



CalSAWS | Project Steering Committee Meeting

August 15, 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 July 18, 2024, PSC Meeting and review of Action Items.



Informational Items

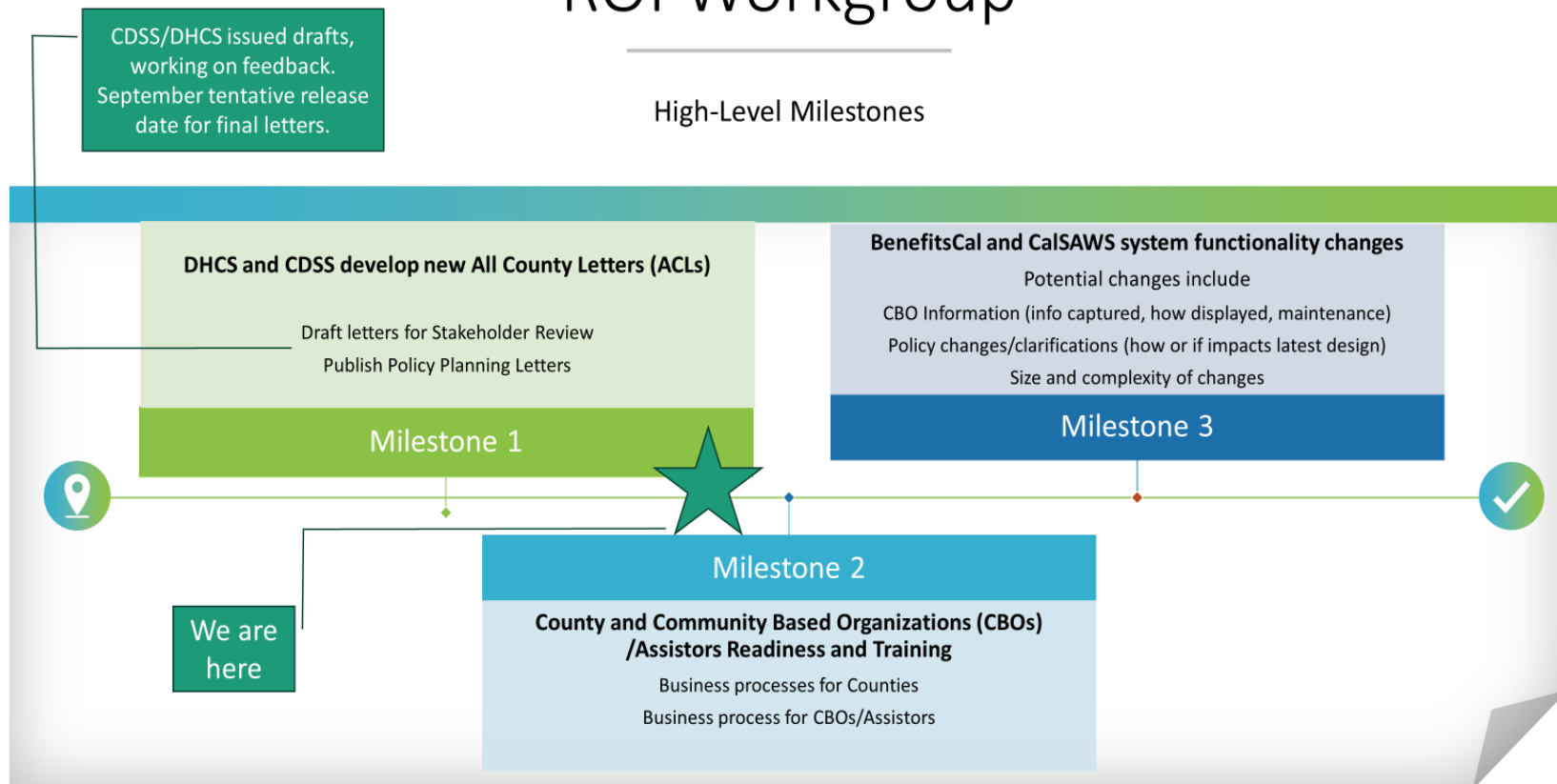


BenefitsCal Update

- ROI Workgroup Update
 - Customer Campaign Update (Outbound Called ID)
 - Release Highlights
 - ABAWD Implementation Update
- 
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ROI Workgroup

High-Level Milestones



- CDSS and DHCS have released draft policy letters for stakeholder review and collected input by July 10, 2024.
- Next workgroup meeting is scheduled on 08/26/24 and group is reviewing the application permutations in conjunction with the draft ACL/ACWDL

BenefitsCal

CalSAWS Outbound Customer Campaign Changes

- SCR CA-239498 Released 24.07.11
 - Updated Outbound Caller ID for outbound call campaigns/robocalls.
 - ✦ Caller ID phone number updated to match text campaigns
 - ✦ Caller ID branded BenefitsCal
 - 844-859-2100 updated for outbound calls and text
 - ✦ Includes handling for cross county zip codes
- SCR CA-272531: Released for 24.07 baseline
 - Updates outbound text campaign name from CalSAWS to BenefitsCal
 - ✦ Incorporated feedback on text verbiage from stakeholders (CA-273436)
 - One-time text sent to opt-ed in customers informing of change
 - Announcement on BenefitsCal to be posted 7/22/24

Title	All text messages will now come to you from BenefitsCal
Body	You will now receive text messages about your case from BenefitsCal instead of CalSAWS. Any message sent to you from the County will come from text code 72422. If you have any questions, please call 844-859-2100 or visit www.calsaws.org/thlp

- Updates Terms and Conditions page on CalSAWS.org

Note: CalSAWS has service to brand campaigns/caller ID to prevent SPAM/spoofing for campaigns. Texts (SMS) are sent from carrier approved short code. CalSAWS conforms to all FCC and Carrier regulations on Robo Calling/Texting.

BenefitsCal

Key Release Highlights and Upcoming Enhancements

24.08

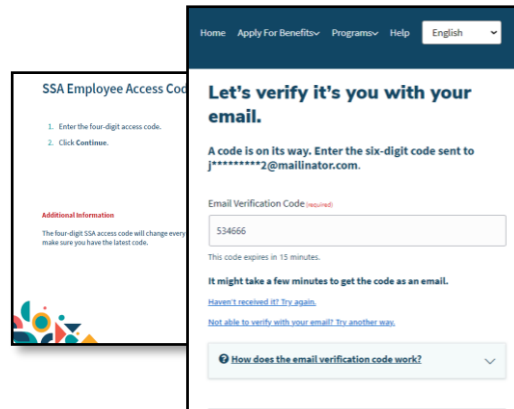
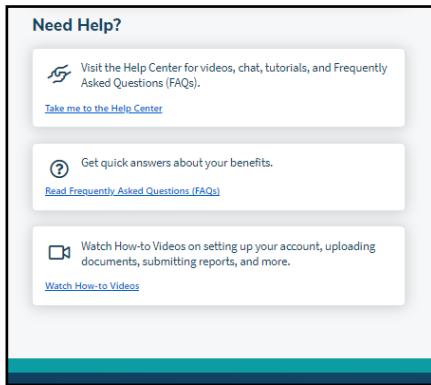
August

24.09

September

24.10

October



- UCD sessions and design activities for the ABAWD Implementation
- Link to **YouTube Videos** on the dashboard and banner
- Technical improvement to **limit the data available** in browser session
- **Implement enhancements to SSA Assisted App Flow** in BenefitsCal & Turn on the flag so SSA Assisters can start submitting apps through BenefitsCal
- Additional improvements for Customer's **Login Journey in BenefitsCal**
- Update the Language options in BenefitsCal to include **Mandarin (Simplified Chinese)**

BenefitsCal

CalFresh Able Bodied Adults Without Dependents (ABAWD) Implementation Update

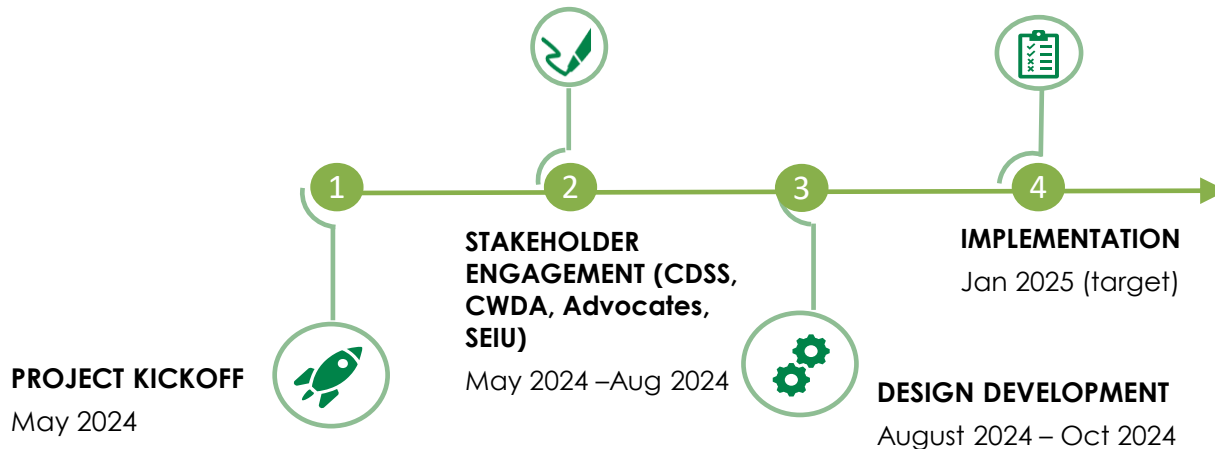
The ABAWD waiver is expected to expire in October. The scope on BenefitsCal :

Add **ABAWD exemptions** in Apply for Benefits flow in BenefitsCal

Display the **ABAWD time limit** on the customer dashboard

Allow CalFresh customers with a BenefitsCal account to:

- ✓ **Report ABAWD exemptions**
- ✓ **Report work requirements**
- ✓ **Request corrections** after initial application, for example, as an option to request ABAWD exemptions via **Support Requests**.





Release and Policy Update



CalSAWS Release and Policy Update

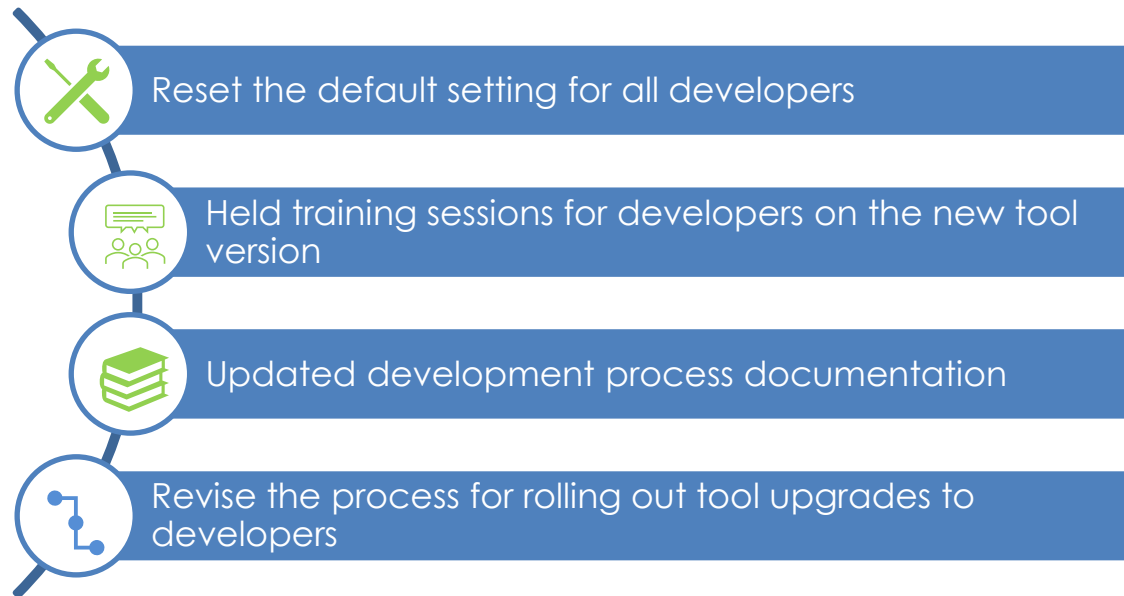
CalSAWS Release Overview

- Executed batch to apply the California Necessities Index (CNI) Rate increases for Foster Care, KinGAP, and Adoption Assistance programs on July 27, 2024
 - Case lists, as described in the batch memorandum, were made available to the counties on July 29, 2024
- Executed a mass replacement for eight counties on August 1, 2024, for residents that suffered food losses as a result of wildfires, power outages, and Public Safety Power ShutOff (PSPS) events July 1 - 10, 2024
- Replaced 60% of July 2024 regular CF benefits for the below counties and zip codes
 - Butte: 95916
 - Mariposa: 95345, 95338
 - Placer: 95728
 - Plumas: 95923, 96137, 95984, 96020, 95983, 95956, 95934, 95971, 95947
 - San Mateo: 94021
 - Santa Barbara: 93254
 - Shasta: 96065, 96062
 - Tehama: 96061, 96063, 96074, 96075, 96029, 96059

CalSAWS Release and Policy Update

CalSAWS Release Overview

- Deployed 24.07 on July 28, 2024
 - Code merge issue was discovered during regression testing that led to a one-week delay in release deployment
 - Conducted a root cause analysis on the 24.07 code merge issue. A development tool upgrade was automatically pushed out to developers. The new version of the tool changed a setting for code mergers. This change was not communicated to developers
 - Action items:



CalSAWS Release and Policy Update

CalSAWS Release Overview

	8/29/24	9/5/24	9/7/24	9/23/24	10/3/24	TBD	TBD	11/25/24
	August 2024		September		October		November	
Major Releases				★ R24.09 - 9/23/24 <u>Key Highlights</u> <ul style="list-style-type: none"> ACWDL 24-07 - 2024/2025 Family Members Base Allocation Amount ACL 22-74 Add and Automate ABAWD Form CF 886 (11/23) CMS Certification Recommendations (OCB/ORR) - e-Verifications Phase I MEDIL I 21-31 - CalHEERS eHIT: Alternate Format Options ACL 22-55 - WTW Pregnancy Exemption 				★ R24.11 - 11/25/24 <u>Key Highlights</u> <ul style="list-style-type: none"> ACL 23-35 - Revisions of ORR-6 Refugee Program Reporting ACL 24-07 - Update CW 2186A and CW 2184 to include PFL and WTW pregnancy exemptions ACL 23-94 - Family Reunification Funding MEDS Alerts – Add Program Prioritization to MEDS Alert Task Configurability
Minor Releases	◆ R.24.08.29 – 8/29/24 <u>Key Highlights</u> <ul style="list-style-type: none"> 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 ACL 23-92 - Update EBT 2259 Transactions Section to be Dynamic - Phase 2 	◆ R.24.09.05 – 9/5/24 <u>Key Highlights</u> <ul style="list-style-type: none"> 2024 CF COLA, CW MAP & CW IRT Values* 	◆ R.24.09.07 – 9/7/24 <u>Key Highlights</u> <ul style="list-style-type: none"> 2024 CF COLA, CW MAP & CW IRT Batch* <p><i>* Pending receipt of final numbers. Alt dates – 9/12 and 9/14 respectively.</i></p>	◆ R.24.10.03 – 10/3/24 <u>Key Highlights</u> <ul style="list-style-type: none"> New State Food Benefit Type for CalFresh Replacements Due to Electronic Theft 	◆ R.24.10.XX – TBD <u>Key Highlights</u> <ul style="list-style-type: none"> ACL 24-54 - Resource Limit Increase for CW/RCA 	◆ R.24.10.XX – TBD <u>Key Highlights</u> <ul style="list-style-type: none"> ACIN I-XX-24 - 2025 State Minimum Wage 		

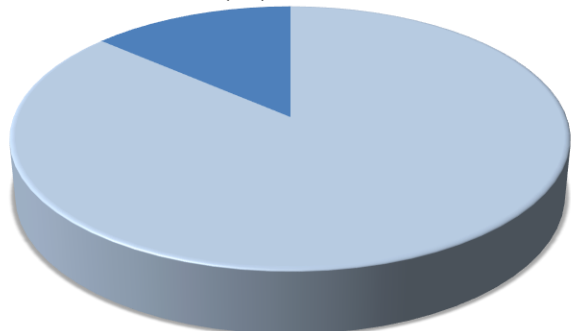


Report Status Update

Reports Update

Updates made since last JPA

Enhancements, 3, 14%



Defects, 19, 86%

■ Defects

■ Enhancements

Top Changes

SCR/Defect #	Summary
SCR CA-278555	Consolidate the Integrated Payroll Summary Report
Defect CA-279591	Add logic to consistently handle incorrectly used 'Other' person claim code
Defect CA-280864	Update logic to display the correct Due Months

Other

Defects

- CF 256
- CA 237 CW
- CW 237 CW Line 8 Backup
- CA 255
- CA 253
- CMSP 237
- CMSP 237 Detailed Backup Report
- WTW 25
- WTW 25A
- CA 237 FC
- FNS 209
- CA 812

State Reports

Management Reports

Fiscal Reports

SCRs

- CA 237 CW
- CA 255
- CA 253

- Application Processing Timeliness

- E-Hit Dashboard
- Medical Renewals Listing Report
- DPSS Renewals Performance Measures Dashboard

- Collections Receipt Daily Report
- Collections Receipt Monthly Report
- Controls Unreceived Voucher Report
- Integrated CalFresh Issuance Detail Claiming Report

- Consolidate Integrated Payroll Summary
- Main Payroll CalFresh EBT Production Reconciliation Report
- Main Payroll CalFresh Issuance Register
- Main Payroll CalFresh Issuance Summary

- Second group of Functional Design Documents (7 reports covered)
- Release Note Report

* July 13 - August 16

Reports Update

Focus: Fiscal Reporting

Defects



Five (5) Open as of 8/7:

- CA-279107 – Controls Unreceived Voucher Report Generating for Non-LA Counties – **Target 8/8**
- CA-279439 – Collections Receipt Daily Details and Summary Don't Reconcile – **Target 8/15**
- **NEW** CA-280504 – CF 256 and Integrated CF Detail Claiming Report Incorrectly Including WINS/LIHEAP/SUAS Replacements – **Target 8/29**
- **NEW** CA-280665 – FNS 209 – Cash Refunds on Line 20b instead of Line 20a – **Target August Release**
- **NEW** CA-281277 – Collections Receipt Monthly and Daily Not Reconciling – **Target 24.09**

Between 7/13 and 8/16:

Nineteen (19) Fiscal defects deployed

- Remaining Defects in development and targeted for resolution

Enhancements



- Implemented first phase of fiscal report consolidation on 8/8 – High priority from counties

Three (3) Fiscal enhancements deployed

- Five (5) Additional SCRs planned through the 25.07, July Release

Upstream Issues



- SCR CA-200644 – Update Eligibility rules to treat CalWORKs Aid Codes 3U and 3W as 'Mixed' instead of 'State' Funded
Status: Currently in Design for 24.11, November release
- Twelve (12) Counties submitted late files resulting in report re-executed.

Ninety-Nine (99) Fiscal Reports Re-Executed

- Operations & Reports teams will be reaching out to discuss recurring issues and impact





Fresno GenAI Initiative Update

Post Go-Live Metrics

Fresno GenAI Call Summary Assist

The Fresno GenAI Call Summary Assist solution was fully deployed to production in June/July. Below captures production metrics since launch from **June 28, 2024 through August 3, 2024**:

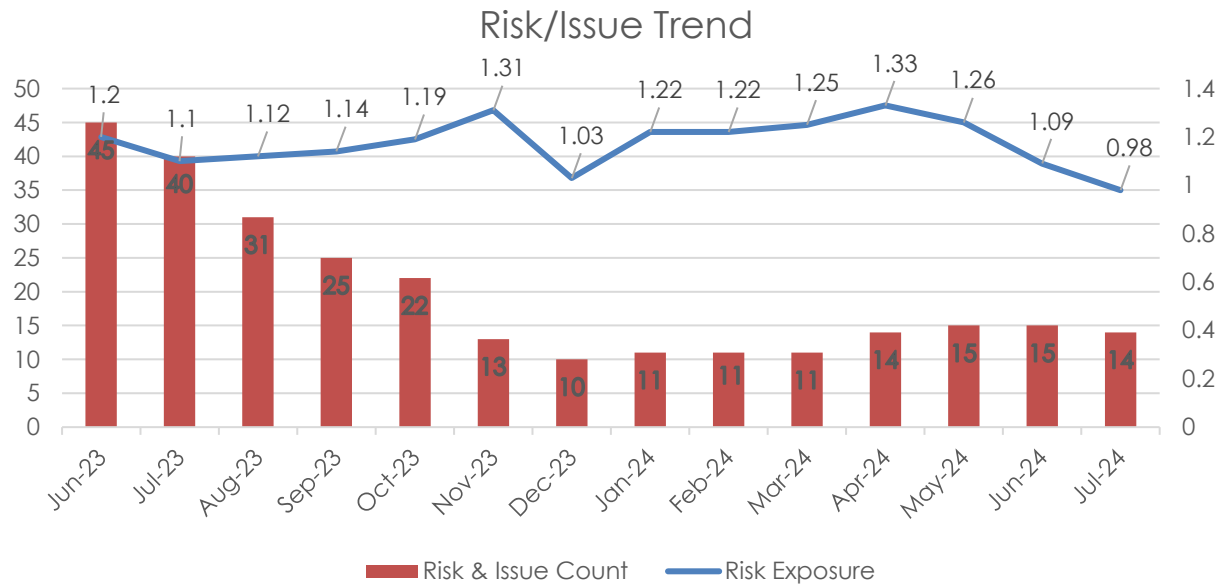
Key Performance Metrics – Generative AI		
23,037 Summaries Generated	100% Summaries Generated Within 60 seconds	8 seconds Average Call End to Summary End
12% Reduction in Average Post-Call Wrap Time	10% Reduction in Average Handle Time	82% GenAI Summary Content Retained

Eligibility Worker Feedback
<p>Highlights:</p> <ul style="list-style-type: none">• “Works at capturing the main points of the call so Eligibility Workers only need to make minor edits”• “So far it’s a great compliment to our duties”• “I am finding the assistance quite helpful in closing out phone calls more accurately and efficiently. Keep up the good work!” <p>Suggestions:</p> <ul style="list-style-type: none">• Room for improvement in recording client’s names, dates, phone numbers and addresses• Feedback on summary sometimes being repetitive or sometimes lacking details

M&E Risks

CalSAWS Project Risks

Risk Exposure Trend



M&O High and Medium Risk Summary

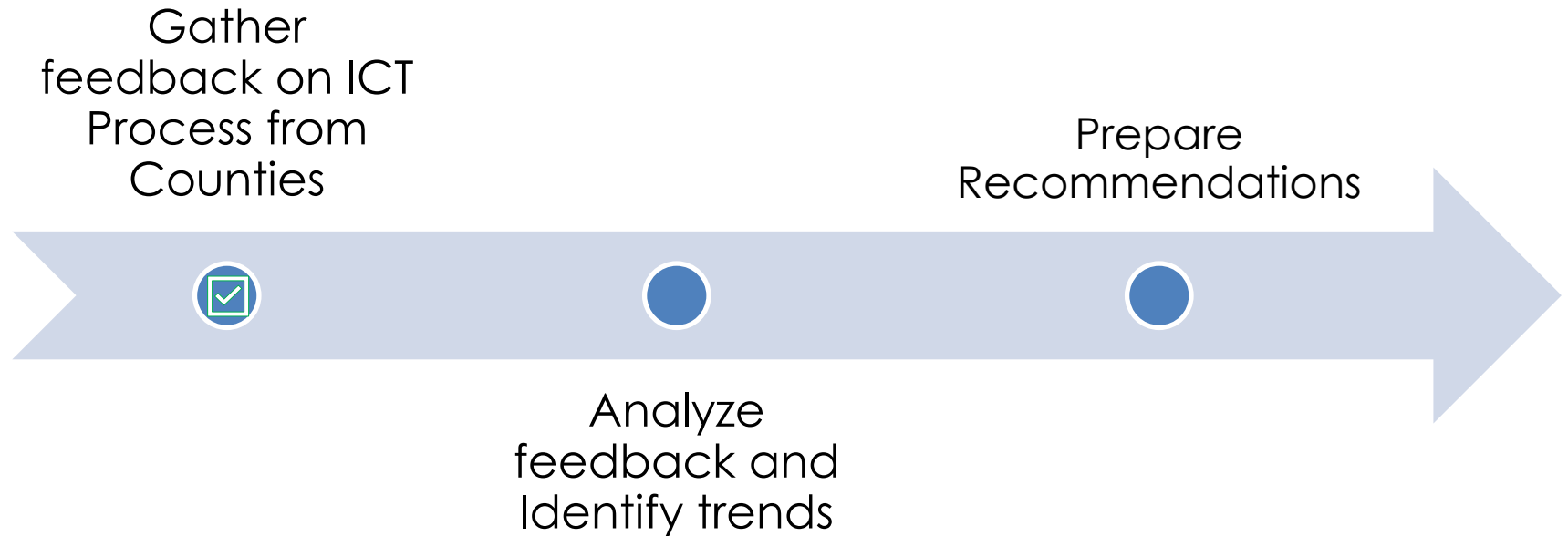
Category	Risk	Risk Name	Level
CalSAWS Project Management Risks	102	Lack of annual project funding may cause schedule delay or reduction in scope for CalSAWS & other projects	Medium
CalSAWS Project Management Risks	203	Project communications must continuously evolve, otherwise stakeholder / audience needs 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	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, low risks are not displayed.



ICT Status Update

County ICT Feedback – Approach



County ICT Feedback – Themes

Communication

- Need forum to discuss ICT Coordinator responsibilities
- Reminders to follow the escalation protocol

Business Process

- Desire for standardized process and clear technical guidelines

Support and Training

- ICT Job Aids and Training materials require updating
- Request for refresher training on ICT process

ICT Protocol

- Outdated protocols and inconsistent communication

County ICT Feedback – Next Steps

Identify Executive Sponsor

- Set tone and get Buy in from other County Leadership

Convene Workgroup

- Coordinate with CDWA, DHCS & CDSS
- Analyze Sending County Requirements for Forms/Images
- Standardize Business Processes
- Share Best Practices
- Identify potential enhancements

Training

- Job Aid, WBT and Quick Guide updates in process
- Future Hot Topic session

ICT Protocol

- DHCS/CDSS reviewing ICT Protocol document
- Update ICT Protocol Document with defined communication and escalation process



Roadshow Update



Maintenance & Enhancement (M&E) Roadshows

July Roadshow – Release Readiness & CalSAWS County Validation

The July Roadshow covered the topic of Release Readiness and CalSAWS County Validation which provided the counties an understanding of the various release readiness activities, testing efforts, and county validation.

**468 Participants
Attended**

**53 Counties
Represented**

**Roadshow dates:
7/8, 7/9 & 7/11/2024**

"The most valuable information was the whole process of how things go about in order to program CalSAWS in general. The presenters did the best they could to keep us engaged and were very accommodating of the questions people asked."

Maintenance & Enhancement (M&E) Roadshows

Next Steps

With 58 CalSAWS counties, the Project continually assesses that Maintenance and Enhancement (M&E) established processes meet the needs of our counties and where we may need to pivot to better serve our counties. We held M & E Roadshows to level set current state M&E.

Next Steps

Ongoing the Project will assess topics that may present challenges for counties and, where appropriate and capacity allows, may hold focused sessions to better assist the counties in gaining a fundamental understanding of the topic matter.

The project has received feedback on desired topics from counties and has formed a Strike Team to discuss strategy for a new initiative.



Procurement Update

- CalSAWS M&O
- BenefitsCal



Procurement Update

M&O Procurement

- One Appeal filed by Accenture on February 15.
- Key Upcoming Dates:
 - 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



State Partners Updates

- OTSI
 - CDSS
 - DHCS
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Regional Priorities



Adjourn Meeting