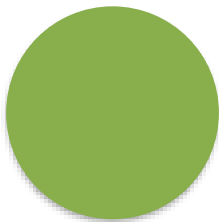




Cal**SAWS** | Project Steering Committee Meeting



November 9, 2023

Agenda

- ① Call Meeting to Order and confirmation of quorum
- ② Agenda Review
- ③ Public Opportunity to speak on items NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six (6) minutes.

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

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



Action Items

Action Items

4. Approval of the Minutes from the October 19, 2023, PSC Meeting and review of Action Items.

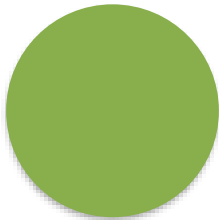


Informational Items



Wave 6 Go-Live Debrief

- Production Update



Wave 6 Go-Live

Production Update

- Cutover:
 - Wave 6B cutover activities completed 5 hours ahead of schedule
 - 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 11/8**), Setting incorrect reporting type (**in research**)
 - 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 11/6 county IT continues to troubleshoot.**

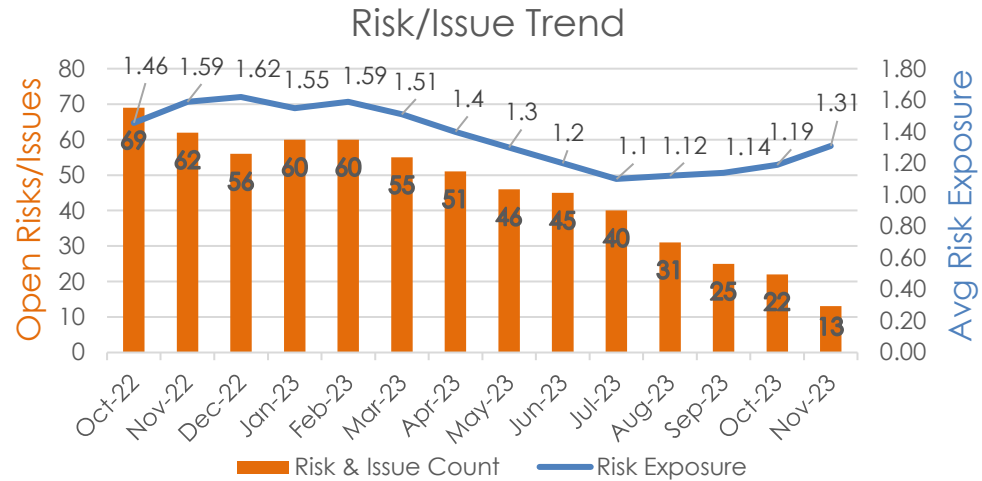


Project Risks

- 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
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 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 require additional support to address gaps in functional understanding related to CalSAWS Case	Medium
295	WelcomeBot Customer Experience	Issue

CalSAWS Project Management Risks

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

Updated as of 11/3/23

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
	<p>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</p> <p>The following mitigation plan will be actioned to address these concerns:</p> <ol style="list-style-type: none">1. Gather county feedback on report concerns through Report Discovery sessions, Wave-specific Fiscal/State Report Support meetings, and Bi-Weekly Fiscal/State Report meetings2. Address questions/tickets/defects affecting the submission of State Reports and County CEC reports3. Improve communication on available resources and existing reporting concerns/questions <p>Refer to Retired Risk #279 for additional information on risk status and history.</p>

M&O Production Risks

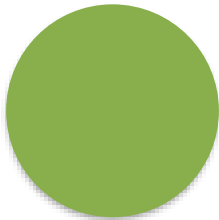
NEW - 297: Counties may face challenges in adopting management and ad hoc reports if additional support is not provided

Risk #297	Risk Description & Mitigation Plan
	<p>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.</p> <p>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</p> <ul style="list-style-type: none">• Phase 1 – Meet with Regional Managers• Phase 2 – Distribute Survey to all 58 Counties• Phase 3 – Meet Regionally with LA/C-IV Counties and in small groups with CalWIN Counties to address areas of concern• Phase 4 – Leverage feedback and collaboration with counties to continuously improve communication on available resources and existing reporting functionality and issues



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 [MEDIL I 23-49E](#) 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:
 - [ACWDL 23-20](#): Treatment of Income-Producing Assets after January 1, 2024.
 - [ACWDL 23-21](#): Treatment of Interest/Dividend Payments from Assets after January 1, 2024.
 - [ACWDL 23-22](#): Treatment of Trusts after the January 1, 2024, Elimination of Assets.
- The ACWDL regarding Transfers of Assets beginning January 1, 2024 is out for stakeholder review and the targeted publishing date is November 20th.
- 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 Income Waiver

11/08/2023:

- CA-267897: Interim process for Stable Income auto-renewal for January 2024 RE

Adult Expansion

11/21/2023:

- CA-251569: NOA Updates
- CA-251565: Batch MAGI EDR requests sent to CalHEERS to transition in scope individuals from restricted scope to full scope MC. Batch EDBC will run nightly to process DERs received from CalHEERS. This is anticipated to run up through 11/30/2023. Non MAGI MC batch will run on 11/22/2023

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

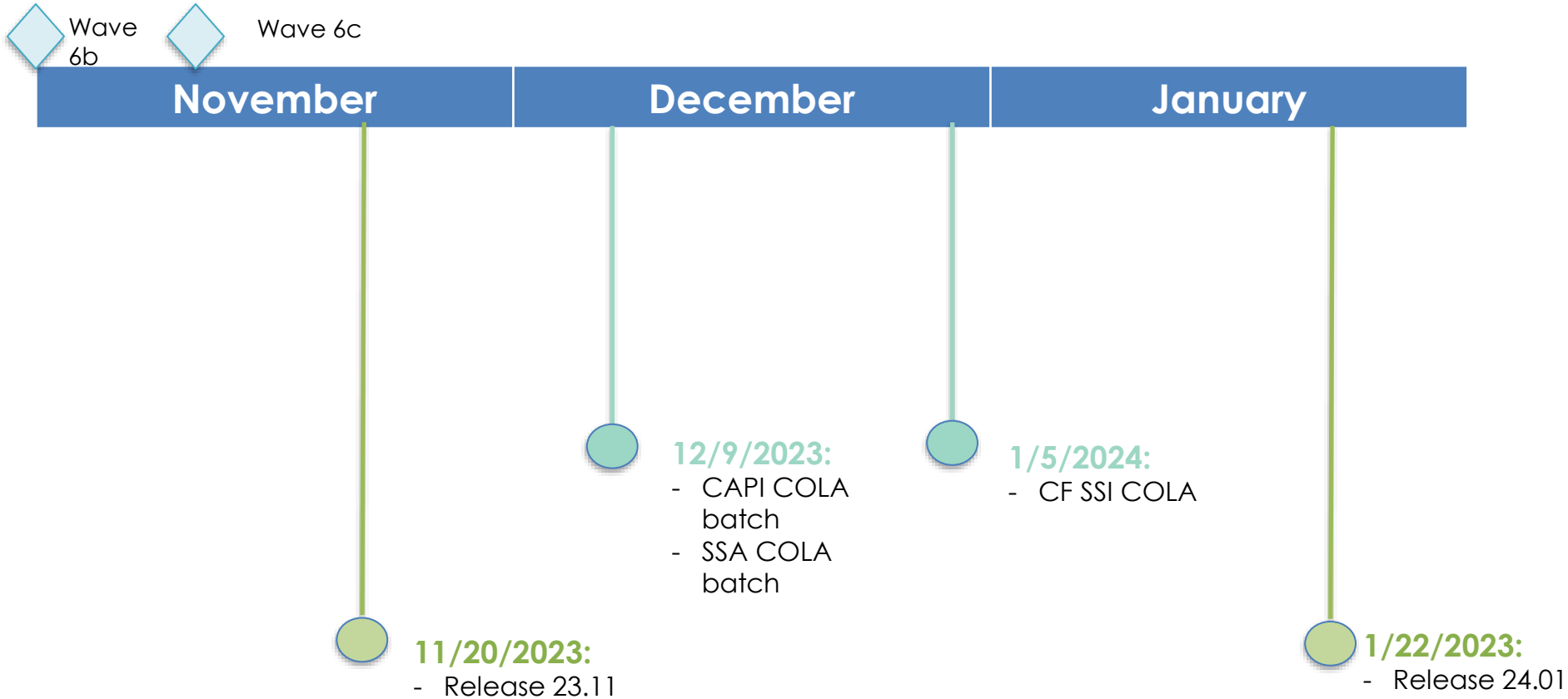
Elimination of Assets

~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



23.11 Key Upcoming Dates



11/7/2023: Webcast



11/15/2023: Greenlight

24.01 Key Tentative Dates



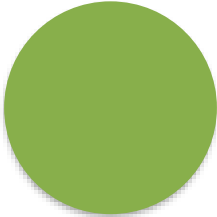
1/9/2024: Webcast



1/17/2024: Greenlight



BenefitsCal Update

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

BenefitsCal

Release Calendar

Fall 2023



Quarterly CM Meeting



R23.10

10/30/23



Highlights for Release 23.11

- CSPM-67119 - Allow users without an account to upload documents is coming up next month too
- CSPM-67684 - Improve MC 216 and MC 217 processing with providing additional information in the payload (alongside CalSAWS change CA-249462)

- CalWIN Wave 6 Go-Live
- New Renewal & Periodic Report tracker on the customer dashboard
- Medi-Cal Renewal Flow Update
- Default Office Retry for office assignment

Winter 2023



Quarterly CM Meeting



R23.11

11/30/2023



- Document Upload for Users with no account
- Updates to MC 216 and MC 217 to send Name & DOB in the payload



R23.12

12/19/2023



- Update the messaging to inform users the updated time in which the RE or SAR 7 link will be available on Customer Dashboard.
- Additional technical improvements for Default Office Retry for office assignment



Monthly Release

BenefitsCal

Recent Release Highlights

Key	 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

✓ **CSPM-67041:** Medi-Cal Renewal Flow Update to remove assets per policy.

✓ **2 Technical Updates:** Including displaying renewal cards on customer dashboard real-time and default office retry for office assignment

November Release 23.11

• **CSPM-67119:** Allow anonymous users to upload documents.

• **CSPM-67684:** Updates to MC 216 and MC 217 to send Name & DOB in payload to CalSAWS

November Research Activities

• **CSPM-67104:** Research E-mail Notifications to be sent from BenefitsCal.

• **CSPM-67189:** Research Display of Primary Applicant Status on a case

December Release 23.12

• **CSPM-66846:** Update the messaging to inform users the updated time in which the RE or SAR 7 link will be available.

• **2 Policy Updates -** Remove the Property Assessment Statement of Facts (MC 210 PA) downloadable form from BenefitsCal effective 1/1/2024. Remove asset questions for all MC only applications

• **CSPM-67881:** Technical Improvement for Office Mapping retry mechanism

October Research Activities

✓ **CSPM-67103:** Update location of where YouTube Videos are located.

✓ **CSPM-67150:** Identify user journeys and research Authorized representative user type in BenefitsCal.

BenefitsCal

Roadmap and Release Highlights

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

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

BenefitsCal

Collaboration Model Update

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

12

Implemented CM Enhancements

9

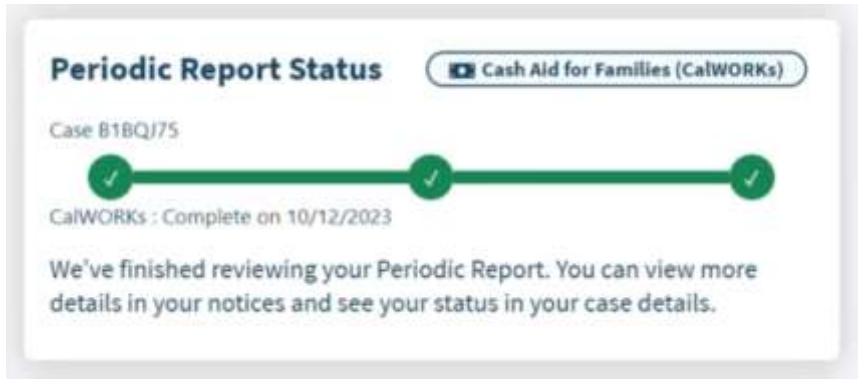
Researched CM Enhancements

13

Implemented Continuous Care Unwinding Enhancements

RE/SAR7 Status Tracker

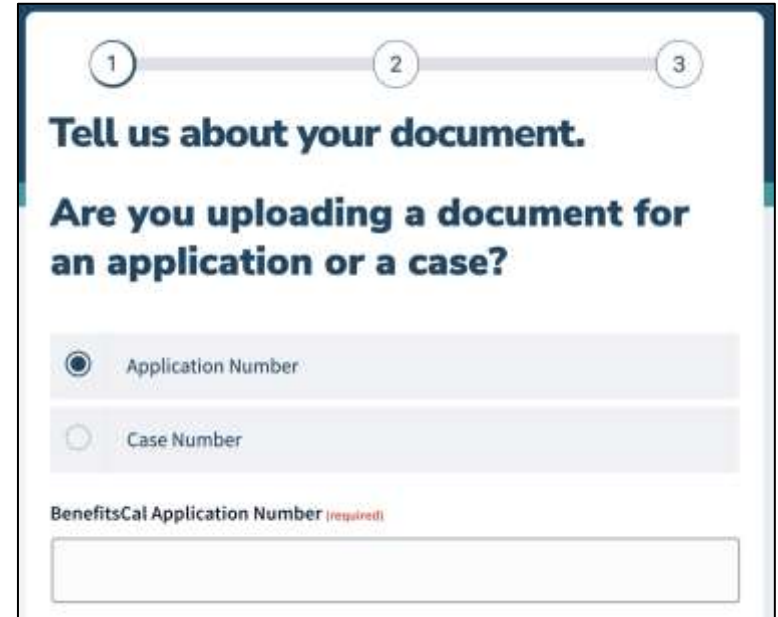
(October 2023)



- 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.

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 bi-monthly 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

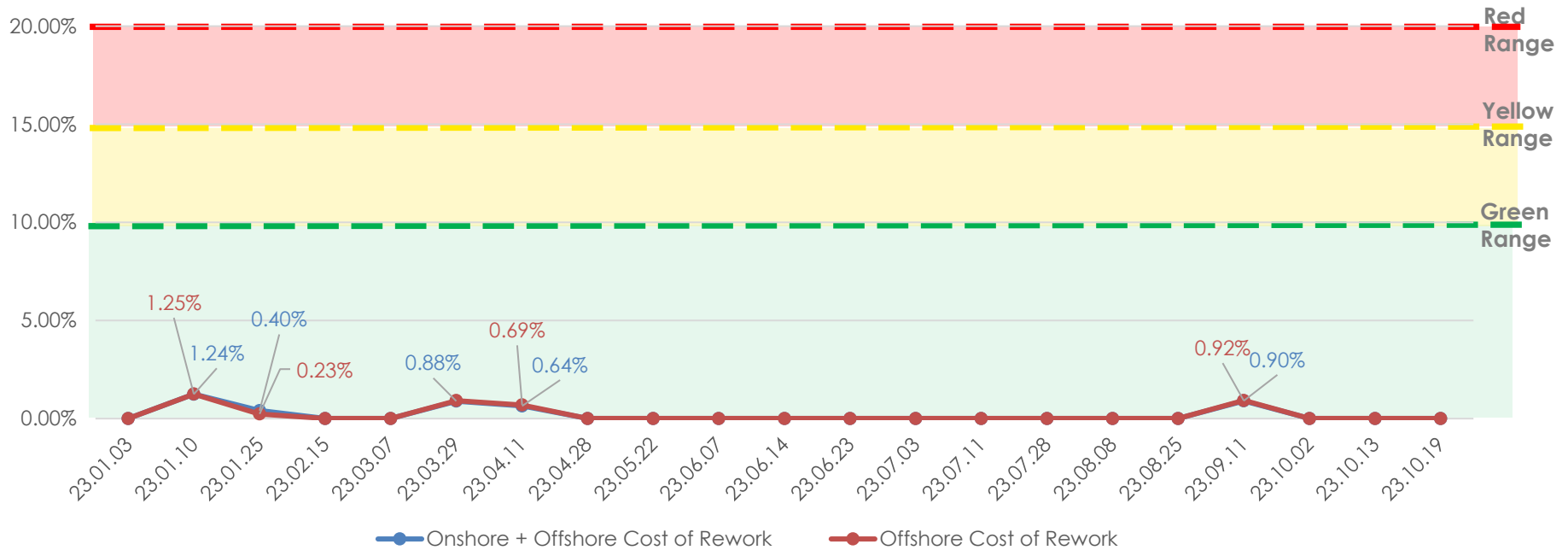
Team	Resolved Defects
Online	225
Fiscal	134
Client Correspondence	84
Eligibility	46
Batch/Interfaces	44
CalHEERS	11
Performance	2
Special Project	1
Tech Ops	1
Reports	1
Grand Total	549

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

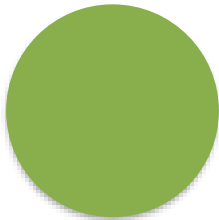
The combined onshore and offshore CoR for CalSAWS code release deployment remains low across releases indicating high quality releases with the additional offshore team.

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



Quarterly Statistics Update

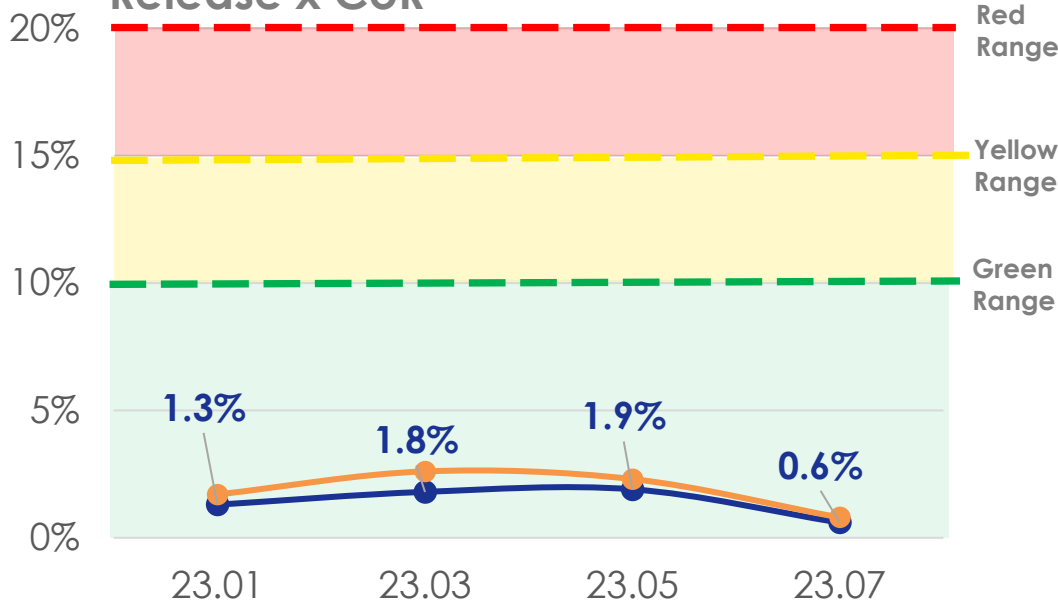
- SLAs, Production Stability, Tickets, and Defects
 - Onshore vs. Offshore
 - Hyland Imaging SLAs
 - Metrics for 70kb documents vs. larger documents
-



CalSAWS Quality, Defect, Stability, Tickets Stats

CalSAWS Application Release Quality Metrics

Release x CoR



Amendment 29 went into effect March 2022

Legend: ■ Onshore + Offshore ■ Offshore

TYPICAL RANGES

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

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

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

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

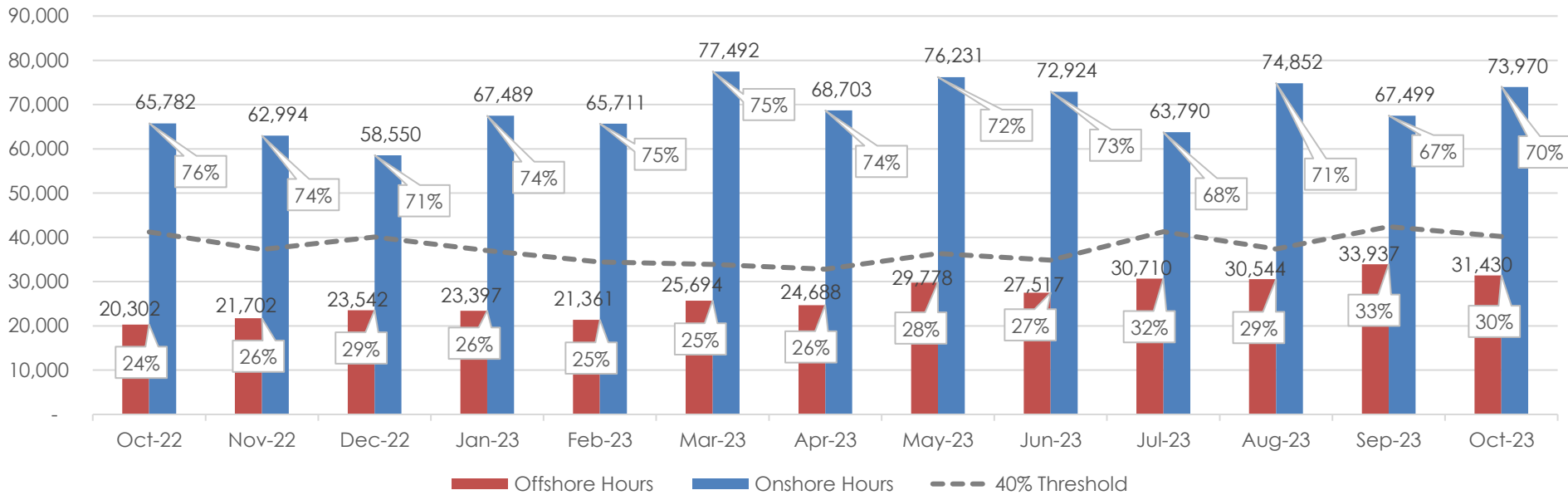
The CoR line graph may increase for the releases if additional defects are found in the future

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

CalSAWS Quality, Defect, Stability, Tickets Stats

GDN Workload Balance

Onshore vs. Offshore (GDN) Hours Across All Teams



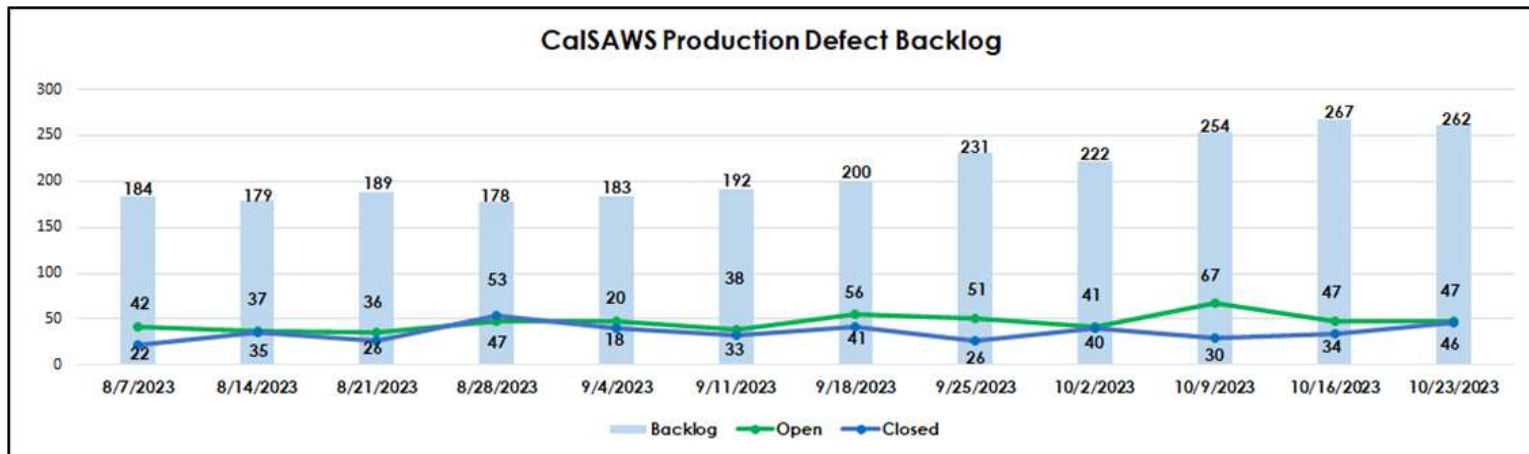
Per Amendment 29: “Use of GDN resources may approximate 40% of the available hours required for Accenture to deliver its obligations under Exhibit X CalSAWS M&O Extension”

CalSAWS Quality, Defect, Stability, Tickets Stats

Production Defects Backlog

Open production defect rate has remained 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	✓	✓	✓	✓	✓	✓	✓	✓	✓
2		Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	✓	✓	✓	✓	✓	✓	✓	✓	✓
3		Monthly Deficiency Notification Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓
4		Monthly Helpdesk Diagnosis Time	✓	✓	✓	✓	✗	✓	✓	✓	✓
5	✓	Daily Peak Usage Hours Availability	✗	✗	✓	✓	✗	✓	✓	✓	✓
6	✓	Daily Prime Business Hours Availability	✗	✗	✗	✓	✗	✓	✗	✓	✓
7	✓	Daily Peak Usage Hours ED/BC Response Time	✓	✓	✓	✓	✓	✓	✗	✓	✓
8	✓	Daily Prime Business Hours ED/BC Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓
9	✓	Daily Peak Usage Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓
10	✓	Daily Prime Business Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓
11	✓	Daily Batch Production Jobs Completion	✓	✓	✓	✓	✓	✗	✗	✓	✗
12		Daily Off Prime Business Hours ED/BC Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓
13		Daily Off Prime Business Hours Screen to Screen Navigation Response Time	✓	✗	✓	✓	✓	✓	✓	✓	✓
14		Daily Unbounded Search Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓
15		Daily Prime Business Hours Availability of CalSAWS Training Environments	✓	✓	✓	✓	✗	✓	✓	✓	✓
16		Daily Peak Usage Hours Standard Report Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓
17	✓	Security Incident Notification	✓	✓	✓	✓	✓	✓	✓	✓	✓
18	✓	Security Incident Reporting	✓	✓	✓	✓	✓	✓	✓	✓	✓
19	✓	Security Incident Negligence	✓	✓	✓	✓	✓	✓	✓	✓	✓
20		Disaster Recovery Response Time	✓	✓	✓	✓	✓	✓	✓	✓	✓

- 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

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
				10/12 @3:50pm – 10/13 @7am IVR self service unavailable	10/12 @3:50pm – 10/13 @7am IVR self service unavailable	
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
	8:10am-11am Sacramento eCCP and CSC issues 10:42am-11:30am SF eCCP issues					

CalSAWS Quality, Defect, Stability, Tickets Stats

Hyland Imaging Performance Metrics

OCTOBER 2023 UPTIME



Monthly Uptime Percentage

Target: 99.90%

Formula: $1 - (\text{total downtime minutes} / \text{total monthly minutes}) \times 100$

Monthly Uptime Target: 99.90%	
Monthly Uptime Service Level Credits	
99.89-99.00%	10% of the Monthly SaaS Fees
Less than 99.00%	20% of the Monthly SaaS Fees
October Actual Uptime	100%
October Service Level Credit	\$0.00

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

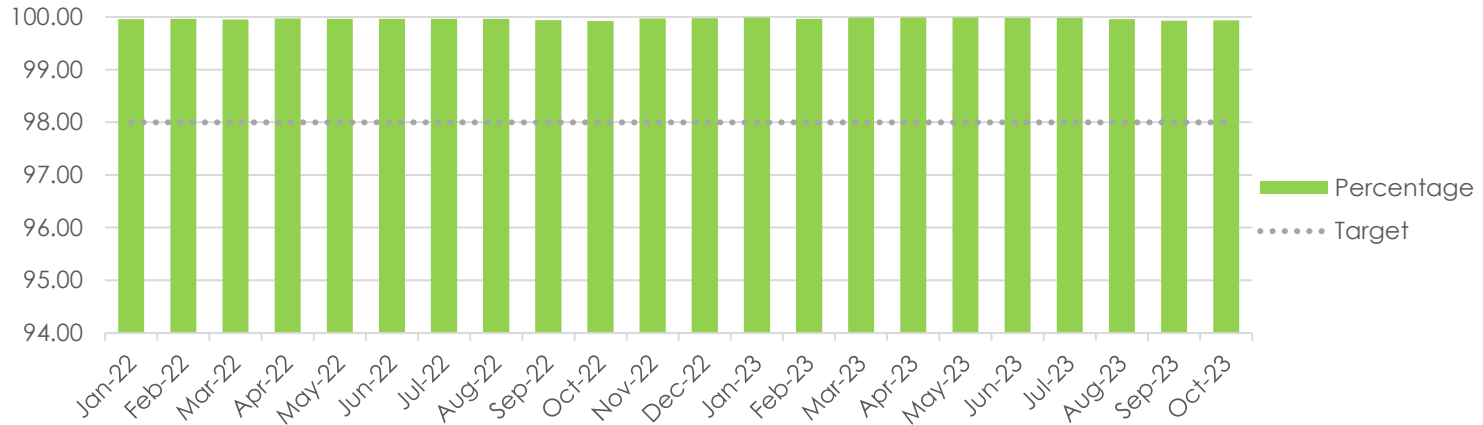
\$0.00

Hyland

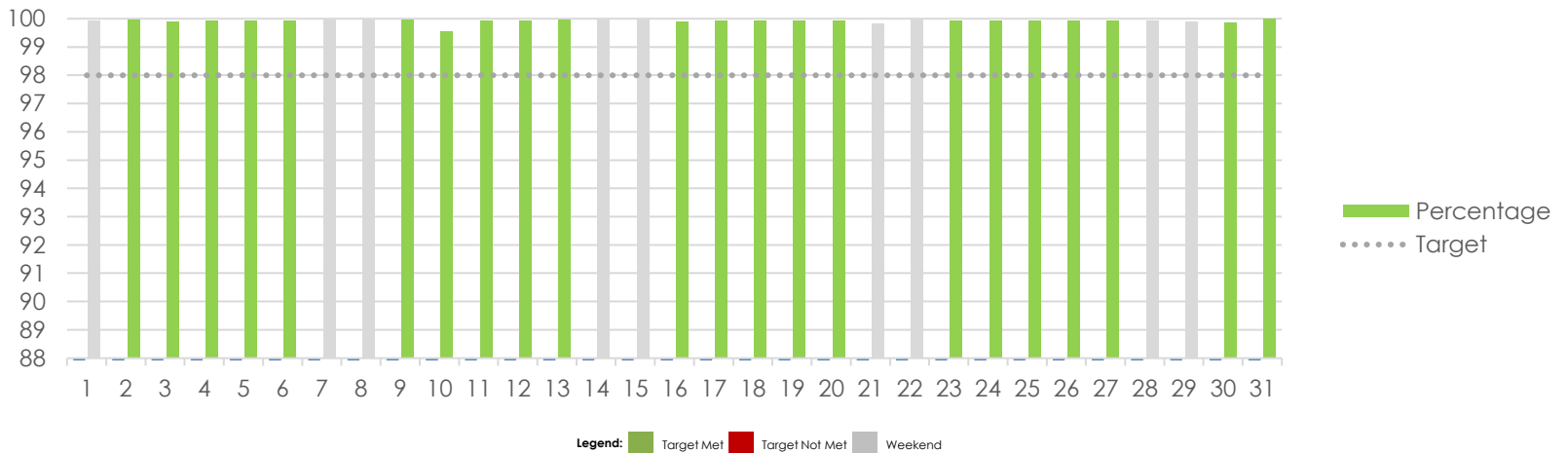
BenefitsCal Performance Metrics

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



Daily View: October 2023



Legend: ■ Target Met ■ Target Not Met ■ Weekend

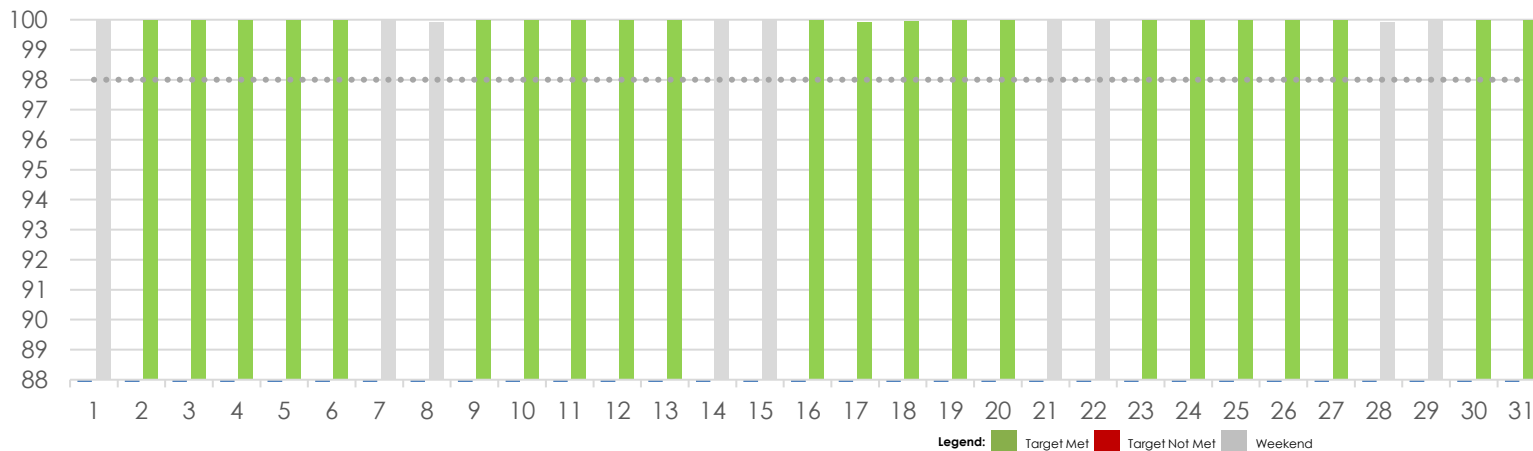
BenefitsCal Performance Metrics

SLA #2: Daily Online transactions – inquiry screens (unbounded)
Target: 98% with an average response time <10 seconds*
Actual: Exceeded daily online transaction (unbounded) response time at no less than 98.62% since January 2022. Measured daily and reported on Monthly

Monthly View: January 2022 – July 2023



Daily View: Oct 2023



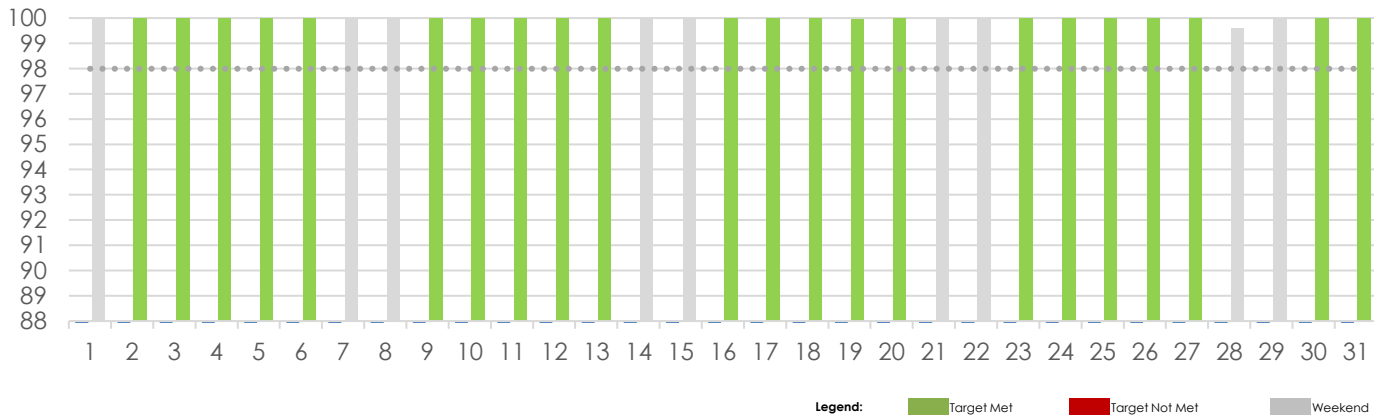
BenefitsCal Performance Metrics

SLA #3: Daily BenefitsCal Hosted API transactions
Target: 98% with an average response time <2 seconds
Actual: **Exceeded daily API transaction response time at no less than 99.97%** since January 2022. Measured daily and reported on Monthly

Monthly View: January 2022 – July 2023



Daily View: Oct 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
Application	C	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
	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
Technical	C	Account / Environment Creation	All AWS accounts and Connect environments deployed
	C	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
Organization	C	Model Office Prep	Training environment validation complete
	G	Model Office Execution	Continuing daily sync on questions / final threshold language updates; eGain / Calabrio demos week of 11/6
Training	C	WBT Training Delivery	All WBTs delivered
	G	Los Angeles County Training Execution	CSC and RE line agents on track to complete 11/9
Cutover	G	Cutover Plan and Checklist	Final production cutover / checklist items in-flight; call forwarding validation to occur 11/16 after hours
	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

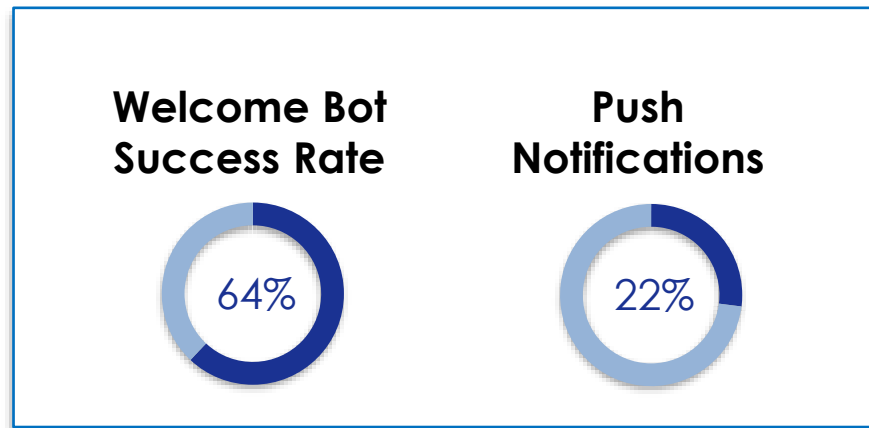
At Risk

Complete

Welcome Bot Dashboard

Dashboard data is averaged across all counties since rollout

Welcome Bot



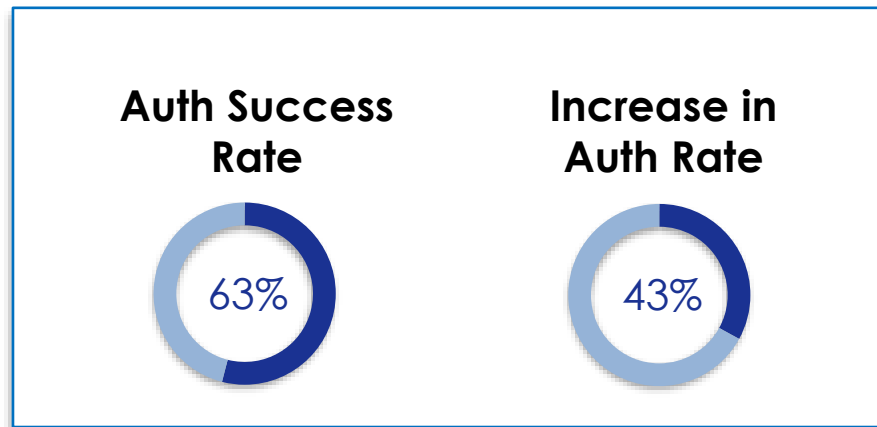
Welcome Bot Update

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



LEAP Update





PSC and JPA Meeting Schedules

PSC and JPA Meeting Schedules

2023 November and December

- November PSC
 - Today, Thursday, November 9, 2023
 - CalSAWS Roseville
 - 8:30 a.m. – 12:00 p.m.
- November JPA Board of Directors
 - Friday, November 15, 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

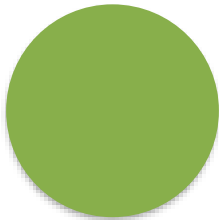
Regular meetings will be available in person and Zoom.
Conference is in person only.

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

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

29 SLAs (CalSAWS, Imaging, OCAT, BenefitsCal)	4 SSP Updates	7 Root Cause Analyses (RCA)	24 Technical Updates (SCRs and Defects)
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QA Implementation Support

10 Retrospectives Per Wave	8 Implementation Support Staff	938 Migration Requirements	23 Migration Updates (SCR and Defects)
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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



Key IV&V Activities

Independent Validation & Verification (IV&V)

Key Activities



CalSAWS and BenefitsCal Releases

- CalSAWS Release 23.11 Testing
- BenefitsCal Monthly Release Development and Testing, UCD, ROI Workgroup Meeting



Performance

- Imaging: Ongoing Performance improvements
- Batch: Ongoing Performance improvements



CalWIN Data Conversion

- Wave 6 Conversion
- Triage and Resolution of open Conversion Defects



CalWIN Implementation

- Wave 5 Post Implementation



State Partners Updates

- OTSI
 - CDSS
 - DHCS
- 
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Regional Updates

Adjourn Meeting

