Cal**SAWS** | Project Steering Committee Meeting

February 15, 2024

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

Informational Items

Procurement Updates

- M&O Procurement
- BenefitsCal RFP

CalSAWS M&O Procurement
Notice of Intent to Award, Appeal & Negotiations Information

- NOIA and Vendor Selection Report Issued on February 8, 2024 and posted to CalSAWS.org.

- Selected Bidders:
  - Gainwell as the Infrastructure Contractor
  - Deloitte as the M&E Contractor

- Non-confidential versions of all Bidder Proposals also posted on February 8, 2024.

- Appeal Information
  - Deadline for filing an appeal: February 15, 2024

- Initial Contract Negotiations with both vendors scheduled on February 15, 2024.

CalSAWS M&O Procurement
Vendor Selection Report

- Overview/Table of Contents
  - Executive Summary
  - Proposal Evaluation Methodology and Process
  - Infrastructure Results
  - M&E Results
  - Consolidated Scoring, Final Selection and Recommendation

CalSAWS M&O Procurement
Vendor Selection Report

- Proposals received from five Bidders:

    1. Peraton - Infrastructure Only

    2. Deloitte - Infrastructure & M&E

    3. Accenture - Infrastructure & M&E

    4. Kyndryl - Infrastructure Only

    5. Gainwell - Infrastructure & M&E

CalSAWS M&O Procurement
Vendor Selection Report

- ## Infrastructure Scoring Summary

	Category/Subcategory	Subcategory Weight	Overall Weight	Total Possible Points	Accenture	Deloitte	Gainwell	Kyndryl	Peraton
	Business Proposal		**70.0%**						
1	Staff Qualifications and Experience	5%		5.0	4.24	4.41	3.93	2.62	3.75
2	Oral Presentations	5%		5.0	3.50	3.00	4.00	4.00	3.00
3	Key Staff Interviews	10%		10.0	8.50	8.00	7.25	6.38	6.38
4	Understanding and Approach	50%		50.0	38.85	41.88	42.40	31.35	36.88
	Business Proposal Raw Scores			**70.0**	**55.09**	**57.29**	**57.58**	**44.35**	**50.00**
	Business Proposal Normalized Scores			**70.0**	**66.98**	**69.65**	**70.00**	**53.92**	**60.79**
	Price Proposal		**30.0%**						
5	6-Year Base Contract Period (Excluding Deliverables Paid During Transition-In)	30.0%		30.0	25.69	26.27	28.37	24.14	30.00
	Price Proposal Scores			**30.0**	**25.69**	**26.27**	**28.37**	**24.14**	**30.00**
	Business Proposal + Price Proposal Total		**100.0%**	**100.0**	**92.67**	**95.92**	**98.37**	**78.06**	**90.79**

CalSAWS M&O Procurement
Vendor Selection Report

- ## M&E Scoring Summary

	Category/Subcategory	Subcategory Weight	Overall Weight	Total Possible Points	Accenture	Deloitte	Gainwell
	Business Proposal		**70.0%**				
1	Staff Qualifications and Experience	5%		5.0	4.68	4.38	4.33
2	Oral Presentations	5%		5.0	4.00	3.50	3.00
3	Key Staff Interviews	10%		10.0	8.42	8.25	6.92
4	Understanding and Approach	50%		50.0	36.75	41.75	33.58
	Business Proposal Raw Scores			**70.0**	**53.85**	**57.88**	**47.83**
	Business Proposal Normalized Scores			**70.0**	**65.12**	**70.00**	**57.84**
	Price Proposal		**30.0%**				
	6-Year Base Contract Period (Excluding Deliverables Paid During Transition-In)	25.0%		25.0	19.93	19.54	25.00
	SCR Price	5.0%		5.0	5.00	1.90	4.24
5	**Price Proposal Scores**	30.0%		**30.0**	**24.93**	**21.44**	**29.24**
	Business Proposal + Price Proposal Total		**100.0%**	**100.0**	**90.05**	**91.44**	**87.08**

CalSAWS M&O Procurement
Vendor Selection Report

- Consolidated Scoring Summary
- Business Score Comparisons

Vendors	Infrastructure Business Score	M&E Business Score	Total Consolidated Business Score
Accenture	66.98	65.12	132.10
Deloitte	69.65	**70.00**	139.65
Gainwell	**70.00**	57.84	127.84
High Score Comparator	**70.00**	**70.00**	**140.00**

CalSAWS M&O Procurement
Vendor Selection Report

- Consolidated Scoring Summary Comparisons

Consolidated Proposals	Business Score: 70%	Price Score: 30%	Total Score: 200 Points	Rank
Accenture	132.10	56.47	188.57	3
Deloitte	139.65	49.50	189.15	2
Gainwell	127.84	59.24	187.08	4
High Score Comparator	**140.00**	**50.87**	**190.87**	**1**

Next Steps

①   Finalize Agreements with Gainwell and Deloitte.

②   Submit Agreements for State review and approval on March 11, 2024.

③   Submit Agreements for Federal review and approval on April 19, 2024.

④   CalSAWS JPA BOD approval planned for June 28, 2024.

⑤   Contingency Month: July 2024.

⑥   Planned Contract Start Dates: 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 and Stakeholder Review of Requirements	June 6 – August 4, 2023
4	State Review of Requirements	November 20 – December 6, 2023
5	Consortium, Stakeholder, State and Federal Reviews and Approval of the RFP	January 17 – May 28, 2024
6	Release RFP	May 29, 2024
7	Proposals Due	July 30, 2024
8	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	July 31, 2024 – February 5, 2025
9	Vendor Selection Report Preparation and Approvals	February 6 – March 18, 2025
10	Publish Notice of Intent to Award and VSR	March 19, 2025
11	Contract Negotiations	March 24 – April 3, 2025
12	State Contract Approval	April 4 – May 8, 2025
13	Federal Contract Approval	May 9 – July 14, 2025
14	Contingency Period	July 15 – August 18, 2025
15	JPA BOD Approval	August 22, 2025
16	Contract Start	September 2, 2025
17	Transition-In Period	September 2, 2025 – February 27, 2026

Next Steps

① State Review and approval of BenefitsCal RFP: January 15 – March 18, 2024.

② Federal review and approval: March 21 – May 22, 2024.

③ BenefitsCal RFP Release: May 29, 2024.

Release and Policy Update/Communications
- Continuous Coverage Unwinding update
- Upcoming Releases
- Workload Assignment
- Case Removal update
- CERs and Timing

CalSAWS Release and Policy Update
Continuous Coverage Unwinding – DHCS Updates

- CMS has approved expanding the continuous coverage unwinding waivers and flexibilities through December 31, 2024.
  - The extension applies to unwinding renewals and to post-unwinding renewals.

- Recently Posted Unwinding Data
  - DHCS has posted the [December 2023](#) Monthly Unwinding Report
    - The data submission includes an increased ex parte success rate due to the automation of several income waivers and a reduced procedural termination rate.
  - On December 29, 2023, DHCS submitted to the Centers for Medicare and Medicaid Services a mandated update to the federal unwinding data for June-August 2023.
    - The updated data is accessible on the Medi-Cal Enrollment and Renewal Data webpage, specifically the updated data is labeled as "90-Day Update" under each respective month.

CalSAWS Release and Policy Update
Release Overview

	1/6/24	1/22/24	2/8/24	2/12/24	3/2/24	3/28/24	TBD

	January 2024	February	March	April
Major Releases	**R24.01 - 1/22/24** Key Highlights • ACWDL 20-22 - Materials Required at MC Auto Ex-Parte Renewal • ACL 18-82 / ACL 20-109 - SB 380 - Phase III	**R24.02 - 2/12/24** Key Highlights • MAGI Renewals and Redeterminations Verification Services	**R24.03 - 3/25/24** Key Highlights • ACL 23-80 - Increase ABAWD Age Limit and Add Exemptions • ACL 23-13 Update EBT 2259 - Theft Replacement Form • ACWDL 21-22 - Suspension of MC Benefits for Incarcerated Beneficiaries	
Minor Releases	**R.24.01.06 – 1/6/24** Key Highlights • 2024 SSI COLA Batch	**R.24.02.08 – 2/8/24** Key Highlights • 2024 FPL COLA values (See CIT 0018-24 2024 FPL COLA Batch Memorandum)	**R.24.03.02 – 3/2/24** Key Highlights • 2024 FPL COLA Batch (No system downtime planned)	**R.24.04.xx –TBD** Key Highlights • MEDIL I 22-01 - Turn off second Medi-Cal Reminder Notice Batch job at conclusion of CCU *(tentative)*

CalSAWS Release and Policy Update

Text Messaging Update

Campaign Name Change

- Change text message campaign name to "CalSAWS" to "BenefitsCal"
- Changes have been approved by the Committee
- Changes were submitted to advocates. Currently reviewing advocate feedback
- Targeting change for 24.07
- One-time informational text blast to notify beneficiaries (approx. 6M) before the switch is made
- Confirming budget and timing

Texting in Other Languages

- Text messages are currently sent in English and Spanish
- Existing text messages to be translated and sent out for review (late Spring)
- Target for deployment next SFY
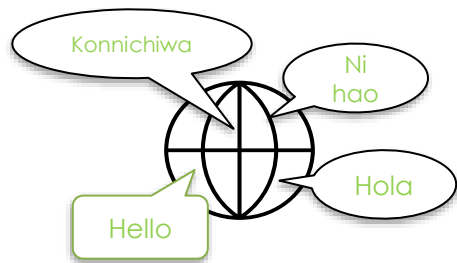
CalSAWS Release and Policy Update
CalFresh Mass Replacement Update

▪ CDSS is preparing to submit a waiver request to FNS to provide automated mass replacements of a certain percentage of February 2024 regular CalFresh allotments for ongoing CalFresh households in areas in which 50% of the residents lost power for four hours or more due to the recent winter storms, power outages, and Public Safety Power Shut-Off (PSPS) events across California.

▪ As of February 9, the request covered 26 counties (highlighted in purple) and over 120 zip codes

BUTTE	SACRAMENTO
CONTRA COSTA	SAN JOAQUIN
EL DORADO	SAN LUIS OBISPO
FRESNO	SAN MATEO
HUMBOLDT	SANTA CLARA
KERN	SANTA CRUZ
LAKE	SHASTA
MARIN	SOLANO
MENDOCINO	SONOMA
MERCED	SUTTER
MONTEREY	TUOLUMNE
NAPA	YOLO
PLACER	YUBA

CalSAWS Release and Policy Update
Workload Assignment Update

The assignment of workers during intake is critical to the timely processing of applications. Many counties are **leveraging tools outside of the system.**

- Initiated from CERs from San Bernardino, Monterey, Santa Clara, and Kern

- Requirements will address automation around intake worker assignment, usability of worker schedule, and related Reporting

- Outcome is to provide a list of requirements and roadmap to address county needs that will be prioritized

CalSAWS Release and Policy Update
Workload Assignment Update
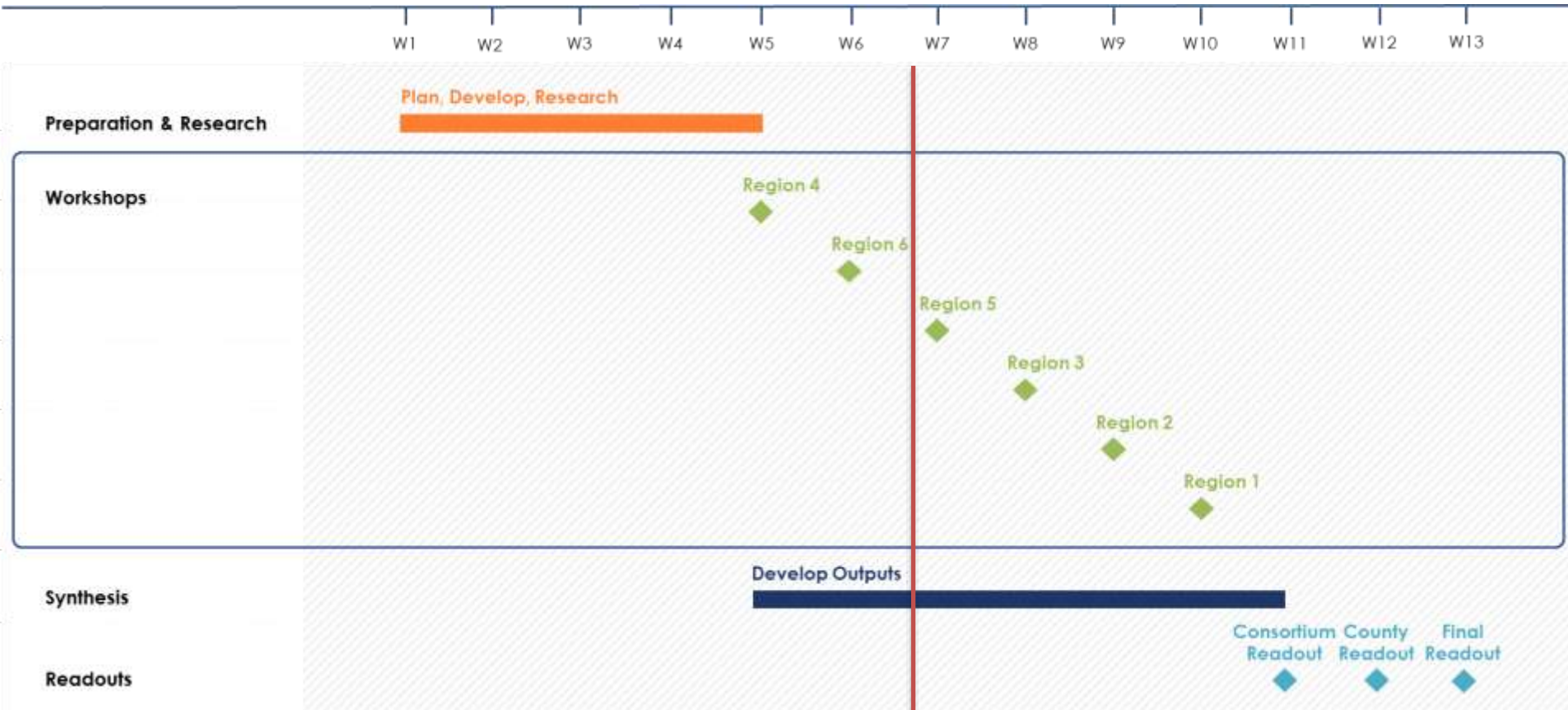
CalSAWS Release and Policy Update
Workload Assignment Update

Common Themes

- Real Time Data to help with assignment
- Enhanced Reporting
- Simplify worker schedule & appointment
- Identify & Prioritize EX/IN applications
- Training
- Auto Assignment factors in Worker schedule

Process Feedback

- 2 Workshops conducted for Regions 4 and 6

- 46 participants across 12 counties

- **100% Positive Feedback on approach**

… tool was very useful for this type of interactive feedback gathering. The facilitators were organized and it felt like everyone was heard.

I appreciated the moderators knowledge and guidance throughout the whole workshop as most of us sort went in different directions. I liked the interactive whiteboard…

It was interactive. It's nice to get different perspectives from other sections about their workflow and challenges they are facing.

Some staff are introverted and would oftentimes like to provide input, but feel too anxious about speaking up to voice their concerns in front of others. The board allowed them to provide valuable input in a manner that did not make them feel anxious.

CalSAWS Release and Policy Update
Case Removal

Background

- In 2021, CalSAWS Project Steering Committee (PSC) approved the CalSAWS Data Retention Policy to remove specific aged data from the C-IV system prior to migration into CalSAWS. The CDRP provides guidelines for how long to retain case data in CalSAWS once a case has been closed. The series of batch programs that implements this policy was last run in CalSAWS in 2022. See CIT 0088-22 for reference.

- The CalSAWS Data Retention Policy is scheduled to occur on an annual basis, once a year.

CalSAWS Release and Policy Update
Case Removal

Upcoming Case Removal

- The next run will occur for LA County + the former C-IV Counties

Case Removal Events	Total Program Count
CalSAWS System: LA + former C-IV Counties October 8, 2022 - First CalSAWS Case Purge	1,657,220
CalSAWS System: LA + former C-IV Counties Cases identified for removal on January 5, 2024	1,070,159

CalSAWS Release and Policy Update
Case Removal

- ## 2024 Case Removal Timeline

December	January	February	March	April	May

County Review Period

Case Removal Process

12/05/2024:
CIT 0401-23
CalSAWS Case Data
Removal Schedule
for 2024 issued

1/04/2024:
SCR CA-247899; CalSAWS
Case Data Removal 2024 Run
Cases Identification & Validation

1/09/2024:
CIT 0004-24 CalSAWS Case
Data Removal Schedule for
2024; Case Data Removal
Identification Report issued

5/03/2024:
- Back-up taken and stored for 6 months
- Data removal process begins. Will run nightly until complete

Policy Update
CERs and Timing

- For 2023
  - 471 CERs received
  - 320 SCRs created

- Working to improve the timeline for resolving CERs by creating SCR or rejecting CER more quickly. Also, focus effort to group relevant CER/SCRs to address several issues at a time

- Working to lighten the time intensive RCM responsibilities
  - Utilizing successful smaller workgroups for design/approval
  - Looking at CER process refinements
  - Maintain transparency and communication

CalSAWS Conference Debrief

Cultivating Cal**SAWS** Community

297 Registered

250 Attended

146 Representatives from

45 Different Counties

Cultivating CalSAWS Community

Overall Experience

The conference duration (day and a half) provided the right amount of time to cover topics. **4.7**

The conference was well-organized. **4.9**

The conference had the right balance of sessions and free time. **4.7**

There were the right number of plenary sessions. **4.7**

There were the right number of breakout sessions. **4.5**

Overall, the conference was a valuable experience. **4.8**

Strongly disagree — Strongly agree

Cultivating CalSAWS Community

Plenary Session #1 - BenefitsCal: A Path to Transform County Service Delivery and Increase Public Self-Reliance

Strongly disagree ← → **Strongly agree**

The plenary session was appropriate in duration. — 4.3

The plenary session was relevant and engaging. — 4.3

The plenary session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new. — 4.4
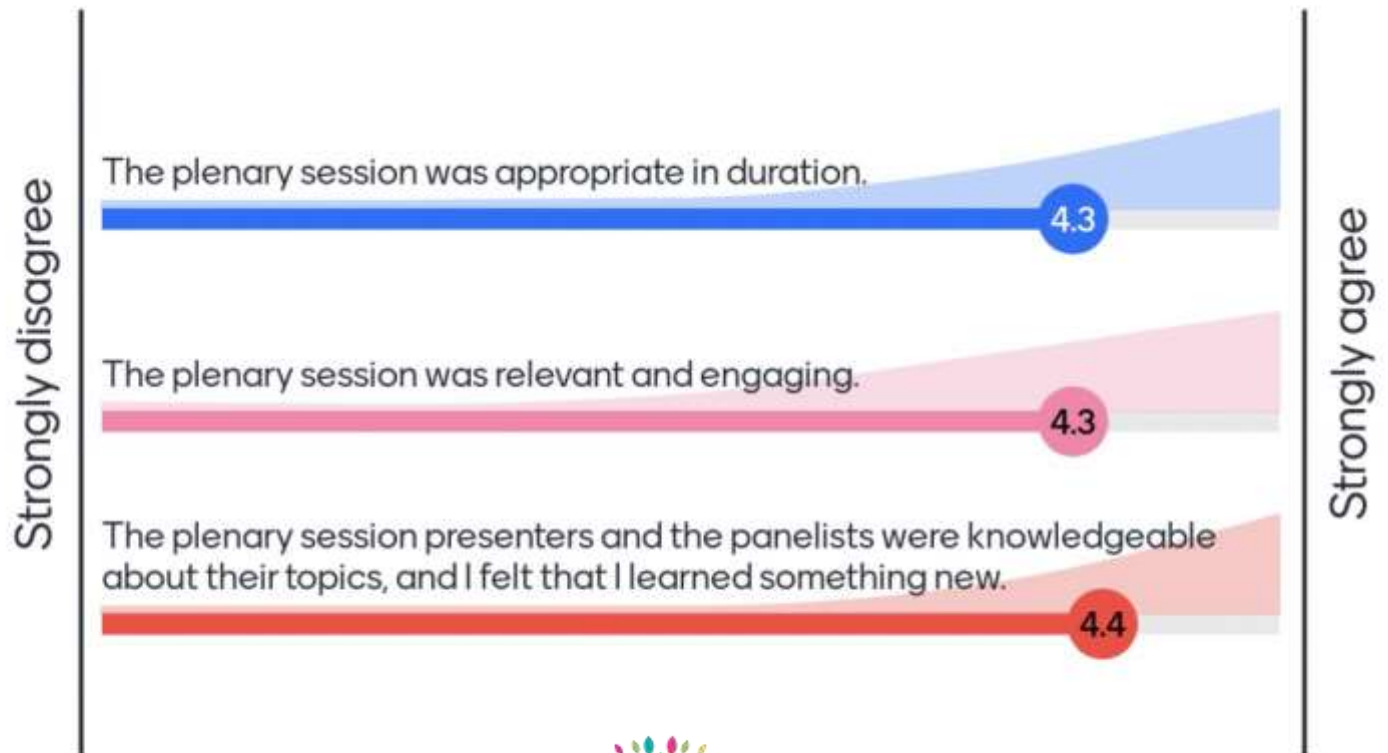
Cultivating CalSAWS Community

Plenary Session #2 - A Peek into the World of Artificial Intelligence (AI) in CalSAWS

Strongly disagree | Strongly agree

The plenary session was appropriate in duration.
4.8

The plenary session was relevant and engaging.
4.7

The plenary session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new.
4.8
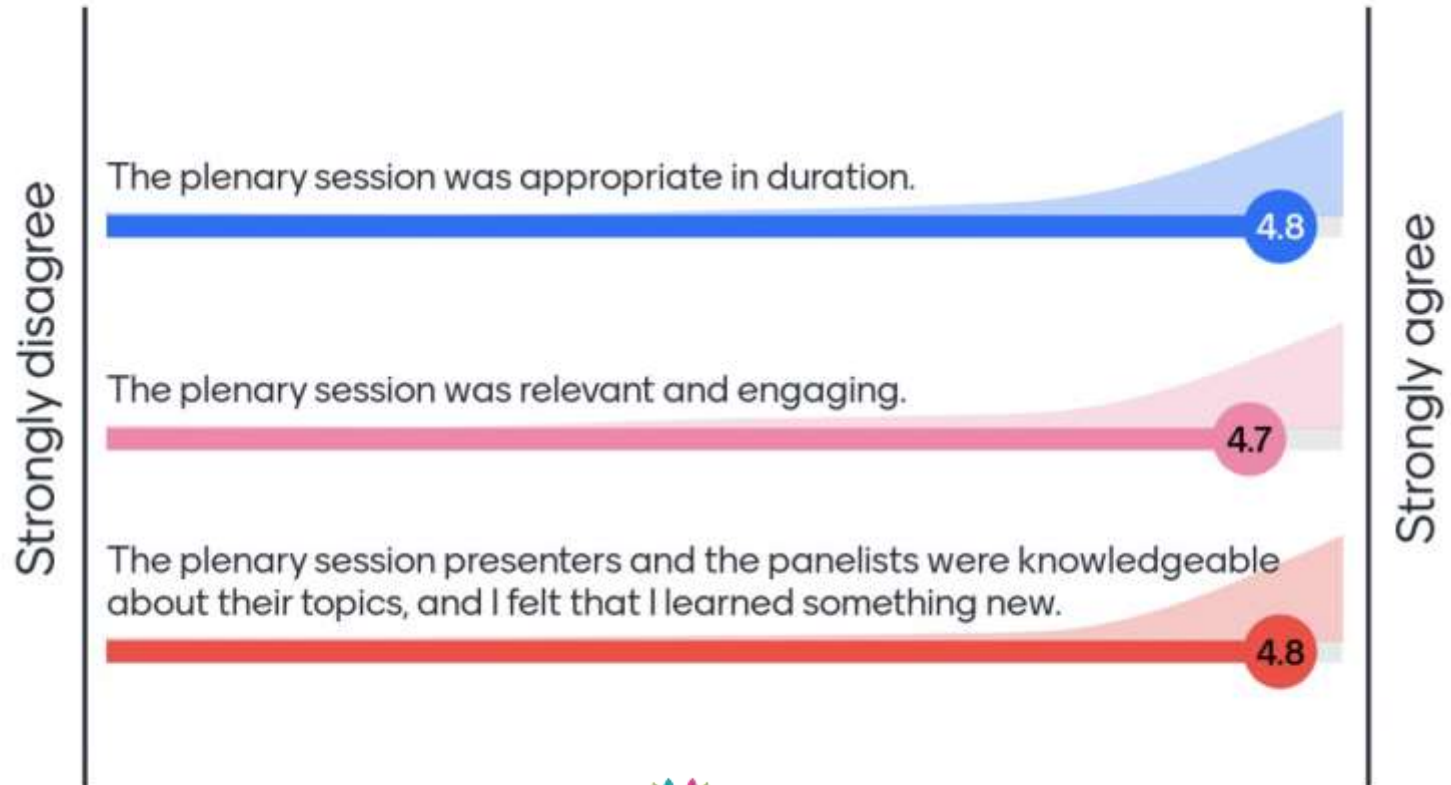
Cultivating CalSAWS Community

Plenary Session #3 - Using Automation to Bridge the Gap within Our Communities

Strongly disagree — Strongly agree

The plenary session was appropriate in duration. **4.3**

The plenary session was relevant and engaging. **4.2**

The plenary session presenter was knowledgeable about their topics, and I felt that I learned something new. **4.3**
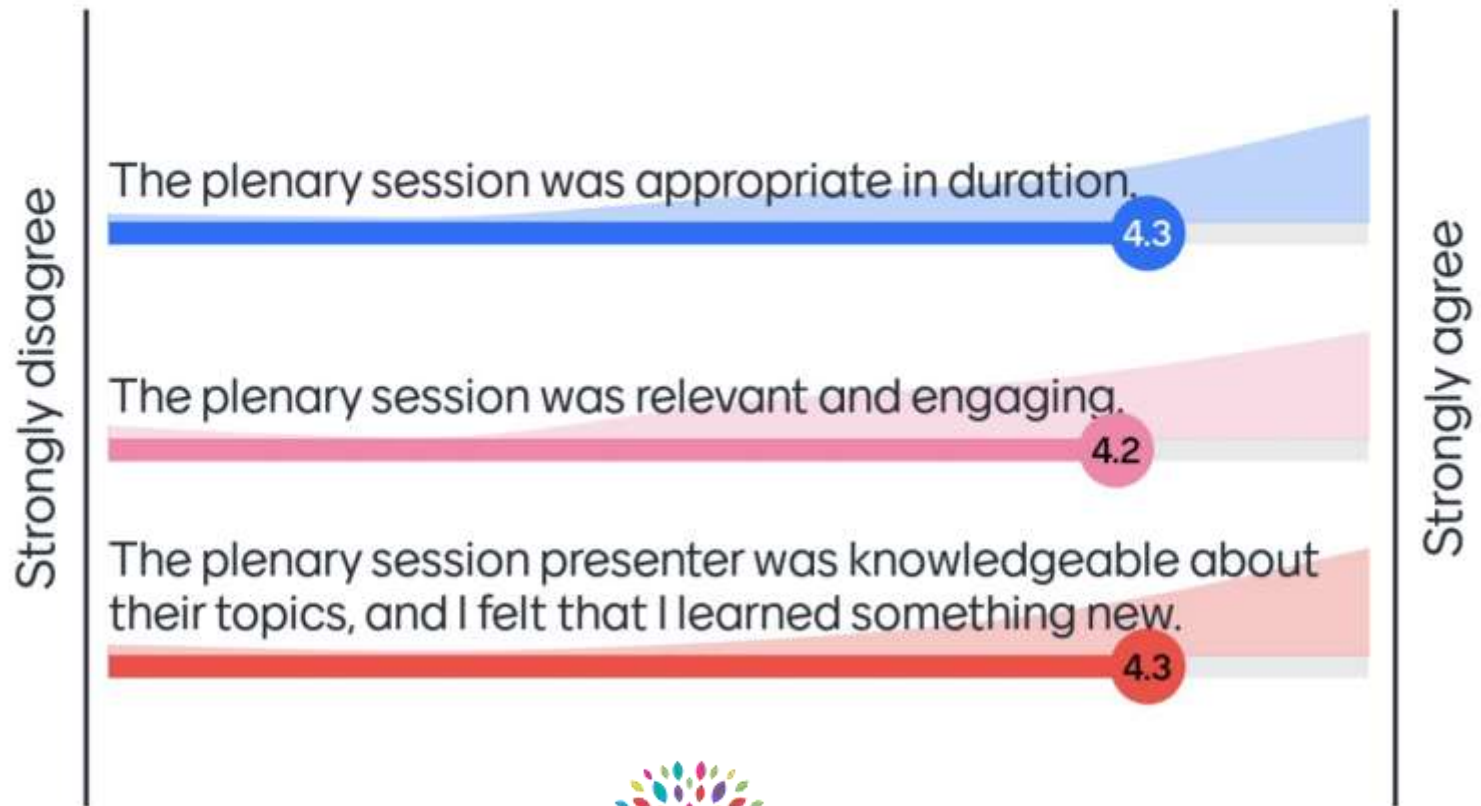
Cultivating CalSAWS Community

Breakout Session #1 - Operationalizing Reports for Effective Day-to-Day Use

Strongly disagree — Strongly agree

The breakout session was appropriate in duration. **4.4**

The breakout session was relevant, engaging, and appropriately interative. **4.2**

The breakout session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new. **4.2**
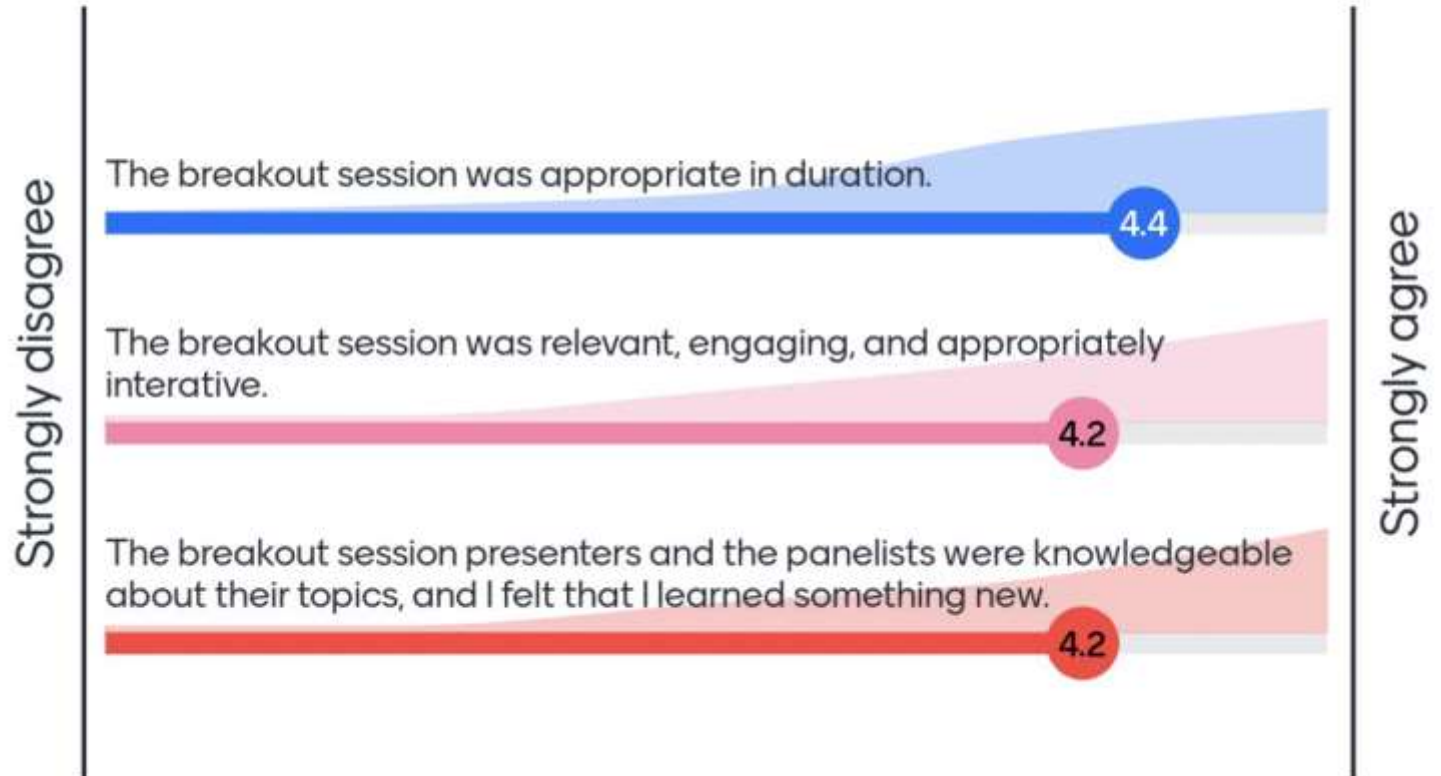
Cultivating CalSAWS Community

Breakout Session #2 - Improving Efficiency Using Task Management and GetNext Functionality

Strongly disagree — Strongly agree

The breakout session was appropriate in duration. **4.5**

The breakout session was relevant, engaging, and appropriately interative. **4.2**

The breakout session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new. **4.4**
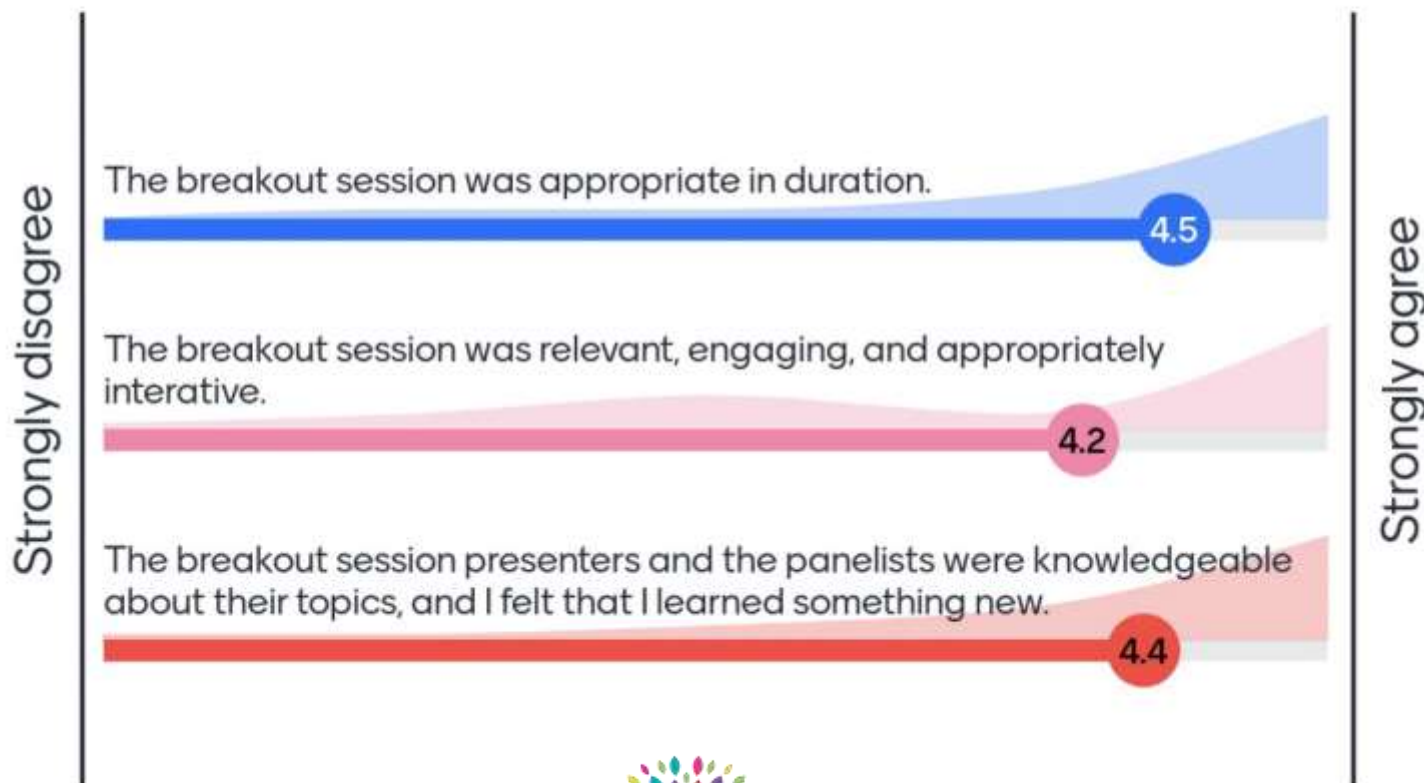
Cultivating CalSAWS Community

Breakout Session #3 - Future of Training for Success

Strongly disagree — **Strongly agree**

The breakout session was appropriate in duration. **4.7**

The breakout session was relevant, engaging, and appropriately interative. **4.3**

The breakout session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new. **4.4**
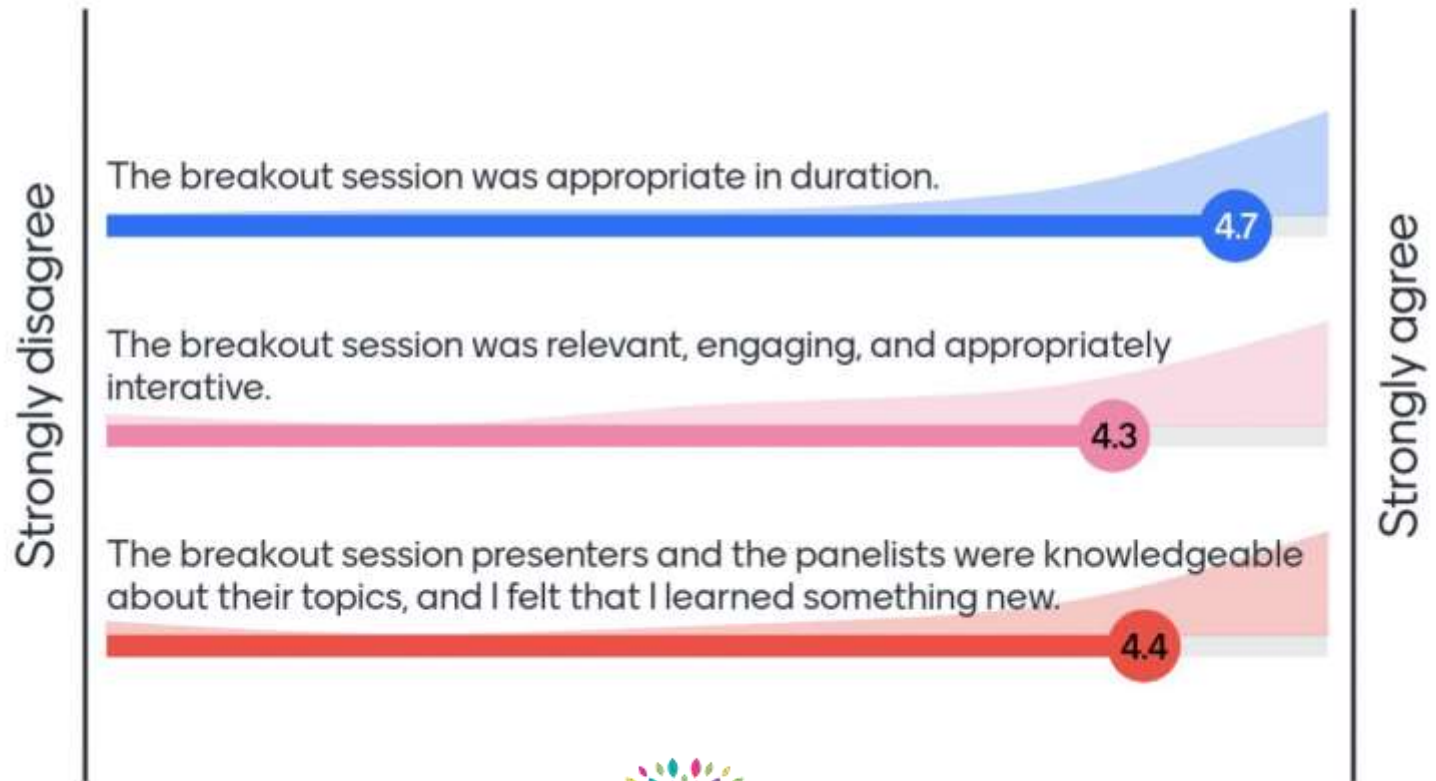
Cultivating CalSAWS Community

Breakout Session #4 - Optimizing Your Contact Center

The breakout session was appropriate in duration. — Strongly disagree ↔ Strongly agree — 4.6

The breakout session was relevant, engaging, and appropriately interative. — 4.4

The breakout session presenters and the panelists were knowledgeable about their topics, and I felt that I learned something new. — 4.5
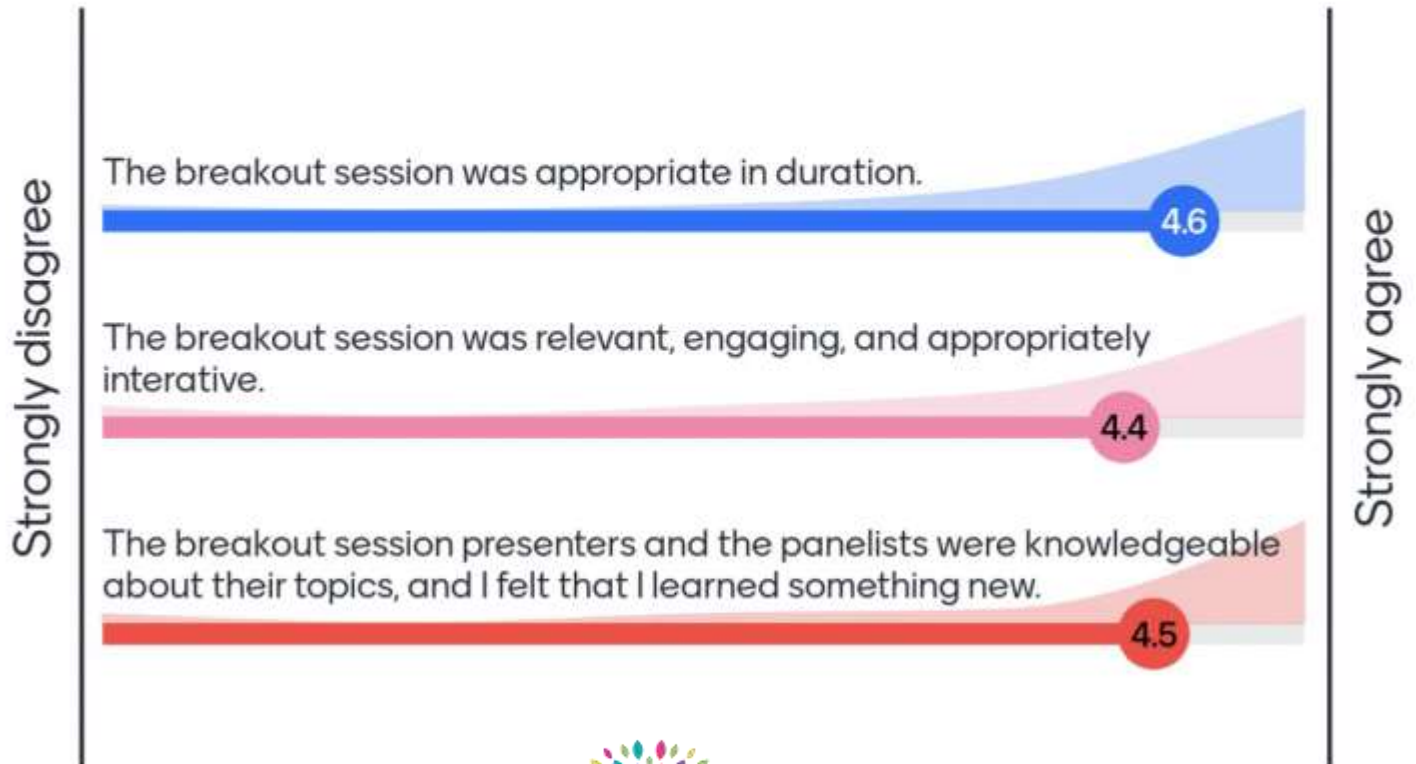
Cultivating CalSAWS Community

For the next in-person conference, would you prefer it to occur in January 2025 or June 2025?

June 2025 — 37%

January 2025 — 36%

Either — 27%
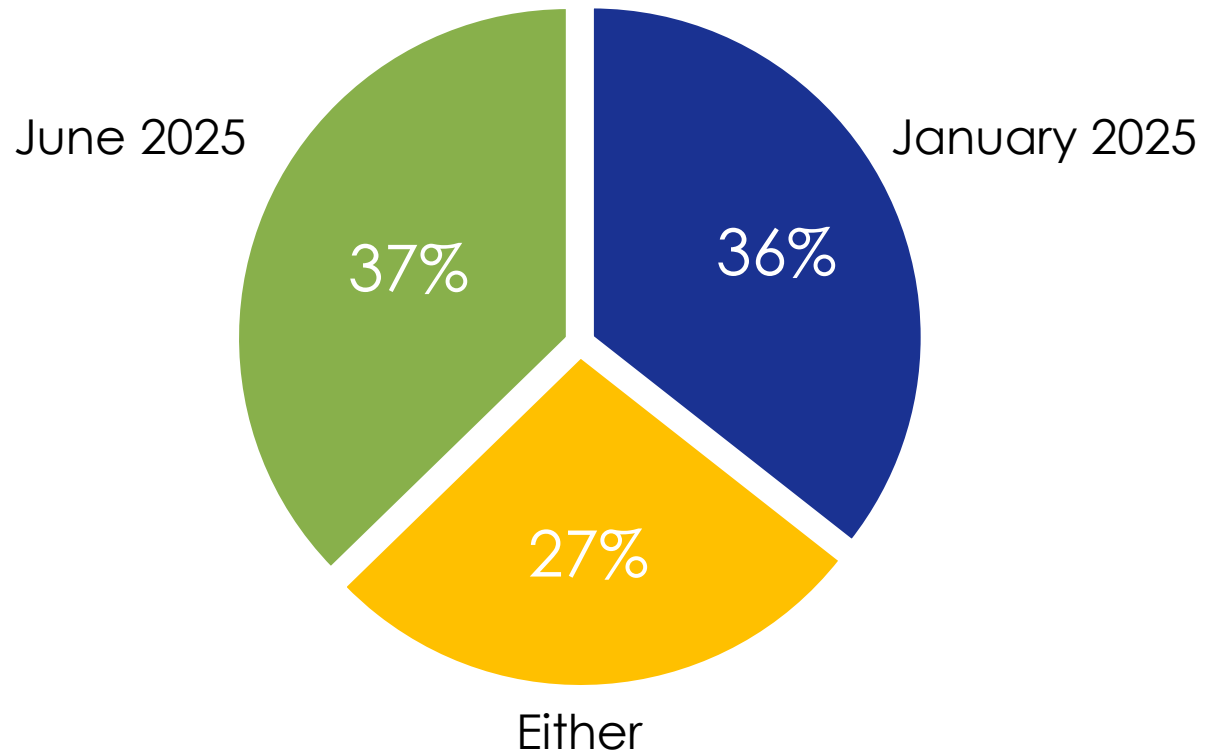
Where would you like the next in-person meeting to be held?

21%
San Diego

15%
San Francisco/
Bay Area

9%
Santa Barbara

8%
Orange County or
Sacramento Area

7%
Los Angeles or
Monterey

Somewhere warm…
Somewhere near the coast…
Somewhere in the center of the state…

What was your favorite part of the conference?

"Networking and catching up with colleagues."

"Putting faces with names. The ability to network and engage my peers from other Counties. Also, the fact that we were given hope that our system can and will get better."

"Panel Discussions"

"Breakout Sessions"

"Renewal of the mission purpose."

"The last presentation that made the connection of our work to the people we serve. I liked the chance to remember the "why" of the work we do."

"The AI Session."

"…And kudos to the AI presenter for demystifying AI. Surprisingly, that turned out to be my favorite session."

"Not information overload. We were able to take away valuable, key components of every topic."

"I enjoyed learning about the system capability and best practices from various counties. I also liked the information about upcoming changes to system programming and AI."

"The Regional Managers Trivia…"

"County sharing, hearing and learning some new things about multiple topics, seeing county and project staff in-person, and networking."

"I really valued the county sharing."

"Interactive pieces. Networking with counties, vendors, and stakeholders."

"All the learning. And celebrating successes."

"The CalSAWS migration video from the CalWIN counties."

"Loved the sessions. Loved the location. Super great energy. Great speakers."

"…Hearing about the things CalSAWS is doing moving forward."

Cultivating Cal**SAWS** Community

How can we improve for next time?

"Offering breakout sessions (same one) at different times so that counties that don't have multiple representatives can attend all breakout sessions."

"More social events"

"Present from the counties perspective and impact to counties."

"More inclusion of Foster Care, KinGap, Child Welfare, and AAP."

"Have closed captions on all videos presented."

"Use a hotel that is not going through construction."

"Sessions that are actually helpful for directors - big picture. The sessions were too in the weeds for department directors."

"The length of the conference was rather short- maybe include additional breakout sessions and maybe include a 2-3 breakout sessions by program (similar to CWDA) - additional networking time (2.5 days)."

"Don't include dinner. Have social time after last session. This approach allows 300 individuals to support small local restaurants/stores nearby to stimulate local economy."

"Better signage."

"Some actual hands-on demonstrations would be great - especially with the Contact Center, AI, and BOTS - to actually show what is being done and what is possible."

"Beer, wine and drink sales in conference area immediately after close of Day 1, similar to CWDA conference. It keeps people close by and talking."

"Having a mobile app, if there was one I somehow missed it."

"Continue with the quality that has been displayed for years. Much thanks to the committee and all of their hard work is truly appreciated."

Cultivating CalSAWS Community

CalSAWS Budget Update

CalSAWS Budget Update
Governor's Proposed Budget

- Funding for CalSAWS and CalWIN aligns to previously approved Advance Planning Documents

- Most premise items aligned to expected amounts

- A few variances to premise items were identified that will require adjustments as part of the the May Revise, including a CARES shift from Current Year to Budget Year and additional enhancements identified for Get CalFresh Parity

CalSAWS Budget Update
CalSAWS January 2024 As-Needed IAPDU Overview

- The CalSAWS Implementation Advance Planning Document Update (IAPDU) was submitted to the State for review on 1/31/24.

- The As-Needed process (vs. Annual) was utilized to address critical needs in Current Year and Budget Year.

- The changes result in an increase of approximately 6% to Budget Year and 21% for SFY 25/26 (net 4% for the budget term with prior year savings)

- State review 2/1/24 – 3/4/24; federal review 3/5/24 – 5/6/24.

CHANGES

• **Technical Roadmap** – Zero-Trust, NIST, Security Upgrades, Database Optimization, Multi-Cloud Environment Assessment • **Hardware/Software** Updates • **Central Print Updates** – Impression Counts, Additional Forms, Return Mail • **State Requests** - State Personnel, IV&V	• **WDTIP Scope Alignment** – Ongoing Support • **Workload Assignment Enhancement** – Appointment Process, Worker Availability, Configuration Needs, AWS • **Customer Service Center** – Agent Counts, Software Licensing, AWS • **Administrative Adjustments**

CalSAWS Executive Director Recruitment Update

CalSAWS Executive Director Recruitment Update

- In partnership with Regional Government Services (RGS), CalSAWS issued a recruitment to backfill the Executive Director position on January 29th.

- The position is posted to governmentjobs.com and to CalSAWS.org/Careers. It has also been distributed by CWDA and promoted on Linked In.

- Recruitment will remain open until February 29th.

- Executive Director Recruitment Advisory Group of three to five JPA Board Members will review resumes and conduct interviews of qualified candidates during the month of March.

- Advisory Group will provide selection recommendation to Board Members during the April Board meeting.

Final Acceptance

- Central Print

- ISS

- CalSAWS

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 - March
  - Central Print Final Acceptance – Gainwell – February
  - CalWIN Implementation Support Services (ISS) - Implementation Complete Report – Deloitte - February
- 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:
  - Feb 2024 – For JPA, Discuss process and scope for CalSAWS Migration Final Acceptance. For PSC, reminder of 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

1 — On **March 4, 2019**, we commenced the **CalSAWS DD&I Project**

2 — **CalWIN UAT** completed **September 2022**

3 — **Wave 1 CalWIN** County users began using **CalSAWS System on AWS Cloud** on **Monday October 31, 2022**

4 — **Wave 2 CalWIN** County users began using **CalSAWS System** on **Monday February 27, 2023**

5 — **Wave 3 CalWIN** County users began using **CalSAWS System** on **Monday April 24, 2023**

6 — **Wave 4 CalWIN** County users began using **CalSAWS System** on **Monday July 3, 2023**

7 — **Wave 5 CalWIN** County users began using **CalSAWS System** on **Tuesday September 5, 2023**

8 — **Wave 6 CalWIN** County users began using **CalSAWS System** on **Monday October 30, 2023**

9 — **58 Counties** will have been using the CalSAWS System **~3 months (11/2023 to 1/2024)**

10 — Conduct CalSAWS Migration **Final Acceptance Period** for 30 consecutive days **(2/1/2024 to 3/1/2024)**

Look Ahead

11 — Provide **results of the CalSAWS Migration Final Acceptance Period** at the **March 15, 2024** JPA Board of Directors meeting

12 — CalSAWS Migration Final Acceptance **April 2024**

CalSAWS Migration Final Acceptance Preview

On October 31, 2023, the last CalWIN counties were migrated to CalSAWS. The CalSAWS System currently supports 58 counties, over 85,000 users, serves over 21.5M residents, and is one of the largest integrated eligibility systems in the world

650 total requirements for the CalSAWS migration were met via:

96 Contract Deliverables

978 SCRs deployed

982,000 Approximate hours worked

REQUIREMENTS

- Reports 14
- PMO 23
- OCM/Training 47
- Migration 20
- Tech 20
- Conversion 63
- Functional 463
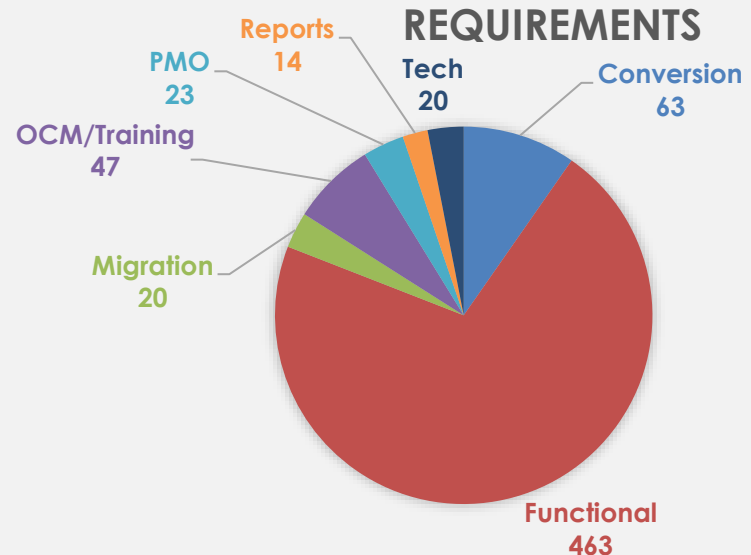
Performance Results
Next Steps for March 2024 Meeting

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 February 8, there are 6 open defects related to CalWIN Migration SCRs deployed via between 21.09 and 23.11, these are targeted for a priority release this month

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
  - Final deliverable including all three Phases was submitted on 12/21

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

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

SCOPE

CalWIN ISS Completion Report – Key Measures

As of 02/06/2024

KEY PROJECT MEASURES

95 of 95
RTM Requirements Met

100%
Deliverables Approved

None
Contract Deficiencies

Open Workplan Tasks

None

Open Workplan Tasks to Transfer

None

Open Action Items

None

Open Risks/Issues

None

IMPLEMENTATION COMPLETION AND RETROSPECTIVES

18 County Retrospectives

Wave 2 Tulare Placer County Retrospective
Wave 2 Orange County Retrospective
Wave 2 Contra Costa Placer County Retrospective
Wave 1 Yolo County Retrospective
Wave 1 Placer County Retrospective
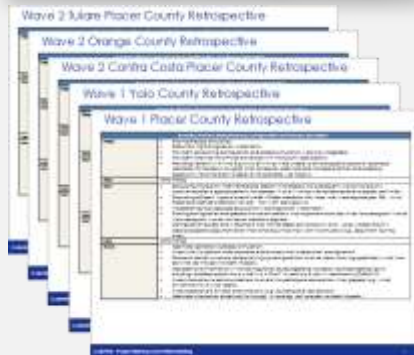
Lessons Learned

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

Lessons Applied to Future Waves

1 2 3 4 5 6

Starfish Technique

CalWIN ISS Completion Report – By the Numbers

The Deloitte Implementation Support Team (**~115 People**) supported 18 California Counties with migration to CalSAWS, a statewide Eligibility and Enrollment (E&E) system. This included extensive pre-implementation planning, artifacts, and activities that were replicated in each wave and tailored to each County's operating model.

16,000+
County Workers Migrated
18 counties, **6** Go-Lives, over **12** months

COUNTY READINESS

1,050
Unique **County Business Processes** Documented

966
Workplans generated

6,173
Tasks from **610** Readiness Checklists completed

296
Onsite Support Implementation meetings held

590
Test Scenarios for business process simulation

792
County Prep Activities completed and resolved **1,300 County Inquiries**

SURVEY RESULTS

70%-100%
County Readiness
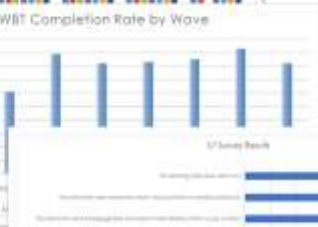
+80%
County WBT Completion

+4.3%
Training Satisfaction Surveys

USER READINESS

776
Change Network Champions

80
Readiness Surveys Distributed and Analyzed Staff Preparedness

16,367
Staff trained through **3,180** Instructor Led Trainings

124
WBT Based and **Topic Specific Webinars** held

859 **Practice Lab** sessions

14
Role-Based Gamification **Learning Journey Maps**

18
County-Specific **Change Discussion Guides**

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305 Days
of **Post Implementation Support** across **6 Implementation Waves**: Onsite and Virtual Support

Virtual Support

14,000+
Virtual Interactions Recorded

94%
First-Time Resolution Rate

Onsite Support

Managed
1,414 **Onsite Support** Staff across **180** **County Offices**

2,497
Managed project, vendor and County **Post Implementation Support Staff**

36
Post Implementation Support **Orientations**

610+
Post Go Live Meetings with County + Project Executives conducted

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			
	Total Requirements	**Met**	**Met In Plan**	**Not Met**
CalSAWS	650	648	2	0
Central Print	149	149	0	0
CalWIN ISS	95	95	0	0
Total	**894**	**892**	**2**	**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

M&E Risks

CalSAWS Project Risks
Risk Exposure Trend

Risk/Issue Trend

Legend: ■ Risk & Issue Count ── Risk Exposure

Risk & Issue Count (bars): Oct-22: 69, Nov-22: 62, Dec-22: 56, Jan-23: 60, Feb-23: 60, Mar-23: 55, Apr-23: 51, May-23: 46, Jun-23: 45, Jul-23: 40, Aug-23: 31, Sep-23: 25, Oct-23: 22, Nov-23: 13, Dec-23: 10, Jan-24: 11

Risk Exposure (line): Oct-22: 1.46, Nov-22: 1.59, Dec-22: 1.62, Jan-23: 1.55, Feb-23: 1.59, Mar-23: 1.51, Apr-23: 1.4, May-23: 1.3, Jun-23: 1.2, Jul-23: 1.1, Aug-23: 1.12, Sep-23: 1.14, Oct-23: 1.19, Nov-23: 1.31, Dec-23: 1.03, Jan-24: 1.22

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	Medium
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	Low
239	Lack of consistent State language translation approach may cause schedule delays and rework	Low
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
298	Identify Continuous Improvement process to prevent poor WelcomeBot and AuthenticationBot Customer Experience	Low
299	Operationalizing Innovation Scaling/POC Initiatives	Low
300	Stability of the CalSAWS Enterprise Identity and Access Management Services	Medium

Updated as of 1/31/2024 Bi-Weekly Status Meeting

Reports Status

- Conference Feedback – LA County Reports

Expanding LA County Reports
Background

- A subset of reports (<100) from the LRS development were included in CalSAWS and are specifically designed for and only accessible to Los Angeles County.

- These reports were not assessed for statewide expansion as part of migration.

- Requests have been made to make these reports available to all counties

Expanding LA County Reports
Next Steps

- Project will work with the counties to develop a list of reports to be assessed for statewide expansion.
- With the list, the project will assess each report for:
  - Complexity and effort to extend to other counties
  - Impact to Los Angeles County (if any)
  - Frequency of use by Los Angeles County
  - If expanding the report will provide value to other counties
- Each report must be assessed on an individual basis to:
  - Determine if there is a unique technology utilized
    - GIS shape files provided by the county
  - Dependence on county specific interfaces, batch jobs, codes values, or application pages
    - eCAPs, CWS/CMS Data Mart, APP pages, etc.
- Any "quick wins" will be prioritized through the appropriate committee.

Expanding LA County Reports
Next Steps

Initial List Development
- Project works with counties to determine list of reports to assess

2-3 Weeks

Project Conducts assessment
- Project reviews report implementation to determine effort and ability to expand statewide

Project reviews results with counties
- As reports complete assessment, counties have a chance to review

2-3 Months

Reports approved for expansion are given to Committee(s)
- Committee prioritizes changes

1-2 Months

Implementation
- Changes are made to CalSAWS to make report available

Ongoing

Expedited "Quick Wins"

CalSAWS Data Archiving Initiative

CalSAWS Data Archive – Phase 1

Background and Goal

> **Move 3+ years-old data to a new database**

Background:
- The current monolithic Oracle database holds all the 58-county data and continues to experience data growth every day.
- The greater the database size; the higher the storage cost.

Goal:
- Reduce the Oracle database size by moving 3 years and older data to a secondary database for EDBC, Fiscal, Client correspondence functional group
- Minimum end-user impact, display information about archived cases and provide an option to unarchive data to the primary database.
- Reduce impact to the Ad-hoc database for reports.

CalSAWS Data Growth Archive – Phase 1
Release Timeline
SCR CA-263291 <R24.03>

2023							2024		
Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar

Define Architecture and Details Analysis

Development and Testing

Performance Testing

Regression Testing
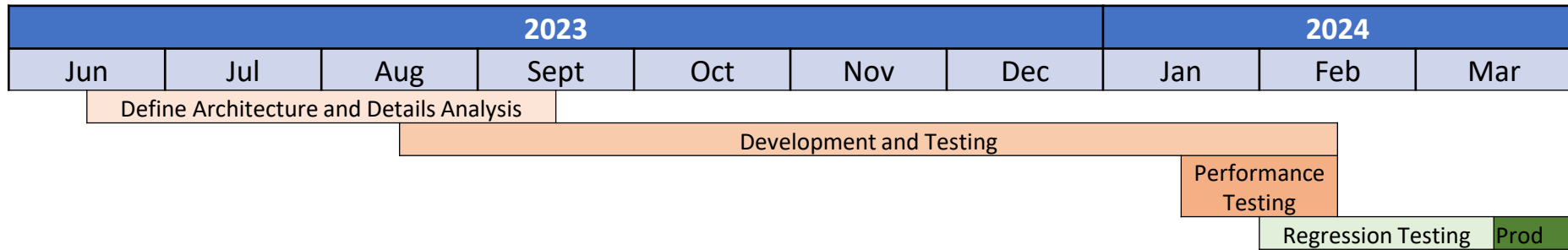
Prod

CalSAWS Data Growth Archive – Phase 1
Archive Process

- **Data identification Process:**
  - Identify three and more year's older case data from the tables used by EDBC, Fiscal, Client correspondence functionality from the CalSAWS Production Oracle database.
- **Archive Process:**
  - Move the identified case data from the primary Oracle database to secondary database and delete from the primary database on successful move.
  - Map the case as a case with archived data.
  - Display online pages for the corresponding case as Case with Archived data.
- **Unarchive Process:**
  - Provide option for the worker to unarchive the case data.
  - Notify the worker in the message center on successful unarchive action.
  - The unarchive is an asynchronous, near real time process.
  - In no change to the data, the unarchived records will be archived again during next archive frequency.

- **Initial One Time Archive:**
  - After the production deployment of the code, there will be communication with plan of approach and timeline.
  - This will be a phase approach by considering the volume of data to be archived.

- **Regular Archive**
  - After the one time archive, the archive process will run on a regular frequency decided by the consortium (example: monthly).

Data Growth Archival Phase I – Adhoc Reporting
Ad-hoc Reporting Data Flow

- Current Process: The Adhoc reporting process will pull necessary load from the primary oracle database.

- After Archive implementation: The database link will be available to pull data from primary and the secondary database.
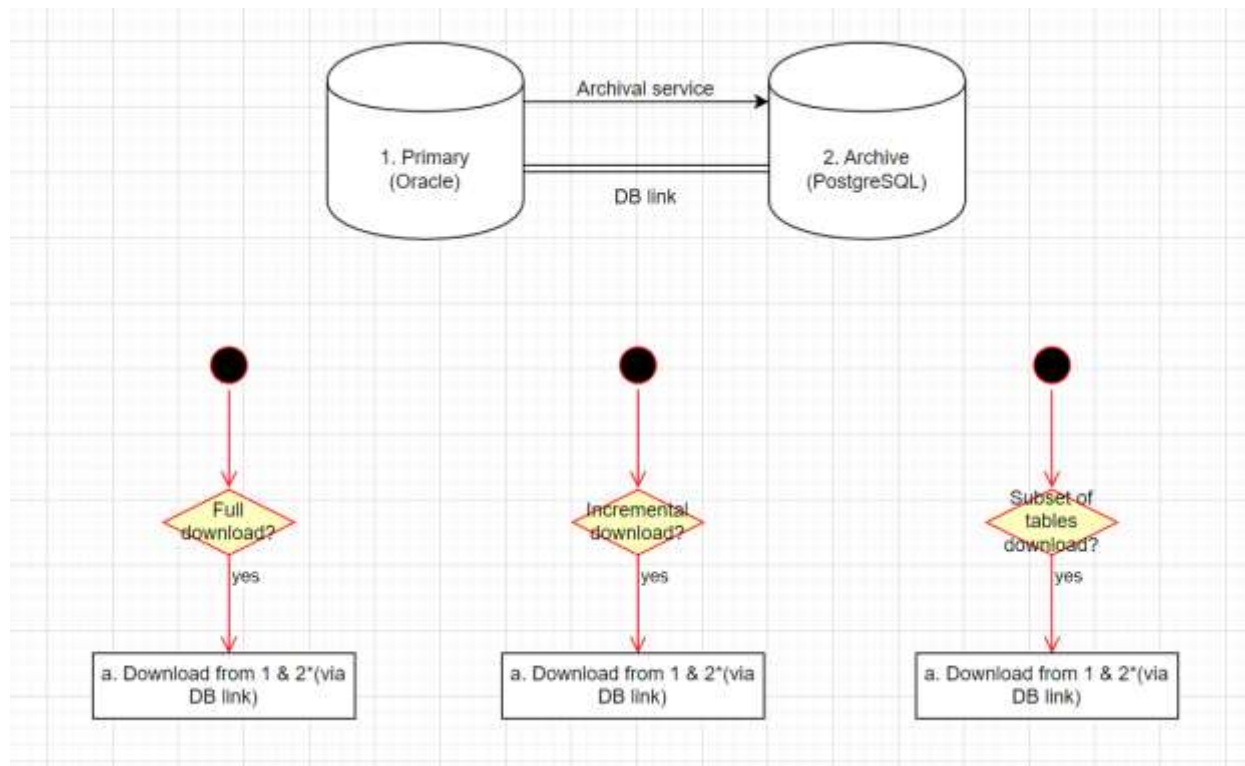
BenefitsCal Update

- ROI Update

- BenefitsCal Release Highlights

- BenefitsCal Client Education Initiative for Text messages

- Path and Scope for threshold languages in CalSAWS

- Optical Character Recognition for BenefitsCal Documents Uploaded by Customers

BenefitsCal Update
Release of Information (ROI) Workgroup

- Most recent working session held on 02/05/24

- Provided a demonstration of the ROI functionality in BenefitsCal and CalSAWS (based on the original design that was paused in May 2023)

- Working with the Stakeholders on 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 in progress to cover scenarios when contracts in place or not. This chart is to be included in future letter.

- Next meeting dates scheduled:
  - 3/4/2024
  - 3/18/2024
  - 4/8/2024

BenefitsCal Update

Release Highlights & Upcoming Enhancements

January (24.01.25)	February (24.02.29)	March (24.03.28)

GCF Parity Enhancements:
- Removal of Vaccine status pages for CalFresh only applications
- Add recommended words to Self-Employment help text
- Implement HTML ISO language code for all the web pages on website to improve Search Engine Optimization

Collaboration Model Research:
- Add a link for customers to view the Keep Your Records section of the MC Renewal Form after submission
- Revamp Customer Dashboard

GCF Parity Enhancements
- Digitize form CF303 and make it available to complete if a user in a County with a declared disaster is already getting CalFresh benefits.

Prod Observation Enhancements
- Not display the future RE/PR due date in BCAL if the program is denied or discontinued.
- Update Dropdown list for document upload to display RE/SAR 7 categories on the top during Review Period
- Additional Conditions added to display RE/SAR7 forms in 'Document Type' dropdown during Doc Upload Flow

Collaboration Model & Policy Enhancements
- Add link to CalHOPE on BC Homepage
- Add EBT 2259A (11/21 version) in English and Spanish as downloadable form in BenefitsCal

Policy Enhancements
- ACL 23-13-Update to EBT 2259-Revised EBT Theft Replacement Form and Policy
- Allow customers to view CalWORKs time clocks information in their account and make request time limit extenders/stoppers or corrections

BenefitsCal Update

Items on the Horizon

Releases and Research

- Enhance the dropdown list for document upload to help simplify Periodic Reporting and Renewal Documents

- Update Application and RE/SAR7 Tracker to provide additional information to customer

- Research to add Card Replacement Tracker to Customers

- Research to add more features for Customer Dashboard

- Provide more information to customers when linking their case

Upcoming

Policy Items
- ABAWD
- Apply for Benefits - CAPI
- CFAP Expansion
- Benefits Replacement (EBT2259 form) – March 2023

Planning In-Progress
- Implement new pre-populated SAR7
- Homeless Assistance
- Collaboration Model Prioritized Enhancements

GCF Parity
- SSA Assisted Applications - May 2024
- Benefits Replacement (CF303) form - March 2024

BenefitsCal Update

During the month of January 2024:

264k Applications Submitted

62k Periodic Reports Submitted

2.8 Million Documents Uploaded

73k Changes Reported.

97k Renewals Submitted

Since Go-live over 3.8 Million Applications submitted

BenefitsCal/CalSAWS
Action Item Updates

1. BenefitsCal Client Education Initiative for Text messages
2. Path and Scope for threshold languages in CalSAWS
3. Optical Character Recognition for BenefitsCal Documents Uploaded by Customers

Optical Character Recognition (OCR)
Customer Uploads

CalSAWS Imaging Solution currently uses OCR to help identify documents scanned by CalSAWS staff using the following datapoints:

- Form Numbers

- Barcode Values

Optical Character Recognition (OCR)
Customer Uploads

Benefits of introducing optical character recognition to BenefitsCal customer uploads:

BenefitsCal Submissions make up ~30% of all document submissions to CalSAWS

Document/Task classification accuracy or specificity improvement in up to 50% of customer uploads

Reduced image re-indexing workload due to inaccurate customer upload selections

Optical Character Recognition (OCR)
Deployment Timeline

Phase 1 Pilot Deployment

25% of BenefitsCal Customer Uploads (8 Counties)	Beginning of March

Phase 2 Observation

Infrastructure efficiency and utilization assessment	2 Month

Phase 3 Full Deployment

Remaining 75% of BenefitsCal Customer Uploads (50 Counties)	End of May

Optical Character Recognition (OCR)
Outreach

Prior to Phase 1 and 2

- CalSAWS Information Transmittal (CIT)
  - Detailed description of enhancement
  - Go-live date
  - Participating Counties
- Socialized in November, January, and March Imaging Committee Meetings
- Direct outreach to County imaging point of contacts and Regional Managers

Advocate Community – Structure and Goals

CalSAWS Advocates Group
History, Structure and Goals

2018-19

CA Food Banks Leadership

Released Priorities Statement

70+

Partner Agencies

Collective Impact Model

Successful Support of BenefitsCal

2024 and beyond

Equitable Language Access

Client support via CBO Functionality

Transparent alignment with WIC 10823.1-3

Contact Center Update

Overall Contact Center Statistics

Over 1M calls handled in January 2024

800K calls handled in December 2023

- CalSAWS Contact Center counties are now live and operational in the CalSAWS Amazon Connect solution

Contact Center Operations
Continuous Improvement

- Improve Agent and Customer Experience
- Improve Customer Service to Counties
- Improve Support for County IT

Aligning our Support Strategy with our Regions
Focus on Customer Service

- Improved Customer Service to Counties

- Dedicated CalSAWS Contact Center Support Staff for each region

- Alignment with regional governance model

Welcome Bot Dashboard

Dashboard data from Monday, 2/5 to Monday, 2/12
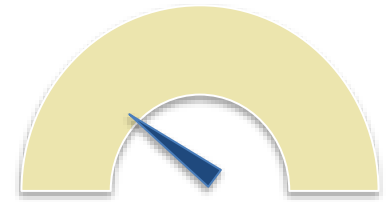
Live Bots to-date : 7

Welcome Bot Update

- Released over 400 new utterances

- Upcoming Releases: Clearer prompts, additional time for callers to give data

- Benefits: Allows customer to specify a reason for their call and to be routed accordingly

- Self-Service: Approximately 36% of callers can successfully resolve their inquiries without the need to speak with a county worker. Allowing county workers to focus on addressing more urgent and important calls, better serving the community.

English   95k+ Calls this Week   **Spanish**   20k+ Calls this Week

Authentication Bot Dashboard

Dashboard data from Monday, 2/5 to Monday, 2/12
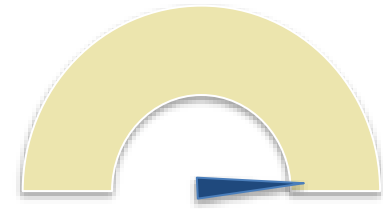
Live Bots to-date : 31

Authentication Bot Update

- 31 Contact Center counties are now live
- Released over 200 new utterances to the Authentication Bot
- Upcoming Releases: Clearer prompts, additional time for callers to give data
- Benefits:
  - Allows customers to use different sets of data to authenticate. (ie: SSN,
  - Reduces average handle time (AHT)
  - Saves time for Worker

English | 280k+ Calls this Week | **Spanish** | 60k+ Calls this Week

RPA Dashboard

Dashboard data from Sunday, 2/5 to Sunday, 2/12

Robotic Process Automation Update

- Deployed RPA to 5 counties

- All remaining counties are scheduled to deploy by May 2024.

  - Scheduling county kick-off sessions with each county as deployments approach.

- Benefits:

  - Automates reissuance of EBT card, thereby reducing the number of requests handled by a county worker.

Key Performance Metrics
Since 11/17 Launch...

96.17% Success Rate

18289 Total EBT Requests

17588 Total Successful Requests

RPA EBT Card Replacement County Schedule for Sprint 1-9

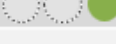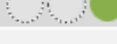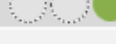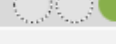| County Rollout Plan	Kickoff Date	County Testing	Deployment Date	Status
Prod Sprint 1 [Yolo]	12/7/23	1/12	1/18	Complete
LA BIC UiPath Cloud Migration to CalSAWS AWS Cloud		1/22 – 1/24	1/24	Complete
LA EBT UiPath Cloud Migration to CalSAWS AWS Cloud	N/A	1/22 – 1/24	2/1	Complete
Prod Sprint 2 [Tulare, Ventura, Santa Barbara]	1/16-1/18	1/29 – 2/1	2/8	Complete
Prod Sprint 3 [Santa Cruz, San Mateo, San Diego, Stanislaus, Kings, Butte]	1/22 - 1/26	2/12 – 2/15	2/22	In Progress San Mateo 2/29 (Go Live) (Tentative)
Prod Sprint 4 [Kern, Santa Clara, Yuba, Monterey, Riverside]	2/19 – 2/22	2/26 – 3/1	3/14	In Progress
Prod Sprint 5 [San Francisco, Fresno, Sonoma, Alameda]	3/4 – 3/8	3/18 – 3/21	4/11	Not Started
Sprint 6 [Sacramento, Humboldt, San Luis Obispo]	4/1 – 4/4	4/22 – 4/25	5/9	Not Started
Prod Sprint 7 [Non-CSC -14 Counties]	TBD	TBD	TBD	N/A (Kickoff and County Testing is not required)
Sprint 8/9 Counties with Welcome Bot: Placer, Shasta, Contra Costa, Orange, San Bernardino, Solano, Sutter, Marin	TBD	TBD	TBD	Not Started
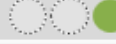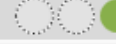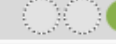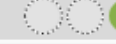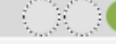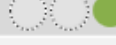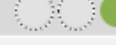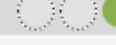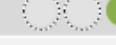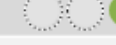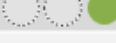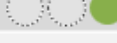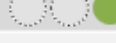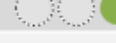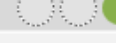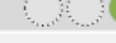
Quarterly Statistics Update

- SLAs, Production Stability, Tickets, and Defects
- Hyland Imaging SLAs
- BenefitsCal Performance Metrics

CalSAWS Quality, Defect, Stability, Tickets Stats
January 2024 Production Highlights

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	1 ○○○●	2 ○○○●	3 ○○○●	4 ○○○●	5 ○○○●	6 ○○○●
7 ○○○●	8 ○○○●	9 ○○○●	10 ○○○●	11 ○○○●	12 ○○○●	13 ○○○●
14 ○○○●	15 ○○○●	16 ○○○●	17 ○○○●	18 ○○○●	19 ○○○●	20 ○○○●
21 ○○○●	22 ○○○●	23 ○○○●	24 ○○○●	25 ○○○●	26 ●○○○ 8:50am-10:26am Users unable to access systems due to ForgeRock slowness	27 ○○○●
29 ○○○●	29 ○○○●	30 ○○○●	31 ○○○●	1	2	3

CalSAWS System Stability
CalSAWS Slowness 2/26

Impact:

- 8:50 AM -> 10:26 AM (~90 Minutes)
  - CalSAWS users experienced slowness during this incident
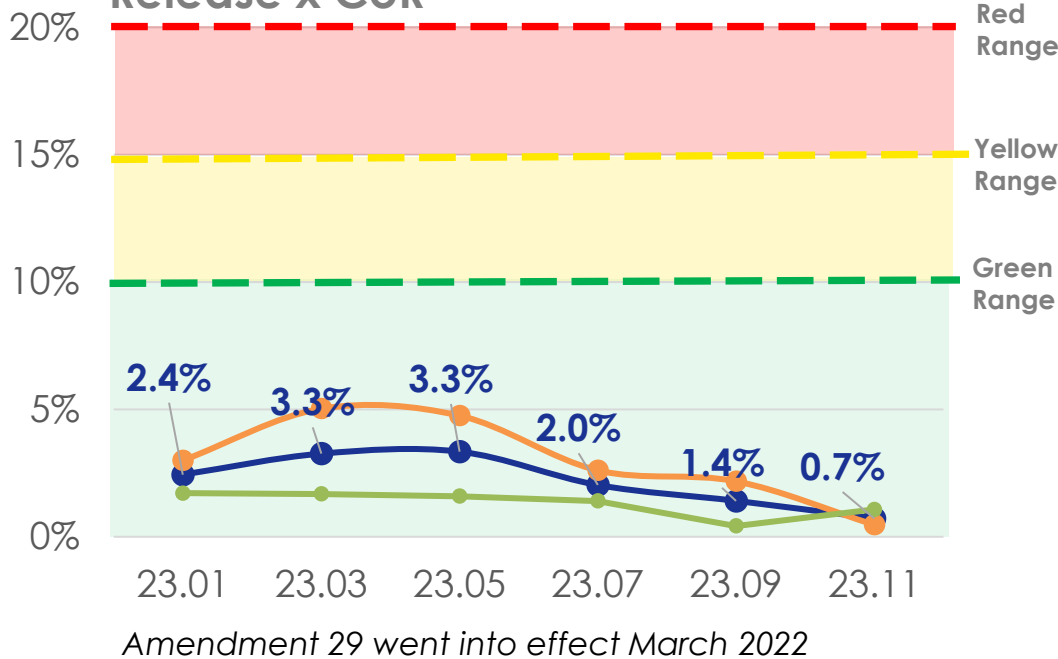 - BenefitsCal was placed in Maintenance mode

Resolution:

- Improvements in system tuning and traffic management were made to the system

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 ■ Onshore

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, 24.01 COR numbers will be available after 24.03 goes live

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

### Onshore vs. Offshore (GDN) Hours Across All Teams
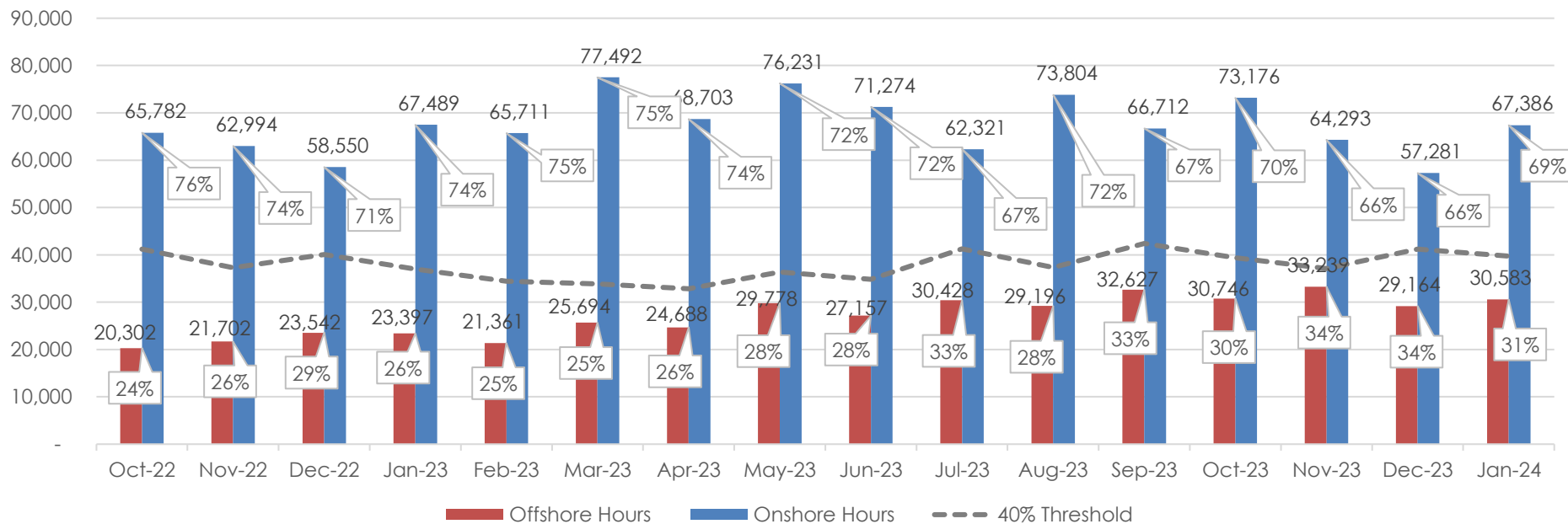
Per Amendment 29: "Use of GDN resources may approximate 40% of the available hours required for Accenture to deliver its obligations under Exhibit X CalSAWS M&O Extension"

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 Production Defect Backlog
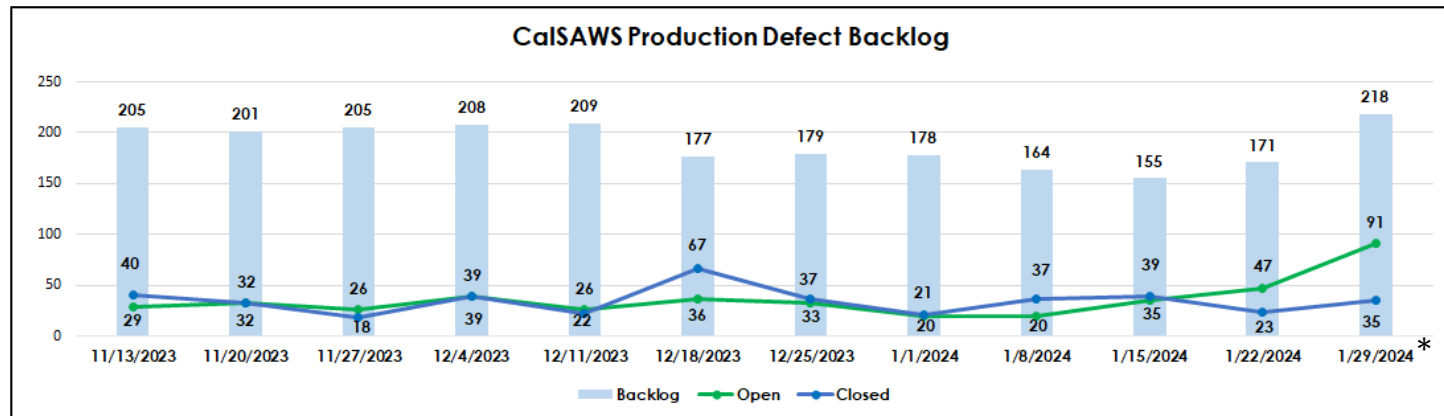
Increase due to single BOTs defect being created for each county to align with deployment schedule

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

Perf Req #	LD Applies	Performance Requirement Title	May	June	July	Aug	Sept	Oct	Nov *	Dec *	Jan *
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	LD	Daily Peak Usage Hours Availability	✅	❌	✅	✅	✅	✅	✅	✅	❌
6	LD	Daily Prime Business Hours Availability	✅	❌	✅	❌	✅	✅	✅	❌	❌
7	LD	Daily Peak Usage Hours ED/BC Response Time	✅	✅	✅	❌	✅	✅	✅	✅	✅
8	LD	Daily Prime Business Hours ED/BC Response Time	✅	✅	✅	✅	✅	✅	✅	✅	✅
9	LD	Daily Peak Usage Hours Screen to Screen Navigation Response Time	✅	✅	✅	✅	✅	✅	✅	✅	✅
10	LD	Daily Prime Business Hours Screen to Screen Navigation Response Time	✅	✅	✅	✅	✅	✅	✅	✅	✅
11	LD	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	LD	Security Incident Notification	✅	✅	✅	✅	✅	✅	✅	✅	✅
18	LD	Security Incident Reporting	✅	✅	✅	✅	✅	✅	✅	✅	✅
19	LD	Security Incident Negligence	✅	✅	✅	✅	✅	✅	✅	✅	✅
20		Disaster Recovery Response Time	✅	✅	✅	✅	✅	✅	✅	✅	✅

- **Daily Peak Business Hours Availability** had 1 day with a missed SLA for Jan-2024

- **Daily Prime Business Hours Availability** had 1 day with a missed SLA for Dec-2023 and Jan-2024

- **Daily Batch Production Jobs Completion** had 2 days with missed SLAs for Nov-2023 and Dec-2023, and 1 day missed SLAs for Jan-2024

- **Daily Prime Business Hours Availability of CalSAWS Training Environments** had 1 day with a missed SLA for Dec-2023 and Jan-2024

* November, December, and January SLA Metrics are still being 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
Roll Back of CA-245819

An enhancement to automatically open the next available document within a County workflow queue (CA-245819) was deployed as part of the 24.01 baseline release.

The Regional Project Managers provided feedback that Counties were experiencing unanticipated business process impacts to the imaging quality assurance queue as part of this enhancement, resulting in a roll back request.

On 1/24/24, CA-27319 rolled back this enhancement which resorted prior functionality.

The design of CA-245819 will be brought back to the Imaging Committee for further review and evaluated for a future release date.

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

Monthly Uptime Target: 99.90%		
Month	**Downtime Minutes**	**Monthly Percentage**
November 2023	0	100%
December 2023	0	100%
January 2024	0	100%

Hyland

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

Monthly Page Views
Target: 90%

Datacenter will provide viewing access to a 70 KB page in <= 2 seconds

Month	Renditions 70K or smaller	Monthly Percentage
November 2023	14,694,870	98.28%
December 2023	14,657,023	97.77%
January 2024	16,400,837	98.82%

Hyland

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

Monthly Database Transactions
Target: 90%

Database transaction will be complete in <= 1 second

Month	Total Queries	Monthly Percentage
November 2023	2,968,655,677	99.95%
December 2023	2,672,473,059	99.93%
January 2024	3,062,229,372	99.94%

Hyland

State Partners Updates
- OTSI
- CDSS
- DHCS

Regional Updates

Adjourn Meeting