CalSAWS | JPA Board of Directors Meeting

July 12, 2024

Agenda

1. Call Meeting to Order
2. Confirmation of Quorum, Welcome new JPA Board Members, 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

6. Approval of Consent Items

   a. Approval of the Minutes and review of the Action Items from the June 27, 2024, joint meetings of the JPA Member Representatives and JPA Board of Directors.

   b. Approval of Accenture Change Notice 33, which includes eight premise items, reconciliation and fiscal year shifts of previously approved changed notices, transition readiness support, and county purchases.

   c. Approval of ClearBest Work Orders 4 and 5, which include Quality Assurance services for eleven premise items and technical and security enhancements.

Informational Items

Performance Trends

Performance Trends
SLAs and Onshore/Offshore Hours

CalSAWS SLAs
March – May 2024
Accenture

	Performance
✕ **System Availability**	**99.4%**

5/24/24 – Intermittent Issues with eCCP (20 minutes to resolve)
5/30/24 – Unable to Access CalSAWS (40 minutes to resolve)

✕ **Helpdesk Diagnosis**	**99%**

1 incident - Dispatch - System-Wide Low (Priority 3)
Total of 15.95 Hours to Complete Dispatch – Target 8 hours

✕ **System Response**	**99.97%**

5/30/24 – Screen time > 10 seconds (99.8%) – Target 99.9%

✓ **Batch Completion**	**100%**
✓ **Training Environment Availability**	**100%**
✓ **Standard Report Response**	**100%**
✓ **Security Incident Response**	**100%**
✓ **Disaster Recovery Response**	**100%**
✕ **ForgeRock**	**99%**

5/30/24 – Users Unable to Log in (40 minutes to resolve)
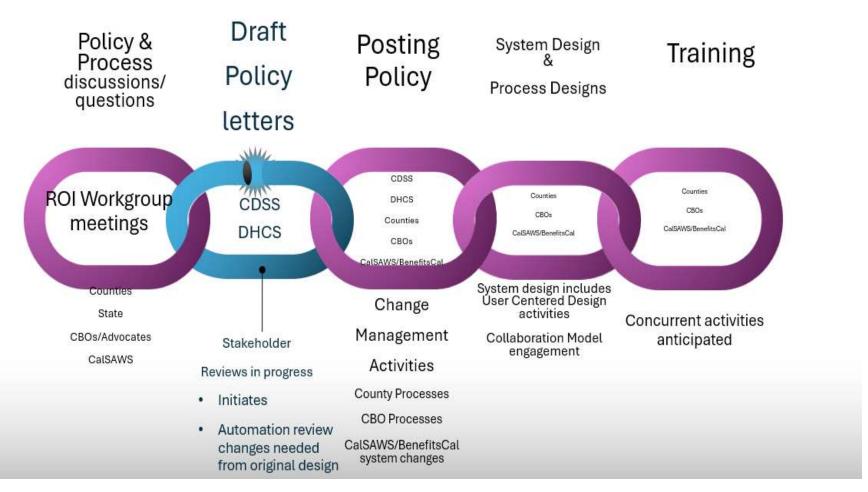
BenefitsCal SLAs
March – May 2024
Deloitte

	Performance
✓ **All Daily Transactions**	**100%**

Imaging SLAs
March – May 2024
Hyland Solutions

	Performance
✕ **Monthly Uptime**	**99.81%**

04/15/24 - 1 incident
(81 minutes to resolve)

✓ **Monthly Page Views**	**100%**
✓ **Monthly Database Transactions**	**100%**

Onshore/Offshore Metrics
March – May 2024

	Onshore %	Offshore %
BenefitsCal Hours	45%	55%
CalSAWS Hours	65%	35%

CalSAWS Cost of Rework

	Onshore %	Offshore %
R24.03	1.01%	2.00%
R23.09 - R24.01	1.84%	1.80%
Target	**$\leq$ 10% (combined)**	

BenefitsCal Update

- ROI Update
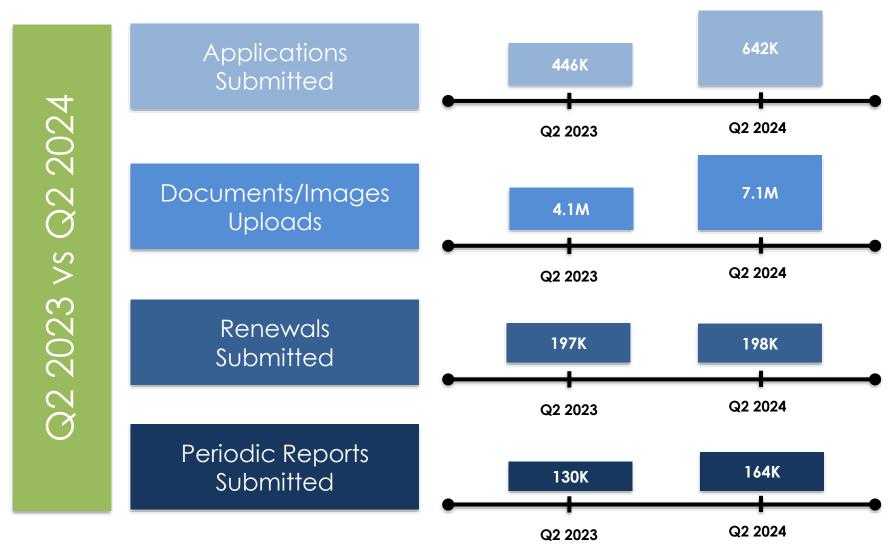- Metrics Comparison Q2 2023 vs Q2 2024

BenefitsCal
ROI Update

- Draft policy letters have been shared for stakeholder review, input due 7/10/24.
- ROI Workgroup meetings: 7/8/24 and 7/29/24

BenefitsCal
BenefitsCal Adoption – Q2* 2023 versus 2024

Q2 2023 vs Q2 2024

Applications Submitted

446K
642K

Q2 2023 — Q2 2024

Documents/Images Uploads

4.1M
7.1M

Q2 2023 — Q2 2024

Renewals Submitted

197K
198K

Q2 2023 — Q2 2024

Periodic Reports Submitted

130K
164K

Q2 2023 — Q2 2024

Q2 2023 metrics reflect the first three Waves of CalWIN Migration

Release and Policy Update
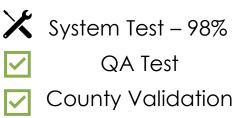- CalSAWS Release Highlights
- CNI Rate Increases

CalSAWS Release and Policy Update
CalSAWS Release Overview

July 2024	August	September
Major Releases		
⭐ **R24.07 - 7/22/24** **Key Highlights** • ACL 18-43 - Revise CalWORKs M40-107D • ACL 22-46 - Update Student Exemptions • ACWDL 22-24 - Update EDBC Rules to prevent granting Accelerated Enrollment (8E) to MC applicants • Conditional CAPI updates		⭐ **R24.09 - 9/23/24** **Key Highlights** • ACL 19-102 Update Fraud determination when suspending CalWORKS Recovery Accounts • ACL 22-74 Add and Automate ABAWD Form CF 886 (11/23) • CMS Certification Recommendations (OCB/ORR) - e-Verifications Phase I • ACL 23-35 - Revisions of ORR-6 Refugee Program Reporting
Minor Releases		
🔶 **R.24.07.03 – 7/3/24** **Key Highlights** • 2024 MBSAC & IIK COLA Batch 🔶 **R.24.07.25 – 7/25/24** **Key Highlights** • 2024 AAP, FC, & KG CNI Rate Increase 🔶 **R.24.07.27 – 7/27/24** **Key Highlights** • 2024 AAP, FC, & KG CNI Rate Increase COLA Batch	🔶 **R.24.08.29 – 8/29/24** **Key Highlights** • ACWDL 24-09 - Update on CHDP Interface • ACWDL 24-09 - Remove the questions related to CHDP from the Health Care Referral List page • ACWDL 24-09 - Children's Presumptive Eligibility & The Newborn Gateway	🔶 **R.24.09.12 – 9/12/24** **Key Highlights** • 2024 CF COLA, CW MAP & CW IRT Values 🔶 **R.24.09.14 – 9/14/24** **Key Highlights** • 2024 CF COLA, CW MAP & CW IRT Batch

CalSAWS Release and Policy Update
CalSAWS Release Overview

Testing Activities

- System Test – 98%
- ☑ QA Test
- ☑ County Validation

Release Communications

- ☑ Webcast
- ☑ Release Notes
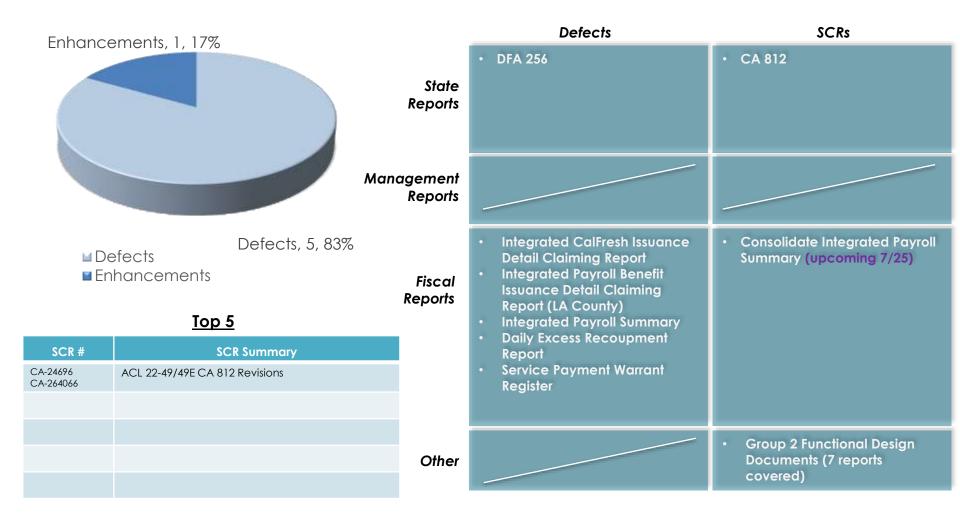- ☑ Release Newsletter

Deployment

Greenlight (7/17)

Code Deployment (7/21)

Daily Calls (7/22-24)

Reports Status Update
- Fiscal Reports defects backlog

Reports Update
Updates made since last JPA

Enhancements, 1, 17%

Defects, 5, 83%

- Defects
- Enhancements

Top 5

SCR #	SCR Summary
CA-24696 CA-264066	ACL 22-49/49E CA 812 Revisions

	Defects	SCRs
State Reports	• DFA 256	• CA 812
Management Reports		
Fiscal Reports	• Integrated CalFresh Issuance Detail Claiming Report • Integrated Payroll Benefit Issuance Detail Claiming Report (LA County) • Integrated Payroll Summary • Daily Excess Recoupment Report • Service Payment Warrant Register	• Consolidate Integrated Payroll Summary **(upcoming 7/25)**
Other		• Group 2 Functional Design Documents (7 reports covered)

Reports Update

Focus: Fiscal Reporting

Defects ⚠️

- DFA 256 and Integrated CalFresh Detail Report Do Not Reconcile – **7/25**
- Integrated Service Payment / Valuable Detail Claiming Report
  - (Monthly) Missing Same Day Unclaimed Cancellation - **5/19**
  - (Daily) Summary and Detail Do Not Reconcile – **6/20**

Enhancements ➕

- ACL 23-92 Update Report for CalFresh Replacements with New 'RPSNAP' EBT Benefit Type - **5/30**
- ACL 22-49/49E CA 812 Revisions – **7/11**
- Consolidate Integrated Payroll Summary Reports – **7/25**

Upstream Issues 🧩

- CalFresh EBT Replacement Issuances with wrong EBT Benefit Type – **6/5**
- Ten (10) instances of Late county files resulting in inaccurate reports

Between 5/1 and 7/31:

Twenty (20) Fiscal defects deployed

☑ Remaining 2 defects for fiscal reports scheduled for the 1st week of August

Six (6) Fiscal enhancements deployed

☑ Remaining 2 SCRs Prioritized by Committee for Fiscal Reports scheduled to complete by 25.05

Forty-six (46) Fiscal reports reran

☑ Operations teams continue to work with counties and reports are reran timely

Fresno GenAI Update

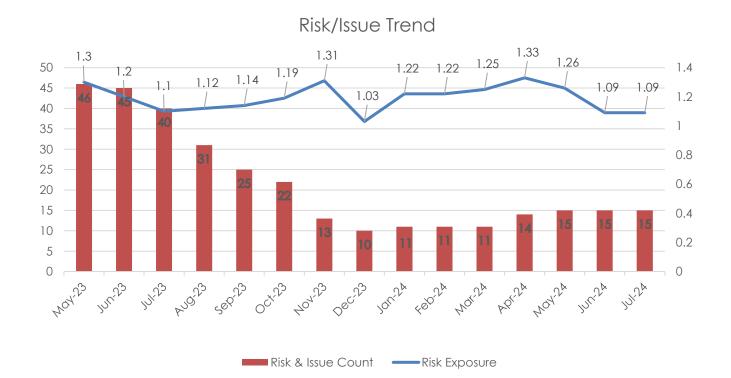# Fresno GenAI Call Summary Assist
Post Go-Live Metrics

The Fresno GenAI Call Summary Assist solution Phase 1 (CalWORKs queues only) was deployed the evening of June 27, 2024. Below captures production metrics from **June 28, 2024 and July 1, 2024**:

Key Performance Metrics – Generative AI		
1042 Summaries Generated	**100%** Summaries Generated Within 60s	**8s** Average Call End to Summary End

Eligibility Worker Feedback

Highlights:
- "Good at organizing the flow of the phone call"
- "It is great, no suggestions"
- "Call Summary Assist has been very consistent with CalWORKs calls I have been receiving."

Suggestions:
- Shorter summaries can be repetitive and longer summaries can lack all details
- Sometimes incorrectly capturing numbers, names, and addresses

Key Performance Metrics – Contact Center

Inbound CalWORKs Calls
13%
Reduction in Average Post-Call Wrap Time
12%
Reduction in Average Handle Time

Outbound Calls
25%
Reduction in Average Post-Call Wrap Time
22%
Reduction in Average Handle Time

M&E Risks

CalSAWS Project Risks
Risk Exposure Trend

Risk/Issue Trend

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

Month	Risk & Issue Count	Risk Exposure
May-23	46	1.3
Jun-23	45	1.2
Jul-23	40	1.1
Aug-23	31	1.12
Sep-23	25	1.14
Oct-23	22	1.19
Nov-23	13	1.31
Dec-23	10	1.03
Jan-24	11	1.22
Feb-24	11	1.22
Mar-24	11	1.25
Apr-24	14	1.33
May-24	15	1.26
Jun-24	15	1.09
Jul-24	15	1.09

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	Issue
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
- M&E Procurement
- BenefitsCal Procurement

Procurement Update
M&O Procurement

- One Appeal filed by Accenture on February 15.
- Key Upcoming Dates:
    - Briefs due from both parties: July 12
    - Appeal Hearing: August 30
    - Appeal Decision: September 19

Procurement Update
BenefitsCal Key Procurement Tasks

	BenefitsCal Procurement Event	Dates
1	Release RFP	May 29, 2024
2	Conduct Bidder's Conference	June 11, 2024
3	Bidder Question Period	May 30 – June 25, 2024
4	Consortium Responds on a Flow Basis	June 6 – 26, 2024
5	Consortium Issues RFP Addendum 1	June 14, 2024
6	Consortium Issues RFP Addendum 2	June 25, 2024
7	Consortium Publishes Final Q&A and RFP Addendum 3	July 3, 2024
8	Bidders Submit Request to OTSI for Proposal Folder	July 15, 2024
9	Proposals Due	July 30, 2024
10	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	July 31, 2024 – February 5, 2025
11	Prepare and Approve Vendor Selection Report	February 6 – March 18, 2025
12	Publish Notice of Intent to Award and VSR	March 19, 2025
13	Contract Negotiations	March 24 – April 3, 2025
14	State Contract Approval	April 4 – May 8, 2025
15	Federal Contract Approval	May 9 – July 14, 2025
16	Contingency Period	July 15 – August 18, 2025
17	JPA BOD Approval	August 22, 2025
18	Contract Start	September 2, 2025
19	Transition-In Period	September 2, 2025 – February 27, 2026

Adjourn Meeting