



CalSAWS | Project Steering Committee Meeting

December 14, 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 November 9, 2023, PSC Meeting and review of Action Items.



Informational Items



Production Incident Update

Outage on December 4, 2023

Timeline of Major Events

December 4, 2023

- 4:57pm Alerts received that Benefits Cal users unable to login
- 5:57pm Determined that data restore least disruptive service restoration option
- 6:18pm Approval process completed, and data recovery process started
- 8:47pm Data recovery completed and began processing new user logins
- 8:50pm Declared service restoration

Outage Impact

- Users, county workers, and system administrators were unable to initiate new logins
- Users with established logins were able to continue without interruption
- Batch and Integrated applications continued to function normally
- 3,618 BenefitsCal users were impacted, and their accounts have been restored to normal status

Current Status

- The environment is running and healthy in the primary region and DR region
- User registrations that were lost have been recovered. Password changes performed during the interval will not be recovered.



Final Acceptance Introduction

Final Acceptance Introduction

CalSAWS Core System, Central Print, and Implementation Support

- The following milestones were completed in the past:
 - OCAT Final Acceptance - November 2021
 - BenefitsCal Final Acceptance – February 2022
 - C-IV/CalACES (40 County) Migration Final Acceptance – May 2022
- These milestones are targeted for completion in 2024:
 - CalSAWS Migration Final Acceptance – Accenture
 - Central Print Final Acceptance – Gainwell
 - CalWIN Implementation Support Services (ISS) - Implementation Complete Report – Deloitte
- Approval of these milestones leads to the Consortium's payment of the final holdback release for the CalSAWS DD&I Project



CalSAWS Migration Final Acceptance

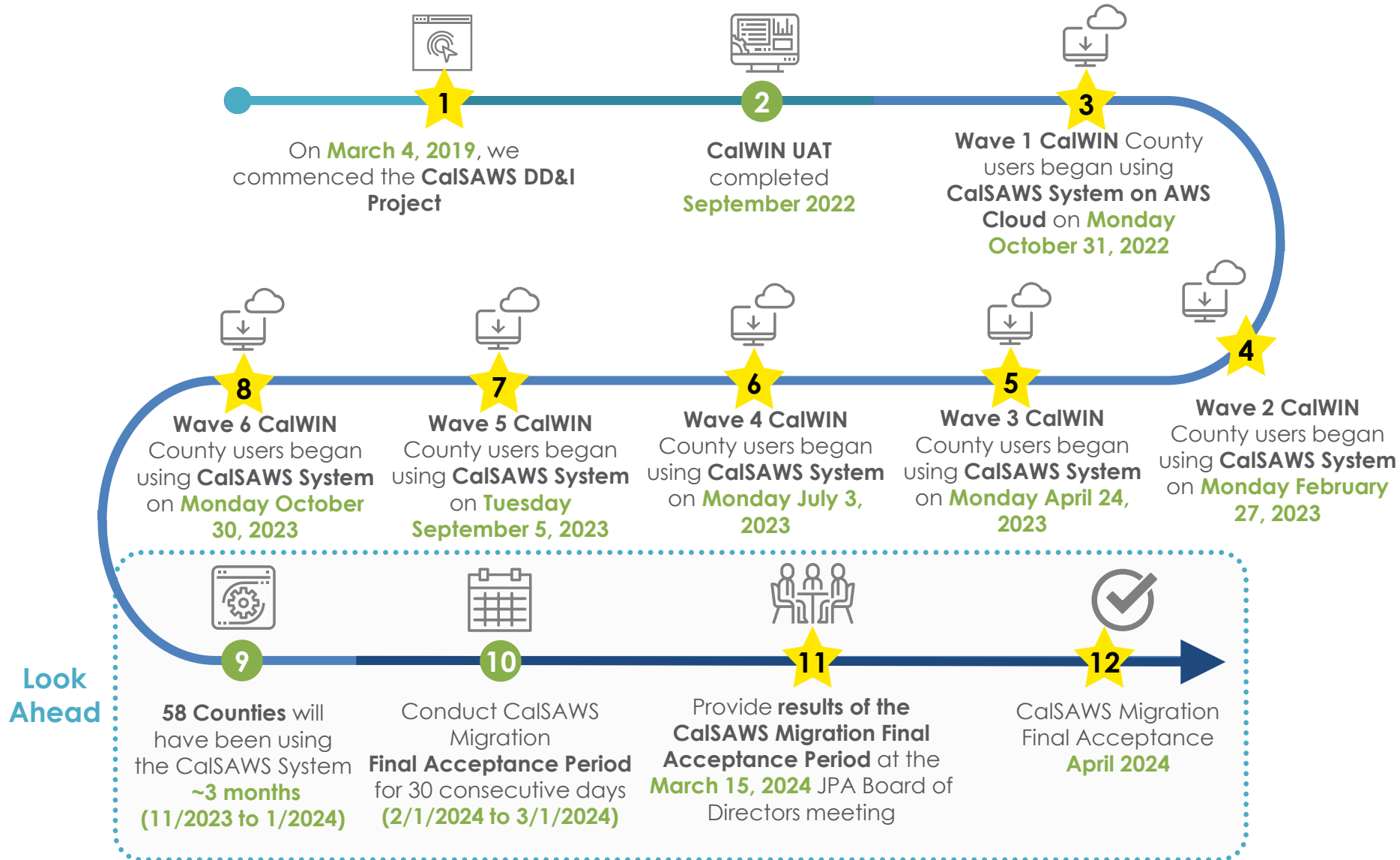
CalSAWS Migration Final Acceptance Preview

Purpose

- The purpose of the CalSAWS Migration Final Acceptance is to confirm that:
 - Requirements related to the CalWIN Counties' migration to CalSAWS have been met
 - The CalSAWS System is meeting performance requirements
 - The CalSAWS Application contains zero non-cosmetic defects related to the CalWIN Counties' migration
- The Final Acceptance process is based on a two-step approach:
 - Dec 2023 – For PSC, Discuss the process and scope for CalSAWS Migration Final Acceptance, close out remaining defects in 24.01, prepare for 30 consecutive day Final Acceptance period in Feb 2024, and explain next steps
 - Feb 2024 – For JPA, Discuss process and scope for CalSAWS Migration Final Acceptance.
 - March 2024 – Review the results and observations of the 30 consecutive day Final Acceptance period, and whether CalSAWS Migration Final Acceptance has been met or if Consortium Director's discretion is required
- Approval of the CalSAWS Migration Final Acceptance leads to the Consortium's payment of the final holdback release for the CalSAWS DD&I Project

CalSAWS Migration Final Acceptance Preview

CalWIN Counties' Migration Timeline Overview























CalSAWS Migration Final Acceptance Preview



CalSAWS Final Acceptance Deliverable includes:

- Results of the 30 consecutive day Final Acceptance Period will include:
 - Results for Performance Requirements
 - Outstanding open non-cosmetic defects (for DD&I CalWIN Migration SCRs deployed via releases 21.09 to 24.01)
 - Summary of key lessons learned and recommendations for improvements to the CalSAWS Software
- Updated Requirements Traceability Matrix (RTM), reporting status of the CalWIN Counties' migration requirements from the CalSAWS DD&I Statement of Requirements

Example of Performance Requirements to be reviewed

Perf Req #	Performance Requirement Title	February 2024 SLA Met/Not Met		QA
1	Monthly Off Prime Business Hours Availability	Met	✓	
2	Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	Met	✓	
3	Monthly Deficiency Notification Response Time	Met	✓	
4	Monthly Helpdesk Diagnosis Time	Met	✓	
5	Daily Peak Usage Hours Availability	Met	✓	
6	Daily Prime Business Hours Availability	Met	✓	
7	Daily Peak Usage Hours ED/BC Response Time	Met	✓	
8	Daily Prime Business Hours ED/BC Response Time	Met	✓	
9	Daily Peak Usage Hours Screen to Screen Navigation Response Time	Met	✓	
10	Daily Prime Business Hours Screen to Screen Navigation Response Time	Met	✓	
11	Daily Batch Production Jobs Completion	Met	✓	
12	Daily Off Prime Business Hours ED/BC Response Time	Met	✓	
13	Daily Off Prime Business Hours Screen to Screen Navigation Response Time	Met	✓	
14	Daily Unbounded Search Response Time	Met	✓	
15	Daily Prime Business Hours Availability of CalSAWS Training Environments	Met	✓	
16	Daily Peak Usage Hours Standard Report Response Time	Met	✓	
17	Security Incident Notification	Met	✓	
18	Security Incident Reporting	Met	✓	
19	Security Incident Negligence	Met	✓	
20	Disaster Recovery Response Time	Met	✓	

Example

Performance Results

Next Steps for March 2024 Meeting



Next Steps for CalSAWS Migration Final Acceptance:

- Report on results of performance requirements for the CalSAWS System for the 30 consecutive day final acceptance period
- Confirm DD&I Requirements are met
- Address open defects. As of December 4, there are 104 open defect related to CalWIN Migration SCRs deployed via between 21.09 and 23.11:
 - 64 targeted for minor release before R24.01
 - 40 targeted for major release R24.01



On-going Maintenance and Operations Activities:

- Address Reporting defects and continue to support counties with questions
- Contact Center
 - Continue regular support meetings with each county to address resolution of tickets and/or defects.
 - Execute action plan for rolling eCCP out to the remaining C-IV counties.
 - On-going maintenance on the Welcome and Authentication BOTs
- Resolve open defects with GA/GR functionality
- Focus on ForgeRock operational and architectural improvements



Central Print Final Acceptance

Central Print Final Acceptance

Phased Implementation

- Implementation of Central Print was completed in three phases:
 - Phase 1 – Los Angeles County
 - Phase 2 – Former C-IV Counties
 - Phase 3 – Former CalWIN Counties corresponding to the six waves
- The Final Acceptance Report has been under development since Phase 1 completion
 - Phase 1 and Phase 2 draft versions were provided following 30 days of operation for each phase
 - Draft deliverable including all three Phases will be submitted on 12/8



Central Print Final Acceptance



Central Print Final Acceptance Report Deliverable

The Final Acceptance Report documents the achievement of full operational capabilities, including:

- Completed operational readiness checklists for each phase
- Summary of all implementation phases with metrics verifying successful completion of all implementation tasks
- Certification that all requirements have been met and all known Deficiencies have been corrected
- Summary of lessons learned and best practices
- Recommendations for any improvements to the Print Services
- Updates to the Print Services M&O Plan, and other documents if required



CalWIN ISS Completion Report

CalWIN ISS Completion Report – Deloitte

PURPOSE

- Signify the conclusion of the Deloitte CalWIN Implementation Support Services (ISS) effort.
- Acknowledge Deloitte performed in accordance with the contract terms.
- Deliverables were delivered in a satisfactory manner, material and cosmetic deficiencies addressed, and obtained Consortium approval.

SCOPE

Implementation Support Services



Design > Build > Implement

CalSAWS Counties



Wave 1

- Placer
- Yolo

Wave 2

- Contra Costa
- Santa Clara
- Tulare

Wave 3

- Orange
- Santa Barbara
- Ventura

Wave 4

- San Diego
- San Mateo
- Santa Cruz
- Solano

Wave 5

- Alameda
- Fresno
- Sonoma

Wave 6

- Sacramento
- San Francisco
- San Luis Obispo

CalWIN ISS Completion Report – Deloitte

As of 12/06/2023

85 of 95

Requirements Met

*10 pending until January 2024

98%

Deliverables Approved

Four (4) remaining for January 2024



Open Risks/Issues

None



Open Action Items

None



Open Workplan Tasks to Transfer

Three (3) Lobby Mgmt. Tasks

Deficiencies

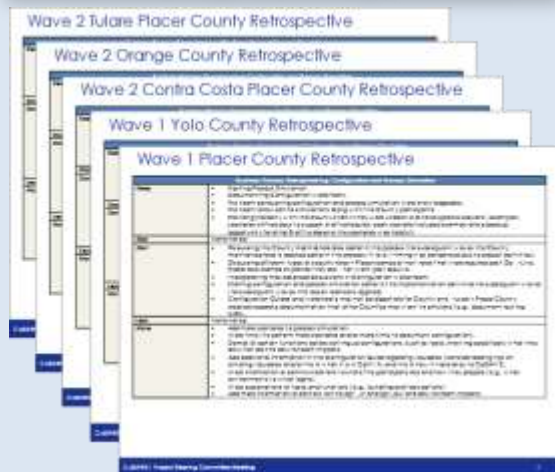
None

Open Workplan Tasks

None

IMPLEMENTATION COMPLETION AND RETROSPECTIVES

18 County Retrospectives



Starfish Technique



Lessons Learned

- PROJECT MANAGEMENT OFFICE (PMO)
- BUSINESS PROCESS REENGINEERING
- ORGANIZATIONAL CHANGE MANAGEMENT
- TRAINING
- IMPLEMENTATION AND CONVERSION SUPPORT

Lessons Applied to Future Waves



Quality Assurance Confirmation



Quality Assurance Confirmation

QA Vendor Responsibilities



QA Project Management Support



Contract Compliance



Independent Test



Testing and Support Services



UAT Support Services



Recommendations for Acceptance



Risk/Issue Management



Change Order Analysis



Deliverable Assessments, Requirements Traceability

System	Met Status (as of 11/2023, updates pending for acceptance)			
	Total Requirements	Met	Met In Plan	Not Met
CalSAWS	692	623	69	0
Central Print	149	144	5	0
CalWIN ISS	95	85	10	0
Total	936	852	84	0

Quality Assurance Confirmation

CalSAWS Core System, Central Print, and Implementation Support



- ❑ QA recommendation for CalSAWS Migration Final Acceptance :
 - ❑ Summary of correction of each Deficiency identified during DD&I period
 - ❑ Summary of Lessons Learned and Recommendations for any Improvements
 - ❑ Update to Requirements Traceability Matrix (RTM)
 - ❑ Verification the CalSAWS Software has performed for 30 consecutive days without any Deficiencies, other than inconsequential Deficiencies that do not affect any Performance Standard, requirement, or Specification
 - ❑ Final Assessment of Del #96 – CalSAWS Migration Final Acceptance Certification

- ❑ QA recommendation for CalWIN ISS Implementation Complete Report :
 - ❑ All deliverables met
 - ❑ All deficiencies identified have been corrected
 - ❑ Implementation Certification Reports is approved

Quality Assurance Confirmation

CalSAWS Core System, Central Print, and Implementation Support



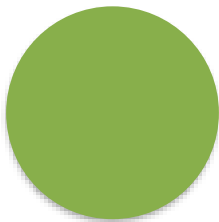
- ❑ QA recommendation for Central Print Final Acceptance:
 - ❑ Completed operational readiness checklists for each phase;
 - ❑ Summary of all implementation phases with metrics verifying successful completion of all implementation tasks;
 - ❑ Certification that all requirements have been met and all known Deficiencies have been corrected;
 - ❑ Summary of lessons learned and best practices;
 - ❑ Recommendations for any improvements to the Print Services;
 - ❑ Updates to the Print Services M&O Plan, and other documents as required by the Consortium.

- ❑ QA will continue to participate in continuous improvement activities in support of the CalSAWS application:
 - ❑ Release Management, Functional Enhancements
 - ❑ Technical Maintenance and Upgrade Planning
 - ❑ Performance/SLA and Service Desk Reviews



Customer Service Center Update

- L.A. Go-Live Debrief
- BOT Status
- ECCP Rollout



Los Angeles County

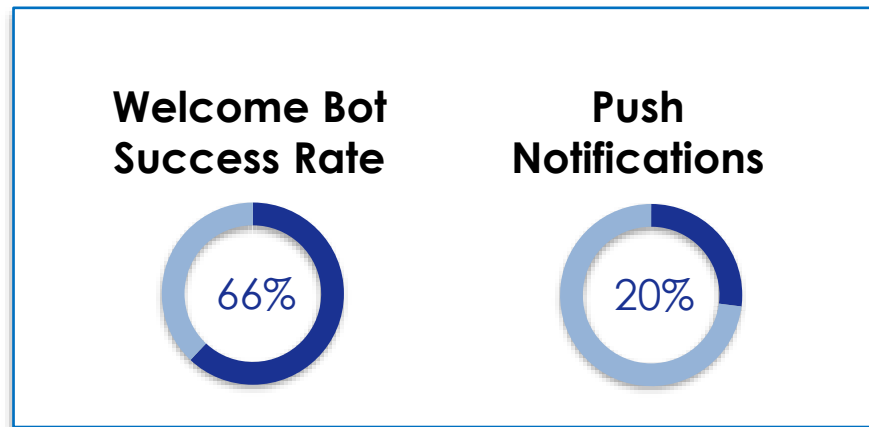
11/17 Contact Center Go Live

- Los Angeles County saw successful go live with Contact Center on 11/17
- Daily post-implementation meetings are now weekly
- Post go-live call metrics are in line with pre go-live metrics
- We are working closely with the county to continue to triage and are reporting out on issues daily end of day.

Welcome Bot Dashboard

Dashboard data is averaged across all live counties since rollout

Welcome Bot



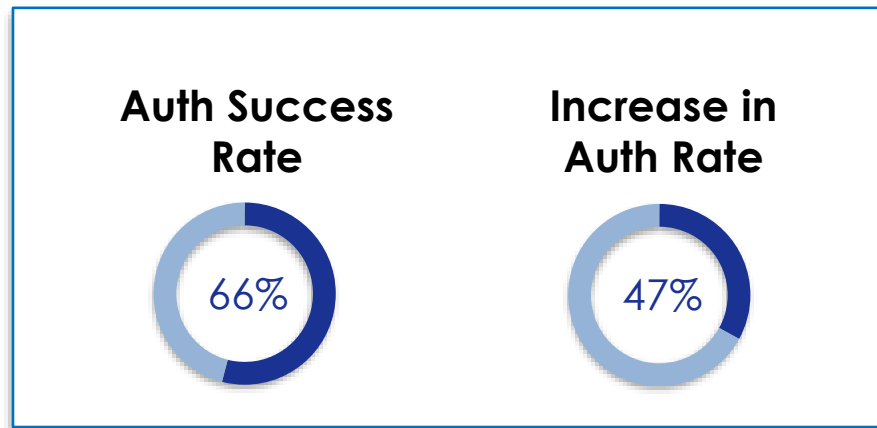
Welcome Bot Update

1. Completed modifying all call flows for the live counties with the Welcome Bot to ensure callers are being routed to the proper queues.
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. Went live with Authentication Bot in LA and all Wave 6 counties.
 - Since last month, the average auth rate increased by 3%
2. Continues to significantly increase customer authentication rate
3. Continue to receive positive feedback

C-IV eCCP Migration Plan

Phases 1-4

Phase	Counties	Target Go-Live	Status
Phase 1	San Joaquin Merced	5/12/2023	Complete
Phase 2	Butte Sutter Marin	8/16/2023	Complete
Phase 3	Stanislaus	9/28/2023	Complete
	Kern	9/28/2023	Complete
	Riverside	10/10/2023	Complete
	Kings	11/29/2023	Complete
Phase 4	Yuba	01/05/2024	In Progress
	Humboldt	01/05/2024	In Progress
	Monterey	01/11/2024	In Progress*
	San Bernardino (move to new account)	02/01/2024	In Progress*

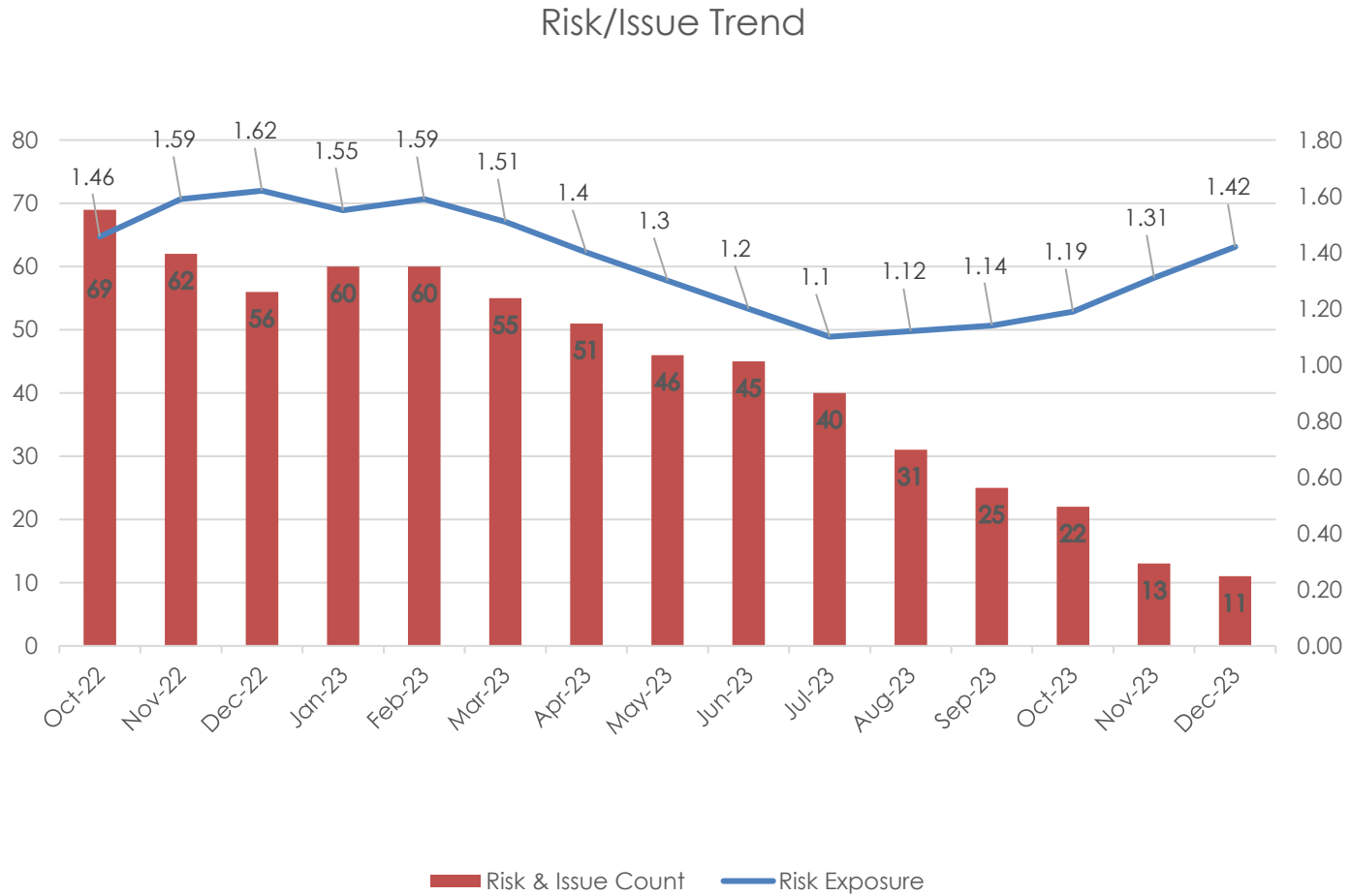
Note: ready for production deployment on date listed. Pending County confirmation for actual go live date.



Project Risks

CalSAWS Project Risks

Risk Exposure Trend



M&O Risk Summary

CalSAWS Project Management Risks

Risk	Risk Name	Level
102	Lack of annual project funding may cause schedule delay or reduction in scope for CalSAWS & other projects	Low
203	Project communications must continuously evolve, otherwise stakeholder / audience needs will not be met	Medium

M&O Production Risks

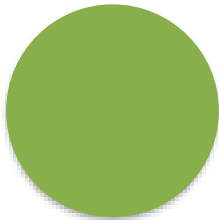
Risk	Risk Name	Level
201	Pace of policy changes may exceed capacity of the project teams, resulting in less automation	Medium
208	CalHEERS release readiness delays may impact CalSAWS delivery timelines, slowing critical updates to Counties	Low
239	Lack of consistent State language translation approach may cause schedule delays and rework	Medium
246	Perceived gap in functionality with GetCalFresh may impact adoption of BenefitsCal	Low
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

Updated as of 12/6/23 RMG Status Meeting



Release and Policy
Update/Communications

- Continuous Coverage Unwinding Update
- Upcoming Releases



CalSAWS Release and Policy Update

Continuous Coverage Unwinding – DHCS Updates

- DHCS and CalSAWS conducted a targeted session on using CalSAWS tools and reports to assist with processing outstanding renewals during the 11/28 county support call
 - DHCS placed the recorded session in county SFTP folders (DHCS-PDB/COUNTIES/[your county name]) on November 30
- Beginning December 18, DHCS will be meeting with counties needing one-on-one technical assistance regarding outstanding renewals.
 - DHCS may bring other partners such as CalSAWS and CalHEERS to the session when applicable.
 - Counties requesting to meet with DHCS on strategies to address outstanding renewals can contact Theresa.Hasbrouck@dhcs.ca.gov to schedule.

CalSAWS Release and Policy Update

Medi-Cal January 2024 Implementations

- Elimination of Assets for Non-MAGI Medi-Cal Programs
 - [ACWDL 23-28](#): TRANSFERS OF ASSETS BEGINNING JANUARY 1, 2024, AND TREATMENT OF TRANSFERS OCCURRING PRIOR TO JANUARY 1, 2024, was released and is the final policy letter connected to asset elimination.
- Ages 26-49 Adult Expansion
 - CalSAWS and MEDS has transitioned all current Medi-Cal members in restricted scope aid codes into full scope aid codes effective January 1, 2024.

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. Non-MAGI MC batch ran on 11/30/2023

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

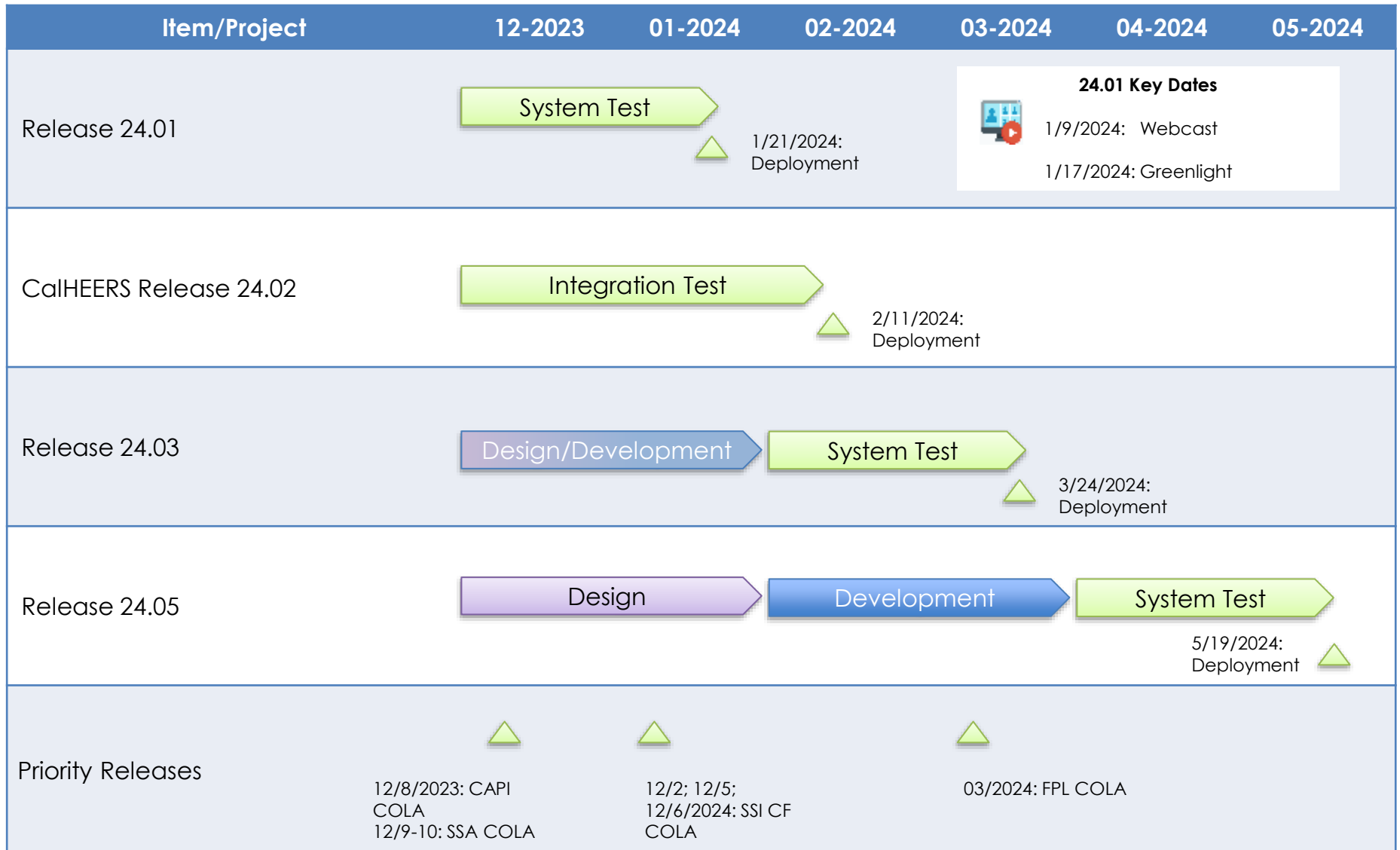
Elimination of Assets

~12/04/2023:

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

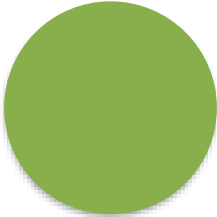
CalSAWS Release and Policy Update

CalSAWS Timelines



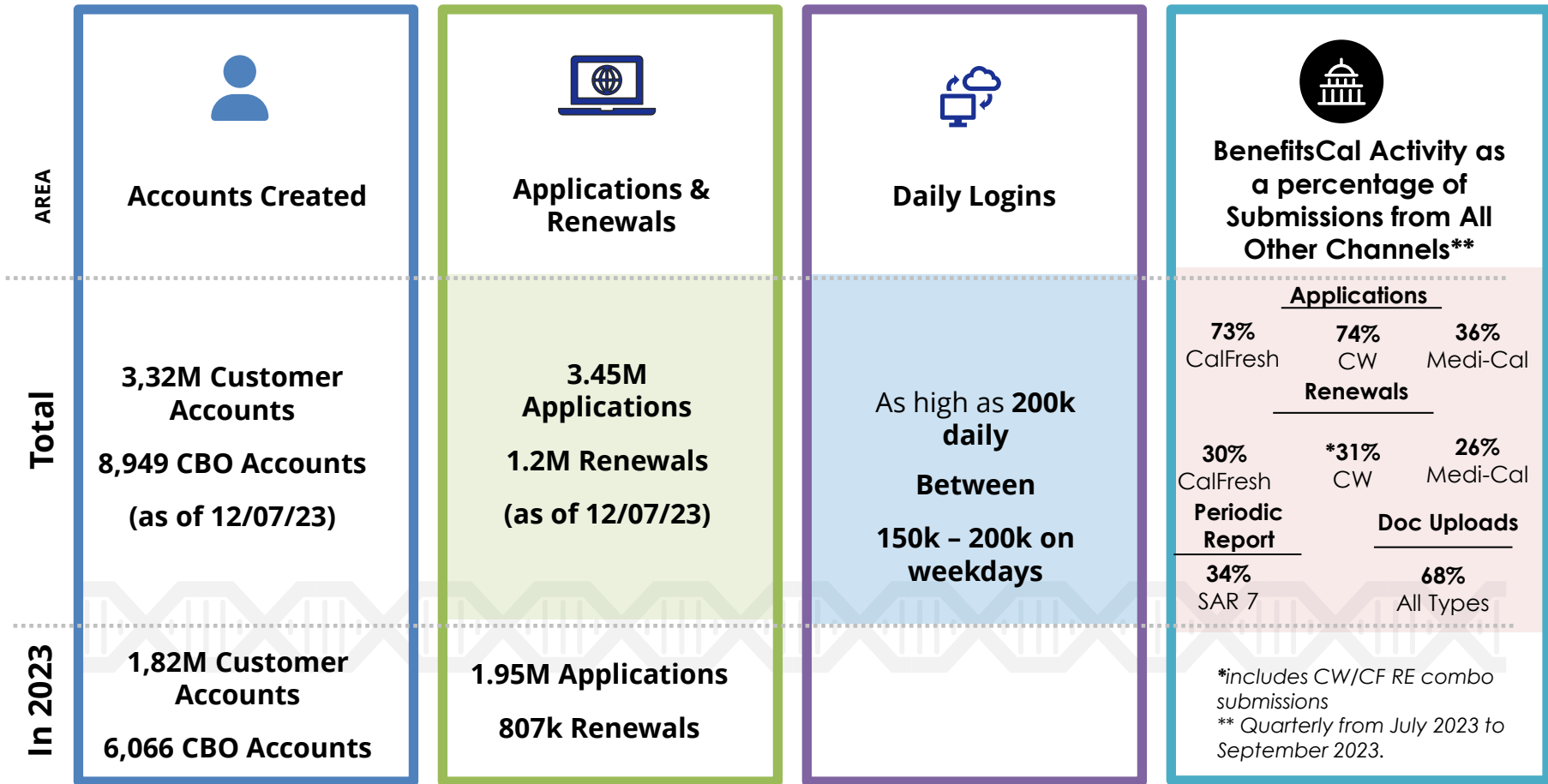


BenefitsCal Update

- Key metrics from Prod as the Calendar year 2023
 - BenefitsCal Roadmap and Release Highlights
 - ROI Update
 - Timeclocks Update
 - Strategy for the top three reasons users request technical help
- 
-

BenefitsCal Updates

Highlights & Metrics



BenefitsCal Roadmap

Proposed Release Schedule

Key		
■ CM Enhancements	■ CM Research	✓ Completed
■ Other Updates	■ Other Research	🔗 Bundled Update

<p>November Release 23.11</p>	<ul style="list-style-type: none"> • CSPM-67119: Document Upload for Users with No Account
	<ul style="list-style-type: none"> • CSPM-66724, CSPM-67684 and 67810: 3 technical updates • CSPM-66583: Updates to Chatbot feature to add new income values at county level and updates RCA TCVAP information
<p>November Research Activities</p>	<ul style="list-style-type: none"> • CSPM-67104: Research E-mail Notifications to be sent from BenefitsCal • CSPM-67189: Display Primary Applicant Status on a Case
	<ul style="list-style-type: none"> • CSPM-68114: Time Clocks usability testing

<p>December Release 23.12</p>	<ul style="list-style-type: none"> • CSPM-66846: Update the messaging to inform users the updated time in which the RE or SAR 7 link will be available • CSPM-67881: Technical changes to Office Mapping interface • CSPM-67993: Remove asset questions for all MC only applications • CSPM-67937: Remove the Property Assessment Statement of Facts (MC 210 PA) downloadable form
<p>December Research Activities</p>	<ul style="list-style-type: none"> • CSPM-65744: Update EBT 2259 (Revised EBT theft replacement form) • CSPM-36812: Digitize form CF303 (CalFresh replacement or disaster supplement affidavit)

System Change Request (SCR) Details are available publicly through CalSAWS.org.

BenefitsCal Roadmap

Proposed Release Schedule

Key

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

January Release 24.01

- **CSPM-67656:** Remove Vaccine status pages for CalFresh only applications
- **CSPM-67657:** Self-Employment help text
- **CSPM-67746:** Do not display the future RE/PR due date if the program is denied or discontinued.
- **CSPM-67784:** Dropdown list for document upload
- **CSPM-67745 and CSPM-4611:** 2 technical updates

January Research Activities

- **CSPM-68109:** Disability Accommodation
- **CSPM-68111:** Case Linking

February Release 24.02

- **CSPM-67761:** Update Application and RE/SAR7 Status Tracker
- **CSPM-67785:** Update Document Type/Upload feature

February Research Activities

- **CSPM-68110:** Card Replacement Tracker
- **CSPM-68112:** Customer Dashboard

System Change Request (SCR) Details are available publicly through CalSAWS.org.

BenefitsCal Roadmap

Proposed Release Schedule





Awareness

Other customer benefit changes (not specific to BenefitsCal changes)

- Medi-Cal Elimination of Asset Limit test January 2024
- Medi-Cal Expansion 26–49-year-olds, regardless of immigration status January 2024
- CalWORKs resource limit increase January 2024

- Cost of Living changes in 2024
 - Social Security benefits, effective 1/1/2024
 - Federal Poverty Levels applied, effective 4/1/2023
 - CalFresh benefits, effective 10/1/2024
 - CalWORKs MAP, effective 10/1/2024

Key

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

Upcoming

Policy Items

- ABAWD
- AFB - CAPI
- CFAP Expansion
- Benefits Replacement (EBT2259 form) - March 2023

Planning In-Progress

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

GCF Parity

- SSA Assisted Applications - May 2024
- Benefits Replacement (CF303) form - March 2024
- Other enhancements

System Change Request (SCR) Details are available publicly through CalSAWS.org.

BenefitsCal

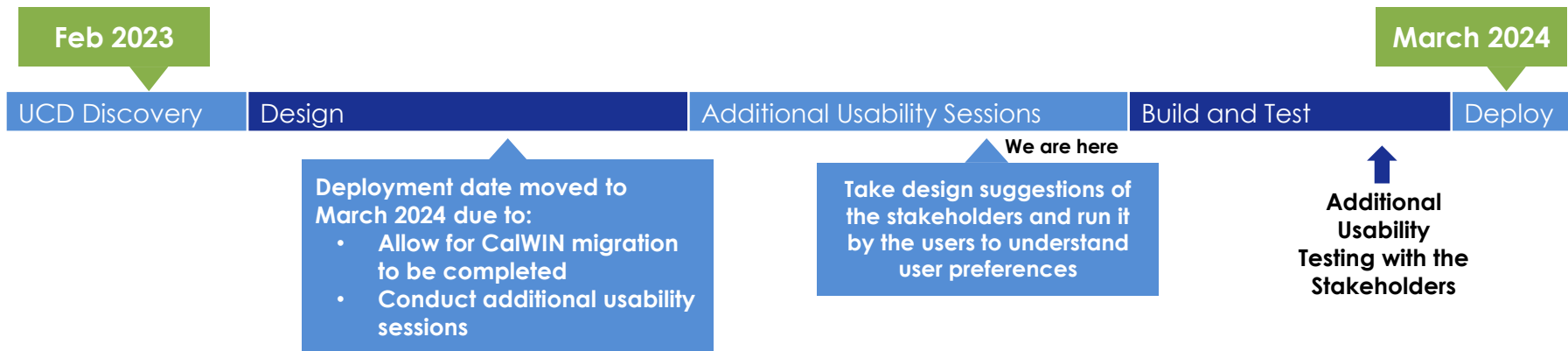
ROI Update

- Draft applicant/recipient roles/responsibilities (e.g., Authorized Representatives, Power of Attorney, CBOs, etc.) matrix, which addresses Medi-Cal, CalFresh and CalWORKs programs completed, will be included in future Errata or state letter by both DHCS and CDSS.
- Additional chart for responsibilities to be developed to cover scenarios when contracts in place or not.
 - Next meeting dates scheduled:
 - 01/08/24
 - 01/22/24
 - 02/05/24

BenefitsCal

Timeclocks Update

- CalWORKs Timeclocks is an upcoming system improvement that will allow customers to view their time left on aid out of the 60-months CalWORKs time limit.
- Currently, planned deployment date is March 2024



- In addition, customers will be presented with help text to explain what the time-limit on aid means
- Customers also will be able to request time-limit extensions via the Support Request functionality to either pause their timeclock or extend their time on aid

BenefitsCal

Strategy for the top three experiences highlighted by customers

DOCUMENT UPLOAD

»» Observation

- 1 Locating uploaded images
- 2 User notifications when a document failed to upload
- 3 User selecting incorrect document types
- 4 Case number entry (without an account)

»» Solution

- 1 FAQs, FACT sheet and Training guides
- 2 New user-friendly messages for upload failures
- 3 Upcoming revisions to document type selections
- 4 New FAQ's to Chatbot related to document upload to assist users
- 5 Enhancements to allow customers to upload without logging in

»» Impact

- 1 Helpdesk call volumes (doc upload related) reduced by 47% since July 2023
- 2 No issues were identified on BenefitsCal for the incidents between September-November
- 3 SCR to allow anonymous uploads implemented in November of 2023

✓ *Two (2) new enhancements to improve document upload experience is planned for January and February 2024*

BenefitsCal

Strategy for the top three experiences highlighted by customers

ACCOUNT MANAGEMENT

»» Observation

- 1 Customer challenges in verification code usage during account creation, and password reset
- 2 User challenges while setting up security responses

»» Solution

- 1 Added tooltip to email/phone OTP for password reset, account creation flow
- 2 New FAQ's to Chatbot related to account management to assist users
- 3 Enhanced system behavior to allow spaces in the security responses
- 4 Upcoming UCD research with end-users for Progressive Account Creations

»» Impact

- 1 Password reset contributed to <5% of the overall call volumes between September-November
- 2 No issues were reported for the security responses set up since the enhancement
- 3 Defect addressed to correct MFA text to enhance usability
- 4 99.8% Successful Login Rate

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

BenefitsCal

Strategy for the top three experiences highlighted by customers

CASE LINKING

»» Observation

- 1 In rare instances, [incorrect case-links](#) were established by customers
- 2 Few customers unable to [view case information](#) after a successful case link

»» Solution

- 1 Enhanced to allow [9-digit SSN](#) instead of the last 4
- 2 [FAQs, Job-Aids, Training guides](#) published for helpdesk and county staff
- 3 Added enhanced messaging for users where case-link is not automatically completed

»» Impact

- 1 No BenefitsCal tickets submitted for the case-link since July 2023.

✓ *Upcoming UCD research to improve case-linking help text and to enable MFA for case-linking*



Workload Management/Intake
Scheduling Effort Update



Enhancing Intake Assignment and Appointment Scheduling

The assignment of workers during intake is critical to the timely processing of applications. Many counties are **leveraging tools outside of the system** to align to their processes, such as:

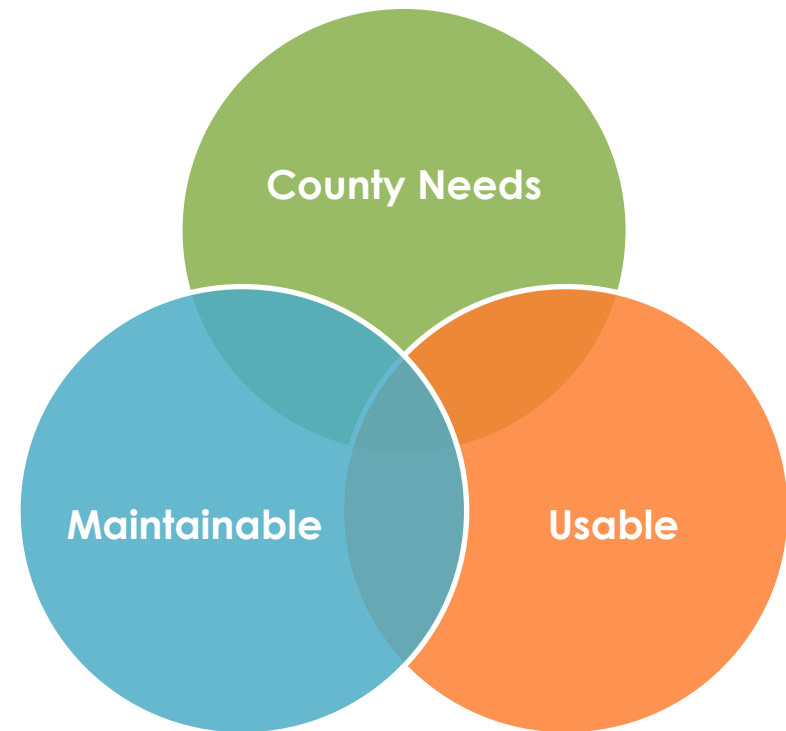
- Manual individual/bulk reassignment
- Bank Caseloads
- Flexible Worker Schedules

Intake Assignment Feedback

- **Limits worker selection** to single office
- Should account for **worker schedule**
- Integration with **Flexible Appointments**
- **Difficult to track** and set concurrent capacity
- Need **more reports** and **metrics**
- More **automatic assignment** options needed
- Better aligned to **banked/task-based work**
- Usability of worker schedule & availability

Addressing Unique Needs with Human Centered Design

- The process of intake assignment and appointment scheduling is part of **county workload management**. This is a unique area in CalSAWS that **requires flexibility and configurability** to align to unique county business processes.
- Leveraging **Human-centered design** will allow us to hear county needs to develop requirements for a highly usable and maintainable solution.

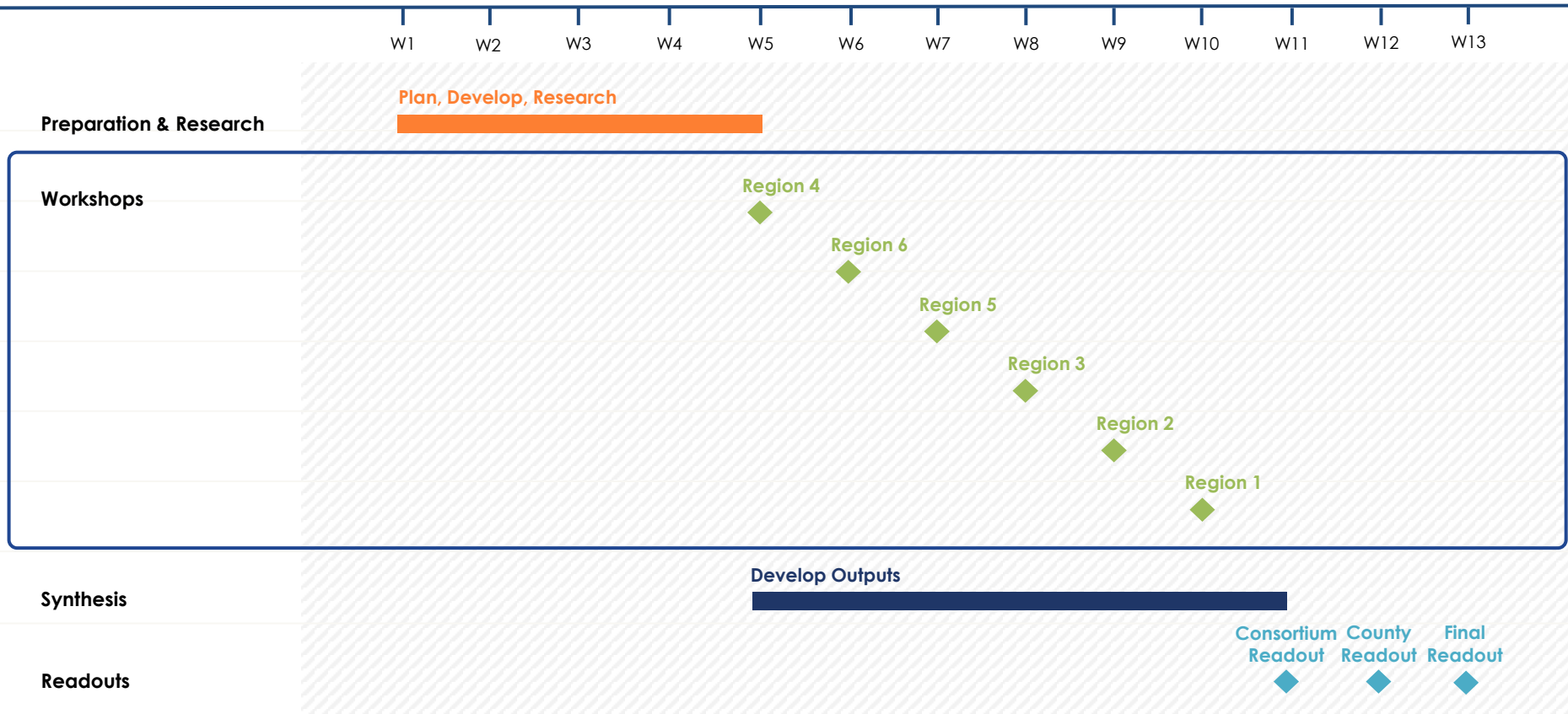


Caseload Assignment Requirements Gathering Approach

Using a five-step approach for developing the strongest recommendations



3-month Project Timeline

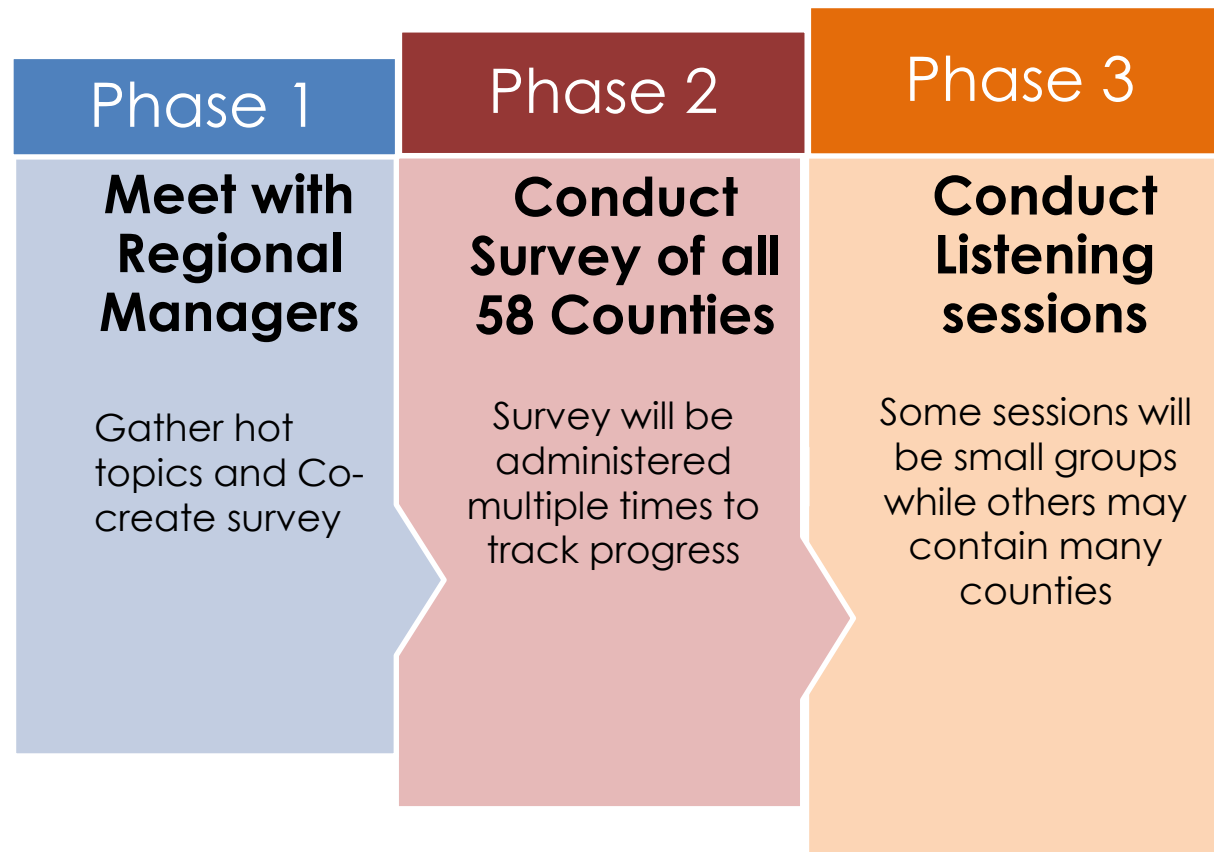




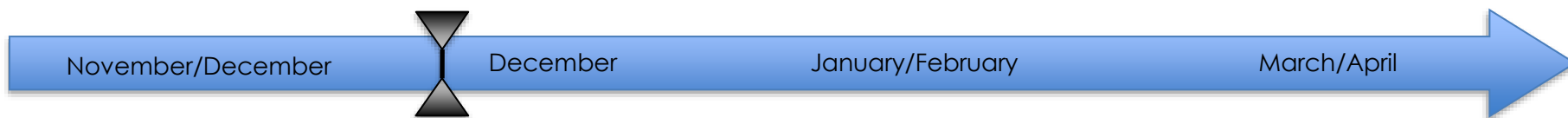
Reports Strategy Update

Reports Strategy Update

Where we are now



Provide outcomes and recommendations to Executive Leadership

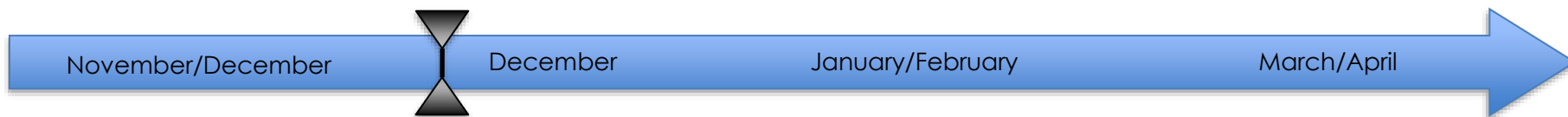


Reports Strategy Update

Where we are now

■ Actions Taken:

- Reports Enhanced Communication increased to Bi-Weekly and updated to include more detail on ALL reports, most recently sent on December 5th
- Revised weekly status report to focus on which reports have known issues or enhancements and resolving defects
- Factsheet sent on Qlik Bookmark functionality on 10/27
- CIT 0383-23 sent providing one place for all Ad Hoc support resources on 11/14
- Met with numerous recently migrated counties to provide additional Reports and related system functionality training
- Conducted All County State and Fiscal sessions on 11/30 and 12/7
- Conducted Wave 6 State and Fiscal sessions on 11/16, 11/30, 12/7
- CRFI 23-125 sent to identify staff to received reports survey from Phase 2 on 11/29
- Met with RMs on 12/6 to review schedule and approach to Phase 3 county sessions



Reports Strategy Update

Where we are now

- Actions In progress
 - Documentation in Review:
 - ✦ Expanding Online Help – Reports Inventory
 - ✦ Fiscal/Claiming guide
 - ✦ Report Reconciliation Guide
 - ✦ Report Documentation created by GenAI
 - Begin scheduling report specific sessions in addition to existing sessions
 - Phase 3 Listening Sessions:
 - ✦ Survey targeted for distribution on 12/11 with three weeks to complete on 1/5
 - ✦ Developing CRFI to identify County Session participants, targeted distribution date 1/2
 - ✦ County Sessions targeted to start week of 1/22
 - Up to 3 sessions each week
 - Sessions conclude by end of February





Procurement Updates

- M&O Procurement
 - BenefitsCal RFP
- 
-

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

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



Key IV&V Activities

Independent Validation & Verification (IV&V)

Key Activities



CalSAWS and BenefitsCal Releases

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



Performance

- Imaging: Defect resolution and enhancements
- Batch: Ongoing Performance improvements



CalWIN Data Conversion

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



CalWIN Implementation

- Wave 6 Post Implementation Support



State Partners Updates

- OTSI
 - CDSS
 - DHCS
- 
-



Regional Updates

Adjourn Meeting

