Cal**SAWS** | Project Steering Committee Meeting

May 16, 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 April 18, 2024, PSC Meeting and review of Action Items.
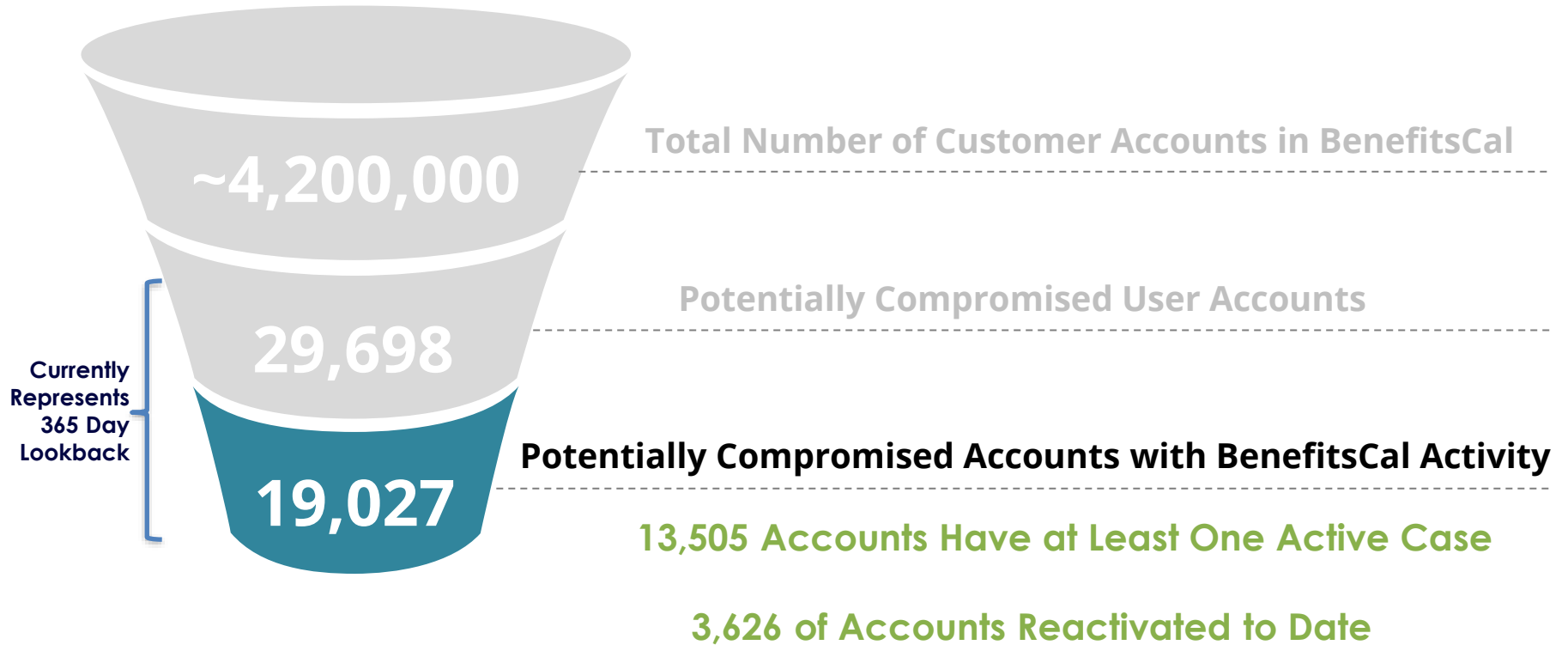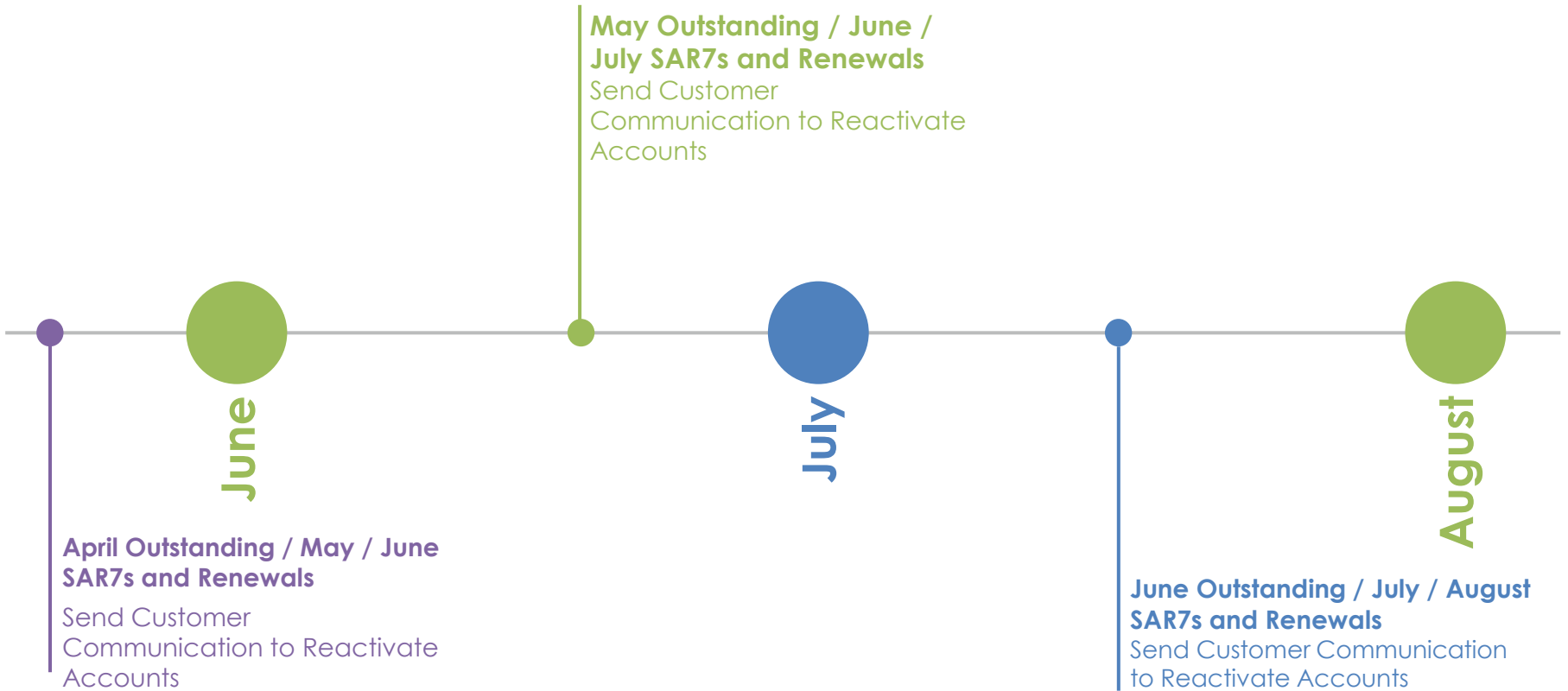
Informational Items

BenefitsCal User Account Security Incident Status Update

Account Reactivation Update

~4,200,000 — **Total Number of Customer Accounts in BenefitsCal**

29,698 — **Potentially Compromised User Accounts**

Currently Represents 365 Day Lookback

19,027 — **Potentially Compromised Accounts with BenefitsCal Activity**

13,505 Accounts Have at Least One Active Case

3,626 of Accounts Reactivated to Date

Account Reactivation / Case Linking Communications

May Outstanding / June / July SAR7s and Renewals
Send Customer Communication to Reactivate Accounts

June

July

August

April Outstanding / May / June SAR7s and Renewals

Send Customer Communication to Reactivate Accounts

June Outstanding / July / August SAR7s and Renewals
Send Customer Communication to Reactivate Accounts

Remediations Completed and Planned

Completed	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

- Addition of MFA for Case Linking
  - Including HyperCare

- OCM Activities and artifacts

Planned

- Additional remediations being evaluated
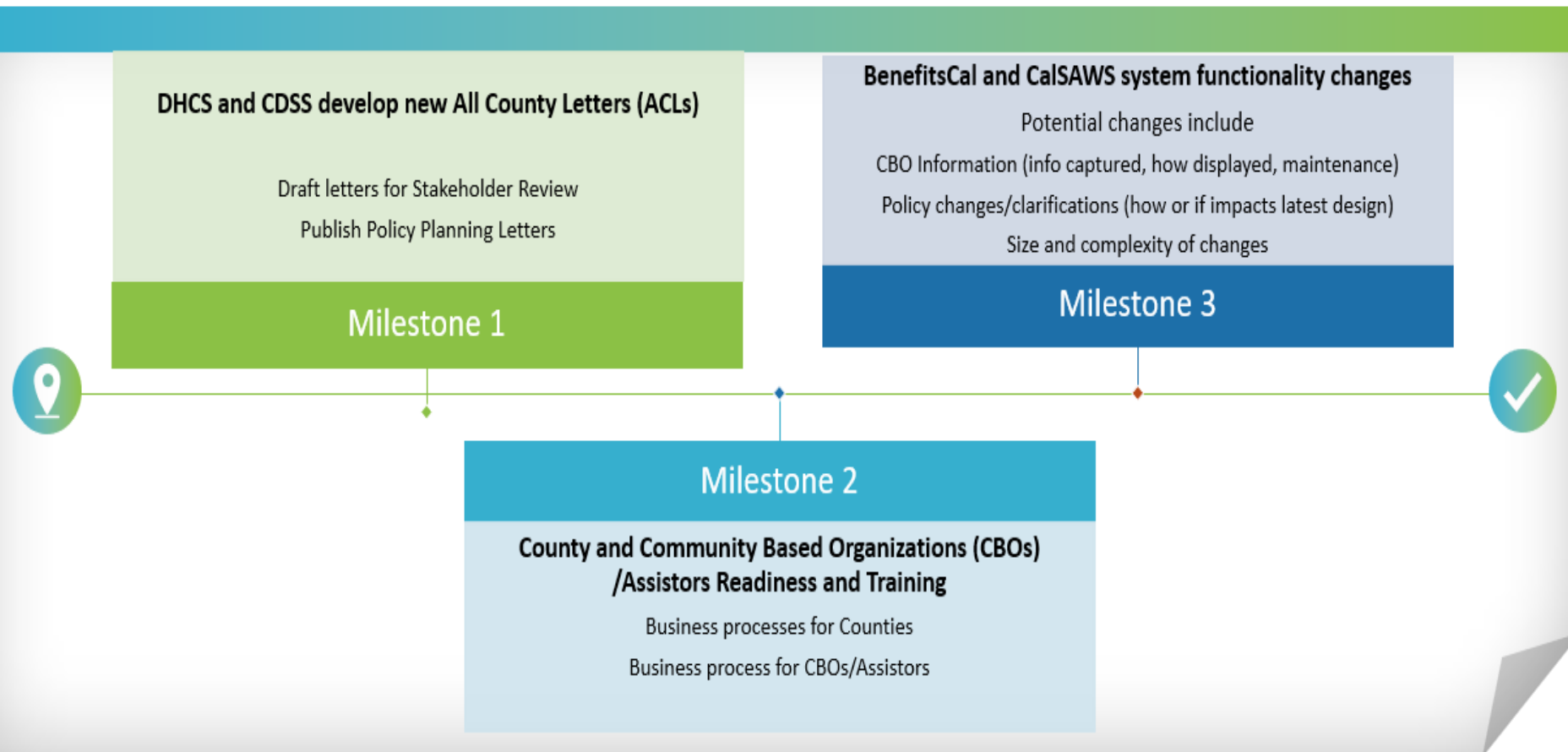
- Adding phone channel for Case Linking MFA

BenefitsCal Update

- ROI Update
- Release Highlights
- OCM Activities Completed and Upcoming for Case Link MFA
- Update on UCD Activities and Top 3 Areas
- April 2024 Metrics
- Update on OCR for Document Upload

ROI Workgroup
High-Level Milestones

DHCS and CDSS develop new All County Letters (ACLs)

Draft letters for Stakeholder Review

Publish Policy Planning Letters

Milestone 1

BenefitsCal and CalSAWS system functionality changes

Potential changes include

CBO Information (info captured, how displayed, maintenance)

Policy changes/clarifications (how or if impacts latest design)

Size and complexity of changes

Milestone 3

Milestone 2

**County and Community Based Organizations (CBOs)
/Assistors Readiness and Training**

Business processes for Counties

Business process for CBOs/Assistors

Meetings continue, next meeting is scheduled for 5/20/2024.

BenefitsCal

Release Highlights and Upcoming Enhancements

April (24.04)	May (24.05)	June (24.06)

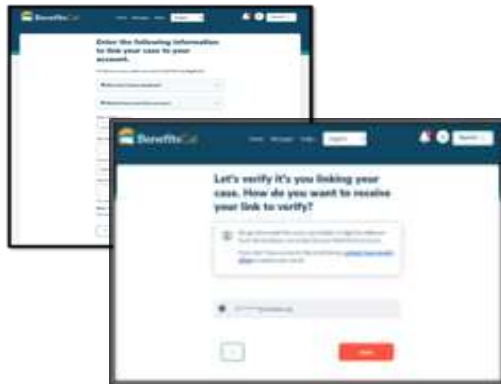**Collaboration Model Enhancements**
- Update Document Type/Upload feature with inline help text, examples and usability improvements based on UCD/CX feedback

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

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

Collaboration Model & Stakeholder Enhancements
- Reenable See If I qualify intent in Chatbot
- Automatically display race options In alphabetical order

Technical/Policy Enhancements
- Add the CF 385 (Application for Disaster CalFresh) to Forms API
- AB 21-24: Update BenefitsCal API to display the SAR7 link on BenefitsCal as soon as it's generated.

Security Enhancements
- Enable Case Linking functionality
- Technical Improvements with ForgeRock Integration

Security Enhancements
- Additional improvements for Case Linking MFA functionality with text channel

Security Enhancements
- Technical improvements to minimize the data available to the customer in the browser

BenefitsCal

Items on the Horizon

RELEASE, RESEARCH & AWARENESS

- ABAWD Research for the upcoming changes
- Case Link, Account Management and Document Upload improvements
- Research to add more features for Customer Dashboard
- 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
  - 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

Series of support activities are completed to support the Counties, Customers and CBOs for the Case Link MFA feature
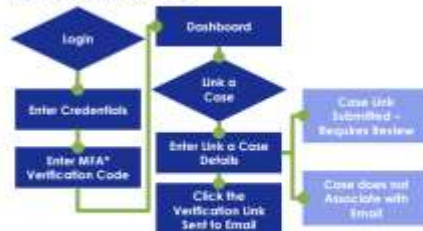

Awareness Sessions
  ➢ County awareness session – 4/16/24
  ➢ CBO awareness session – 4/17/24

Website Updates
  ➢ New FAQs
  ➢ New YouTube Video
  ➢Announcement

Communication Tools for CBOs, County, and the Public
  ➢Downloadable flyer (printable version)
  ➢ FACT sheet (CIT 0065-24)
  ➢Job Aid (CIT 0063-24)
  ➢Quick Reference Guide

Social Media Update
  ➢Twitter handle

Hypercare Calls (04/26 -05/02)

BenefitsCal

New set of support activities are planned for the Counties, Customers and CBOs for the **Case Link MFA via Text** channel in **May 2024**

Awareness Sessions
- ➢ County awareness session – Planned 5/20/24
- ➢ CBO awareness session – Planned 5/21/24

Website Updates
- ➢ New FAQs
- ➢ New YouTube Video
- ➢Announcement

Communication Tools for CBOs, County, and the Pu
- ➢Downloadable flyer (printable version)
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- ➢Quick Reference Guide

Social Media Update
- ➢Twitter handle

Hypercare Calls

BenefitsCal

Update on the UCD activities for the top three experiences highlighted by customers

CASE LINKING

Improvements Implemented

- Enable Case Link functionality with Email (Apr 2024)
- Completed series of OCM activities to support Counties, Customers and CBOs (April 2024)

Items on the Horizon

- Add phone channel for the Case Link MFA feature (May 2024)
- Provide inline help text for Customers when Case does link (May 2024)

Impact Summary

- Between April 26, 2024 – May 12, 2024, **>63K** successful case links have been established.

- No issues have been reported for BenefitsCal since Case Link functionality enabled on April 25th.

- The impact will be continuously monitored for additional CX improvements for usability.

BenefitsCal

Update on the UCD activities for the top three experiences highlighted by customers

ACCOUNT MANAGEMENT

Improvements Implemented

- Enable Two Step Verification (MFA) for New & Existing Customers Login (Feb 2024)
- Allow customers to update their MFA preferences for login (email/SMS) (Mar 2024)
- Adde new user-friendly messages for MFA enrollment. (Mar 2024)

Items on the Horizon

- UCD/CX Research for Account Management for MFA for customer login (July 2024)

Impact Summary

- The helpdesk call volume inquiries for updating the user's MFA preference dropped from 35 in the month of March 24 to less than **5 tickets** in the month of April'24.

- The impact will be continuously monitored for additional CX improvements for usability.

BenefitsCal

Update on the UCD activities for the top three experiences highlighted by customers

DOCUMENT/IMAGES UPLOAD

Improvements Implemented

- 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)
- Usability improvements to update doc type/ upload feature with inline help text, examples and usability (Apr 2024)

Items on the Horizon

- UCD Research for Document Upload – Multiple Docs in Anonymous Application Flow (May 2024)
- Provide unique confirmation code for uploaded docs/images (July 2024)

Impact Summary

- 10M documents/images uploaded Jan through April 2024 with 99.5% success rate

- No Tickets (0) were received for helpdesk or tier 3 after the release of the updates delivered in April 2024.

- The impact will be continuously monitored for additional CX improvements for usability.

BenefitsCal

During the month of April 2024:

221k Applications Submitted

54k Periodic Reports Submitted
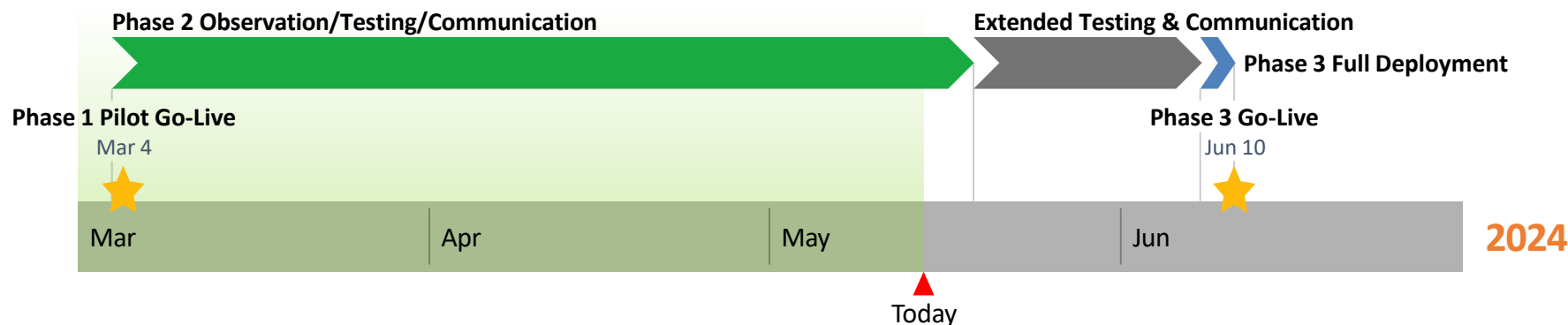
2.4 Million Documents Uploaded

49k Changes Reported.

63k Renewals Submitted

Since Go-live over 4.53 Million Applications submitted

Optical Character Recognition (OCR)
BenefitsCal Pilot Update

Phase 2 Observation/Testing/Communication

Extended Testing & Communication

Phase 3 Full Deployment

Phase 1 Pilot Go-Live
Mar 4

Phase 3 Go-Live
Jun 10

| Mar | Apr | May | Jun | **2024** |

Today

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

- Production implementation of the phase 1 counties continues to remain performant and within expectations
- Phase 2 performance testing timeline has been extended to support additional tests
- Due to additional test timeline, the communication and outreach will also be extended through the end of May
- Full implementation target has been shifted from May 20th to June 10th

CalSAWS Migration – Final Acceptance

CalSAWS Migration Final Acceptance
Purpose

The purpose of the CalSAWS Migration Final Acceptance is to confirm that:

- 650 Requirements related to the CalSAWS migration to CalSAWS have been met
    - Approximately 982,000 hours worked
- The CalSAWS System is meeting performance requirements
- All non-cosmetic defects related to the CalWIN Counties' migration have been resolved

On-going M&O:

Focus will be maintained on M&O activities including Reporting, Imaging, and Contact Center

The Final Acceptance process is based on a two-step approach:

February/March 2024

- Discuss the process and scope for CalSAWS Migration Final Acceptance
- Review performance criteria of the CalSAWS System for February 1, 2024 to March 1, 2024,

April 2024

- Reviewed and assessed Final Deliverable results

May 2024

- Review the final results and observations of the 30 consecutive day Final Acceptance period, and
- Evaluate whether CalSAWS Migration Final Acceptance has been met

Approval of the CalSAWS Migration Final Acceptance leads to the Consortium's payment of the final holdback release for the CalSAWS DD&I Project

Results of Final Acceptance Period
Performance Requirements

Perf Req #	Performance Requirement Title	Jan	Final Acceptance Period		QA
			Feb	Mar	
1	Monthly Off Prime Business Hours Availability	✓	✓	✓	✓
2	Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	✓	✓	✓	✓
3	Monthly Deficiency Notification Response Time	✓	✓	✓	✓
4	Monthly Helpdesk Diagnosis Time	✓	✓	✓	✓
5	Daily Peak Usage Hours Availability	✗	✓	✓	✓
6	Daily Prime Business Hours Availability	✗	✓	✓	✓
7	Daily Peak Usage Hours ED/BC Response Time	✓	✓	✓	✓
8	Daily Prime Business Hours ED/BC Response Time	✓	✓	✓	✓
9	Daily Peak Usage Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓
10	Daily Prime Business Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓
11	Daily Batch Production Jobs Completion	✗	✓	✓	✓
12	Daily Off Prime Business Hours ED/BC Response Time	✓	✓	✓	✓
13	Daily Off Prime Business Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓
14	Daily Unbounded Search Response Time	✓	✓	✓	✓
15	Daily Prime Business Hours Availability of CalSAWS Training Environments	✗	✓	✓	✓
16	Daily Peak Usage Hours Standard Report Response Time	✓	✓	✓	✓
17	Security Incident Notification	✗	✓	✓	✓
18	Security Incident Reporting	✓	✓	✓	✓
19	Security Incident Negligence	✓	✓	✓	✓
20	Disaster Recovery Response Time	✓	✓	✓	✓

Final Acceptance Period was from Feb 1, 2024 to March 1, 2024 so values listed here are for March 1st only

CalSAWS Migration Final Acceptance

QA—Requirement Verification (DDID 2188)

- ☑ QA recommendation for final acceptance is on track pending
  - ☑ Summary of correction of each Deficiency identified during DD&I period
  - ☑ Summary of Lessons Learned
  - ☑ Recommendations for any Improvements to CalSAWS Software
  - ☑ 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
  - ☑ Receipt of Certification Letter from Accenture
  - ☑ Final Assessment of Del #96—CalSAWS Migration Final Acceptance Certification

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

CalSAWS Migration Final Acceptance
Recommendation for Final Acceptance

Next Steps for CalSAWS Migration Final Acceptance:

- Recommendation for Project Director to approve 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
Informational Items

On-going Maintenance and Operations Activities:

- Continue to address Reporting adoption challenges including system enhancements and supporting counties with questions
- Contact Center
    - Continue regular support meetings with each county to address resolution of tickets and/or defects
    - **Completed** eCCP deployment to the remaining C-IV counties
    - Continue on-going maintenance on the Welcome and Authentication BOTs
- Focus on ForgeRock operational and architectural improvements

CalWIN Implementation Support Services – Update on Final Acceptance

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

KEY PROJECT MEASURES

95 of 95
RTM Requirements Met

100%
Deliverables Approved

Open Workplan Tasks

None

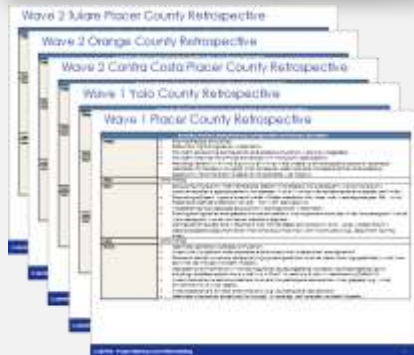**Open Workplan Tasks to Transfer**

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. 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**

Additional OCM and Communications Support to former CalWIN Counties for Reports

In October 2023, the CalWIN counties went live with CalSAWS. Post go-live, in March 2024, the Consortium raised support needs related to OCM and Communications for the 18 former CalWIN Counties for CalSAWS Reports adoption between March and May 2024.

☑ **Activities Completed (developed for former CalWIN Counties; will support all 58 Counties)**

    ☑ CIT 0053-24 Navigating the Ongoing Reports Support Resources

☐ **Activities In Progress**

    ☐ Documentation for Consortium Training (development in progress)

        ✦ CalSAWS Screens for Claiming and State Reports

        ✦ Override – Manual EDBC Pages

        ✦ Skipped Issuance Period Reporting Corrections

        ✦ Tax Intercept Reports and Posting

        ✦ External Recovery Account Guide

    ☐ Ongoing Ticket/Issue data gathering with former CalWIN Counties for Consortium Reports Team triage

    ☐ Support the development of County Report Champions and Buddy System

CalWIN ISS Completion Report

Quality Assurance Verification - In Process, Target May/June Close

- ❑ QA recommendation for CalWIN ISS Implementation Complete Report :

    - ✓ All deliverables met

    - ❑ All known deficiencies have been corrected

    - ❑ Implementation Certification Report is approved

- ☑ QA will continue to review and verify future activities to support CalSAWS users. Examples include:

    - ☑ Documentation Updates

    - ☑ County Site Visits

    - ☑ Review of Communication Updates

    - ☑ Review/Test of Future Enhancements

Release and Policy Update/Communications

- Continuous Coverage Unwinding
- CalSAWS Release Highlights
- Workload Assignment Update

CalSAWS Release and Policy Update
Continuous Coverage Unwinding – DHCS Updates

- **DHCS Reports**
  - DHCS will continue requests for data from CalSAWS for the DHCS Medi-Cal Enrollment and Renewal [Data Dashboard](#).
  - Monthly requests for upcoming renewal and failure to complete data for outreach efforts will continue indefinitely.
  - The CMS Unwinding Data Report will end as of June 2024 reporting month.

- **DHCS Processes**
  - Monthly MEDS Restoration Processes ended on 4/30/2024.

- **DHCS SIRFRAs**
  - Continuing SIRFRAs:
    - End of CCR Renewal Data Request*
    - PHE Renewal and Demographics Data Request*
    - PHE Pending Apps and Redeterminations*
    - Failure to Complete Redetermination*
    - SIRFRA 1374 – CMS Unwinding Update Report – May 2024 - October 2024
    - *SIRFRA numbers have changed each month for these requests but will remain the same beginning in June 2024.

CalSAWS Release and Policy Update
Release Overview

Timeline markers:
- 5/20/24
- 5/30/24
- 6/6/24
- 6/15/24
- 6/27/24
- 7/22/24
- 8/1/24
- 8/3/24

Timeline: May 2024 | June | July | August

Major Releases

R24.05 - 5/20/24
Key Highlights
- ACL 23-20 Add BenefitsCal API for DCF Application
- ACL 23-30 - Paid Family Leave CW Time Limit Exemption
- ACL 23-83 - Homeless Assistance Additional at Risk Populations
- Configurable Tasks Categories

R24.07 - 7/22/24
Key Highlights
- ACL 18-43 - Revise CalWORKs M40-107D
- ACL 22-46 - Update Student Exemptions
- MEDIL I 21-13 - Update Postpartum Approval NOA Generation
- MEDS Alerts – Add Program Prioritization to MEDS Alert Task Configurability

Minor Releases

R.24.05.30 – 5/30/24
Key Highlights
- ACWDL 20-21 - Update MC RE Packets Variable Population Logic
- ACL 19-13 - Add the Special Circumstance Icon to the e-Application Summary page
- ACL 22-85 & 21-25 - Update CalFresh Reports
- ACL 23-92 - Update Reports for CalFresh Replacements with New Benefit Type of 'RPSNAP'
- ACL 23-93 Exempt Child Support Income types for formerly assisted CW families

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

R.24.06.27 – 6/27/24
Key Highlights
- ACL 21-24 - Send the SAR 7 the Month Prior to the Submit Month

R.24.08.01 – 8/1/24
Key Highlights
- 2024 AAP, FC, & KG CNI Rate Increase

R.24.08.03 – 8/3/24
Key Highlights
- 2024 AAP, FC, & KG CNI Rate Increase COLA Batch

CalSAWS Release and Policy Update
Release Overview

24.05 Status and Key Dates

- Completed activities
  - County Validation
- In-Progress activities
  - System Test: 99% executed and passed as of May 10th, 2024
  - Release Preparations:
    - Web cast
    - Deployment checklist activities
    - Post release check-point calls

Go-live
05/20/2024

Release Webcast
05/07/2024

6   13   20   27

May

Release Greenlight
05/15/2024

CalSAWS Release and Policy Update
Intake Assignment/Worker Schedule - Overview

Mission

Enhance CalSAWS to assist staff in assigning intakes to eligibility workers, scheduling and rescheduling
intake appointments, establishing worker availability, and tracking Intake appointments.

- 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
Intake Assignment/Worker Schedule – UCD Summary

Conducted **6 four-hour regional workshops** with **10-40** participants each (**122** total)

Recruited participants from each county and region through CRFI 23-128

44 of 58 counties participated in total (75% of all counties)

Met with Regional Managers prior to each regional workshop to research key county concerns

Conducted **7 site visits** at Stanislaus, Merced, San Bernardino, Sacramento, Imperial, Riverside, and Santa Clara counties

CalSAWS Release and Policy Update
Intake Assignment/Worker Schedule – Synthesis

1

Assist counties in Scheduling Intake Appointments (20% of Pain Points)

2

Assist Counties in determining the appropriate Intake Worker to assign (13% of Pain Points)

3

Simplify the Maintenance of Worker schedules (13% of Pain Points)

4

Simply viewing worker schedules (10% of Pain Paints)

5

Simplify the reassignment of existing appointments (6% of Pain Points)

6

Develop "Real-Time" Reports for improved tracking (18% of Pain Points)

7

Training on New System Functionality (4% of Pain Points)

We used these themes to categorize the workshop feedback and draft requirements

CalSAWS Release and Policy Update
Intake Assignment/Worker Schedule – Next Steps

1 Finalize Draft Requirement Synthesis

2 Review Requirements with Workgroup

3 Refine Requirements Based on Feedback
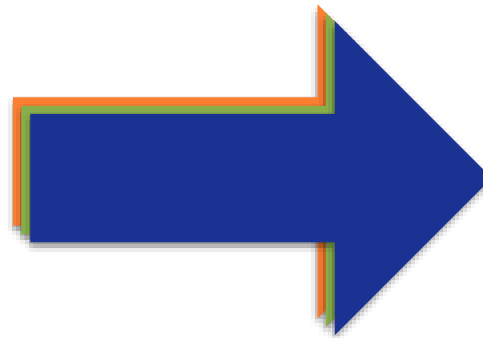
Final Readout of Suggested Enhancements

Contact Center Update

- County Site Visits

- RPA Rollout Update

- Courtesy Call Back Update

- eGain Reporting Issues

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

- **Visits Completed since last meeting**
  - Sacramento 4/22 - 4/25
  - Santa Clara 5/2
- **Visits Upcoming**
  - Tulare 5/14
  - Contra Costa 5/21
  - San Mateo 5/22
  - Solano 5/29

RPA Dashboard: EBT Card Replacement Request
Dashboard data from April 22, 2024, to April 29, 2024

Key Performance Metrics

92.65% Success Rate

1415 Total EBT Requests

1311 Total Successful Requests

102 Total Tasks Created

Robotic Process Automation Update

- Successfully deployed RPA EBT BOT for 10 counties
- Sprint 6 go live is scheduled for 5/9
- 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.

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	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	Complete
Sprint 6 [Sacramento, Humboldt, San Luis Obispo, Marin, Butte]	4/1 – 4/4	4/16 – 4/26	5/9	On Track
Sprint 7/8 Counties with Welcome Bot: Placer, Shasta, Contra Costa, Orange, San Bernardino, Solano, Sutter	4/29 – 5/2	NA	5/30	In Progress
Prod Sprint 9 [Non-CSC - 27 Counties]	5/15	NA	6/27	In progress

Contact Center

Courtesy Callback (CCB) Update

- CalSAWS Optional Custom Courtesy Callback solution – Call Customer First(Fall 2024)

- **AWS update**
  - Updated wait time estimator
  - Voicemail Recognition
  - Enhanced CCB reporting

Contact Center

eGain Reporting

- Enhancing our County Support for eGain Reporting

  - Trainings underway to provide guidance on county specific requirements around metrics and reporting

- Escalating concerns regarding specific production operations and performance to the eGain Executive Team

  - Re-iterating expectations and timelines for issue resolutions and enhancements

  - Improved monitoring and resolution of performance and synchronization issues

Reports Status Update

Reports Update
Ongoing Efforts

UPDATE

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

- CER Committee review on 4/24
- Conducted on 4/25 & 5/9
- Conducted CF 296 Part 1 on 5/2
- Conducted on 4/18
- Scheduled for 5/28
- Scheduled for 5/14

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

Extended through end of May to support next steps for enhanced county support recommendations.

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

Ongoing

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

Distributed on 4/30

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

Ongoing – Counties continue to request access

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

Initial reports accessed for implementation and usage presented at bi-weekly meeting on 5/9

Reports Update
Recommendation Updates

RECOMMENDATION	UPDATE	
Establish County Report Champions & Buddy System	Consortium, ISS Support and Accenture began developing design and strategy in May.	STARTED
Introduce 1:1 Ticket Resolution Support	Santa Clara County first to receive extra support offered.	STARTED
Launch Forumbee for Reports	Targeted start early June	NOT STARTED

Reports Update
Recommendation Updates

RECOMMENDATION	UPDATE	
Consolidate Reports	Consolidation of Payroll Summary Reports in design for 24.07. Larger consolidation tentatively scheduled for 25.01.	STARTED
Enhance Usability of Report Pages	Target to start planning by mid-July	NOT STARTED
Expand Page Export Coverage	Accessing page usage data and identifying appropriate reports. Fall 2024 likely to start	STARTED
Increase Page Mapping Coverage	Targeting 24.07, July 2024, for first SCR.	STARTED
Introduce Report Subscriptions & Notifications	Awaiting funding	NOT STARTED

Reports Update
Commonly Request SCRs

Initial Group

SCR #	Description	Status Update	
CA-274366	Update CA 237 CW logic to account for Multiple Applications -Dispositioned	In design for 24.07 release.	STARTED
CA-264884	Update-CA 237 CW Line 8 Backup	Tentative release: 25.03	NOT STARTED
CA-253826	CalSAWS CalWIN UAT_ CA 237 CW report enhancements	Tentative release: 25.03	NOT STARTED
CA-271149	Update WTW 25/25A logic for Enrollees	Tentative release: 25.03	NOT STARTED
CA-273875	Update SAR 7 Discontinuance Logic -CA 237 CW CA 253 CF 296	Tentative release: 25.05	NOT STARTED

Secondary Group

SCR #	Description	Status Update	
CA-272021	Update TEMP 2220 to Exclude Replacement Benefits		NOT STARTED
CA-270000	Reactivated Expungements for WTW Display on Supplemental Benefit Issuance Registers		NOT STARTED
CA-272415	Update the Direct Deposit Production Reconciliation Report to include the Benefit Month		NOT STARTED
CA-274204	Update Integrated Service Payment/Valuable Detail Claiming Report to include Reactivated Expungements		NOT STARTED

Reports Update
Recommendation Updates

RECOMMENDATION	UPDATE	
Create Reports Documentation	First sets of documents will be distributed at the end of May 2024.	STARTED
Promote Communication	Counties are evaluating their committee members. Customer Engagement roadshows continue.	STARTED
Communicate Ad Hoc Roadmap	Documentation of solutions are underway & planning activities for Roadmap development will occur in later 2024 in a separate forum.	STARTED
Create Ad Hoc Training	Approach in development. Assessing available materials.	STARTED
Review Common Ad Hoc Reports	Targeted for winter 2024	NOT STARTED

3
EXPAND KNOWLEDGE REACH

4
REFINE AD HOC

Reports Update
Recommendation Updates

RECOMMENDATION	UPDATE	
Set Process Expectations	Targeted start of June 2024	NOT STARTED
Establish Automation Expectations	Targeted start of June 2024	NOT STARTED

Next survey in development.

SUMMER 2024

Fresno Gen AI Initiative Update

Fresno - GenAI Call Summary Assist
High-Level solution overview and objectives

Solution Overview

The GenAI Call Summary Assist solution will streamline the post-call summarization process for Contact Center Agents by automatically generating and populating a draft of the call summary on the Call Log Detail page. The agents will be able to review and modify the AI generated summaries before saving them to the system.

Benefits / Objectives

With the GenAI Call Summary Assist solution, we expect to see the following benefits for the Fresno Contact Center:

Reduced Post-Call Wrap Time

Increased Call Summary Consistency

Project Timeline
Timeline for Fresno GenAI Call Summary Assist implementation

The below timeline gives a high-level look at the different activities and target dates for the Fresno GenAI Call Summary Assist implementation.

PROJECT KICKOFF
March 2024

SOLUTION DEVELOPMENT
April 2024 – May 2024

INITIAL GO-LIVE
June 27, 2024

1 **2** **3** **4** **5** **6**

SOLUTION DESIGN
March 2024

TESTING & TRAINING
May 2024 – June 2024

POST IMPLEMENTATION SUPPORT
July 2024 – August 2024

Example Metrics
Key metrics that will be captured once the solution is implemented

Once the Call Summary Assist solution is implemented in late June, we will collect and analyze the following metrics to quantify the benefits, identify areas of improvement, and track the output of the solution.

Average Post-Call Wrap Time

Average amount of time the Contact Center worker spends on call-related tasks after ending a call

Average Handle Time

Average amount of time it takes to resolve a support request, including talk time, hold time, and wrap time

Contact Center Worker Feedback

Feedback sourced from Contact Center workers, including accuracy of summaries, overall satisfaction, and qualitative feedback and suggestions

Number of Summaries Generated

Number of summaries generated by Call Summary Assist

Average Summary Generation Time

Average time it takes Call Summary Assist to generate the call summaries

Percent of Summaries Generated Within 60 Seconds

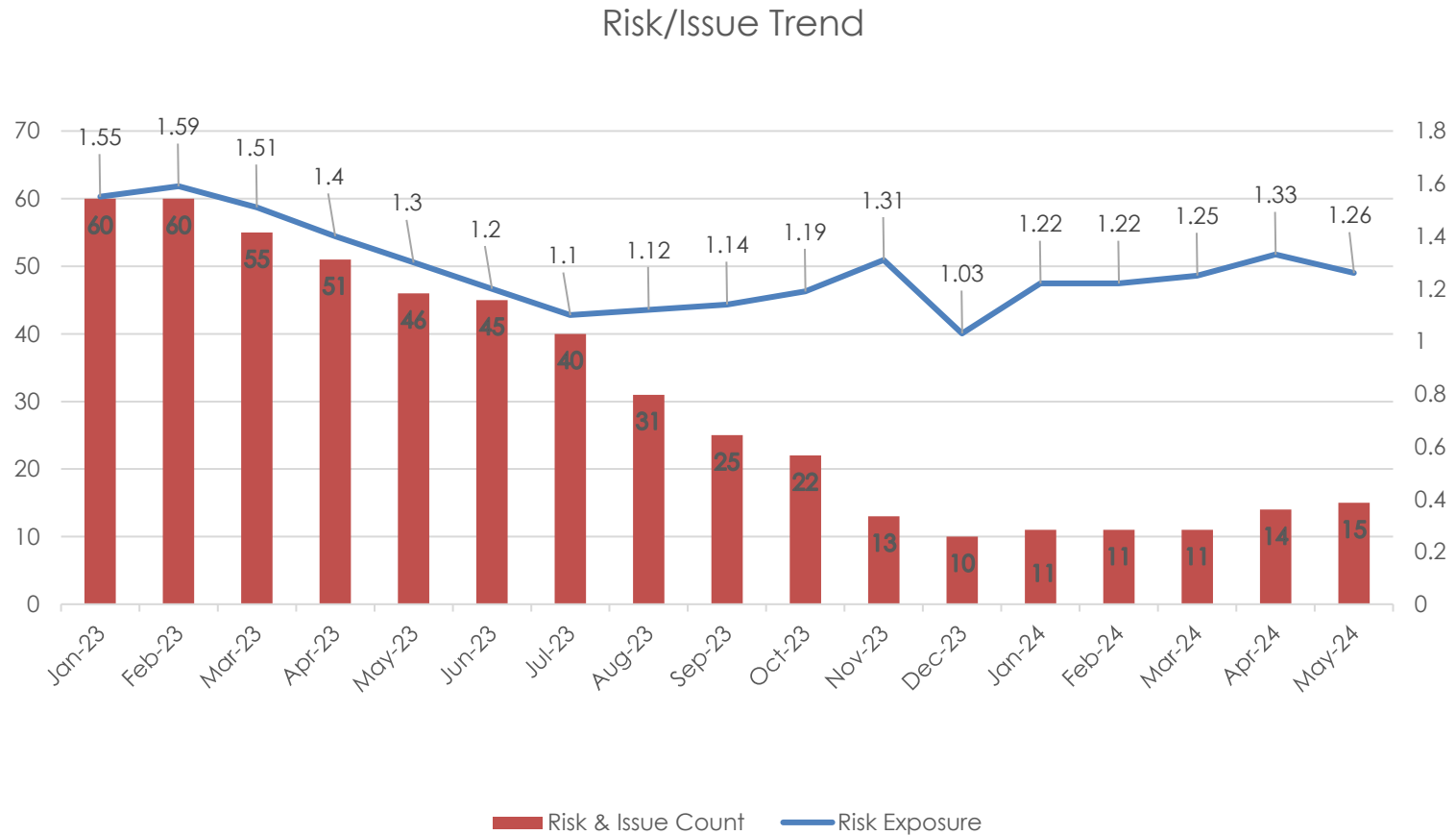Percent of Call Summary Assist summaries generating within expected 60-second time frame

M&E Risks

CalSAWS Project Risks
Risk Exposure Trend

Risk/Issue Trend

Legend: Risk & Issue Count (red bars), Risk Exposure (blue line)

Data points (Risk Exposure / Risk & Issue Count):
- Jan-23: 1.55 / 60
- Feb-23: 1.59 / 60
- Mar-23: 1.51 / 55
- Apr-23: 1.4 / 51
- May-23: 1.3 / 46
- Jun-23: 1.2 / 45
- Jul-23: 1.1 / 40
- Aug-23: 1.12 / 31
- Sep-23: 1.14 / 25
- Oct-23: 1.19 / 22
- Nov-23: 1.31 / 13
- Dec-23: 1.03 / 10
- Jan-24: 1.22 / 11
- Feb-24: 1.22 / 11
- Mar-24: 1.25 / 11
- Apr-24: 1.33 / 14
- May-24: 1.26 / 15

M&O High and Medium 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	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	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

*Please note, 6 low risks are not displayed.

Procurement Update
- CalSAWS M&E
- BenefitsCal

BenefitsCal Procurement Timeline
Key Procurement Tasks

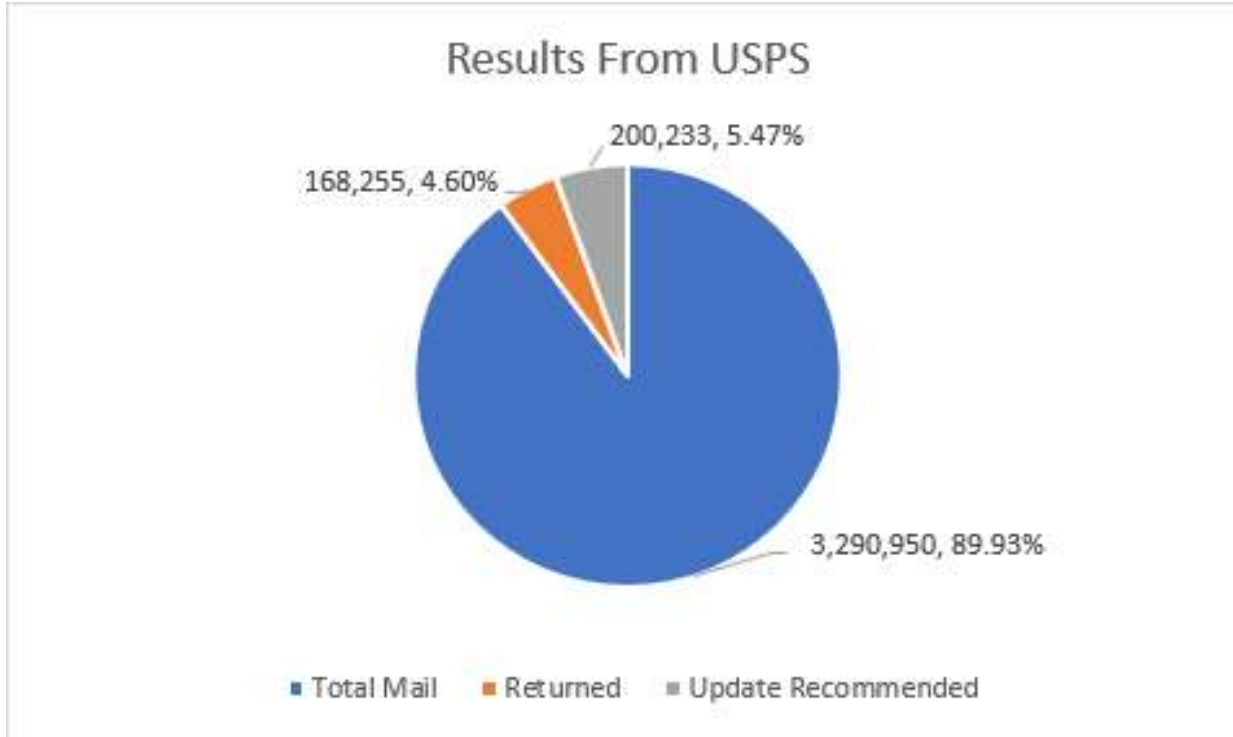|	Procurement Event	Dates
1	State and Federal RFP Reviews and Approval	January 17 – May 28, 2024
2	Release RFP	May 29, 2024
3	Conduct Bidder's Conference	June 11, 2024
4	Bidder Question Period	May 30 – June 18, 2024
5	Consortium Responds on a Flow Basis	June 6 – 26, 2024
6	Consortium Publishes Final 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	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

Return Mail Overview and Status

Central Print Return Mail
Status Update

- Seven Counties have implemented return mail
- Four additional Counties targeting summer of 2024

Results From USPS

200,233, 5.47%
168,255, 4.60%
3,290,950, 89.93%

■ Total Mail ■ Returned ■ Update Recommended

July 2023

December 2023

January 2024

February 2024

February 2024

April 2024

May 2024

Central Print Return Mail
Status Update

Verification with USPS on deliverable status	Journaling of results	Report and/or task created per County preference	Central Print as the Return Mail address instead of the County mailroom. Central Print sorts the envelopes
• Deliverable – No update recommended • Deliverable – update recommended • Undeliverable	• Return mail is always journaled • Address update journaling is optional		• Securely destroys those that were journaled • Returns physical envelopes to the County when the return is carrier initiated or suspected to be carrier initiated

County Feedback has been positive with additional service suggestions such as imaging the carrier initiated return envelopes.
- San Diego – "We get the information on return mail weeks earlier to take action. Looking forward to the imaging implementation."
- San Luis Obispo – "Tasks are going to assigned workers and they look beautiful."

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 – July 2024
    - 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

M&E Roadshows

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 to 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.
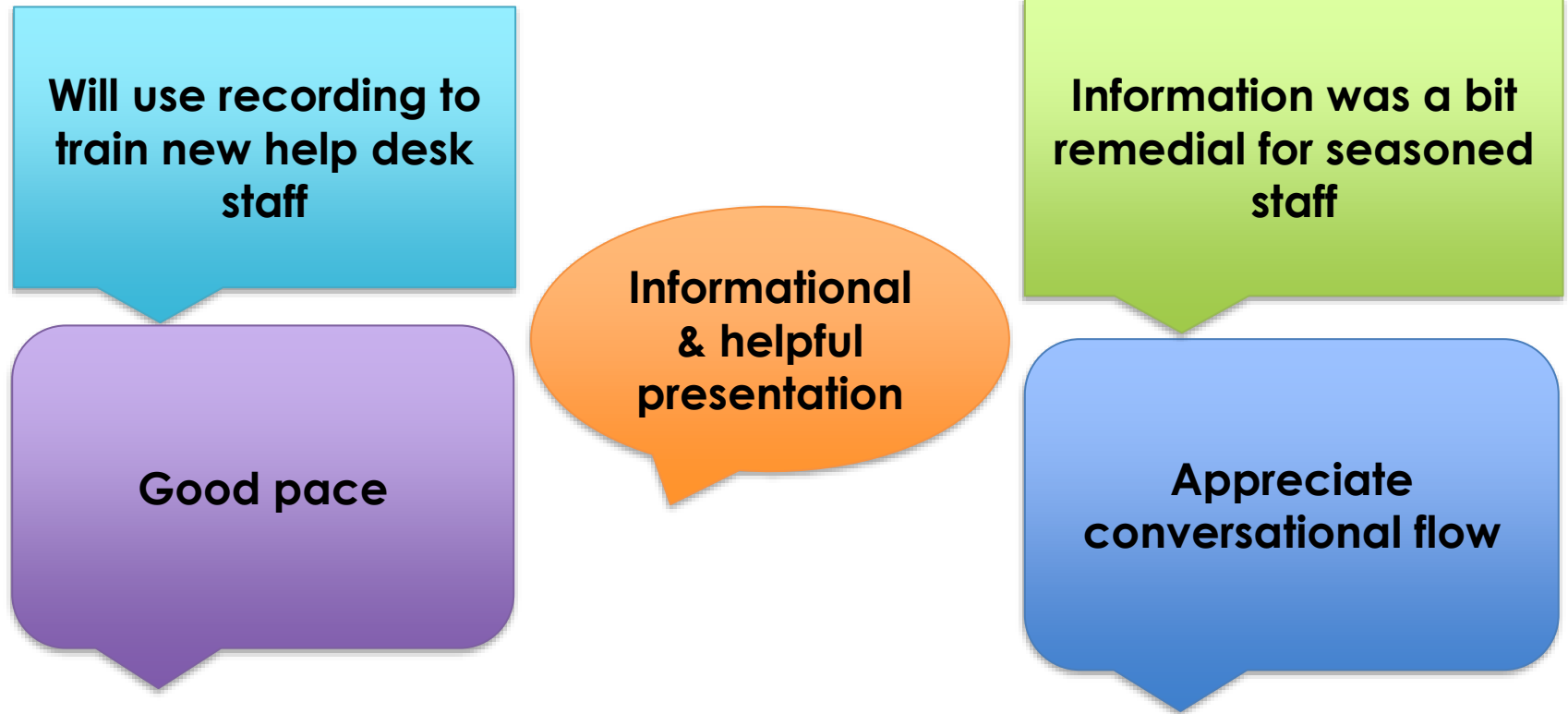
Maintenance & Enhancement (M&E) Roadshows
April Roadshow – Ticketing / SNOW

The April Roadshow covered the topic of Ticketing and ServiceNow (SNOW) and was held on three days, 4/9-4/11/2024. The Ticketing / SNOW Roadshow gave participants a better understanding of the ticketing processes and other features of SNOW.

- 396 participants attended
- 49 counties represented

Maintenance & Enhancement (M&E) Roadshows
April Roadshow – Feedback

-

Will use recording to train new help desk staff

Good pace

Informational & helpful presentation

Information was a bit remedial for seasoned staff

Appreciate conversational flow

Maintenance & Enhancement (M&E) Roadshows
May Roadshow – SCR Lifecycle

The May Roadshow covered the System Change Request (SCR) Lifecycle. Three identical sessions were held from 5/7-5/9/2024. The objective of the SCR Lifecycle Roadshow was to ensure counties understand how the CalSAWS Project tracks functional changes from an initial request to when the design for the change has been approved.

- Topics included:
  - Non-Policy & Policy SCRs
  - County Design Input (CDI)
  - SCR Design
  - Committee SCR Prioritization
  - SCR Planning Group (SPG) & Change Control Board (CCB)

- 492 participants attended
- 48 counties represented

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

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

March 2024 – Governance

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

May 2024 – SCR Lifecycle

Sessions
07/08/24
07/09/24
07/11/24

July 2024– Release Readiness / County Validation

Feb. 2024

Planning

April 2024 – Ticketing/SNOW

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

June 13, 2024 – RCM/SME Orientation

Maintenance & Enhancement (M&E) Roadshows
Next Steps

- RCM & SME Orientations will resume in June.

- CRFI for Roadshow #4 Release Readiness / County Validation will be distributed 6/10/2024. County responses with participant names will be due on 6/21/2024.

- Provide Roadshow updates at a future meeting.

State Partners Updates
- OTSI
- CDSS
- DHCS

Regional Updates

Adjourn Meeting