CalSAWS | Project Steering Committee Meeting

March 21, 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 February 15, 2024, PSC Meeting and review of Action Items.

Informational Items

BenefitsCal User Account Security Incident

BenefitsCal User Security Update

Investigation

- ## Completed 180-day lookback to determine impacted user accounts

  - Impacted user accounts have been deactivated

  - Affected users notified and directed to contact the county helpdesk to validate identity and re-activate their accounts

- ## 360-day lookback in progress

  - Targeted to be complete by 3/15/2024

BenefitsCal User Security Update
Remediations Completed and Planned

Completed	Planned
▪ Additional advanced firewall protections ▪ Mandatory MFA for all users (Customers and CBOs) ▪ Temporary disabling of new requests to link cases to accounts	• Addition of MFA for Case Linking targeted for 4/25/2024 • Additional remediations being evaluated

BenefitsCal User Security Update
Communications

County Briefings

FAQ Sheet

Flyer

Social Media Messaging

CBO Webinar

County Webinar

Case Linking to BenefitsCal Accounts (Temporarily Disabled)

Tweet – 193 Char

Case linking on BenefitsCal.com, is temporarily disabled on the customer dashboard for new case link requests. Don't worry! You can still upload documents without logging in. Use the "upload documents" button on the home page. #TogetherWeBenefit
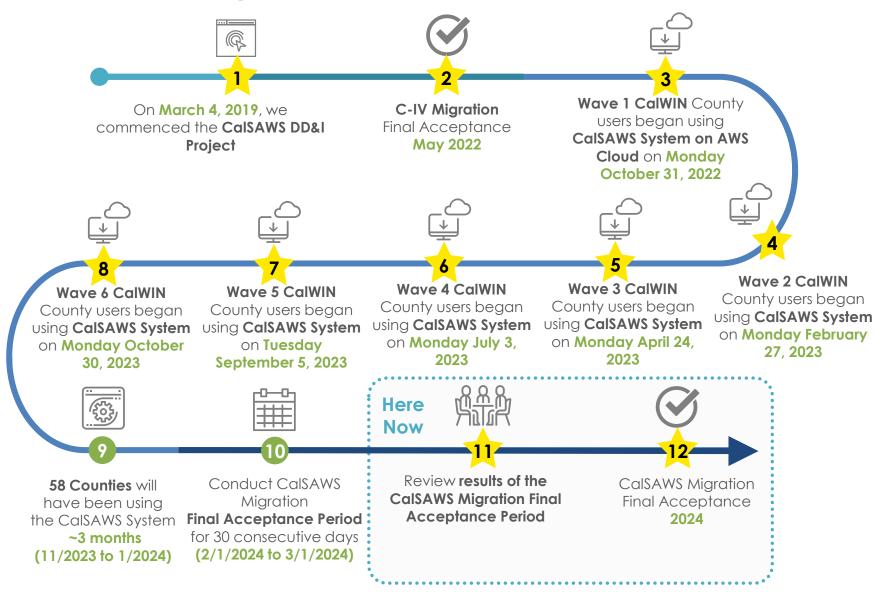
Final Acceptance

- CalSAWS
- ISS

Final Acceptance Introduction
CalSAWS Core System, Central Print, and Implementation Support

- The following Final Acceptance milestones were completed in prior years:
  - ✓ OCAT - November 2021
  - ✓ BenefitsCal – February 2022
  - ✓ C-IV/CalACES (40 County) Migration – May 2022

- These Final Acceptance milestones are targeted for 2024:
  - ✓ Central Print – Gainwell – completed March 2024
  - ❑ CalSAWS Migration – Accenture
  - ❑ CalWIN Implementation Support Services (ISS) – Deloitte

- Approval of these milestones leads to the Consortium's payment of the final holdback release for the projects

CalSAWS Migration Final Acceptance Overview

CalWIN Counties' Migration Timeline Overview

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

2 — **C-IV Migration** Final Acceptance **May 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)**

Here Now

11 — Review **results of the CalSAWS Migration Final Acceptance Period**

12 — CalSAWS Migration Final Acceptance **2024**

CalWIN ISS Completion Report – Key Measures
Extend CalWIN Acceptance to Provide Additional Report Support

KEY PROJECT MEASURES

95 of 95	100%	None
RTM Requirements Met	**Deliverables Approved**	**Contract Deficiencies**

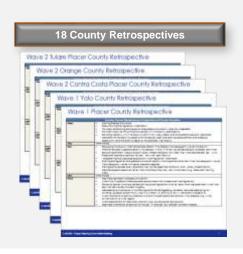| Open Workplan Tasks	Open Workplan Tasks to Transfer	Open Action Items	Open Risks/Issues
None	None	None	None

IMPLEMENTATION COMPLETION AND RETROSPECTIVES

18 County Retrospectives

Lessons Learned

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

Lessons Applied to Future Waves

Starfish Technique

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 throughout M&O and M&E:

- ❑ 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

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	Medium
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	Medium
296	Counties may not be prepared to reconcile Fiscal Reports and submit State Reports, timely	Medium
297	Counties may face challenges in adopting management and ad hoc reports if additional support is not provided	Medium
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 3/13/2024 Monthly RMG

Reports Status Update

Reports Status Update
Progress on Phased Approach

Phase 1	Phase 2	Phase 3
Meet with Regional Managers	**Conduct Survey of all 58 Counties**	**Conduct Listening sessions**
Gather hot topics and Co-create survey	Survey will be administered multiple times to track progress	Some sessions will be small groups while others may contain many counties
COMPLETED	COMPLETED	COMPLETED

Provide outcomes and recommendations to Executive Leadership

We are here

November/December	December	January/February	March/April
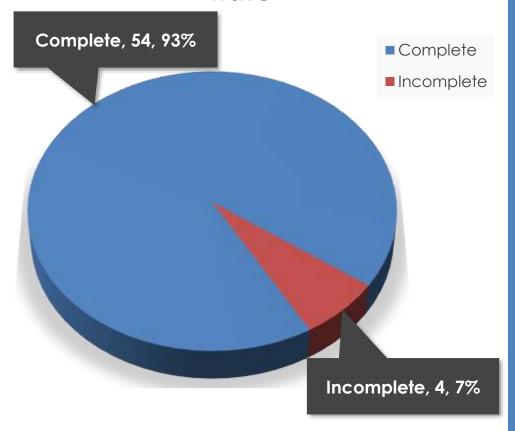
Reports Status Update
Phase 2 – Survey Results

Overall County Response Rate

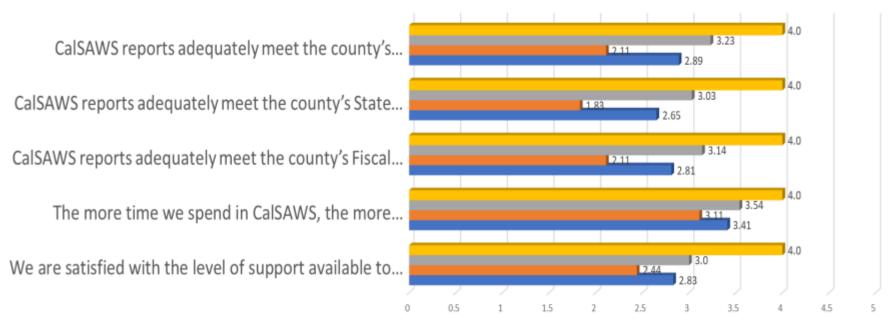Complete, 54, 93%

Incomplete, 4, 7%

■ Complete
■ Incomplete

Survey Facts

○ One survey response received per county

○ Administered Dec 11, 2023, to Jan 12, 2024

○ 49 required questions, 34 optional questions

○ 80-minute average time to complete

○ Used to target Discovery Sessions

Reports Status Update
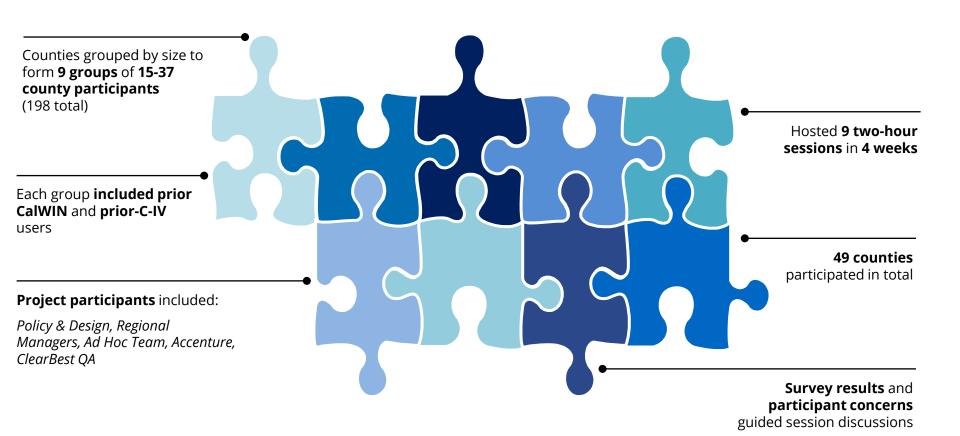
Phase 2 – Survey Results

Overall Question Responses

	We are satisfied with the level of support available to assist with reports.	The more time we spend in CalSAWS, the more comfortable we are with CalSAWS reports.	CalSAWS reports adequately meet the county's Fiscal reporting needs.	CalSAWS reports adequately meet the county's State reporting needs.	CalSAWS reports adequately meet the county's Management reporting needs.
LA	4.0	4.0	4.0	4.0	4.0
C-IV	3.0	3.54	3.14	3.03	3.23
CalWIN	2.44	3.11	2.11	1.83	2.11
Overall	2.83	3.41	2.81	2.65	2.89

■ LA   ■ C-IV   ■ CalWIN   ■ Overall

Reports Status Update

Phase 3 – Listening Sessions

Counties grouped by size to form **9 groups** of **15-37 county participants** (198 total)

Each group **included prior CalWIN** and **prior-C-IV** users

Project participants included:

Policy & Design, Regional Managers, Ad Hoc Team, Accenture, ClearBest QA

Hosted **9 two-hour sessions** in **4 weeks**

49 counties participated in total

Survey results and **participant concerns** guided session discussions

Reports Status

Actions Taken or In Process

Completed / Ongoing

Meetings
- Extended bi-weekly State & Fiscal Reports meeting to 90min
- Started bi-weekly State & Fiscal Report Deep Dive Sessions
- Restarted Management Reports Committee on 1/24

System Changes
- Identify L.A. County Reports for statewide expansion

Help Desk
- Continuous training of Tier 3 team for helpful responses

Documentation
- Fiscal/Claiming Guide and CIT 0025-24 CalSAWS Claim Process Training Video
- Distributed Factsheets on Qlik Bookmark functionality
- Distributed CIT 0383-23 providing one place for all Ad Hoc support resources

Other
- Maintained Project Risks 296 and 297
- Completed Phase 2 Reports Survey and Phase 3 Listening Sessions

In Process

Documentation
- Expand Online Help Reports Inventory
- Develop Report Reconciliation Guide
- Develop Report Document by GenAI

System Changes
- Investigate reintroduction of Reports Subscriptions

Other
- Develop Final Executive Overview and Recommendations Report

Key Take Away - #1
Lack of Education and Documentation

Counties are having difficulty adopting CalSAWS reports due to a lack of education and documentation on reports.
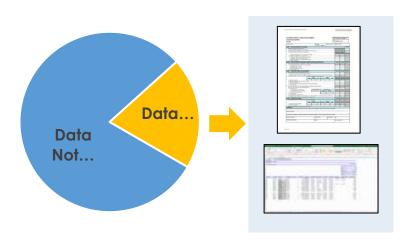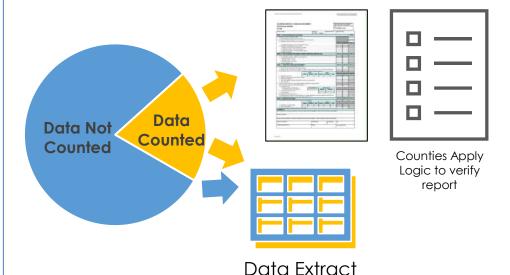
Key Take Away - #2
Reporting Approach Difference

CalSAWS

System generates a complete report along with the detail report breakout of the records counted.

CalWIN

System generates a complete report along with a corresponding data extract of all program activity. Users apply filters or external county solutions to confirm the report included and excluded the right information.

Counties Apply Logic to verify report

Data Extract

Note:
- *Some CalWIN counties have stated detailed report documents alone will not allow them to sufficiently verify the reports.*
- *Purpose Built Data Sets do not support this concept*

Key Take Away - #3
Existing Unreported Issues

C-IV counties were experiencing reporting issues prior to and after migration that went unreported.

Reports Status Update
Phase 3 – Listening Sessions

Recurring Themes
Consistent Across all Listening Sessions

- Detailed reports documentation does not exist.

- Training materials are not report specific

- Ad hoc training:
  - Hasn't sufficiently penetrated the county users
  - Requires more functional support
  - Unclear on different solutions
  - Continue to Heavily invest in APEX
  - Solution requires technical resources unavailable to some counties

- Counties are not utilizing the service desk ticket process:
  - Ticket responses are not helpful – often focused on defect or not defect
  - Tickets closed before resolution
  - Often counties email project directly for problem resolution
  - Not all county staff are aware of how to log a ticket
  - Without documentation unclear if the issue is a problem to report or not

- Usability concerns:
  - Approach to security causes confusion
  - Can't identify report reruns
  - Limited search criteria
  - Category and separations confuse users
  - Counties dislike having to set parameters/filters every time a report is needed
  - Ability to extract search pages are helpful
  - Counties dislike Qlik filtering and usability

- Counties want to review "L.A. Only" reports for expansion to all counties

- Counties concerns with slowness responding to CERs and Information Request tickets, Lack of State/Fiscal Committee Meetings, requested SCRs not being prioritized

Reports Status

Executive Report – Draft Recommendations

- Continue to:
  - Hosting bi-weekly State and Fiscal Reports meetings
  - Hosting bi-weekly State and Fiscal deep dive sessions
  - Hosting Monthly Ad Hoc meetings integrating Functional experts who also know the data model
  - Reviewing L.A. County reports for statewide expansion
  - Reinvigorate the help desk process and reenforce need for counties to submit tickets
  - Continue Enhanced bi-weekly communication
  - Continue ad hoc consortium support

Reports Status

Executive Report – Draft Recommendations

- Provide in-county support to assist with reports adoption and identify specific report concerns in a subset of CalWIN and C-IV counties.
- System Changes:
  - Series of Reports Search page changes to support user feedback, employ UCD approach
  - Re-introduce C-IV's report subscription functionality
  - Add report availability "notifications"
  - Expand use of Page Extract functionality
  - Consolidate and reduce reports
  - Identify and address specific Qlik usability concerns
  - Annually review reports usage to identify under or un-utilized report

DRAFT

Reports Status

Executive Report – Draft Recommendations

- Documentation:
  - Expand information available in Online Help
  - Move forward with GenAI approach to developing detailed documentation
- Ad Hoc Related:
  - Expand Page Mapping coverage
  - Develop "low tech" alternative
  - Create road map for Ad Hoc solutions and solution end-state
  - Establish approach to transfer common/popular Ad Hoc reports back into CalSAWS

- Consortium:
  - Introduce Service Now and CER deadlines with corresponding KPIs
  - Create recurring Management Reports support call
  - Restart formal Fiscal/State Committee meetings
  - Establish rules for county specific reporting requirements
- Counties:
  - Reinforce process and need for Service Desk tickets
  - Establish network of "Report Champions" to assist counties
  - Reinforce internal communications to share information provided by project

DRAFT

Reports Status

☐ Complete Consolidating listening session feedback

☐ Finalize recommendations

☐ Finalize Executive Report

☐ Develop prioritized recommendations

OCM Reports Support Overview

Reports Discovery Sessions started in Nov. 2023 to capture County sentiments and needs around Reports. The sessions included meetings with Regional Managers, a 58-County survey, and listening sessions to gather actionable recommendations. As the Reports work group turns to enacting recommendations and supported changes, the OCM Team will be working with the work group to support changes and recommendations.

To support broader adoption of the actionable recommendations and supported changes from the <u>Reports Discovery Sessions</u>, the OCM Team will:

| Work Thread	Inputs & Activities	Outputs
Review/ Update Deloitte Documentation	• Review CalWIN Counties' feedback and pain points from Reports Discovery Sessions. • Identify Deloitte-created Reports documentation to identify existing resources that could meet existing pain points. • Work with QA to review and plan for distribution/communication of materials.	• Deloitte-created Reports Documentation & Resources that can be distributed to all counties via CIT.
Gathering Case Examples	• Gather case examples, where possible, through virtual support, and make available for ticketing triage.	• Reports tickets with case examples.
Communication Support	• Ongoing support of two-way communications between CalWIN Counties and Reporting Teams	• Ongoing two-way communications support.
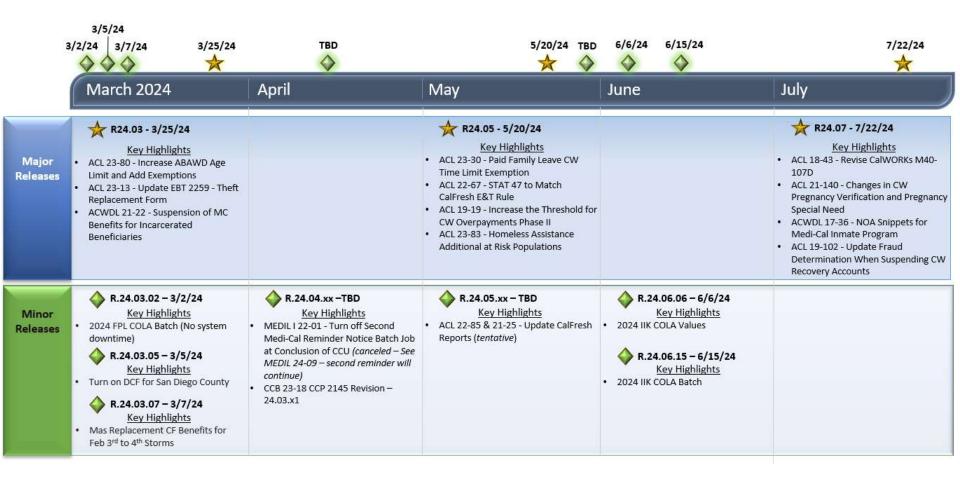
The OCM Team will focus on continued support and adoption for CalWIN Counties and make available any relevant resources to all Counties.

Release and Policy Update/Communications

- CalSAWS Release Highlights

CalSAWS Release and Policy Update
Release Overview

Timeline dates: 3/2/24 · 3/5/24 · 3/7/24 · 3/25/24 · TBD · 5/20/24 · TBD · 6/6/24 · 6/15/24 · 7/22/24

	March 2024	April	May	June	July
Major Releases	**⭐ 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		**⭐ R24.05 - 5/20/24** Key Highlights • ACL 23-30 - Paid Family Leave CW Time Limit Exemption • ACL 22-67 - STAT 47 to Match CalFresh E&T Rule • ACL 19-19 - Increase the Threshold for CW Overpayments Phase II • ACL 23-83 - Homeless Assistance Additional at Risk Populations		**⭐ R24.07 - 7/22/24** Key Highlights • ACL 18-43 - Revise CalWORKs M40-107D • ACL 21-140 - Changes in CW Pregnancy Verification and Pregnancy Special Need • ACWDL 17-36 - NOA Snippets for Medi-Cal Inmate Program • ACL 19-102 - Update Fraud Determination When Suspending CW Recovery Accounts
Minor Releases	**◆ R.24.03.02 – 3/2/24** Key Highlights • 2024 FPL COLA Batch (No system downtime) **◆ R.24.03.05 – 3/5/24** Key Highlights • Turn on DCF for San Diego County **◆ R.24.03.07 – 3/7/24** Key Highlights • Mas Replacement CF Benefits for Feb 3rd to 4th Storms	**◆ R.24.04.xx –TBD** Key Highlights • MEDIL I 22-01 - Turn off Second Medi-Cal Reminder Notice Batch Job at Conclusion of CCU *(canceled – See MEDIL 24-09 – second reminder will continue)* • CCB 23-18 CCP 2145 Revision – 24.03.x1	**◆ R.24.05.xx – TBD** Key Highlights • ACL 22-85 & 21-25 - Update CalFresh Reports *(tentative)*	**◆ R.24.06.06 – 6/6/24** Key Highlights • 2024 IIK COLA Values **◆ R.24.06.15 – 6/15/24** Key Highlights • 2024 IIK COLA Batch	

CalSAWS Release and Policy Update
CalFresh Mass Replacement Update

- CDSS submitted 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.

- February mass replacement ran on March 7, 2024, and issued over $4.5M in replacement benefits for 27 counties
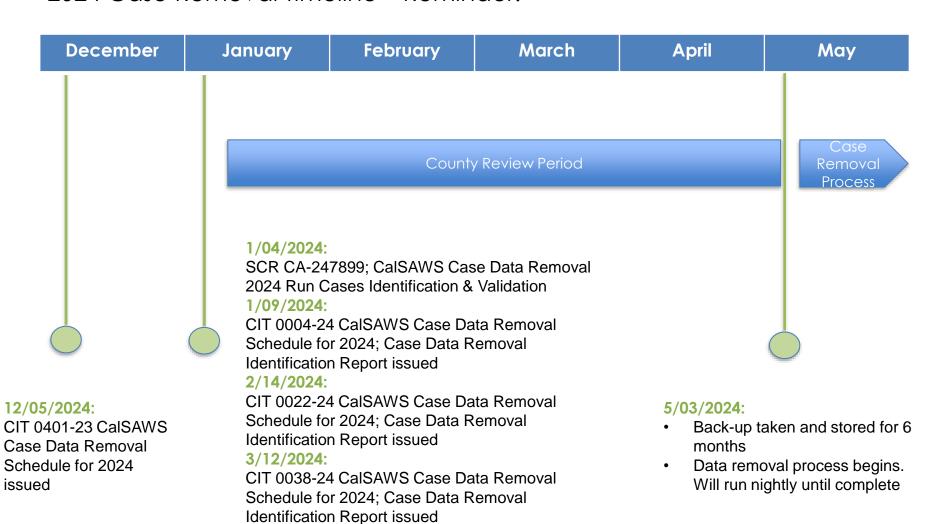
- As of March 11, 2024, CDSS is preparing to submit a waiver request to FNS to provide automated mass replacements of a certain percentage of March 2024 regular CalFresh allotments for ongoing CalFresh households in areas in which 50% of the residents lost power for four hours or more due to the recent winter storms, power outages, and Public Safety Power Shut-Off (PSPS) events across California

February Mass Replacement	
Butte	San Bernardino
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
Sacramento	

March Mass Replacement	
El Dorado	Shasta
Humboldt	Sierra
Mendocino	Tehama
Nevada	Trinity
Placer	Tuolumne
Plumas	Yuba

CalSAWS Release and Policy Update
Case Removal

- 2024 Case Removal Timeline – Reminder!

December	January	February	March	April	May

County Review Period

Case Removal Process

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

2/14/2024:
CIT 0022-24 CalSAWS Case Data Removal Schedule for 2024; Case Data Removal Identification Report issued

3/12/2024:
CIT 0038-24 CalSAWS Case Data Removal Schedule for 2024; Case Data Removal Identification Report issued

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

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

CalSAWS Release and Policy Update
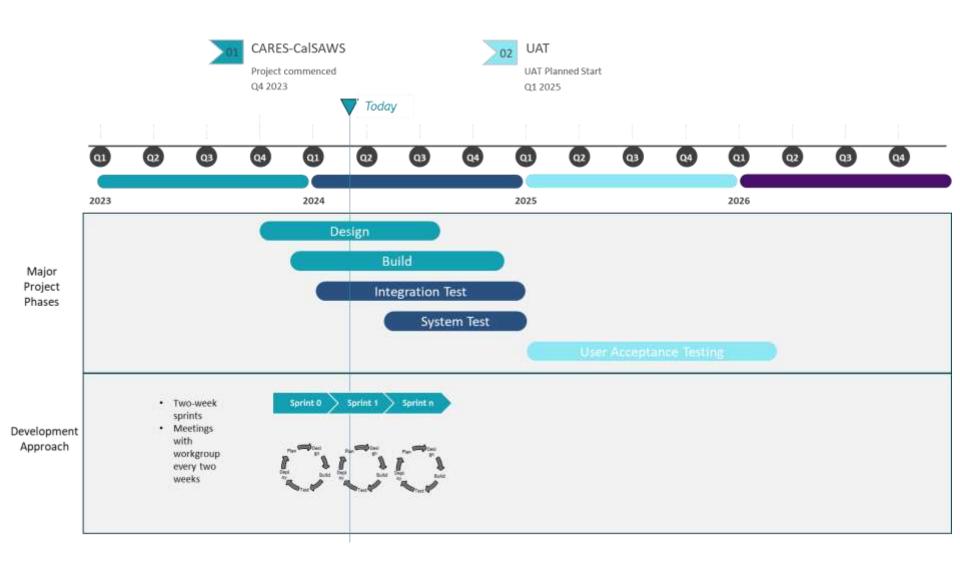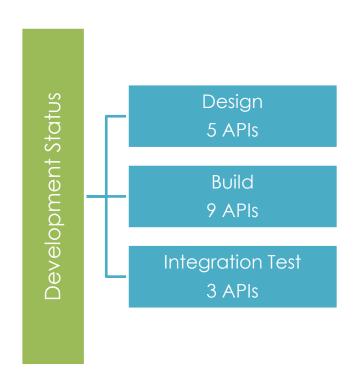
CARES-CalSAWS: Integration Overview

- Real Time Integration via APIs to allow Social worker and Case worker to more electronically share information
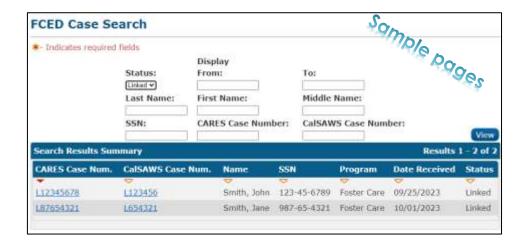- New pages in CalSAWS to show data received/sent

CARES System ← →

- Case Link
- Individual Demographics
- Case Worker
- Request for Information
- Eligibility Results
- Placement
- Placement Authority
- Child Support Referral
- Court Information
- Extended Foster Care
- Income
- Assets
- Documents
- Imaging

← → CalSAWS System

CalSAWS Release and Policy Update

CARES-CalSAWS: Development Timeline

CalSAWS Release and Policy Update

CARES-CalSAWS: API Development Status Update

Development Status

Design
5 APIs

Build
9 APIs

Integration Test
3 APIs

Sample pages

FCED Case Search

✱ - Indicates required fields

Status: [Linked ▾]

Display From:

To:

Last Name:

First Name:

Middle Name:

SSN:

CARES Case Number:

CalSAWS Case Number:

[View]

Search Results Summary   Results 1 – 2 of 2

CARES Case Num.	CalSAWS Case Num.	Name	SSN	Program	Date Received	Status
L12345678	L123456	Smith, John	123-45-6789	Foster Care	09/25/2023	Linked
L87654321	L654321	Smith, Jane	987-65-4321	Foster Care	10/01/2023	Linked

FCED Outbound Transaction List

[Send to CARES]

File Name	Date Received	Data Modified?	Status
Case Link	01/01/2024	No	Sent
Individual Demographics	01/01/2024	Yes	Pending

[Send to CARES]

BenefitsCal Update

- ROI Update
- BenefitsCal Release Highlights
- Updates on top three experiences highlighted by customers
- Optical Character Recognition for BenefitsCal Documents Uploaded by Customer

BenefitsCal

ROI Workgroup Update

- Most recent meeting was 3/4/2024

  - Focus of the meeting was to begin reviewing operational items and to identify any other policy clarifications or guidance that may be needed to help support counties and public.

  - Counties worked with CWDA to capture outstanding concerns, and these have been shared with DHCS and CDSS.

- Next steps will be for CDSS and DHCS to draft Errata or new policy letters that will encompass the new charts and additional policy clarifications to route for full stakeholder review. Following their existing processes.

- Next meeting is 3/18/2024. DHCS and CDSS to provide updates for progress of letters. Initiate discussion to capture high level milestones.

  - Policy, Change Management, Automation, Funding and Timing

BenefitsCal
Release Highlights and Upcoming Enhancements

February (24.02.29)	March (24.03.28)	April (24.04.25)	May (24.05.23)

Collaboration Model Research
- Make "Keep Your Records" component available after MC Renewal submission
- Revamp Customer Dashboard

GCF Parity Enhancements
- Digitize form CF303 so customers can submit via BenefitsCal

Collaboration Model Enhancements
- Update Document Type/Upload feature

Collaboration Model Enhancements
- Provide inline help text to Customers when Case does not link Automatically

GCF Parity Enhancements
- Social Security Admin (SSA) Assisted Apps in BenefitsCal - implemented with a flag
- Enable flag in Sept 2024 per request from SSA

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 digitize the 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

Security Enhancements
- Enable Auto-Case Link functionality
- Technical Improvements with ForgeRock Integration

Security Enhancements
- Additional improvements for Auto-Case Link functionality

BenefitsCal

Items on the Horizon

Releases, Research and Awareness

- Update Application and RE/SAR7 Tracker to provide additional information to customer
- Research to add Card Replacement Tracker for Customers
- Research to add more features for Customer Dashboard

Awareness (not specific to BenefitsCal changes)

- Cost of Living changes in 2024
  - Federal Poverty Levels applied, effective 4/1/2023
  - CalFresh benefits, effective 10/1/2024
  - CalWORKs MAP, effective 10/1/2024
- Legislation passed during California state budget with impacts to BenefitsCal

Upcoming

Policy Items
- ABAWD
- Apply for Benefits - CAPI
- CFAP Expansion

Planning In-Progress
- Implement new pre-populated SAR7
- Homeless Assistance
- CalWORKs 2.0
- Collaboration Model Prioritized Enhancements

GCF Parity
- Other enhancements

BenefitsCal

During the month of Feb 2024:

222k Applications Submitted

58k Periodic Reports Submitted

2.4 Million Documents Uploaded

55k Changes Reported.

70k Renewals Submitted

Since Go-live over 4.08 Million Applications submitted

BenefitsCal

Update on the top three experiences highlighted by customers

DOCUMENT UPLOAD

CASE LINKING

ACCOUNT MANAGEMENT

Improvements Implemented

DOCUMENT UPLOAD
- Update Dropdown list to display RE/SAR 7 categories on the top during (Jan 2024)
- Additional Conditions added to display RE/SAR7 forms in dropdown during Doc Upload Flow (Jan 2024)

CASE LINKING
- To enhance security, disable Case Link on BenefitsCal (Feb 2024)
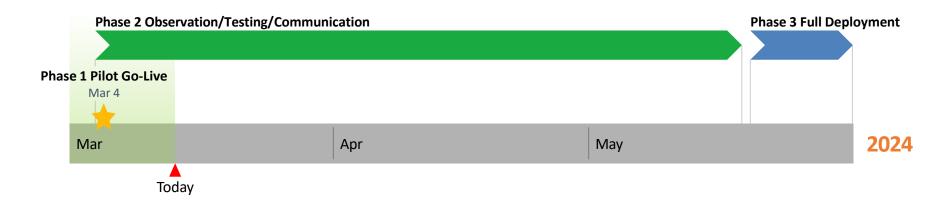
ACCOUNT MANAGEMENT
- Enable Two Step Verification (MFA) for New & Existing Customers Login (Feb 2024)

Items on the Horizon

DOCUMENT UPLOAD
- Additional revisions to update document type/upload feature (Apr 2024)
- UCD Research for Document Upload – Multiple Docs in Anonymous Application Flow (May 2024)

CASE LINKING
- Enable Auto-Case Link functionality (Apr 2024)
- Additional improvements for Auto-Case Link functionality (May 2024)
- Provide inline help text for Customers when Case does NOT link automatically (May 2024)

ACCOUNT MANAGEMENT
- Usability Updates to MFA for Login in BenefitsCal (Mar 2024)
- 2 Technical Changes to enhance security by updating APIs between BenefitsCal & Partner systems (Apr 2024)

Optical Character Recognition (OCR)

BenefitsCal Pilot Update

Phase 2 Observation/Testing/Communication

Phase 3 Full Deployment

Phase 1 Pilot Go-Live
Mar 4

Mar

Apr

May

2024

Today

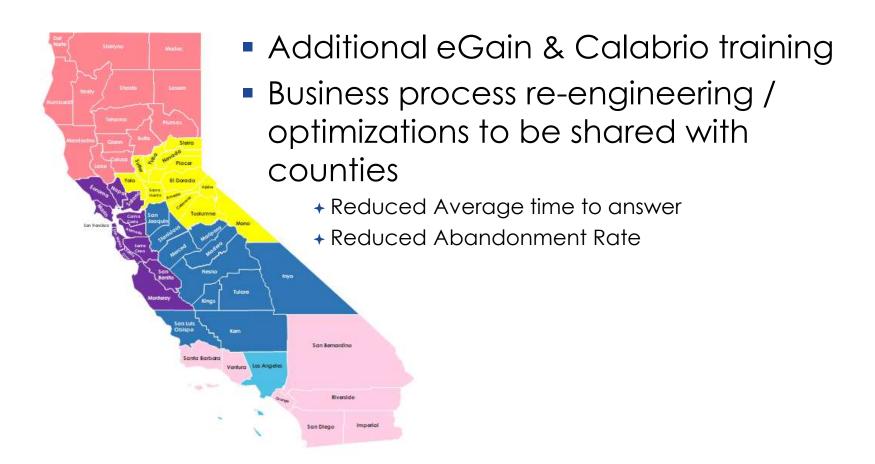Phase 1 Counties: Monterey, Orange, Placer, Riverside, Sacramento, San Francisco, Santa Cruz, and Yolo

- ~120,000 BenefitsCal documents processed from pilot counties
- ~98.4% of documents processed by OCR do not route to an exception queue
- Performance has remained stable and volumes within projections
- Project monitoring and comments from pilot county points of contact indicate no negative impacts to county managed queues
- Full implementation targeted for May 20th to remaining 50 counties

Contact Center Update

Contact Center Operations
Continuous Improvement

- Additional eGain & Calabrio training
- Business process re-engineering / optimizations to be shared with counties
  - Reduced Average time to answer
  - Reduced Abandonment Rate

Welcome and Authentication Bot Dashboard

Dashboard data from February 28, 2024 to March 6, 2024

Welcome Bot Update
- 7 Contact Center counties are now live
- **Benefits:** Allows customer to specify a reason for their call and to be routed accordingly

Authentication Bot Update
- 31 Contact Center counties are now live
- **Benefits:** Reduces average handle time, which saves time for the Call Center Agent

English — 87k+ Calls this Week

Spanish — 18k+ Calls this Week

English — 224k+ Calls this Week

Spanish — 51k+ Calls this Week

↑ **76%** English

↑ **59%** Spanish

↑ **64%** English

↑ **41%** Spanish

RPA Dashboard

Dashboard data from February 28, 2024 to March 6, 2024

Key Performance Metrics
Since 11/17 Launch...

96.25% Success Rate

22356 Total EBT Requests

21517 Total Successful Requests

Robotic Process Automation Update

- Successfully deployed RPA EBT BOT for 10 counties
- All remaining counties are scheduled to be deployed by May 2024.
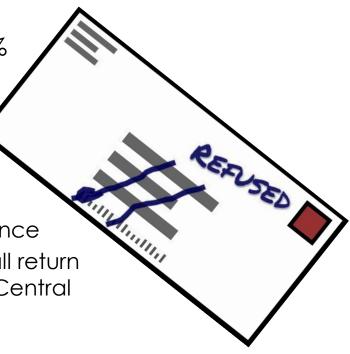- **Benefits:** Automates reissuance of EBT card, reducing manual processing by a county worker

Sprint	Go Live	Status
Prod Sprint 1 [Yolo]	1/19	Complete
Prod Sprint 2 [Tulare, Ventura, Santa Barbara]	2/9	Complete
Prod Sprint 3 [Santa Cruz, San Mateo, San Diego, Stanislaus, Kings]	2/23	Complete
Prod Sprint 4 [Kern, Santa Clara, Yuba, Monterey, Riverside]	3/15	On Track
Prod Sprint 5 [San Francisco, Fresno, Sonoma, Alameda, Butte]	4/12	In Progress
Prod Sprint 6 [Sacramento, Humboldt, San Luis Obispo]	5/10	Not Started
Prod Sprint 7 [Non-CSC -14 Counties]	TBD	Not Started
Prod Sprint 8/9 Counties with Welcome Bot: Placer, Shasta, Contra Costa, Orange, San Bernardino, Solano, Sutter, Marin	TBD	Not Started

Central Print Return Mail Update

Central Print Return Mail

Current Status

- Five Counties have implemented return mail

- Expect an additional two in April

- Return mail: Average 4.61%

- Address update recommended: Average 5.5%

- Central Print currently provides:

  - Verification with USPS on deliverable status

  - Journaling of results
    - Return mail is always journaled
    - Address update journaling is optional

  - Report and/or task created per County preference

  - Central Print can be the Return Mail address – all return mail which was centrally printed is received at Central Print's address instead of the County mailroom
    - Central Print sorts the envelopes
    - Securely destroys those that were journaled
    - Returns physical envelopes to the County when the return is carrier initiated or suspected to be carrier initiated

Central Print Return Mail
Imaging Returned Mail

Undeliverable known at the time of mailing

- USPS notification plus the date and form mailed has been journaled
- No additional information is obtained by imaging the envelope
- Envelope can be securely destroyed

Suspected Carrier Initiated Return - Undeliverable NOT known at the time of mailing

- Central Print as the return mail address:
  - Today – Physical envelope returned to County for processing
  - Future
    - Barcode will be checked to determine if a journal entry was made at the time of mailing
    - Journal entry exists – secure destruction
    - Journal entry does not exist – Send an image of the envelope and subset of contents to CalSAWS

Maintenance & Enhancement Roadshows

Maintenance & Enhancement (M&E) Roadshows

Purpose

We are now a Consortium of 58 counties working together, helping and supporting each other in our CalSAWS journey. The objective has been for Maintenance and Enhancement (M&E) to meet the needs of our counties and where we may need to consider pivoting to better serve our counties.

The purpose of the M & E Roadshows is level set current state M& E to provide consistent education to the regions on a variety of topics and allow the Project to be responsive to county questions.

Maintenance & Enhancement (M&E) Roadshows

CRFIs

Via the CRFI process, the Project will request county participant names (with recommended attendees based on topic).

- Roadshow topics will be rotated each month.
- Roadshows will be offered virtually and facilitated by the Regional Managers (RMs).
- There will be multiple sessions offered for each monthly Roadshow topic.

The topics were compiled from county feedback: Regional meetings, Leadership meetings, one-on-one county meetings, and other county checkpoints.

Maintenance & Enhancement (M&E) Roadshows
Planning and Roadshow Schedule

Feb. 2024

Planning

Sessions
03/19/24
03/20/24
03/21/24

March 2024 - Governance

April 2024 – Ticketing

Sessions
04/09/24
04/10/24
04/11/24

Sessions
05/07/24
05/08/24
05/09/24

May 2024 – SCR Lifecycle

June 2024 – CalSAWS Consortium County Validation

Sessions
06/11/24
06/12/24
06/13/24

July 2024 – Topic TBA

Maintenance & Enhancement (M&E) Roadshows

Next Steps

- Roadshow #1 Governance sessions are scheduled for 3/19, 3/20, and 3/21. There are 600+ participants signed up for the three sessions.

- CRFI for Roadshow #2 Ticketing was released on 3/12. County responses with participant names are due on 3/25.

- Provide Roadshow updates at a future meeting.

State Partners Updates
- OTSI
- CDSS
- DHCS

Regional Updates

Adjourn Meeting