same time both 10 day cutoff and LA payroll were running.

\* October SLA Metrics have not been formally reviewed

Legend: 📀 SLA Met 😢 SLA Not Met 📀 LD Applies



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

# CalSAWS Quality, Defect, Stability, Tickets Stats October 2023 Production Highlights



# CalSAWS Quality, Defect, Stability, Tickets Stats Hyland Imaging Performance Metrics

### **OCTOBER 2023 UPTIME**



#### Monthly Uptime Percentage

Target: 99.90% Formula: 1 – (total downtime minutes / total monthly minutes) x 100

#### Monthly Uptime Target: 99.90%

Monthly Uptime Service Level Credits

99.89-99.00%	10% of the Monthly SaaS Fees
Less than 99.00%	20% of the Monthly SaaS Fees
October Actual Uptime	100%

Hyland

# CalSAWS Quality, Defect, Stability, Tickets Stats Hyland Imaging Performance Metrics

### **OCTOBER 2023 PERFORMANCE STANDARDS**

### Monthly Page View Objective

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

#### Monthly Page View Target: 99.11%

Monthly Page View Service Level Credits

Less than 90%	3.5% of the Monthly SaaS Fees
October Actual Monthly Page View Percentage	99.11%
October Service Level Credit	\$0.00

Hyland

# CalSAWS Quality, Defect, Stability, Tickets Stats Hyland Imaging Performance Metrics

### **OCTOBER 2023 PERFORMANCE STANDARDS**

#### **Database Transaction Objective**

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

#### Database Transaction Target: 90%

Monthly Database Transaction Service Level Credits

Less than 90%	3.5% of the Monthly SaaS Fees
October Actual Database Transaction Percentage	99.97%
October Service Level Credit	\$0.00

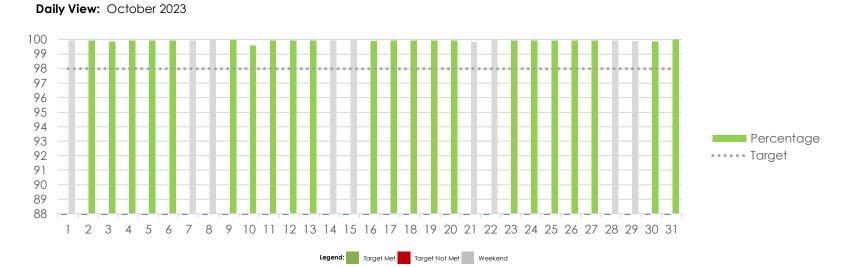
Hyland

## BenefitsCal Performance Metrics

SLA #1:	Daily Online transactions – inquiry screens (bounded)*			
Target:	98% with an average response time < 2 seconds			
Actual:	Exceeded daily online transaction (bounded) response time at no less than 99.92%			
since January 2022. Measured daily and reported on Monthly				



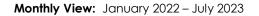
Monthly View: Jan 2022 - Oct 2023

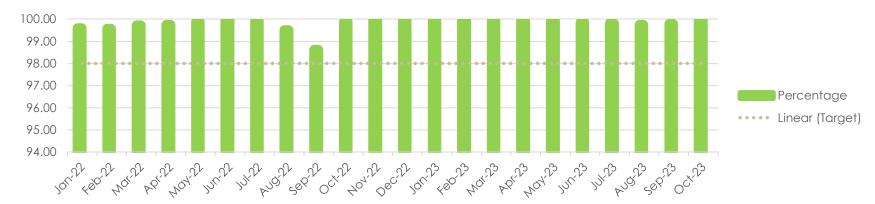


## BenefitsCal Performance Metrics

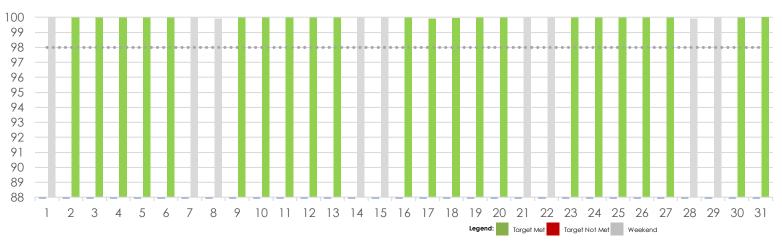
SLA #2:Daily Online transactions – inquiry screens (unbounded)Target:98% with an average response time <10 seconds\*</th>

Actual: Exceeded daily online transaction (unbounded) response time at no less than 98.62% since January 2022. Measured daily and reported on Monthly





#### Daily View: Oct 2023



## BenefitsCal Performance Metrics

SLA #3: Daily BenefitsCal Hosted API transactions

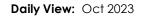
Target:98% with an average response time <2 seconds</th>

Actual: Exceeded daily API transaction response time at no less than 99.97% since

January 2022. Measured daily and reported on Monthly



Monthly View: January 2022 – July 2023





## Contact Center Update

- Continuity of Services (How Counties continue service when AWS is down)
- L.A. Go-Live
- BOTS Update



# Contact Center Continuity of Services

 Continue to collaborate with AWS on the options available based on AWS Connect roadmap

# Los Angeles County Readiness: Executive Summary Readiness Areas and Categories

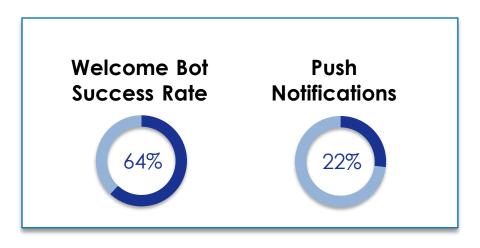
Readiness Area*		Readiness Category	Comments
	С	IVR Call Flow Design	Approved 5/26
	G	(CA-240156) Los Angeles Migration to CalSAWS Contact Center – CSC Line	Finalizing remaining threshold language updates prior to Model Office completion
Application	G	(CA-261213) Los Angeles Migration to CalSAWS Contact Center – Renewal Line	Finalizing remaining threshold language updates prior to Model Office completion
	G	EBT Bot Porting to CalSAWS	On track for Model Office testing completion 11/13
	G	Nuance Voice Print Migration	Bulk migration complete (780k+ Voice Prints); final delta runs in progress prior to cutover
	С	Account / Environment Creation	All AWS accounts and Connect environments deployed
Technical	С	Performance Testing	Performance testing completed
	G	Production Configurations and Validation	Final production validation activities in flight; all CSC and RE Line agents beginning to test log-on capability
	С	Model Office Prep	Training environment validation complete
Organization	G	Model Office Execution	Continuing daily sync on questions / final threshold language updates; eGain / Calabrio demos week of 11/6
Training	С	WBT Training Delivery	All WBTs delivered
Training	G	Los Angeles County Training Execution	CSC and RE line agents on track to complete 11/9
	G	Cutover Plan and Checklist	Final production cutover / checklist items in-flight; call forwarding validation to occur 11/16 after hours
Cutover	G	On-site Support Plan	On-site plan finalized; team-members will be dispersed across all CSC / RE Line sites
	G	Go-Live Communications Plan	Communications to be delivered night of cutover
Post-Cutover	G	Post-Go Live Monthly Support Plan	Confirmed plan with operational team

Not Started	On Schedule	Trending Risk	At Risk	Complete

# Welcome Bot Dashboard

Dashboard data is averaged across all counties since rollout

### Welcome Bot



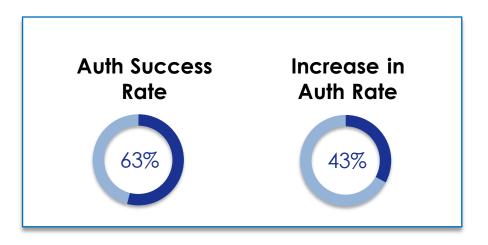
#### Welcome Bot Update

- 1. In the process of modifying call flows for all live counties with the Welcome Bot to ensure callers are being routed to the proper queues.
  - Six counties have received their call flow updates, there are three remaining counties.
- 2. Continue to review feedback for updates to optimize customer experience and flow.
- 3. Working on developing a plan with the on-hold counties to re-enable their Bots.

# 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

## PSC and JPA Meeting Schedules



# PSC and JPA Meeting Schedules 2023 November and December

- November JPA Board of Directors
  - Friday, November 17, 2023
  - Tsakopoulos Library Galleria
  - 12:30 p.m. 3:30 p.m.
- December PSC
  - Thursday, December 14, 2023
  - CalSAWS Roseville
  - 8:30 a.m. 12:00 p.m.
- December JPA Board of Directors
  - CANCELLED

# PSC and JPA Meeting Schedules

## 2024 Meeting Schedules

Regular meetings will be available in person and Zoom. Conference is in person only.

Month	PSC	JPA
January	N/A	24-26 San Diego
February	15 <sup>th</sup> Roseville	16 <sup>th</sup> Roseville
March	21 <sup>st</sup> Roseville	15 <sup>th</sup> Library Galleria
April	18 <sup>th</sup> Roseville	12 <sup>th</sup> Library Galleria
May	16 <sup>th</sup> Roseville	10 <sup>th</sup> Library Galleria
June	N/A	28 <sup>th</sup> Roseville
July	18 <sup>th</sup> Roseville (Tentative)	12 <sup>th</sup> Roseville (Tentative)
August	15 <sup>th</sup> Roseville	16 <sup>th</sup> Roseville
September	19 <sup>th</sup> Roseville	13 <sup>th</sup> Library Galleria
October	17 <sup>th</sup> Roseville (Tentative)	18 <sup>th</sup> Roseville (Tentative)
November	14 <sup>th</sup> Roseville	15 <sup>th</sup> Library Galleria
December	12 <sup>th</sup> Roseville (Tentative)	13 <sup>th</sup> Roseville (Tentative)

## 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&EBAFO #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 8, 2023
18	Price BAFO #2 Due Date	November 29, 2023
19	Evaluate Price BAFO #2	November 30 – December 7, 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 23.01 – 23.09	30	52	1623/1623	58		
CalSAWS 23.11	11	6	194/222	In Progress		
BenefitsCal 23.01 - 23.10	83	37	Ad hoc	20		
Total	124	95	1817	98		

QA Technical Reviews						
<b>29</b> SLAs (CalSAWS, Imaging, OCAT, BenefitsCal)	<b>4</b> SSP Updates	<b>7</b> Root Cause Analyses (RCA)	<b>24</b> Technical Updates (SCRs and Defects)			

QA Implementation Support					
<b>10</b> Retrospectives Per Wave	<b>8</b> Implementation Support Staff	<b>938</b> Migration Requirements	<b>23</b> Migration Updates (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 imaging, performance, and networking.

Contact Center Wave 6 and LA Model Office reviews

#### Implementation Support Highlights

Facilitate Retrospectives and Best Practice sharing across Waves

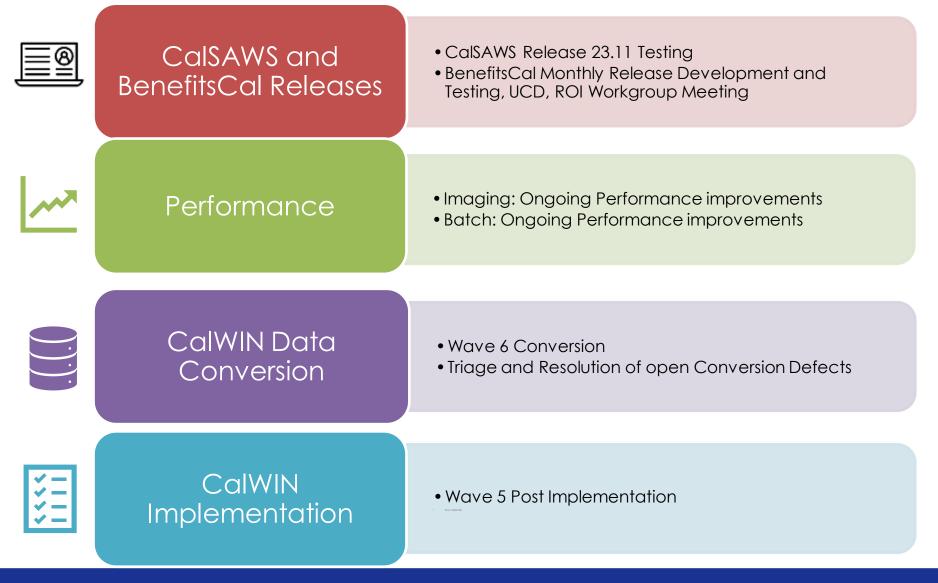
Assist with onsite and virtual support

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



## Adjourn Meeting

