Cal**SAWS** | JPA Board of Directors Meeting

May 10, 2024

Agenda

1. Call Meeting to Order
2. Confirmation of Quorum and 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 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 Chair to speak.

- All lines will be muted when meeting begins.
- To unmute:
  - ✦ When connected via computer – click the microphone icon.
  - ✦ When connected via telephone – press *6.

Action Items

Action Items

4. Approval of Resolution recognizing John Boule for his contributions to CalSAWS upon his retirement.

5. Approval of Accenture Amendment 32, which includes technical and security updates; updates to hardware and software, updates to technical infrastructure services; updates to the change and county purchase allowances, and an update to the named Executive Director.

Action Items
Accenture Amendment 32

Imaging Extension & Enhanced Support
Alignment of Imaging scope to the M&E transition period offset by savings associated with enhanced technical infrastructure support post go-live.

Hardware/Software
Updates are needed to align hardware/software to the annual tech refresh plan.

New Projects/Scope
Additional scope to align to the CalSAWS January 2024 As-Needed IAPDU for various security upgrades including Zero-Trust and NIST Revision 5, various software upgrades, lobby management updates, and the redesign of CalSAWS purge components to support multiple databases existing in CalSAWS.

Change Notice Allowance for Premise and County Purchases
The Accenture contract includes an allowance for Regulatory & Administrative (R&A) changes, as well as County Purchases.

CalSAWS M&O Schedule 1, Attachment 2 Pricing	Current Total	Revised Total	Difference
Application Maintenance	$132,172,296	$132,172,296	$0
Innovation Lab – One-Time Services	$1,142,453	$1,142,453	$0
Production Operations	$211,934,613	$209,400,853	($2,533,760)
Hardware & Software	$126,173,314	$164,784,641	$38,611,327
Facilities	$12,506,915	$12,506,915	$0
Additional Projects	$39,744,875	$54,530,953	$14,786,078
Production Operations November 2024 Onwards	$28,601,734	$27,389,792	($1,211,942)
Total (Rounded)	$552,276,200	$601,927,903	$49,651,703

Imaging Project Schedule 13, Attachment 2	Current Total	Revised Total	Difference
One-Time Services	$14,571,432	$14,571,432	$0
Technical Infrastructure Services	$8,040,460	$9,084,748	$1,044,288
WAN Administration	$799,116	$799,116	$0
Total (Rounded)	$23,411,008	$24,455,296	$1,044,288

Regulatory & Administrative (R&A) Exhibit C – Schedule D	Current Total	Revised Total	Difference
Change Budget Services	$184,953,426	$259,953,426	$75,000,000
Total (Rounded)	$184,953,426	$259,953,426	$75,000,000

County Purchases Exhibit C – Schedule E	Current Total	Revised Total	Difference
County Purchases	$22,099,932	$37,099,832	$15,000,000
Total (Rounded)	$22,099,932	$37,099,832	$15,000,000

Combined Total for Amendment 32			$140,695,991

Action Items

6. Approval of Consent Items
   a. Approval of the Minutes and review of the Action Items from the April 12, 2024, JPA Board of Directors Meeting.

   b. Approval of Delegated Authority to the CalSAWS Executive Director for AWS through Rackspace Agreement.

   c. Approval of Deloitte Change Order 9, which includes a county purchase and an update to the named Consortium Executive Director.

Informational Items

Quarterly Fiscal Update
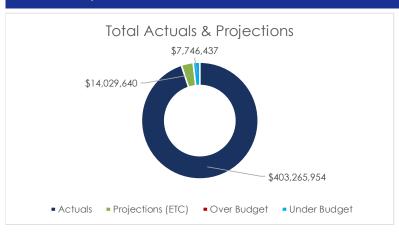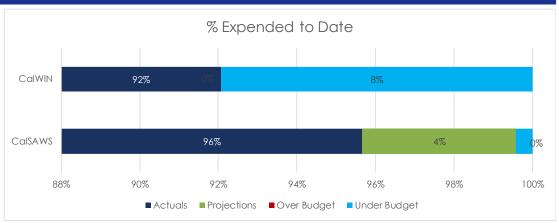
CalSAWS Financial Update
Overview

CalSAWS DD&I/M&O

Premise

CalWIN M&O

JPA Admin

1 Actuals to Date
Based on Vendor Invoices & County Claims

2 Projections (Estimates to Complete)
Estimated Costs for Future Months

3 Estimate at Completion (EAC)
Actual Costs Plus Estimated

4 Total Allocation/Budget
Amount Allocated by Line Item for the Approved Budget

5 Balance
Difference Between EAC and Budget
Negative balance is over budget
Positive balance is under budget

6 % Expended to Date (Actuals)
Percent of Actuals to Date Divided by the Budget

7 % EAC to Budget
Percent of EAC Divided by the Budget

Total Actuals & Projections

$7,746,437
$14,029,640
$403,265,954

- Actuals
- Projections (ETC)
- Over Budget
- Under Budget

% Expended to Date

CalWIN: 92% | 0% | 8%
CalSAWS: 96% | 4% | 0%
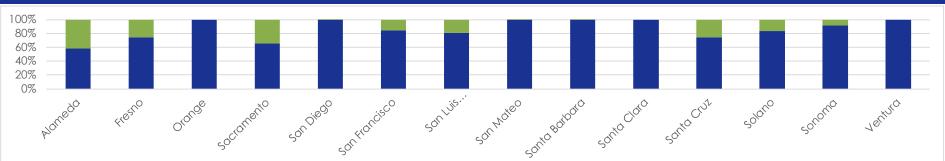
- Actuals
- Projections
- Over Budget
- Under Budget

Category	Actuals to Date[1]	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
CalSAWS	**$336,125,991**	**$13,748,579**	**$349,874,569**	**$351,341,652**	**$1,467,083**	**95.7%**	**99.6%**	
DD&I Non-App. Dev.	$29,891,166	$1,611,939	$31,503,105	$32,223,423	$720,318	92.8%	97.8%	ISS, Staff, and Travel less than planned
DD&I Training	$2,386,203	$0	$2,386,203	$2,588,330	$202,127	92.2%	92.2%	Travel less than planned
CalSAWS M&O	$294,651,545	$12,134,447	$306,785,991	$307,051,070	$265,079	96.0%	99.9%	
M&O Procurement	$1,099,023	$0	$1,099,023	$1,099,023	$0	100.0%	100.0%	
OCAT M&O	$2,041,229	$2,193	$2,043,422	$2,199,419	$155,997	92.8%	92.9%	Software costs less than planned
CalHEERS Interface	$4,990,351	$0	$4,990,351	$4,990,351	$0	100.0%	100.0%	
Covered CA CSC	$1,066,474	$0	$1,066,474	$1,190,036	$123,562	89.6%	89.6%	CSC operations less than planned
CalSAWS Premise	**$29,226,759**	**$0**	**$29,226,759**	**$32,272,479**	**$3,045,720**	**90.6%**	**90.6%**	
CalSAWS Premise	$29,226,759	$0	$29,226,759	$32,272,479	$3,045,720	90.6%	90.6%	ARPA and QA costs less than planned
CalWIN M&O	**$37,542,698**	**$0**	**$37,542,698**	**$40,776,332**	**$3,233,634**	**92.1%**	**92.1%**	
CalWIN M&O	$34,033,353	$0	$34,033,353	$36,853,440	$2,820,087	92.3%	92.3%	
CalHEERS Interface	$2,877,517	$0	$2,877,517	$3,070,178	$192,661	93.7%	93.7%	Costs less than planned
CalHEERS CSCN	$631,828	$0	$631,828	$852,714	$220,886	74.1%	74.1%	
JPA Admin. Budget	**$370,506**	**$281,061**	**$651,567**	**$651,567**	**$0**	**56.9%**	**100.0%**	
CalSAWS 58 Counties	$370,506	$281,061	$651,567	$651,567	$0	56.9%	100.0%	
Total	**$403,265,954**	**$14,029,640**	**$417,295,593**	**$425,042,030**	**$7,746,437**	**94.9%**	**98.2%**	

1. Actuals are based on planned invoices through June (partial) payment month

CalSAWS | SFY 2023/24 DD&I COUNTY SUPPORT STAFF

COMBINED TOTAL	$ 5.4 M Actuals to Date	$ 1.6 M Projections	$ 7.0 M Estimate At Completion	$ 7.0 M Total Allocation	$ .0 M Balance (+Under/-Over)	77% % Expended to Date	100% % EAC to Budget
Alameda	$624,034	$448,927	$1,072,961	$1,072,961	$0	58%	100%
Fresno	$1,239,555	$434,191	$1,673,746	$1,673,746	$0	74%	100%
Orange	$393,487	$0	$393,487	$393,487	$0	100%	100%
Sacramento	$1,142,890	$602,499	$1,745,389	$1,745,389	$0	65%	100%
San Diego	$1,002,011	$94	$1,002,105	$1,002,105	$0	100%	100%
San Francisco	$236,581	$42,619	$279,200	$279,200	$0	85%	100%
San Luis Obispo	$135,644	$32,875	$168,519	$168,519	$0	80%	100%
San Mateo	$156,867	$48	$156,915	$156,915	$0	100%	100%
Santa Barbara	$69,976	$2	$69,978	$69,978	$0	100%	100%
Santa Clara	$61,248	$0	$61,248	$61,248	$0	100%	100%
Santa Cruz	$73,773	$24,994	$98,767	$98,767	$0	75%	100%
Solano	$85,608	$16,864	$102,472	$102,472	$0	84%	100%
Sonoma	$100,711	$8,826	$109,537	$109,537	$0	92%	100%
Ventura	$80,353	$0	$80,353	$80,353	$0	100%	100%

CalSAWS | SFY 2023/24 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
CalSAWS	**$26,676,678**	**$2,863,104**	**$29,539,782**	**$29,922,157**	**$382,375**	**89.2%**	**98.7%**	
Consortium Personnel - County[1]	$9,307,837	$2,791,450	$12,099,287	$12,099,287	$0	76.9%	100.0%	
Consortium Personnel - Contractor[2,3]	$17,368,841	$71,654	$17,440,495	$17,822,870	$382,375	97.5%	97.9%	
CalWIN M&O	**$1,589,740**	**$0**	**$1,589,740**	**$1,872,074**	**$282,334**	**84.9%**	**84.9%**	
Consortium Personnel - County[1]	$53,579	$0	$53,579	$69,195	$15,616	77.4%	77.4%	
Consortium Personnel - Contractor[2,3]	$1,536,161	$0	$1,536,161	$1,802,879	$266,718	85.2%	85.2%	
CalSAWS Premise	**$63,873**	**$0**	**$63,873**	**$63,873**	**$0**	**100.0%**	**100.0%**	
Consortium Personnel - County	$63,873	$0	$63,873	$63,873	$0	100.0%	100.0%	
Consortium Personnel - Contractor[2]	$0	$0	$0	$0	$0	0.0%	0.0%	
Total	**$28,330,291**	**$2,863,104**	**$31,193,395**	**$31,858,104**	**$664,709**	**88.9%**	**97.9%**	

SFY 2022/23 - Consortium Personnel FTE Counts	FTE
CalSAWS DD&I and M&O	**168**
Consortium Personnel - County[1]	71
Consortium Personnel - Contractor[2]	73
Consortium Personnel - Contractor Limited Term[3]	17
TBD[4]	7
CalWIN M&O	**16**
Consortium Personnel - County[1]	1
Consortium Personnel - Contractor[2]	10
Consortium Personnel - Contractor Limited Term[3]	5
TBD[4]	0
Premise	**1**
Consortium Personnel - County[1]	1
Consortium Personnel - Contractor[2]	0
Total	**185**

[1]Includes only Consortium Staff, does not include County Support Staff
[2]Includes RGS and CSAC employees
[3]Includes RGS, CSAC, and First Data Staff (Non-Employees)
[4]Does not account for backfill considerations

CalSAWS | SFY 2023/24 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalWIN M&O	**$7,505,870**	**$0**	**$7,505,870**	**$7,634,846**	**$128,976**	**98.3%**	**98.3%**
CalWIN M&O	$6,834,030	$0	$6,834,030	$6,838,212	$4,182	99.9%	99.9%
CalHEERS Interface Change Budget	$602,604	$0	$602,604	$602,604	$0	100.0%	100.0%
CalHEERS CSCN Change Budget	$0	$0	$0	$124,794	$124,794	0.0%	0.0%
CalWIN Premise	$69,236	$0	$69,236	$69,236	$0	100.0%	100.0%
CalSAWS M&O	**$42,931,512**	**$0**	**$42,931,512**	**$43,155,552**	**$224,040**	**99.5%**	**99.5%**
CalSAWS M&E	$26,899,878	$0	$26,899,878	$26,899,878	$0	100.0%	100.0%
CalHEERS Interface Change Budget	$3,166,044	$0	$3,166,044	$3,166,044	$0	100.0%	100.0%
BenefitsCal	$4,038,124	$0	$4,038,124	$4,038,124	$0	100.0%	100.0%
CalSAWS Premise	$8,827,466	$0	$8,827,466	$9,051,506	$224,040	97.5%	97.5%
TOTAL	**$50,437,382**	**$0**	**$50,437,382**	**$50,790,398**	**$353,016**	**99.3%**	**99.3%**

Application Maintenance
Hours by Service Month

Legend: CalWIN · CalSAWS · CalSAWS Client Correspondence · BenefitsCal

Change Budget Category	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Total
CalWIN M&O	**2,327**	**6,583**	**7,840**	**8,141**	**4,844**	**6,376**	**2,066**	**3,537**	**4,606**	**5,728**	**6,104**	**5,013**	**5,478**	**68,643**
Design & Build	1,015	1,479	1,630	3,530	1,460	1,143	322	805	728	1,257	1,032	206	1,027	15,634
Test	272	2,823	1,924	2,384	1,981	2,630	1,142	970	1,161	1,024	1,015	1,406	1,042	19,774
Management & Other Support	1,040	2,281	4,286	2,227	1,403	2,603	602	1,762	2,717	3,447	4,057	3,401	3,409	33,235
Projection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CalSAWS M&O	**7,789**	**19,742**	**17,675**	**20,750**	**21,631**	**19,647**	**16,572**	**17,139**	**14,795**	**10,352**	**15,651**	**17,109**	**19,315**	**218,167**
Design & Build	2,316	7,762	8,062	8,581	10,041	7,140	6,940	11,953	5,441	2,423	7,050	7,477	10,120	95,306
Test	1,212	2,912	2,053	3,211	3,710	4,083	3,096	3,108	2,948	2,135	2,435	3,424	2,486	36,813
Management & Other Support	4,261	9,068	7,560	8,958	7,880	8,424	6,536	2,078	6,406	5,794	6,166	6,208	6,709	86,048
Projection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CalSAWS Client Correspondence	**-**	**-**	**-**	**23,840**	**6,868**	**4,893**	**5,344**	**4,271**	**3,934**	**2,141**	**12,113**	**3,945**	**5,469**	**72,818**
Client Corresondence	-	-	-	23,840	6,868	4,893	5,344	4,271	3,934	2,141	12,113	3,945	5,469	72,818
Projection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
BenefitsCal	**1,094**	**473**	**1,713**	**1,095**	**1,094**	**2,367**	**1,745**	**1,774**	**2,854**	**3,085**	**4,762**	**4,086**	**3,858**	**30,000**
Design & Build	598	257	959	603	602	1,301	966	981	1,570	1,699	2,626	2,247	2,123	16,532
Test	276	120	436	274	274	592	439	437	714	772	1,194	1,021	965	7,514
Management & Other Support	220	96	318	218	218	474	340	356	570	614	942	818	770	5,954
Projection	-	-	-	-	-	-	-	-	-	-	-	-	-	-
COMBINED TOTAL		26,798	27,228	29,986	27,569	28,390	20,383	22,450	22,255	19,165	26,517	26,208	28,651	316,810

CalSAWS | SFY 2023/24 CONTRACT OBLIGATIONS

Warranty & Liquidated Damages Detail

Category	Contract	Service Month	Amount	Invoice Month	Invoice #
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	April-23	$5,000	September-23	1100942377
SLA - Release Quality within User Acceptance Test	CalWIN	May-23	$3,000	August-23	80011313
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	June-23	$10,000	September-23	1100942377
Hyland - Delay in document processing	CalSAWS	June-22	$79,564	October-23	1100948204
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	June-23	$10,000	September-23	1100942377
Deficiency Service Ticket Resolution Performance	CalWIN	July-23	$34,000	November-23	80013286
CalSAWS System Daily Batch Production	CalSAWS	July-23	$5,000	October-23	1100948269
Prime EDBC Response Time	CalSAWS	August-23	$2,000	December-23	1100969260
CalSAWS System Daily Batch Production	CalSAWS	August-23	$5,000	December-23	1100969260
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	August-23	$5,000	December-23	1100969260
CalSAWS System Daily Batch Production	CalSAWS	October-23	$5,000	December-23	1100969260
CalSAWS System Daily Batch Production	CalSAWS	November-23	$5,000	May-24	TBD
CalSAWS Incident Notification Delay	CalSAWS	December-23	$5,000	May-24	TBD
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	December-23	$5,000	May-24	TBD
CalSAWS System Daily Batch Production	CalSAWS	December-23	$5,000	May-24	TBD
CalSAWS System Daily Batch Production	CalSAWS	January-24	$5,000	May-24	TBD
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	January-24	$10,000	May-24	TBD
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	January-24	$10,000	May-24	TBD
CalSAWS Incident Notification	CalSAWS	January-24	$5,000	May-24	TBD
CalSAWS Incident Notification	CalSAWS	January-24	$5,000	May-24	TBD
AWS	CalSAWS	January-24	$12,079	June-24	TBD
Hyland	CalSAWS	December-23	$8,160	April-24	1100986234
Total			**$238,803**		

Hours & Credits

Category	Actuals	Projections (ETC)	EAC	Allowance	BALANCE +Under / (-Over)
CalWIN Modernization ("Modification") Hours	$10,033,825	$0	$10,033,825	$10,033,825	$0
CalWIN Business Intelligence (BI)	$3,971,215	$0	$3,971,215	$3,971,215	$0
CalWIN IDMS	$1,500,000	$0	$1,500,000	$1,500,000	$0
CalWIN Business Rules Engine (BRE)	$3,500,000	$0	$3,500,000	$3,500,000	$0
Total	**$19,005,040**	**$0**	**$19,005,039**	**$19,005,040**	**$0**

Notes:
All CalWIN modification hours and contract credits have been closed out.

CalSAWS Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 32**)	$167,000,000	
Previously Approved through June 2022	$36,303,520	FIVE - EIGHTEEN
Functional Support, Technical Help Desk, Premise, Portal	$4,633,614	NINETEEN - TWENTY ONE
Various Premise Items	$2,170,998	TWENTY TWO
Various Premise Items	$1,871,351	TWENTY THREE
Various Premise Items (Incl ARPA)	$2,431,090	TWENTY FOUR
Various Enhancements and Premise Items	$5,398,049	TWENTY FIVE
Various Premise Items	$2,700,132	TWENTY SIX - TWENTY SEVEN
Various Premise Items	$1,836,762	TWENTY EIGHT
Various Premise Items	$1,541,846	TWENTY NINE
Various Premise Items	$20,545,920	THIRTY
Various Premise Items and Reconciliation to Actual Costs	$948,661	THIRTY ONE
Various Premise Items, Security and Technical Updates	$4,980,254	THIRTY TWO
Total Allocated Amounts	$85,362,197	
Total Remaining Allocation	$81,637,803	

CalSAWS Contract (County Purchases)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 32**)	$35,000,000	
Approved County Purchases	$1,702,883	FIFTEEN
Approved County Purchases	$5,112,800	TWENTY
Approved County Purchases	$552,126	TWENTY TWO
Approved County Purchases	$6,672,844	TWENTY FIVE- TWENTY SEVEN
Approved County Purchases	$581,873	TWENTY EIGHT
Approved County Purchases	$245,232	TWENTY NINE
Approved County Purchases	$80,147	THIRTY
Approved County Purchases	$658,623	THIRTY-ONE
Total Allocated Amounts	$15,606,528	
Total Remaining Allocation	$19,393,472	

ClearBest	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 8)	$8,829,000	
Various Premise Items	$593,134	CO 8 ONE - THREE
Total Allocated Amounts	$593,134	
Total Remaining Allocation	$8,235,866	

CalWIN Contract (Premise/App Maint. Services)	Total Amount	Change Order Ref.
Total Baseline Allocation	$6,010,749	
Projects 60584, 61307, 58079, and 61073	$1,500,000	SEVEN
BenefitsCal Technical Help Desk Support	$1,367,616	NINE
Total Allocated Amounts	$2,867,616	
Total Remaining Allocation	$3,143,133	

CalWIN Contract (County Purchases)	Total Amount	Change Order Ref.
Total Baseline Allocation	$3,900,000	
Previously Approved	$2,021,592	N/A
Projects 60548 and 60549	$177,419	FOUR
Projects 60858, 60859, 61078 and 61377	$262,105	FIVE
Projects 62909, 63220, 62955, and 62287	$158,426	SIX
Projects 61624, 60975, 61785, 61472, 62259, 62910	$121,752	SIX
Projects 62197, 63468, 63,600, and 63655	$42,034	SEVEN
Project 64149	$9,160	EIGHT
Project 64340, 63833, 64394	$202,073	NINE
Total Allocated Amounts	$2,994,561	
Total Remaining Allocation	$905,439	

Deloitte Portal/Mobile	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 5)	$13,000,000	
Various Premise Items	$1,112,377	ONE - THREE
American Recovery Plan Act (ARPA)	$2,226,023	FOUR-FIVE, SEVEN
Get CalFresh (Code for America) - Security Monitoring	$50,001	SIX
CW Time Clocks	$71,000	EIGHT
ARPA - Release of Information (ROI)	$2,074,391	NINE
ARPA - SAR7/7A UCD Phase 3	$216,910	TEN
Additional Enhancements	$92,890	ELEVEN
ARPA - Communication and Marketing	$1,472,000	TWELVE
ARPA - CalFresh App "Joint Processing" by SSA	$530,664	THIRTEEN
BenefitsCal CalFresh Parity Work	$1,949,536	FOURTEEN
Total Allocated Amounts	$9,795,792	
Total Remaining Allocation	$3,204,208	

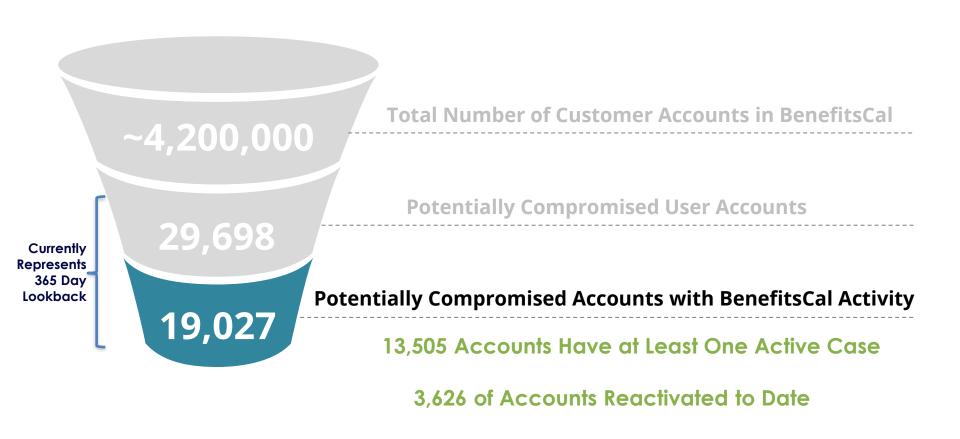| Deloitte CalWIN ISS (County Purchases)	Total Amount	Work Order Ref.
Total Baseline Allocation (Amendment 2)	$8,000,000	
San Francisco County	$615,250	ONE
Santa Clara	$183,236	THREE
San Diego	$256,117	THREE
San Mateo	$496,648	FOUR
San Francisco	$326,376	FIVE-SIX
San Francisco	$53,688	EIGHT**
Total Allocated Amounts	$1,931,315	
Total Remaining Allocation	$6,068,685	

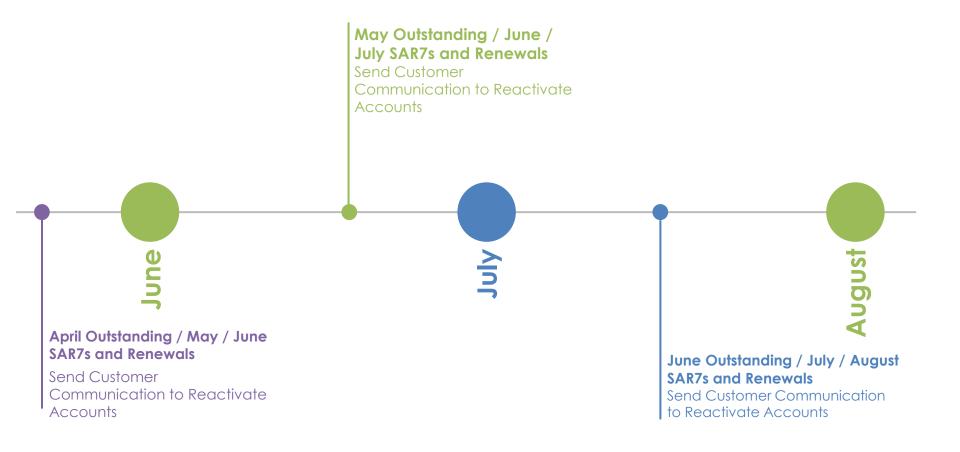* Infosys and First Data removed due to end of contract term

**Pending Board Approval

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 in April for Case Link MFA
- Metrics Comparison Q1 2023 vs Q1 2024
- Update on OCR for Document Upload

BenefitsCal

ROI Workgroup Update

- Most recent meeting was 4/29/2024
  - Focus of the meeting was to continue 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. They will follow their existing processes.
- Next meeting is 5/13/2024. DHCS and CDSS to provide updates for progress of letters.

BenefitsCal

Key Release Highlights and Upcoming Enhancements

24.04

24.05

24.06
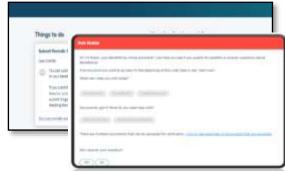
April

May

June

- **Enable Case Linking** functionality With MFA
- **Update Document Type/Upload** feature
- With inline help text, examples and usability improvements

- Additional improvements for **Case Linking functionality**
- **Social Security Admin (SSA) Assisted Apps** in BenefitsCal (implemented with a flag)

- Reenable **See If I qualify intent in Chatbot**
- Update BenefitsCal API to **display the SAR7 link on BenefitsCal** as soon as it's generated
- 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
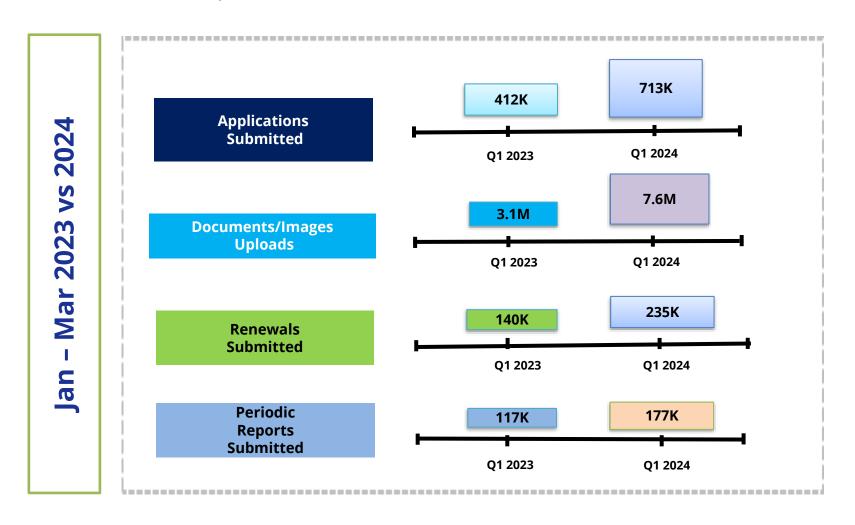
Hypercare Calls (04/26 -05/02)

BenefitsCal

OCM Activities Completed in April for Case Link MFA

- Information Flyers and QRGs are published under CalSAWS.Org-> BenefitsCal

- FAQs, YouTube closed captions and Flyers are translated into 20 threshold languages

BenefitsCal

Metrics Comparison Q1* 2023 vs Q1 2024

Jan – Mar 2023 vs 2024

Applications Submitted

- 412K — Q1 2023
- 713K — Q1 2024

Documents/Images Uploads

- 3.1M — Q1 2023
- 7.6M — Q1 2024

Renewals Submitted

- 140K — Q1 2023
- 235K — Q1 2024

Periodic Reports Submitted

- 117K — Q1 2023
- 177K — Q1 2024

*Q1 2023 metrics reflects the first two Waves of CalWIN migration

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 Feb	Mar	QA
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

Quality Assurance Verification - Complete

- ☑ 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. Examples include:
    - ☑ Release Management, Functional Enhancements
    - ☑ Technical Maintenance and Upgrade Planning
    - ☑ Service Level Agreement (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
  - Continue on-going maintenance on the Welcome and Authentication BOTs
  - Completed eCCP deployment to the remaining C-IV counties
- 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
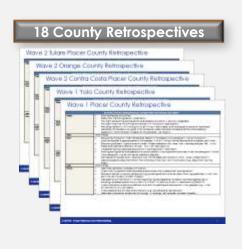
None

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
  - ☐ Support the development of Forumbee on Reports

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

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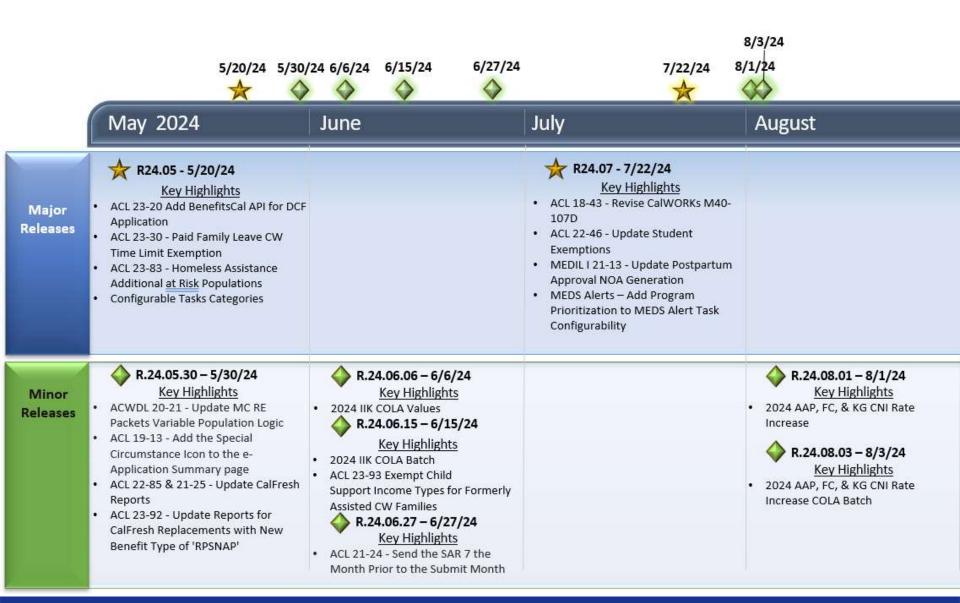
- ## DHCS Processes
  - Monthly MEDS Restoration Processes ended on 4/30/2024.

- ## 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.
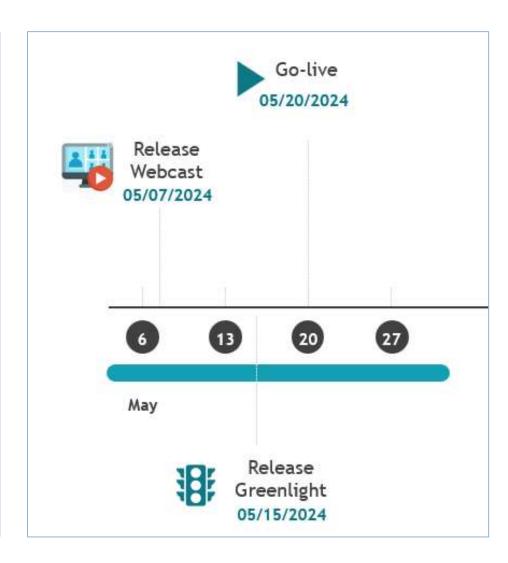
CalSAWS Release and Policy Update
Release Overview

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

Months: 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'

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
- ACL 23-93 Exempt Child Support Income Types for Formerly Assisted CW Families

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: 92% executed and passed as of May 3rd, 2024
  - Release Preparations:
    - Web cast
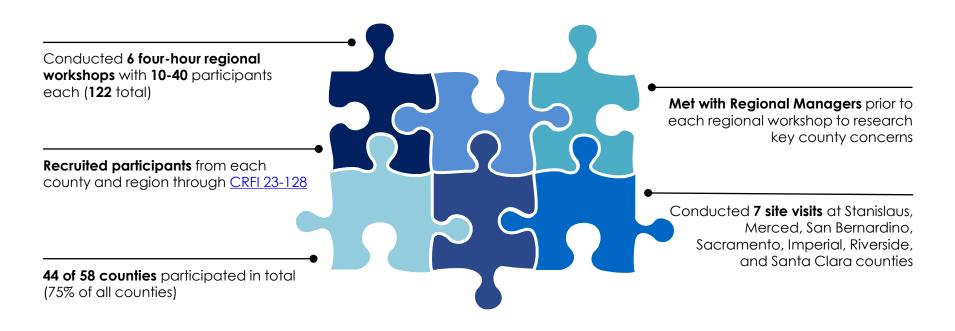   - Deployment checklist activities
    - Post release check-point calls

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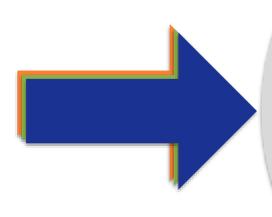
We used these themes to categorize the workshop feedback and draft requirements

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
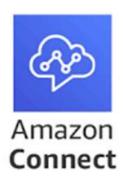
Contact Center

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

1
ENHANCE COUNTY SUPPORT

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
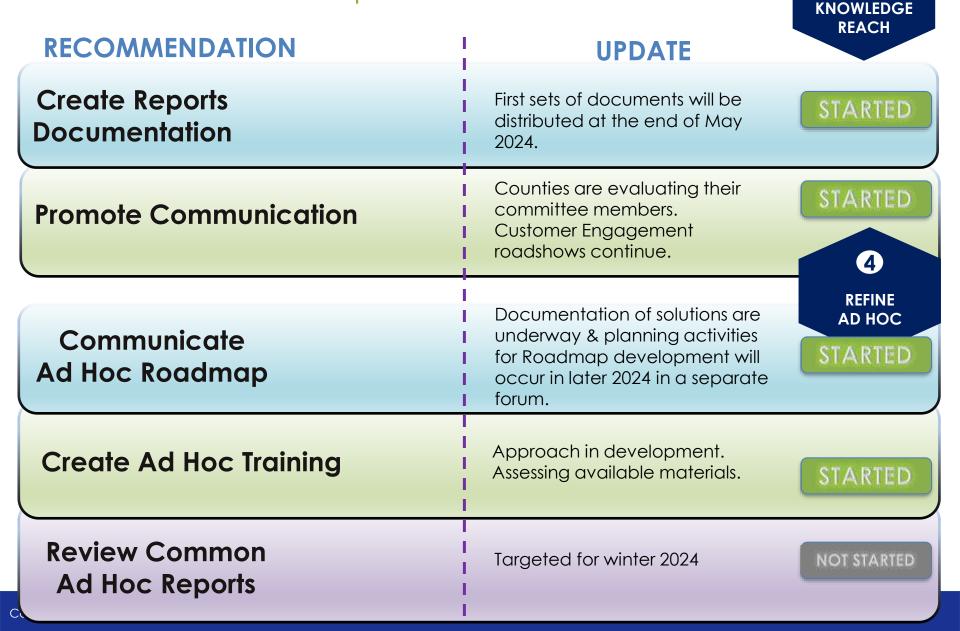
Initial Group

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

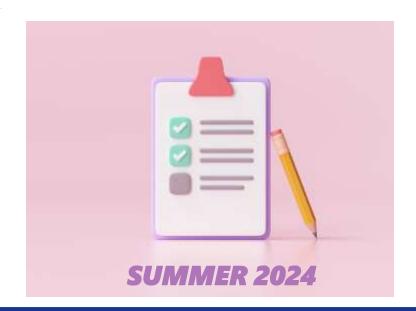| SCR #	Description	Status Update	
CA-272021	Update TEMP 2220 to Exclude Replacement Benefits		NOT STARTED
CA-270000	Reactivated Expungements for WTW Display on Supplemental Benefit Issuance Registers		NOT STARTED
CA-272415	Update the Direct Deposit Production Reconciliation Report to include the Benefit 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

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
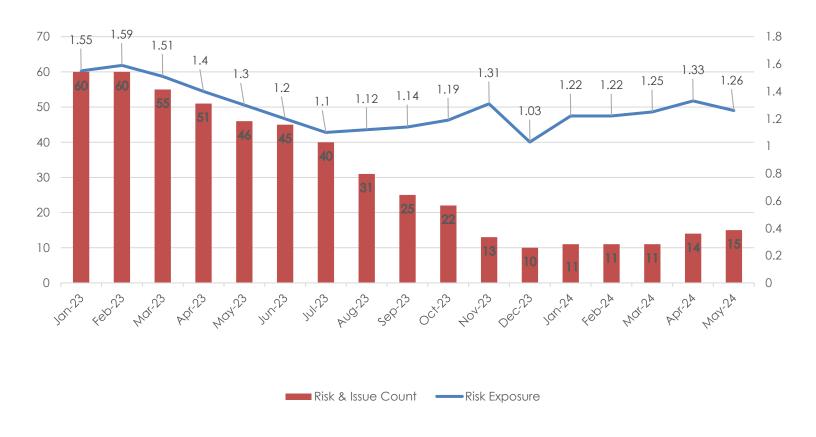
M&E Risks

CalSAWS Project Risks
Risk Exposure Trend

Risk/Issue Trend

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
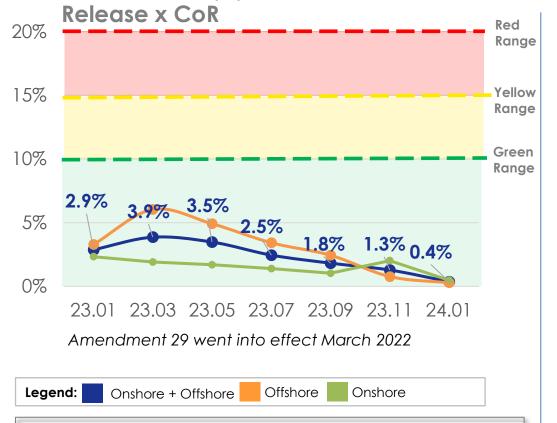
*Please note, 6 low risks are not displayed.

Quarterly Statistics Update

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

CalSAWS Quality, Defect, Stability, Tickets Stats

CalSAWS Application Release Quality Metrics

Release x CoR

Amendment 29 went into effect March 2022

Legend: ■ Onshore + Offshore ■ Offshore ■ Onshore

TYPICAL RANGES
GREEN: The amount of time being spent on rework is lower than expected. This will enable the project to be completed faster and more efficiently.
AMBER/**RED**: The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

Cost of Rework (CoR) is the ratio of effort spent performing rework on deliverables to the total effort to Date
(Actual Rework effort Hours/ Actuals To Date Hours)*100

The combined onshore and offshore CoR for CalSAWS code release deployment remains low across releases indicating high quality releases with the additional offshore team
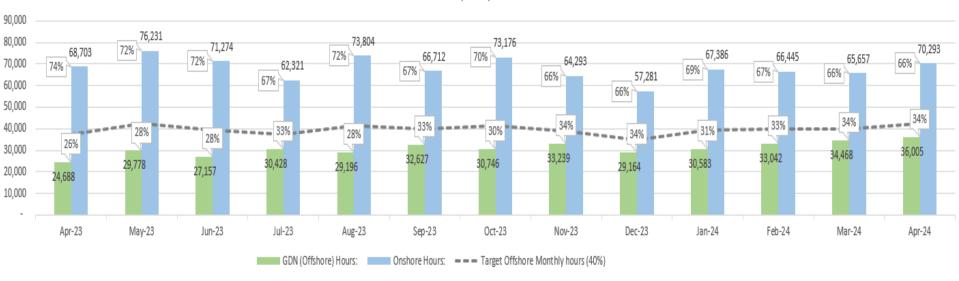
The CoR line graph may increase for the releases if additional defects are found in the future

New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 24.03 COR numbers will be available after 24.05 goes live

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

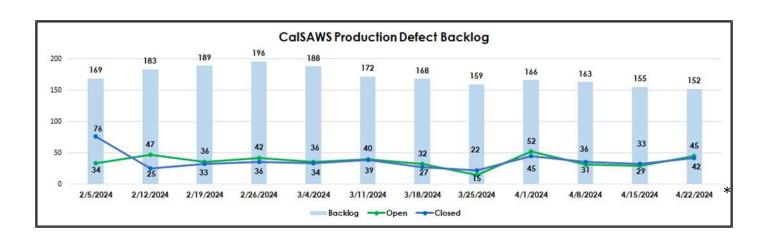Onshore vs. Offshore (GDN) Hours Across All Teams

Month	GDN (Offshore) Hours	Offshore %	Onshore Hours	Onshore %
Apr-23	24,688	26%	68,703	74%
May-23	29,778	28%	76,231	72%
Jun-23	27,157	28%	71,274	72%
Jul-23	30,428	33%	62,321	67%
Aug-23	29,196	28%	73,804	72%
Sep-23	32,627	33%	66,712	67%
Oct-23	30,746	30%	73,176	70%
Nov-23	33,239	34%	64,293	66%
Dec-23	29,164	34%	57,281	66%
Jan-24	30,583	31%	67,386	69%
Feb-24	33,042	33%	66,445	67%
Mar-24	34,468	34%	65,657	66%
Apr-24	36,005	34%	70,293	66%

Legend: GDN (Offshore) Hours: — Onshore Hours: — Target Offshore Monthly hours (40%)

Per Amendment 29: "Use of GDN resources may approximate 40% of the available hours required for Accenture to deliver its obligations under Exhibit X CalSAWS M&O Extension"

CalSAWS Quality, Defect, Stability, Tickets Stats
Production Defects Backlog

Open production defect rate has remained level, demonstrating system stability with no major spikes outside of normal ranges

The Production defect backlog bar-chart depicts the balance of open (unresolved Production defects) and closed defects, week-over-week. Defects are closed upon system test validation and release deployment to Production

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

Perf Req #	LD Applies	Performance Requirement Title	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr*
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	✅	✅	✅	✅	✅	✅	✅	✅

* April SLA Metrics have yet to be formally reviewed by QA and Consortium

Legend: ✅ SLA Met   ❌ SLA Not Met   🟣 LD Applies

Performance reports are emailed to RMs and posted to the CalSAWS Web Portal for County PPOCs and County Help Desk Staff.

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

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1 ⚪⚪🟢	2 ⚪⚪🟢	3 ⚪⚪🟢	4 ⚪⚪🟢	5 ⚪⚪🟢	6 ⚪⚪🟢
7 ⚪⚪🟢	8 ⚪⚪🟢	9 ⚪⚪🟢	10 ⚪⚪🟢	11 ⚪⚪🟢	12 ⚪⚪🟢	13 ⚪⚪🟢
14 ⚪⚪🟢	15 ⚪🟡⚪ 1:20pm – 3:00pm Users unable to access imaging solution	16 ⚪⚪🟢	17 ⚪⚪🟢	18 ⚪⚪🟢	19 ⚪⚪🟢	20 ⚪⚪🟢
21 ⚪⚪🟢	22 ⚪⚪🟢	23 ⚪⚪🟢	24 ⚪⚪🟢	25 ⚪⚪🟢	26 ⚪⚪🟢	27 ⚪⚪🟢
29 ⚪⚪🟢	29 ⚪⚪🟢	30 ⚪⚪🟢	1	2	3	4

Hyland Imaging - 2024 Monthly Uptime

Target: 99.90%

System will be available for logging in, retrieving documents, and importing documents

Month	Reported Incidents	Event Duration (Minutes)	Monthly Uptime Percentage
January	0	0	100%
February	0	0	100%
March	0	0	100%
April	1	81	99.81%
May			
June			
July			
August			
September			
October			
November			
December			
TOTALS	1	81	99.95% (avg)

Hyland

Hyland Imaging - 2024 Monthly Page Views

Target: 90%

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

Month	Page Views 70 KB or Smaller	Percentage of 70 KB or Smaller Page Views in 2 Seconds or Less		All Page Views* *not part of SLA	Percentage of All Page Views in 2 Seconds or Less
January	16,400,837	**98.82%**		41,538,003	96.64%
February	15,630,798	**99.00%**		39,576,402	96.74%
March	16,689,289	**99.08%**		40,976,394	96.86%
April	16,693,143	**99.18%**		40,845,057	96.83%
May					
June					
July					
August					
September					
October					
November					
December					
TOTALS	65,414,067	99.02% (avg)		162,935,856	96.77% (avg)

Hyland™

Hyland Imaging - 2024 Monthly Database Transactions

Target: 90%

Database transaction will be complete in <= 1 second

Month	Total Number of Database Queries	Percentage of Queries Completed in 1 Second or Less
January	3,062,229,372	99.94%
February	2,715,243,294	99.94%
March	2,822,731,008	99.94%
April	2,866,789,340	99.94%
May		
June		
July		
August		
September		
October		
November		
December		
TOTALS	11,466,993,014	99.94% (avg)

Hyland

BenefitsCal Performance Metrics

SLA #1: Daily Online transactions – inquiry screens (bounded)*
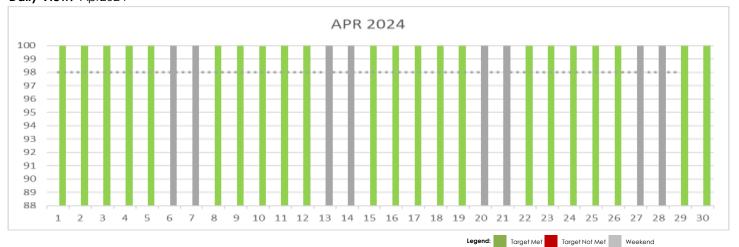**Target:** 98% with an average response time < 2 seconds
Actual: **Exceeded daily online transaction (bounded) response time at no less than 99.92%** since January 2022. Measured daily and reported on Monthly
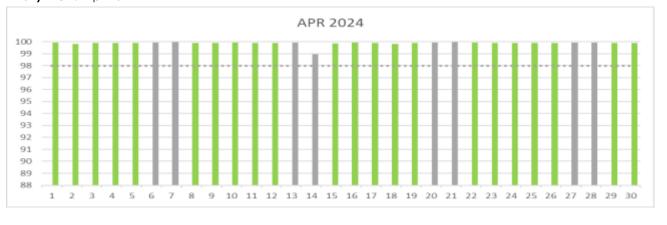
Monthly View: Jan 2022 – Apr 2024

Daily View: Apr 2024

APR 2024

Legend: Target Met Target Not Met Weekend

BenefitsCal Performance Metrics

SLA #2: Daily Online transactions – inquiry screens (unbounded)
Target: 98% with an average response time <10 seconds*

Actual: **Exceeded daily online transaction (unbounded) response time at no less than 98.62%** since January 2022. Measured daily and reported on Monthly

Monthly View: January 2022 – Apr 2024

Daily View: Apr2024

Legend: Target Met   Target Not Met   Weekend

BenefitsCal Performance Metrics
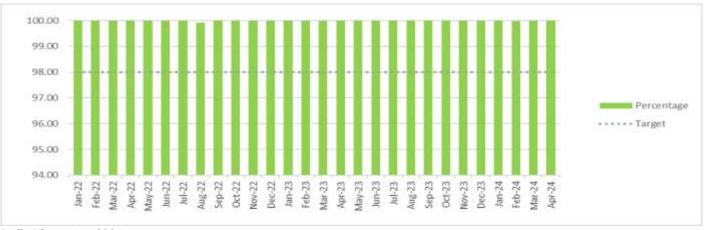
SLA #3: Daily BenefitsCal Hosted API transactions
Target: 98% with an average response time <2 seconds
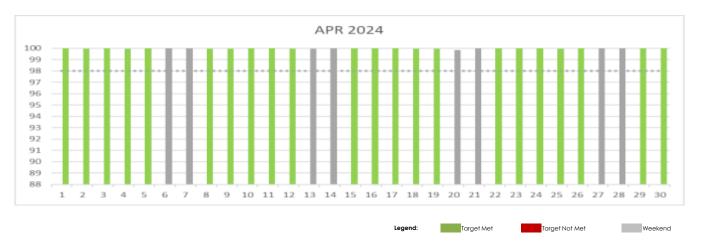Actual: **Exceeded daily API transaction response time at no less than 99.97%** since
January 2022. Measured daily and reported on Monthly

Monthly View: January 2022 – Apr 2024

Daily View: Apr 2024

Legend: Target Met · Target Not Met · Weekend

Procurement Update

- M&E Procurement

- BenefitsCal Procurement

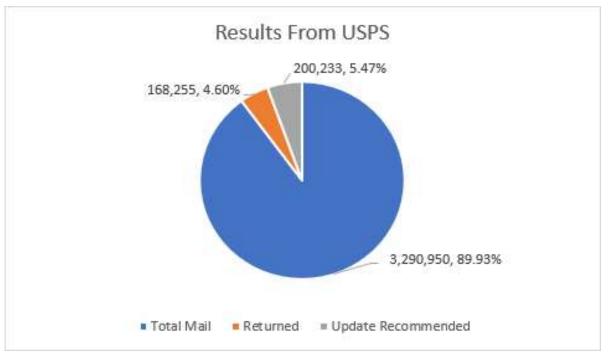# BenefitsCal Procurement Timeline
Key Procurement Tasks

	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

- Six 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%

Legend: ■ Total Mail ■ Returned ■ Update Recommended

July 2023

December 2023

January 2024

February 2024

May 2024

February 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
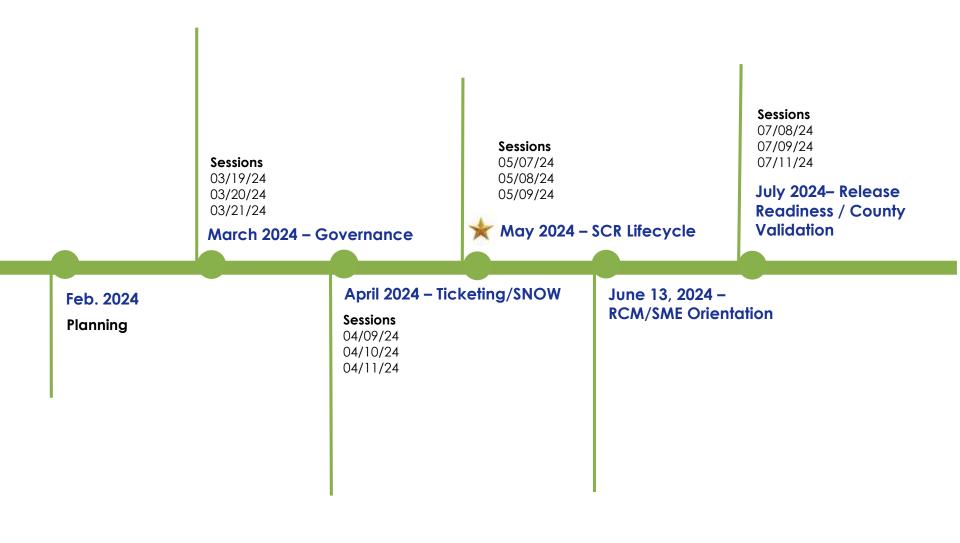
Appreciate conversational flow

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

The May Roadshow will cover the System Change Request (SCR) Lifecycle. Three identical sessions will be held from 5/7-5/9/2024. The objective of the SCR Lifecycle Roadshow is 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 include:
  - Non-Policy & Policy SCRs
  - County Design Input (CDI)
  - SCR Design
  - Committee SCR Prioritization
  - SCR Planning Group (SPG) & Change Control Board (CCB)

- 594 participants registered
- 48 counties represented

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/SNOW

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 13, 2024 – RCM/SME Orientation

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

July 2024– Release Readiness / County Validation

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.

Adjourn Meeting