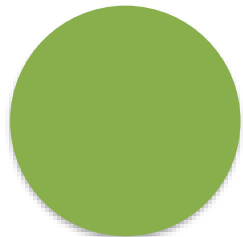


CalSAWS | Project Steering Committee Meeting



April 18, 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 March 21, 2024, PSC Meeting and review of Action Items.



Informational Items





# CalSAWS Executive Director Recruitment Update

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# Consortium Executive Director Appointment

The JPA Board has appointed **Ms. Julia Erdkamp** as Consortium Executive Director.

Ms. Erdkamp has extensive experience dedicated to driving positive growth, and transformational change in both public and private programs.

## Julia Erdkamp, MPA

- Over 15 years of experience leading large-scale projects and systems
- Proven track record in supporting governing boards and engaging diverse stakeholders
- Provided thought leadership and advisory services to local, state, and federal agencies on advancing goals related to economic growth, food security, and housing programs
- Created and led technology and business solutions for public, education, and social-impact industry verticals, including providing strategic account management
- Led client services operations, project management, new program/process development, and stakeholder relations while liaising with educational institutions, organizations, and local government entities
- Managed relationships with private sector partners to develop and maintain the third largest landfill gas (LFG) facility in the US
- Administered stakeholder relations, customer support, and quality improvement activities as well as risk management, program development and launch, change management, best practices implementation, control assessments, program performance, and other related assignments while serving as primary liaison for aviation security at a large, Category 1 airport
- Provided strategic leadership for day-to-day office operations, overseeing training and development while advising executive leadership on Central Valley Project's (CVP) water accounting systems and other mission-critical programs



# BenefitsCal User Account Security Incident Status Update

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# BenefitsCal User Security Update

## Investigation

- Completed 365-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

# BenefitsCal User Security Update

## Remediations Completed and Planned

### Completed

- Additional advanced firewall protections
- Mandatory Multi-Factor Authentication (MFA) for all users (Customers and CBOs)
- Breach Notification was distributed on 04/02/24

### Planned

- Addition of MFA for Case Linking targeted for 4/25/2024 with OCM activities included
- Additional remediations being evaluated
- Temporary disabling of new requests to link cases to accounts



## Release and Policy Update

- Continuous Coverage Unwinding
- CalSAWS Release Highlights



# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – DHCS Updates

- Link to White House USDS Blog: [Cutting red tape for Americans renewing their health coverage | United States Digital Service \(usds.gov\)](#)
- Link to CalHHS blog: [https://www.chhs.ca.gov/blog/2024/03/27/issue-brief-journey-with-medi-cal-redeterminations/](#)
- Link to brief: [https://www.chhs.ca.gov/wp-content/uploads/2024/03/California-USDS-Issue-Brief-March-2024.pdf](#)

# CalSAWS Release and Policy Update

## Release Overview

	April 2024	May	June	July	August
	<p>4/3/24</p> <p>4/4/24</p> <p>4/18/24</p>	<p>5/20/24</p> <p>5/30/24</p>	<p>6/6/24</p> <p>6/15/24</p>	<p>7/22/24</p>	<p>8/1/24</p> <p>8/3/24</p>
<b>Major Releases</b>		<p>★ <b>R24.05 - 5/20/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>ACL 23-20 Add <u>BenefitsCal</u> API for DCF Application</li> <li>ACL 23-30 - Paid Family Leave CW Time Limit Exemption</li> <li>ACL 23-83 - Homeless Assistance Additional at <u>Risk</u> Populations</li> <li>ACL 23-93 Exempt Child Support Income Types for Formerly Assisted CW Families</li> <li>Configurable tasks categories</li> </ul>		<p>★ <b>R24.07 - 7/22/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>ACL 18-43 - Revise CalWORKs M40-107D</li> <li>ACL 22-46 - Update Student Exemptions</li> <li>MEDIL I 21-13 - Update Postpartum Approval NOA Generation</li> <li>MEDS Alerts – Add Program Prioritization to MEDS Alert Task Configurability</li> </ul>	
<b>Minor Releases</b>	<p>◆ <b>R.24.04.03 – 4/3/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>CCB 23-18 - CCP 2145 Revision</li> </ul> <p>◆ <b>R.24.04.04 – 4/4/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>ACWDL 24-03 - Continuous Eligibility for Children-Accelerated Enrollment</li> </ul> <p>◆ <b>R.24.04.18 – 4/18/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>ACWDL 22-18 - Turn off Batch PHE Protections at conclusion of CCU</li> </ul>	<p>◆ <b>R.24.05.30 – 5/30/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>ACL 22-85 &amp; 21-25 - Update CalFresh Reports</li> </ul>	<p>◆ <b>R.24.06.06 – 6/6/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>2024 IIK COLA Values</li> </ul> <p>◆ <b>R.24.06.15 – 6/15/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>2024 IIK COLA Batch</li> </ul>		<p>◆ <b>R.24.08.01 – 8/1/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>2024 AAP, FC, &amp; KG CNI Rate Increase</li> </ul> <p>◆ <b>R.24.08.03 – 8/3/24</b> <u>Key Highlights</u></p> <ul style="list-style-type: none"> <li>2024 AAP, FC, &amp; KG CNI Rate Increase COLA Batch</li> </ul>

# CalSAWS Release and Policy Update

## CF Mass Replacement

- CDSS submitted 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
  - March mass replacement ran on March 28, 2024, and issued over \$75,000 in replacement benefits for 12 counties

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

# CalSAWS Release and Policy Update

## Release Readiness Discovery Sessions

### ■ Background

- During the transition to the M&O phase of CalSAWS, the project is actively reviewing current processes to identify areas for enhancement. These enhancements aim to better support and educate counties on CalSAWS processes and release communication, with forums like M&E roadshows
- As we engage in these forums, we are gathering feedback from counties. We have received input regarding counties preparedness for upcoming releases, including:
  - ✦ The pace of change in CalSAWS is faster than in legacy systems with more frequent releases
  - ✦ There were differences in release notes across the systems
  - ✦ Counties have limited access to Jira and are therefore not always able to self-serve on upcoming changes
- Based on feedback received to date, we are planning for several release readiness discovery sessions

# CalSAWS Release and Policy Update

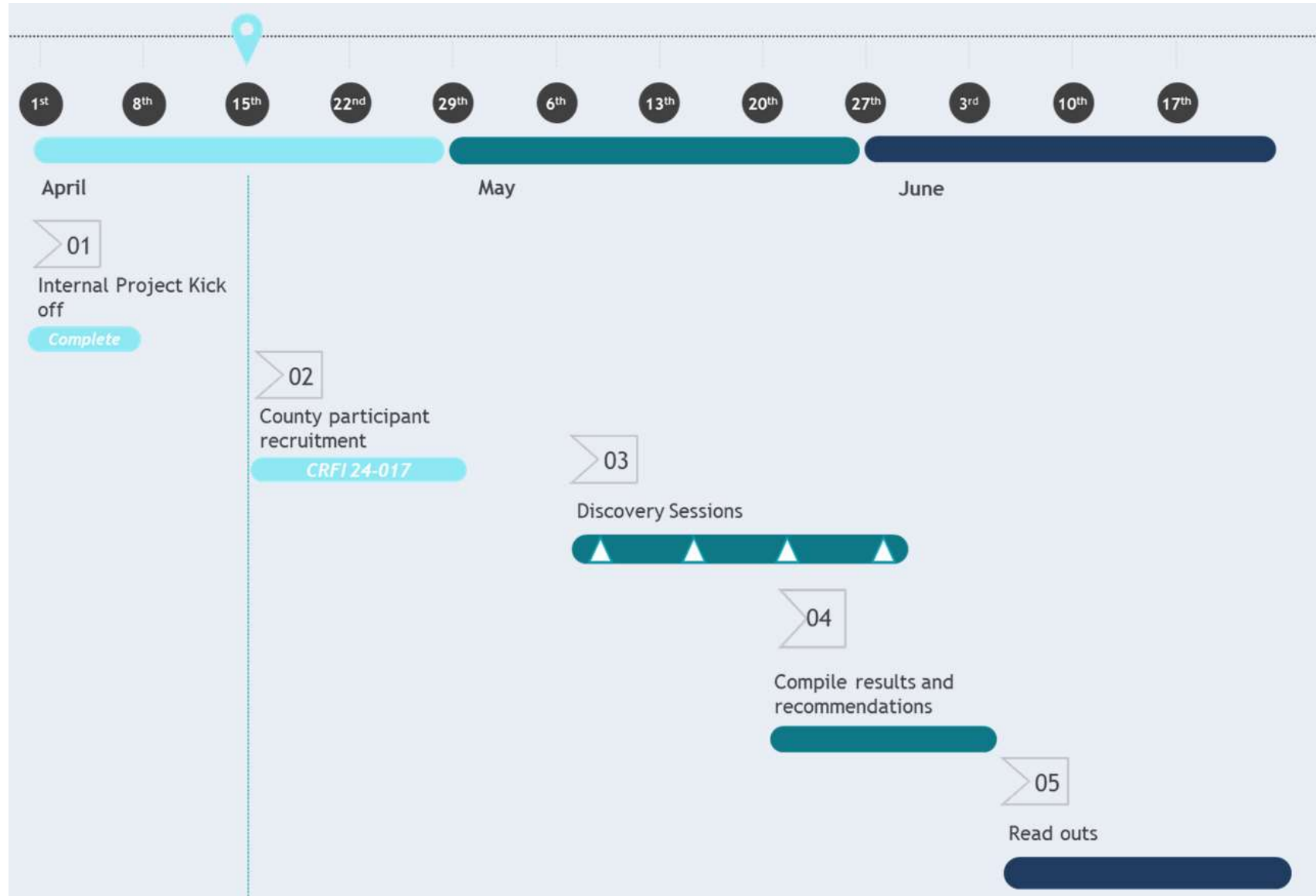
## Release Readiness Discovery Sessions

- Goal
  - Evolve pre-release communications and documentation to assist county readiness for releases
- Approach
  - A series of facilitated workshops including county participants, regional managers, and project staff to explore what is needed to better prepare counties for upcoming system releases. This series is focused on core CalSAWS
  - Topics will be provided in advance of each session
  - 5 participants per region
- Scope
  - Potential Topics include:
    - ✦ Baseline vs Priority releases
    - ✦ Major upcoming changes
    - ✦ Webcasts
    - ✦ Release Notes
    - ✦ Change Management
    - ✦ Online Help/Job Aids
    - ✦ County Preview Environment



# CalSAWS Release and Policy Update

## County Release Readiness Discovery Sessions – Draft timeline

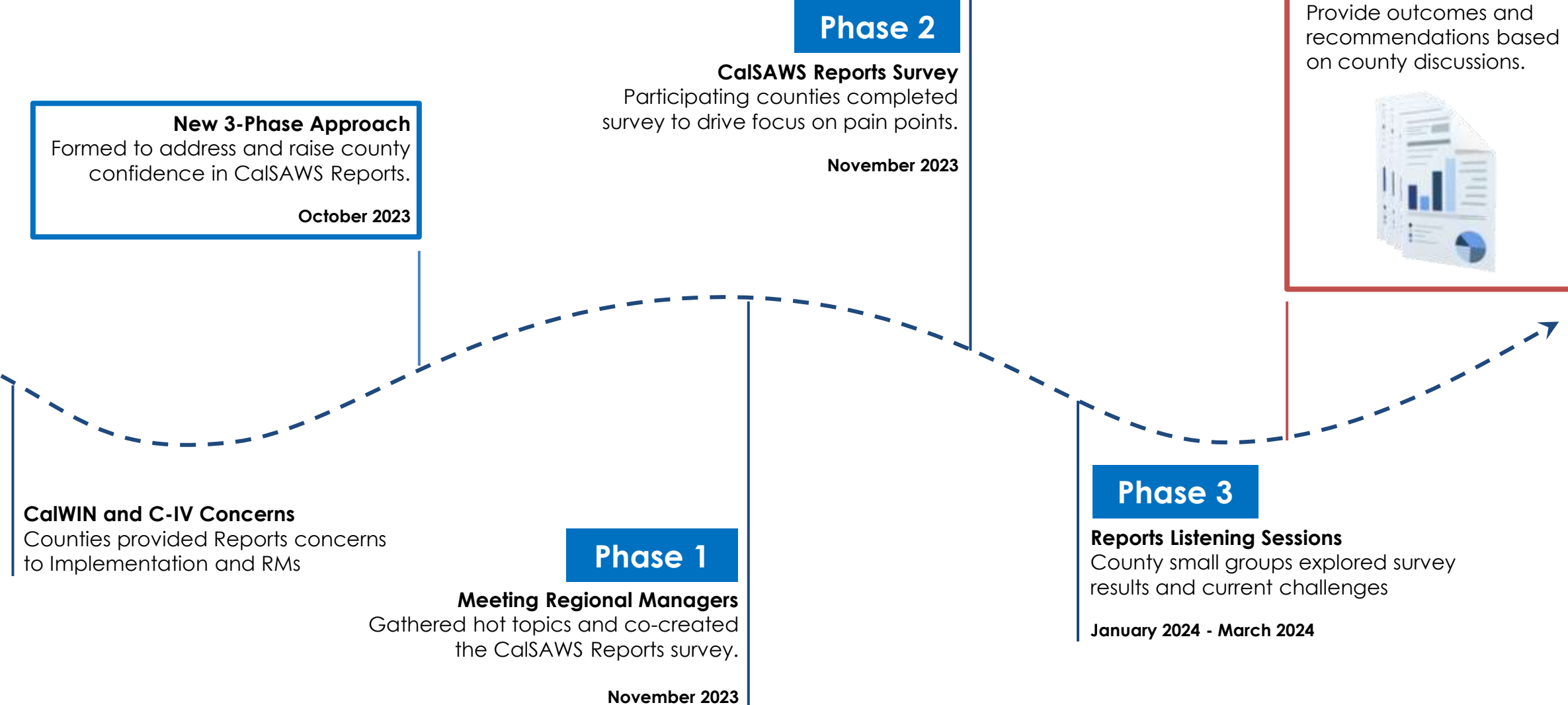




# Reports Status Update

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# Reports Background



**CalWIN and C-IV Concerns**  
Counties provided Reports concerns to Implementation and RMs

# Reports Support

## MIGRATION RESOURCES

**Weekly Wave-specific Reports Support Calls**  
2 weeks prior and 8 weeks after migration

**Gainwell Report Refactoring Support**

**Post Go Live Meetings and Demos**

## ONGOING RESOURCES

**State/Fiscal Reports Bi-Weekly Calls**  
(150-200 people)

**CalSAWS Service Desk**

**Targeted Report Sessions**

**CalSAWS Reports Enhanced Bi-Weekly Communication**  
(500-600 people)

**Monthly Ad Hoc Meetings**  
(175-200 people)

**State & Fiscal and Management Report Committees**





**OCM & Communications Support**

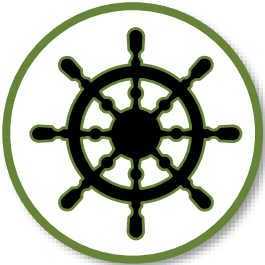


**Phases 1 & 2:**  
CalSAWS Reports Survey

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# Survey Process

Phase	Description
<b>Development</b> 	<b>Formulated questions</b> in MS Forms to <b>solicit general and specific feedback</b> on: <i>CalSAWS Service Desk utilization   Reports resources and training   Ad hoc   Scheduled reports   On Request reports   Business Intelligence dashboards   Common State, Fiscal and Management reports</i>
<b>Review</b> 	Questions <b>underwent extensive review</b> by RMs, Section Directors, Policy and Design, ClearBest QA, and Accenture
<b>Administration</b> 	County <b>representatives received the survey</b> to complete in collaboration with other county members (see <a href="#">CRFI 23-125</a> )
<b>Analysis</b> 	Leveraged Power BI and Generative AI to <b>analyze results</b> and <b>gain new insights</b> once counties completed survey

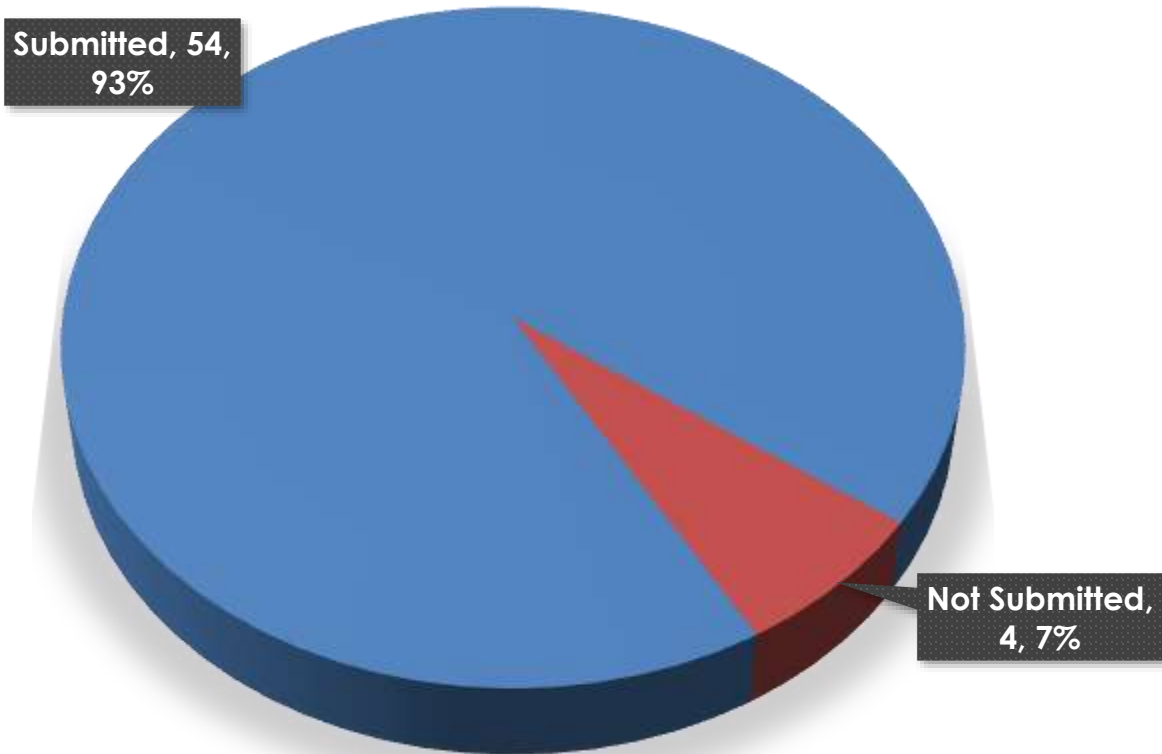


## Survey Outcome

Highlighted **key inefficiencies** in **documentation, training,** and **communications** that were explored more in county listening sessions.

# Survey Responses

## Overall County Response Rate



For additional survey data, see [Appendix – Part A – Survey Data](#)

## 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 Listening Session topics

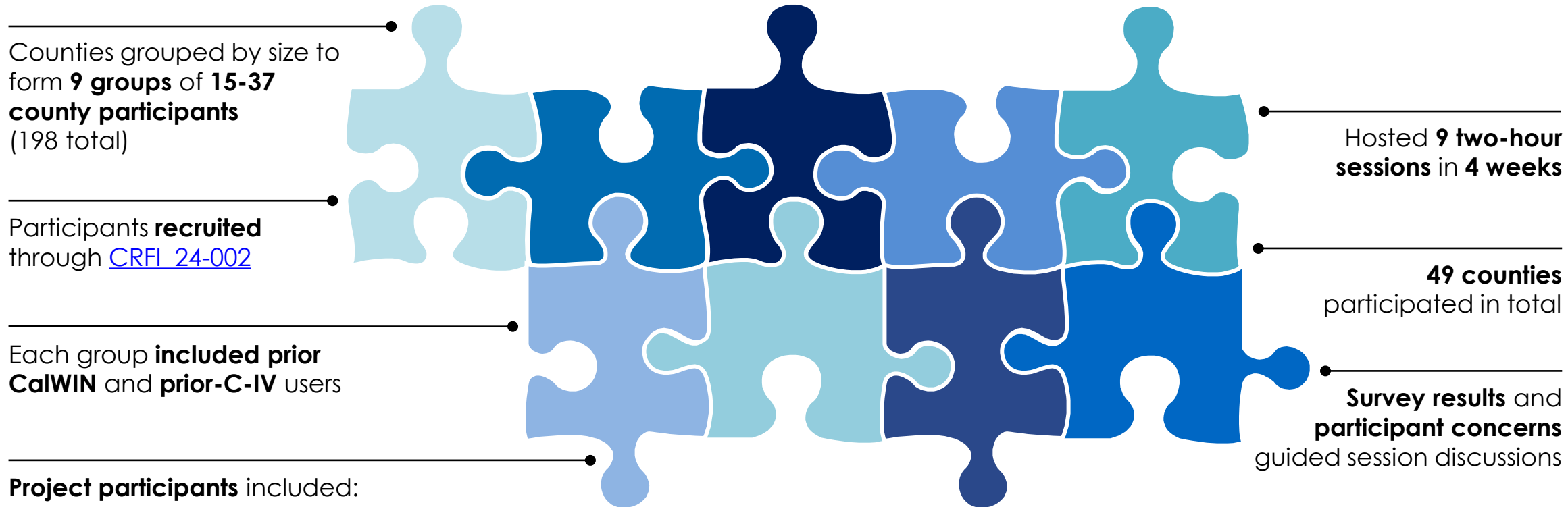
Incomplete county responses: *Calaveras, Sierra, Siskiyou, and Yuba*

**Phase 3:**  
Reports Listening Sessions





# Reports Listening Sessions

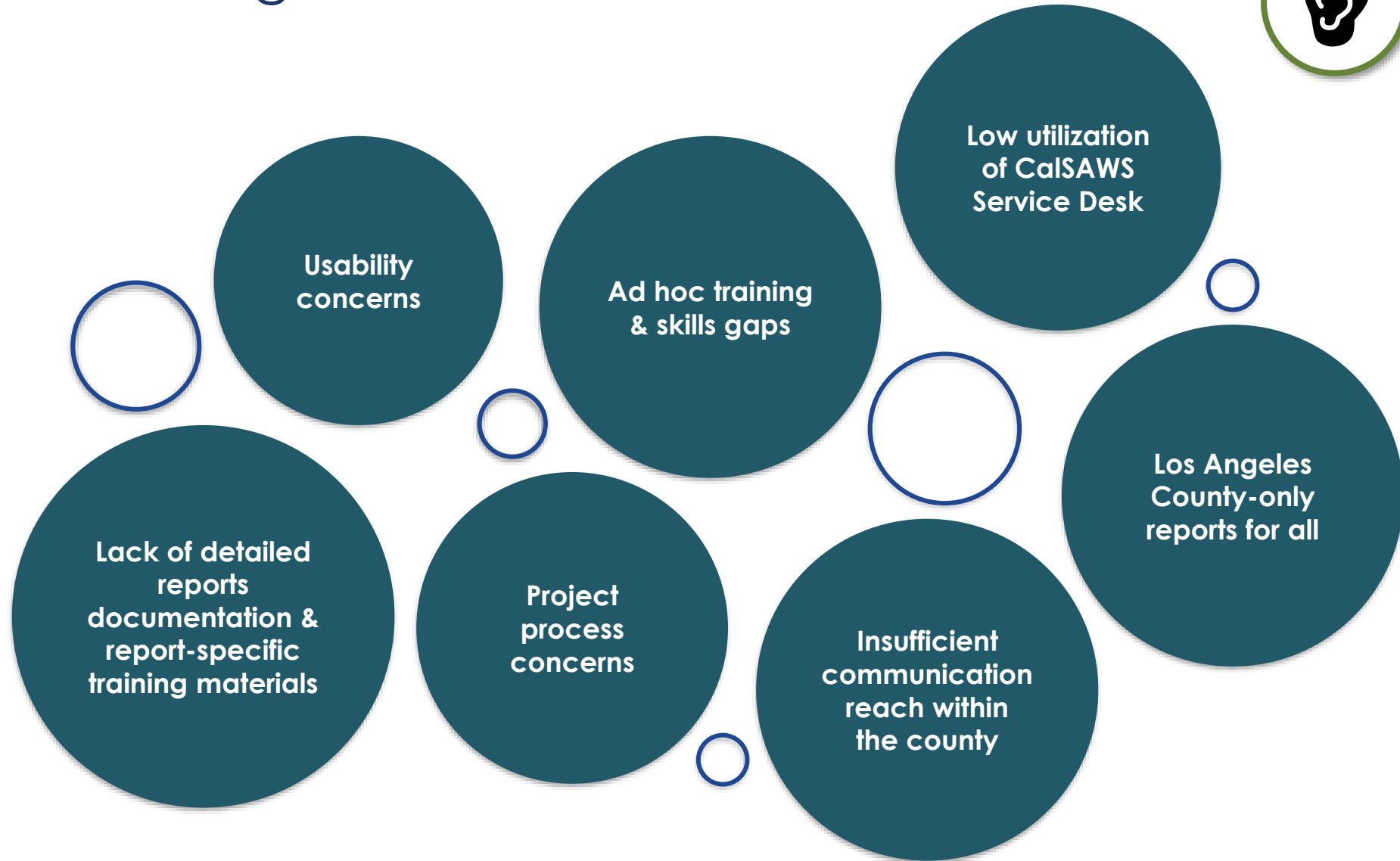


For additional information on participant groups and agenda, see [Appendix – Part B – Listening Sessions](#)

# County Feedback



# Recurring Themes



For additional details, see [Appendix – Part B – Listening Sessions](#)



## Key Take Away - #1

### Lack of Training and Documentation



*Counties are having difficulty adopting CalSAWS reports due to a lack of training and available documentation on reports.*

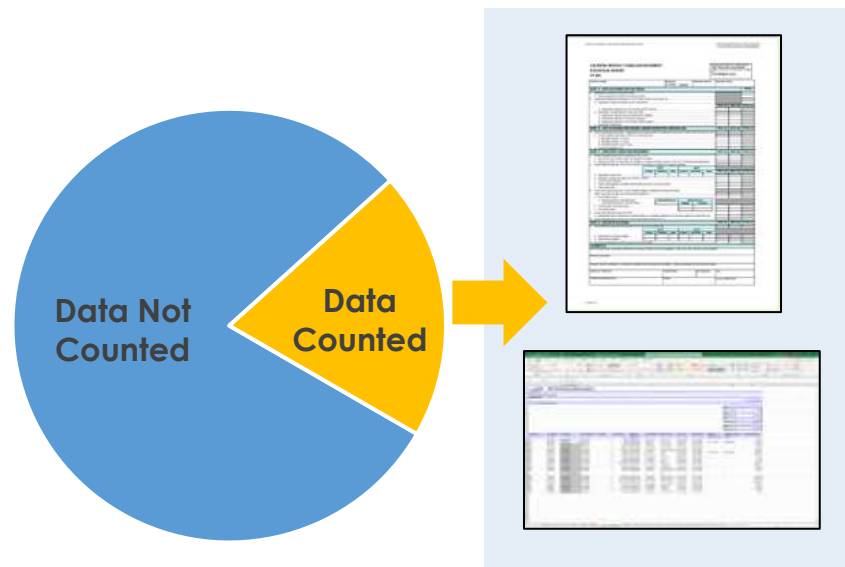
# Key Take Away - #2

## Reporting Approach Difference



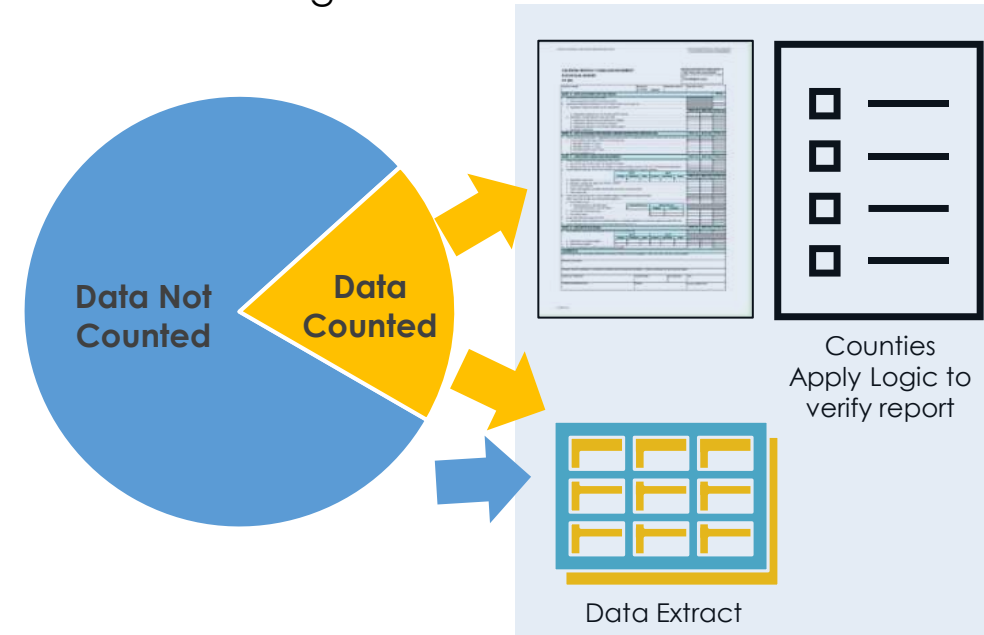
### CalSAWS

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.



**Note:**

- Counties have stated detailed report documents alone will not allow them to sufficiently verify the reports
- Approach does not conform to the Purpose Built Data Sets concept used in the data lake

## Key Take Away - #3

### Existing Unreported Issues



*C-IV counties were experiencing reporting issues prior to migration that were unknown to the project.*

## Actions Taken and In Process



# Actions Taken & In Process



## Completed / Recurring

### Support & Committee Meetings

- Extended bi-weekly State & Fiscal Reports support meeting duration
- Started bi-weekly State & Fiscal Report Targeted Report Sessions
- Integrated functional experts in the Monthly Ad Hoc Meetings
- Restarted Management Reports Committee

### OCM & Communications Support

- Review and distribute documentation to increase former CalWIN County reports adoption and county information sharing
- Support data and information gathering with former CalWIN Counties to facilitate issue escalation and resolution
- Facilitate ongoing change management and communication support

### Service Desk

- Ongoing training of Tier 3 team to provide more helpful responses
- Reinforce the need for counties to utilize the CalSAWS Service Desk to report issues

### Training & 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
- Continued distribution of CalSAWS Reports Bi-weekly Enhanced Communication

### Other

- Maintained Project Risks 296 – ‘Counties may not be prepared to reconcile Fiscal Reports and submit State Reports, timely’ and 297 – ‘Counties may face challenges in adopting management and ad hoc reports if additional support is not provided.’
- Completed Phase 2 Reports Survey and Phase 3 Listening Sessions



## In Process

### Training & Documentation

- Update Online Help Reports & Dashboards to include meaningful summary, list of data points, related pages, frequency, etc.
- Develop Report Reconciliation Guide
- Establish monthly Management Reports support meetings

### System Changes

- Identify L.A. County Reports for statewide expansion

### Ad Hoc

- Roll-out of the Qlik Developer environment for use by less technical staff



# Accenture Recommendations



# Moving Forward

## Efforts to Continue

### County Engagement:



- State/Fiscal Reports Committee Meetings
- Bi-weekly State & Fiscal Reports Support Meetings
- Bi-weekly State & Fiscal Targeted Report Sessions
- Monthly Ad Hoc Meetings with functional experts
- Management Reports Committee Meetings
- Monthly Management Reports Support Meetings



Provide **OCM** and **communications** support to former CalWIN Counties



Reinforce the **CalSAWS Service Desk** process and provide more **helpful responses** through the **Tier 3** team



Distribute the **CalSAWS Reports Bi-Weekly Enhanced Communication** and provide other helpful training/documentation for all counties



Provide **Ad Hoc County Support** with Qlik Developer as the “low tech” approach



Identify **Los Angeles County reports** for **statewide expansion**

## Areas to Explore



# Recommendations: Enhance County Support

PROBLEM STATEMENT	RECOMMENDATION	IMPLEMENTATION	
<p><i>Counties have limited opportunities to learn from and support each other in a statewide system.</i></p>	<p><b>Establish County Report Champions &amp; Buddy System</b></p> <ul style="list-style-type: none"> <li>• Appoint County Staff volunteers</li> <li>• Share Knowledge on reports</li> <li>• Provide Guidance on issues</li> <li>• Build network of contacts</li> </ul>	<p><b>OWNERS</b> Regional Managers, Counties, Consortium</p>	<p><b>APPROACH</b> Counties and Consortium will utilize existing meetings to establish expectations, align county buddies, and establish Report Champions. Information will be published to all counties.</p>
<p><i>Counties receive insufficient and slower than needed responses to reported issues.</i></p>	<p><b>Introduce 1:1 Ticket Resolution Support</b></p> <ul style="list-style-type: none"> <li>• For Service Desk incidents which are causing frustration, miscommunication, or significant time spent, allow for 1:1 meetings with counties</li> <li>• Document discussion outcomes in Service Desk for traceability and share at bi-weekly meetings (where appropriate)</li> </ul>	<p><b>OWNERS</b> Regional Managers, Counties, Accenture</p>	<p><b>APPROACH</b> Counties, Consortium, Regional Managers, and Accenture will establish expectations. Process will be communicated through established meetings.</p>
<p><i>Counties do not have a centralized location to facilitate communication and researchable Q&amp;A between counties and project.</i></p>	<p><b>Launch Forumbee for Reports</b></p> <ul style="list-style-type: none"> <li>• Enable information sharing and collaboration among County Report Champions and Buddies</li> <li>• Enhance self-service through a growing repository of knowledge</li> <li>• Action faster Q&amp;A with co-management between champions/buddies and Accenture</li> </ul>	<p><b>OWNERS</b> Regional Managers, Consortium, Accenture</p>	<p><b>APPROACH</b> Accenture and Consortium to establish structure and support roles. Will be rolled out to all counties through existing meetings.</p>

# Recommendations: Implement System Changes

PROBLEM STATEMENT	RECOMMENDATION	IMPLEMENTATION
<p><i>Reports take significantly longer to review as compared to in CalWIN, where fewer reports display all information.</i></p>	<p><b>Consolidate Reports</b></p> <ul style="list-style-type: none"> <li>• Consolidate and reduce reports; e.g., Fiscal Aid Code(CA-274265)</li> <li>• Review with counties under and unutilized reports annually</li> <li>• Review with counties under and unutilized Qlik Sheets</li> </ul>	<p><b>OWNERS</b> Committee, Accenture</p> <p><b>APPROACH</b> Design will be reviewed and approved with Consortium and Counties. Accenture will schedule for earliest available release.</p>
<p><i>Counties report difficulty with finding system reports, accessing prior reports after re-runs, and obtaining appropriate access.</i></p>	<p><b>Enhance Usability of Report Pages</b></p> <ul style="list-style-type: none"> <li>• Display Report Re-Runs</li> <li>• Update Categorization</li> <li>• Update Security behavior</li> <li>• Add Search criteria</li> <li>• Link On Request page to Online Help</li> <li>• Direct User involvement/design</li> </ul>	<p><b>OWNERS</b> Committee, Accenture</p> <p><b>APPROACH</b> User Centered Design will drive the changes documented that will be reviewed and approved by the Consortium and Counties.</p>
<p><i>Export functionality is limited to select pages.</i></p>	<p><b>Expand Page Export Coverage</b></p> <ul style="list-style-type: none"> <li>• Target the top 20 search/list pages</li> <li>• Focusing on fiscal/collections pages</li> </ul>	<p><b>OWNERS</b> Committee, Accenture</p> <p><b>APPROACH</b> Accenture will target the most common pages and review list with Counties to implement most useful pages first. Coverage will expand over a series of releases.</p>
<p><i>Not all pages and fields are mapped resulting in limited Ad Hoc usability.</i></p>	<p><b>Increase Page Mapping Coverage</b></p> <ul style="list-style-type: none"> <li>• Over a series of releases expand page mapping coverage</li> </ul>	<p><b>OWNERS</b> Committee, Accenture</p> <p><b>APPROACH</b> Accenture will identify missing page mapping. Coverage will expand over a series of releases.</p>
<p><i>Absence of previous subscription and notification model has significantly increased time it takes to run reports.</i></p>	<p><b>Introduce Report Subscriptions &amp; Notifications</b></p> <ul style="list-style-type: none"> <li>• Development of architecture and initial report</li> <li>• Ongoing and covered through M&amp;E Processes</li> </ul>	<p><b>OWNERS</b> Consortium, Accenture</p> <p><b>APPROACH</b> Will be included in the upcoming IAPDU to request funding to introduce this capability.</p>

# Recommendations: Commonly Requested SCRs

State		Fiscal	
SCR #	Description	SCR #	Description
★ CA-274366	Update CA 237 CW logic to account for Multiple Applications -Dispositioned	CA-272021	Update TEMP 2220 to Exclude Replacement Benefits
★ CA-264884	Update-CA 237 CW Line 8 Backup	CA-270000	Reactivated Expungements for WTW Display on Supplemental Benefit Issuance Registers
★ CA-253826	CalSAWS CalWIN UAT_ CA 237 CW report enhancements	CA-272415	Update the Direct Deposit Production Reconciliation Report to include the Benefit Month
★ CA-271149	Update WTW 25/25A logic for Enrollees	CA-274204	Update Integrated Service Payment/Valuable Detail Claiming Report to include Reactivated Expungements
★ CA-273875	Update SAR 7 Discontinuance Logic - CA 237 CW CA 253 CF 296	<b>Utilize bi-weekly meeting with counties to confirm the order of implementation.</b>	

# Recommendations: Expand Knowledge Reach

## PROBLEM STATEMENT

## RECOMMENDATION

## IMPLEMENTATION

*Counties primary concern is lack of documentation for reports. Detailed info is not available.*

### Create Reports Documentation

- Create reports documentation including functional explanation of logic, back & front-end mapping of data points, maintain with future system changes

**OWNERS**  
Committee,  
Consortium  
Accenture

**APPROACH**  
Accenture will develop a template for functional documentation to be reviewed in the Bi-Weekly Reports meeting. Technical documentation is already in flight to be reviewed by the Ad Hoc workgroup. Once functional templates are approved a timeline will be developed to roll-out documents as completed.

*Information distributed during support calls are not shared with other county staff.*

### Promote Communication

- Advocate that everyone is collectively responsible for communicating information to the right county staff
- Reevaluate county staff receiving communications through distribution groups to enhance reach

**OWNERS**  
Regional  
Managers,  
Counties

**APPROACH**  
Regional Managers and Counties will reinforce the need to share information provided throughout the county. Regional Managers can help each region evaluate staff on committees to reflect appropriate representation.

# Recommendations: Refine Ad Hoc

PROBLEM STATEMENT	RECOMMENDATION	IMPLEMENTATION
<p><i>Counties are unable to invest in appropriate long-term ad hoc plan.</i></p>	<p><b>Communicate Ad Hoc Roadmap</b></p> <ul style="list-style-type: none"> <li>Communicate a long-term road map of the direction for Ad Hoc reporting to PSC/JPA and Ad Hoc/Reporting committees</li> </ul>	<p><b>OWNERS</b> Consortium, Accenture</p> <p><b>APPROACH</b> Accenture and Consortium will document a vision of what is known regarding the direction of Ad Hoc including possible outcomes.</p>
<p><i>Counties with fewer dedicated resources need more accessible information on ad hoc reports.</i></p>	<p><b>Create Ad Hoc Training</b></p> <ul style="list-style-type: none"> <li>Develop ad hoc training materials; Beginner, Intermediate and Advanced</li> <li>Host dive-in data sessions covering various functional areas including topical experts</li> </ul>	<p><b>OWNERS</b> Consortium, Accenture, Ad Hoc Workgroup</p> <p><b>APPROACH</b> Accenture will develop an initial approach to consolidate existing materials into a progressive training regimen.</p>
<p><i>Counties are not leveraging available reports to their full capability.</i></p>	<p><b>Review Common Ad Hoc Reports</b></p> <ul style="list-style-type: none"> <li>Conduct annual review of ad hoc usage to transfer of popular reports to CalSAWS-generated reports</li> </ul>	<p><b>OWNERS</b> Consortium, Accenture</p> <p><b>APPROACH</b> Consortium and Ad Hoc Workgroup will annually engage the Reports Committees to identify potential system changes of commonly used Ad Hoc reports.</p>

# Recommendations: Finetune Project Processes

## PROBLEM STATEMENT

## RECOMMENDATION

## IMPLEMENTATION

*Counties voiced frustration with the time it takes to address concerns through tickets, CERs, and SCRs.*

### Set Process Expectations

- Establish expectations on turnaround times for information request tickets and CER
- Establish and monitor Key Performance Indicators (KPIs)
- Reinforce submitting tickets vs. emails

**OWNERS**  
Consortium

**APPROACH**  
Consortium will set achievable goals and communicate expectations back to county stakeholders. ServiceNow will be used where possible to track performance.

*Counties are unclear when to require system changes instead of developing an ad hoc report.*

### Establish Automation Expectations

- Establish expectations for automating county specific needs
- When to Ad Hoc and when to have CalSAWS automate

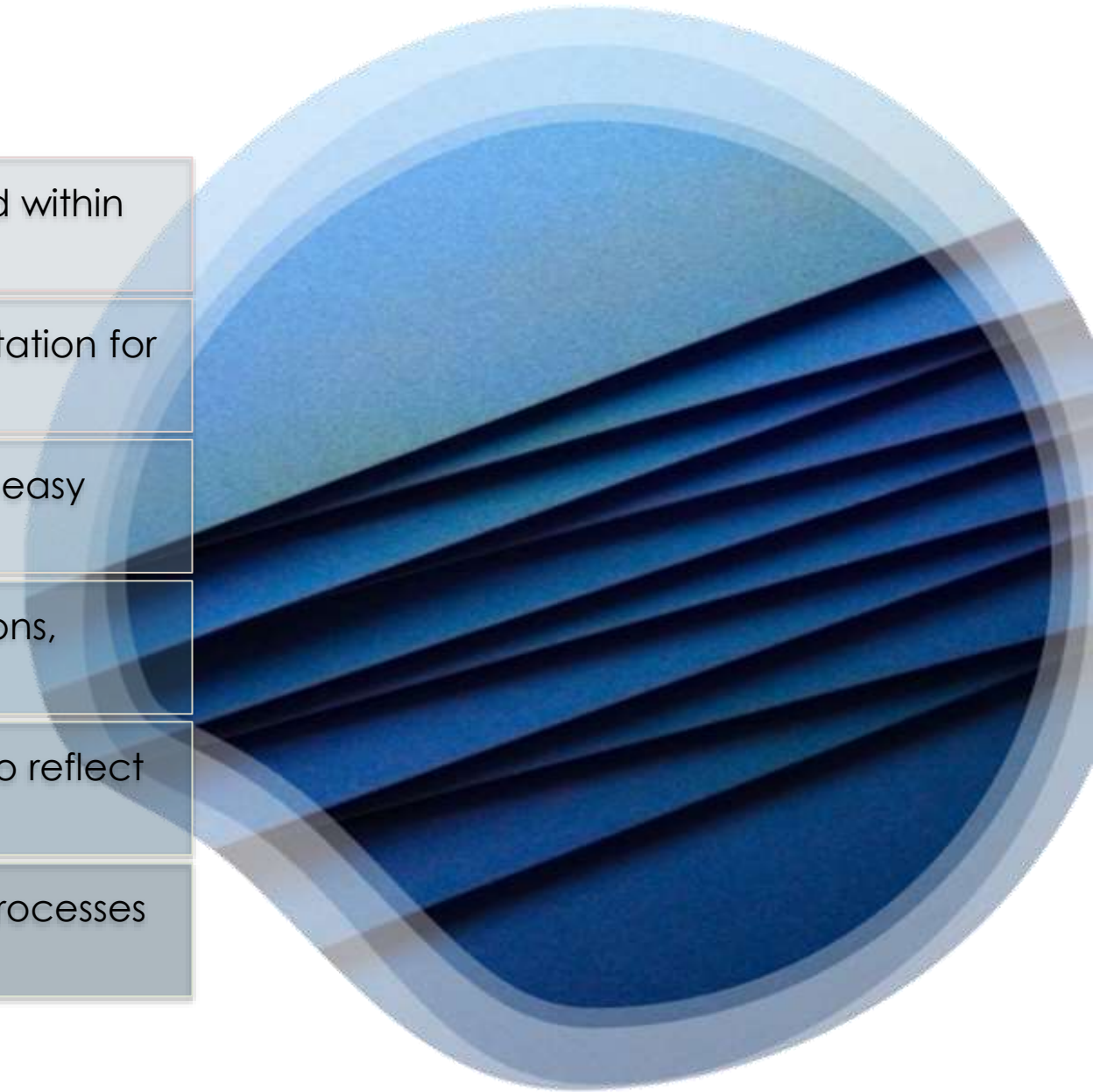
**OWNERS**  
Consortium

**APPROACH**  
Consortium will establish guidelines for when a county should expect system automation or should expect to develop an Ad Hoc report. Guidelines will be communicated in the bi-weekly reports meetings.



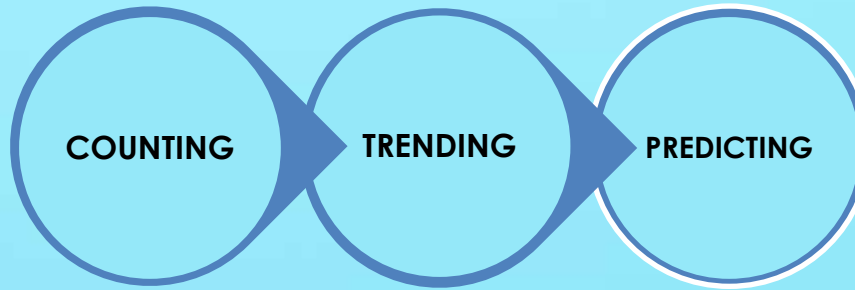
# Conclusion

<b>Promote</b>	Promote communication throughout and within the counties
<b>Develop</b>	Develop and maintain reports documentation for both technical and functional purposes
<b>Implement</b>	Implement usability changes to allow for easy searching and consolidated reports
<b>Increase</b>	Increase data access through Subscriptions, Notifications, and page extracts
<b>Advance</b>	Advance Ad Hoc solutions and training to reflect different skill levels
<b>Establish</b>	Establish clear expectations for project processes and automation guidelines



**Michael Sylvester**  
CalSAWS JPA Board Chair

*"Counties are driven by data and reports, that's how we operate."*



**Marla Stewart**  
CalSAWS JPA Board Vice Chair

*"...reporting and operations are completely iterative, reports inform how we do our operations, how we do our operations gives us better reports."*



## Long Term Vision

- California has an opportunity for evolution with the FIRST single source of social services and child welfare data in our history
- Employ a **top-down, strategic, iterative** vision including funding for the direction and future of analytics to take advantage of emerging capabilities:
  - Machine Learning
  - Artificial Intelligence
  - Predictive Modeling
  - Inclusion of other data sources
  - Churn detection
  - Cross program eligibility
  - Self-sufficiency outcomes

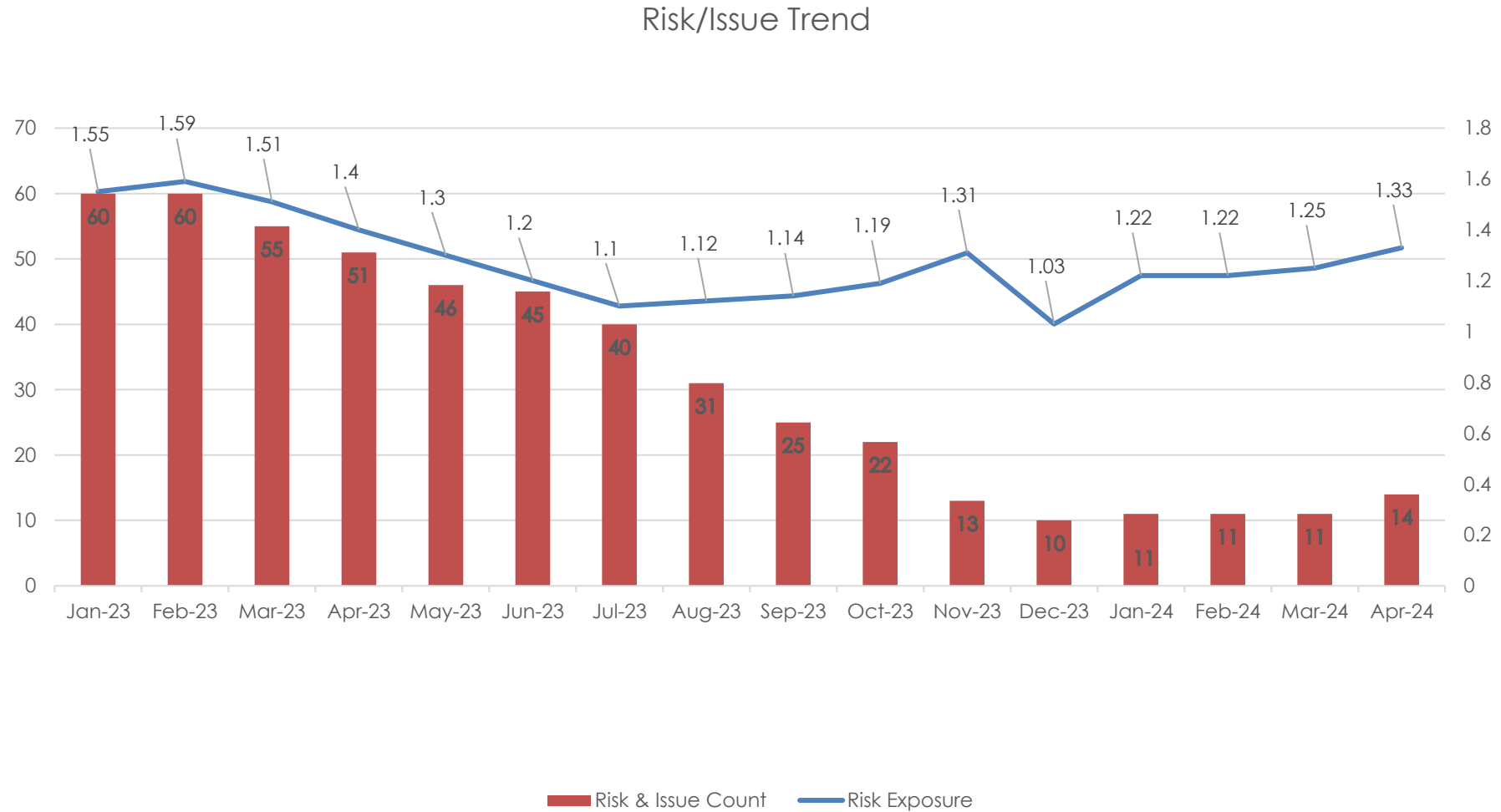


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M&E Risks

## Risk Exposure Trend



# M&O Risk Summary

Category	Risk	Risk Name	Level
CalSAWS Project Management Risks	102	Lack of annual project funding may cause schedule delay or reduction in scope for CalSAWS & other projects	Medium
CalSAWS Project Management Risks	203	Project communications must continuously evolve, otherwise stakeholder / audience needs will not be met	Medium
M&O Production Risks	201	Pace of policy changes may exceed capacity of the project teams, resulting in less automation	Low
M&O Production Risks	239	Lack of consistent State language translation approach may cause schedule delays and rework	Low
M&O Production Risks	246	Perceived gap in functionality with GetCalFresh may impact adoption of BenefitsCal	Medium
M&O Production Risks	290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	Medium
M&O Production Risks	296	Counties may not be prepared to reconcile Fiscal Reports and submit State Reports, timely	Medium
M&O Production Risks	297	Counties may face challenges in adopting management and ad hoc reports if additional support is not provided	Medium
M&O Production Risks	298	Identify Continuous Improvement process to prevent poor WelcomeBot and AuthenticationBot Customer Experience	Low
M&O Production Risks	299	Operationalizing Innovation Scaling/POC Initiatives	Low
M&O Production Risks	300	Stability of the CalSAWS Enterprise Identity and Access Management Services	Medium
M&O Production Risks	301	Lack of Finalized FCED Integrated Schedule and Test Plan May Impact CalSAWS API Delivery	Medium
M&O Production Risks	302	There could be customer dissatisfaction and county frustrations unless Courtesy Call Back configuration and eGain reporting is improved	Medium
M&O Production Risks	303	Unauthorized BenefitsCal Users could access CalSAWS data without Digital Identity Verification when case linking functionality is enabled	Low

4/10/2024 Monthly RMG



## Procurement Update

- CalSAWS M&E
- BenefitsCal



# CalSAWS M&O Procurement

## Key Procurement Tasks

	M&O Procurement Event	Date
1	Publish Vendor Selection Report	December 13, 2023 – February 7, 2024
2	Issue Notice of Intent to Award	February 8, 2024
3	Appeal Filed	February 15, 2024
4	Conduct Contract Negotiations and Finalize Agreements	February 15 – March 29, 2024
5	Establish Appeal Review Panel (ARP)	February 22, 2024
6	State, Federal and JPA Contract Approvals	April 2 – July 26, 2024
7	Appeal Hearing Date	To Be Determined by ARP
8	Contract Start Date	August 1, 2024

# BenefitsCal RFP Walkthrough

## Key Procurement Tasks

	<b>BenefitsCal Procurement Event</b>	<b>Dates</b>
1	State and Federal RFP Review and Approval	February 15 – May 28, 2024
2	Release RFP	May 29, 2024
3	Conduct Bidder's Conference	June 11, 2024
4	Bidder Question Period	May 30 – June 18, 2024
5	Consortium Responds on a Flow Basis	June 6 – 26, 2024
6	Consortium Publishes Final Q&A and RFP Addendum	July 3, 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	Prepare and Approve Vendor Selection Report	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





## BenefitsCal Update

- ROI Update
- BenefitsCal Release Highlights



## ROI Workgroup Update

- Most recent meeting was 4/8/2024
  - Focus of the meeting was to begin reviewing the use cases and the data points 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 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 4/29/2024. DHCS and CDSS to provide updates for progress of letters. Initiate discussion to capture high level milestones.
  - Policy, Change Management, Automation, Funding and Timing

## Release Highlights and Upcoming Enhancements

March (24.03)	April (24.04)	May (24.05)	June (24.06)
<p><b>GCF Parity Enhancements</b></p> <ul style="list-style-type: none"><li>Digitize form CF303 so customers can submit via BenefitsCal</li></ul>	<p><b>Collaboration Model Enhancements</b></p> <ul style="list-style-type: none"><li>Update Document Type/Upload feature</li></ul>	<p><b>Collaboration Model Enhancements</b></p> <ul style="list-style-type: none"><li>Provide inline help text to Customers when Case does not link</li></ul> <p><b>GCF Parity Enhancements</b></p> <ul style="list-style-type: none"><li>Social Security Admin (SSA) Assisted Apps in BenefitsCal - implemented with a flag</li><li>Enable flag in Sept 2024 per request from SSA</li></ul>	<p><b>Collaboration Model &amp; Stakeholder Enhancements</b></p> <ul style="list-style-type: none"><li>Automatically display race options in alphabetical order</li><li>Reenable See If I qualify intent in Chatbot</li></ul> <p><b>Technical Enhancements</b></p> <ul style="list-style-type: none"><li>Add the CF 385 (Application for Disaster CalFresh) to Forms API</li><li>AB 21-24: Update BenefitsCal API to display the SAR7 link on BenefitsCal as soon as it's generated.</li></ul>
<p><b>Policy Enhancements</b></p> <ul style="list-style-type: none"><li>ACL 23-13-Update to digitize the EBT 2259-Revised EBT Theft Replacement Form and Policy</li></ul>	<p><b>Security Enhancements</b></p> <ul style="list-style-type: none"><li>Enable Case Linking functionality</li><li>Technical Improvements with ForgeRock Integration</li></ul>	<p><b>Security Enhancements</b></p> <ul style="list-style-type: none"><li>Additional improvements for Case Linking functionality</li></ul>	<p><b>Security Enhancements</b></p> <ul style="list-style-type: none"><li>Technical improvements to minimize the data available to the customer in the browser</li></ul>

## Items on the Horizon

### Releases, Research and Awareness

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

#### **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

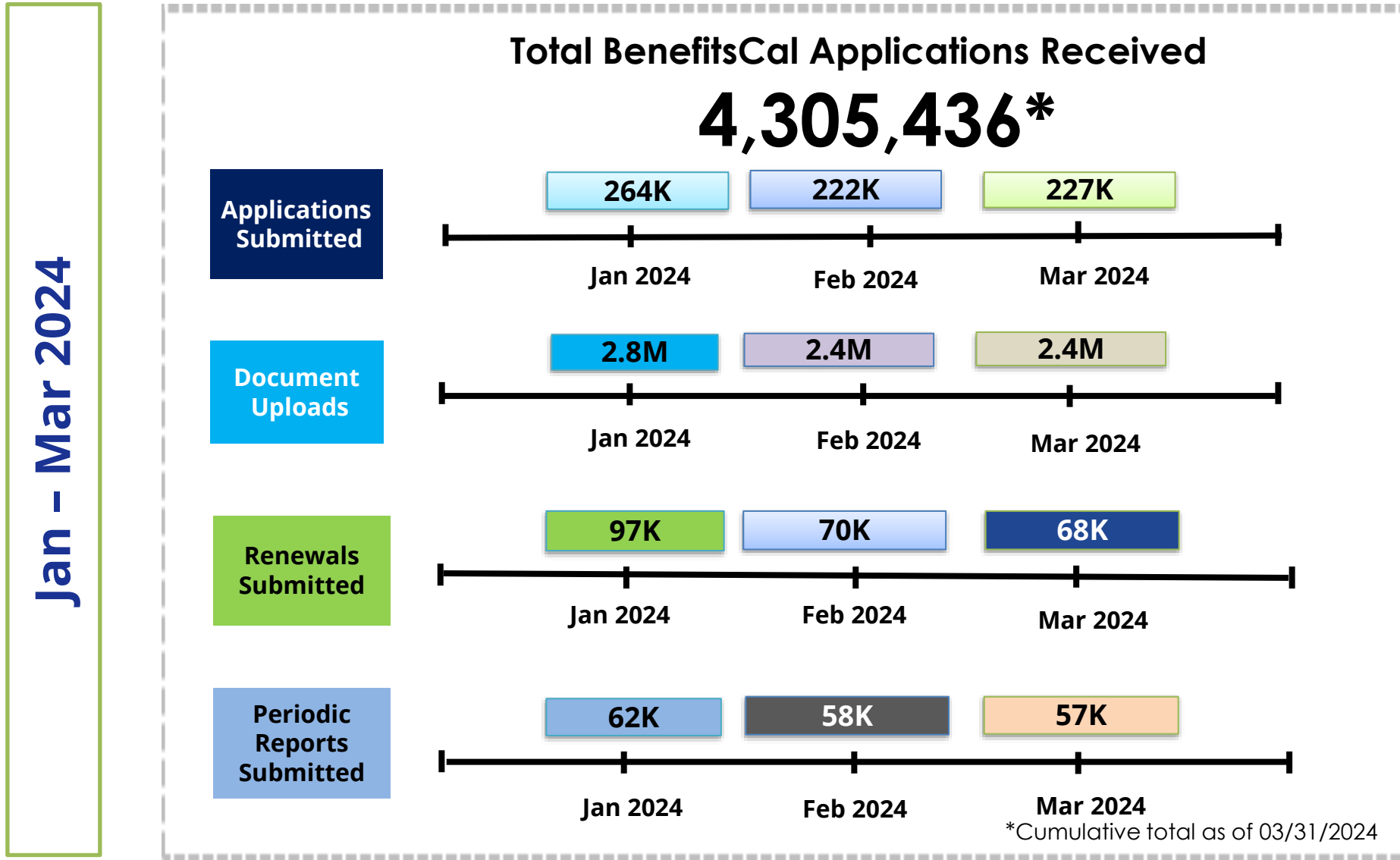
#### **Planning In-Progress**

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

#### **GCF Parity**

- Other enhancements

During the January through March 2024:





## Contact Center Update

- Courtesy Call Back



# AWS Courtesy Callback

## CalSAWS Contact Center

The CalSAWS Contact Center team heard the concerns about Courtesy Callback and **took action**

- How we responded
  - Worked directly with counties who voiced concerns about issues
  - Scheduled multiple deep dive sessions with the AWS team to understand the deployed functionality
  - Analyzed the data surrounding customer frustrations and walked through findings with concerned counties
- Strategic Response and Next Steps
  - Developed and provided a detailed one-pager to describe the deployed functionality to the counties
  - CalSAWS Contact Center will be meeting with counties individually to provide best practices and recommendations to optimize customer and agent experience with CCB and other areas of Call Center operations



# Enhanced County Support

## Personalized experience for each county

*The CalSAWS project Contact Center team has provided enhanced support through county visits and personalized trainings to address county business process and requests*

- **County Site Visits**

- Our CalSAWS Project Teams have mobilized to start visiting CalSAWS Contact Center counties to listen to concerns, understand what's working well and areas of improvement. Our team members interacted with County Call Center Agents and provided guidance and recommendations for optimizing the use of technology

- **Reporting and Workforce Management (eGain and Calabrio Trainings)**

- Our CalSAWS Project Teams have continued to respond to requested trainings to improve the confidence in reporting and workforce management tools resulting in an improved Call Center Management experience with better visibility in county metrics and data.





# Welcome and Authentication Bot Dashboard

Dashboard data from March 25, 2024, to April 1, 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

English


72k+  
Calls this Week


Spanish

15k+  
Calls this Week

## Success Rates\*:

Green arrows indicate an upward trend

 **79%**  
English

 **67%**  
Spanish

\*Please note success rates are calculated based on the total number of calls handled by the bot, which includes calls abandoned by the customer. Success rates would be higher if abandoned calls were not taken into consideration.

# RPA Dashboard

Dashboard data from March 25, 2024, to April 1, 2024

## Key Performance Metrics

Since 11/17 Launch...

96.19% Success Rate      27803 Total EBT Requests

### Robotic Process Automation Update

- Successfully deployed RPA EBT BOT for 15 counties
- Sprint 5 go live is scheduled for 4/11
- All remaining counties are scheduled to be deployed by May 2024.
- **Benefits:** Automates reissuance of EBT card via a request option in the Call Center IVR, eliminating the need to talk to a county worker.

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	N/A	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]	1/22 - 1/26	2/12 – 2/15	2/22 San Mateo 2/29	Complete
Prod Sprint 4 [Kern, Santa Clara, Yuba, Monterey, Riverside]	2/19 – 2/22	2/26 – 3/1	3/14	Complete
Prod Sprint 5 [San Francisco, Fresno, Sonoma, Alameda]	3/4 – 3/8	3/18 – 4/1	4/11	On Track
Sprint 6 [Sacramento, Humboldt, San Luis Obispo, Marin, Butte]	4/1 – 4/4	4/22 – 4/25	5/9	In Progress
Prod Sprint 7 [Non-CSC - 14 Counties]	TBD	TBD	TBD	N/A (Kickoff and County Testing may not be required)
Sprint 8/9 Counties with Welcome Bot: Placer, Shasta, Contra Costa, Orange, San Bernardino, Solano, Sutter	4/29	TBD	5/30	In Progress



# M&E Roadshows

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# Maintenance & Enhancement (M&E) Roadshows

## Objective

As a Consortium of 58 counties now, the Project needs to continually assess that Maintenance and Enhancement (M&E) established processes 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

## March Roadshow - Governance

The March Roadshow covered the topic of Governance and was held on three days, 3/19-3/21/2024. The Governance Roadshow gave participants an overview of the role and responsibilities of the CalSAWS governing bodies and illustrated the collaboration between counties and the Project.

- 665 participants attended
- 50 counties represented

# Maintenance & Enhancement (M&E) Roadshows

## March Roadshow – R3 & R4 Feedback



- \*Feedback has been incorporated into the April Roadshow

# Maintenance & Enhancement (M&E) Roadshows

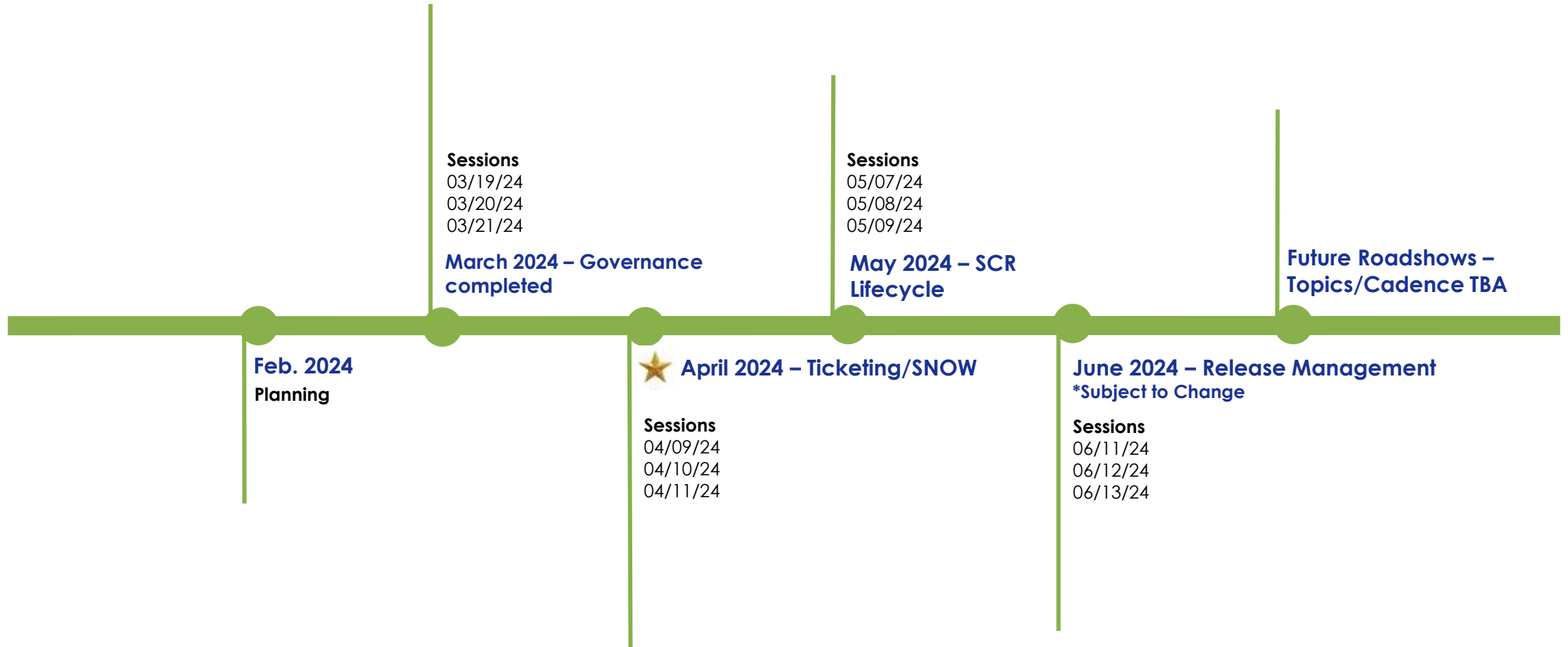
## April Roadshow – Ticketing/SNOW

The April Roadshow will cover the topic of Ticketing and ServiceNow. It is scheduled for three days, 4/9-4/11/2024. The objective of the Ticketing and ServiceNow Roadshow is to ensure counties understand how to navigate the CalSAWS issue resolution process and provide information on how to track issues that have been logged.

- Topics include:
  - ServiceNow
  - Cases, Incidents/Problems
  - Service Requests
  - Dashboards
  - Knowledge Base
- 467 participants registered
- 49 counties represented

# Maintenance & Enhancement (M&E) Roadshows

## Planning and Roadshow schedule





# Maintenance & Enhancement (M&E) Roadshows

## Next Steps

- CRFI for May Roadshow #3 SCR Lifecycle was released on 4/8. County responses with participant names are due on 4/19.
- Provide Roadshow updates at a future meeting.



## State Partners Updates

- OTSI
  - CDSS
  - DHCS
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# Regional Updates

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Adjourn Meeting

