Cal**SAWS** | Project Steering Committee Meeting

September 19, 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 August 15, 2024, PSC Meeting and review of Action Items.

Informational Items

Performance Trends

Performance Trends
SLAs and Onshore/Offshore Hours

CalSAWS SLAs
June – Aug* 2024
Accenture

	Performance
✕ **System Availability**	**99.9%**
6/4/24 – Unable to Access CalSAWS (28 minutes to resolve)	
✓ **Helpdesk Diagnosis**	**98.4%**
✓ **System Response**	**100%**
✓ **Batch Completion**	**100%**
✓ **Training Environment Availability**	**100%**
✓ **Standard Report Response**	**100%**
✓ **Security Incident Response**	**100%**
✓ **Disaster Recovery Response**	**100%**
✕ **ForgeRock**	**99.9%**
6/4/24 – Users Unable to Log in (28 minutes to resolve)	

* August Performance Report is pending review

BenefitsCal SLAs
June - Aug 2024
Deloitte

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

Imaging SLAs
June – Aug 2024
Hyland Solutions

	Performance
✕ **Monthly Uptime**	**99.89%**
07/11/24 - (85 minutes to resolve)	
08/09/24 - (61 minutes to resolve)	
✓ **Monthly Page Views**	**98.82%**
✓ **Monthly Database Transactions**	**99.89%**

Onshore/Offshore Metrics
June – Aug 2024

	Onshore %	Offshore %
BenefitsCal Hours	45%	55%
CalSAWS Hours	64%	36%

CalSAWS Cost of Rework

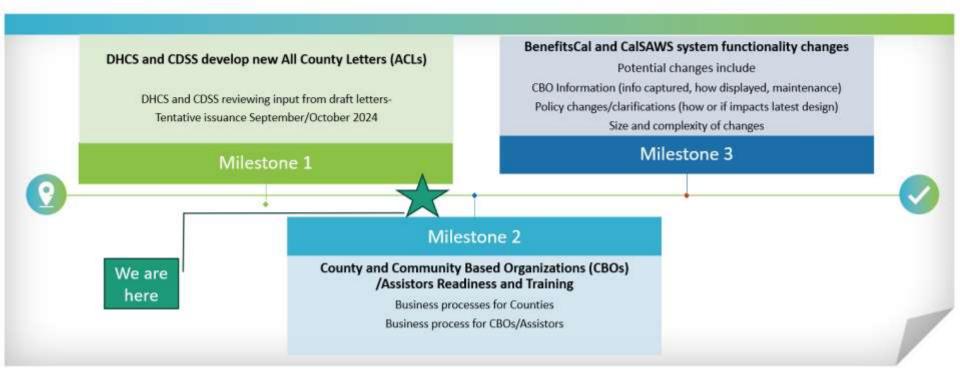|	Onshore %	Offshore %
R24.05	0.44%	1.09%
R23.11 - R24.03	1.64%	1.51%
Target	**≤ 10% (combined)**	

BenefitsCal Update

- ROI Workgroup Update

- ABAWD Update

- GCF Parity Update

- Release Highlights

BenefitsCal
ROI Update

ROI Workgroup
High-Level Milestones

DHCS and CDSS develop new All County Letters (ACLs)

DHCS and CDSS reviewing input from draft letters-
Tentative issuance September/October 2024

Milestone 1

BenefitsCal and CalSAWS system functionality changes

Potential changes include

CBO Information (info captured, how displayed, maintenance)

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

Size and complexity of changes

Milestone 3

We are here

Milestone 2

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

Business processes for Counties

Business process for CBOs/Assistors

- Next workgroup meeting is scheduled for 09/30/24. Agenda topics include letter updates and initiate discussion what information is needed to capture to facilitate users searching for CBOs.

BenefitsCal

CalFresh Able Bodied Adults Without Dependents (ABAWD) Implementation Update

The ABAWD waiver is expected to expire in October 2025.
The scope on BenefitsCal :

Apply for Benefits (AFB Flow)

1. Add ABAWD exemptions and work requirement reporting to Apply for Benefits Flow.
2. Applicable to Anonymous, CBO users, and Logged in Customers
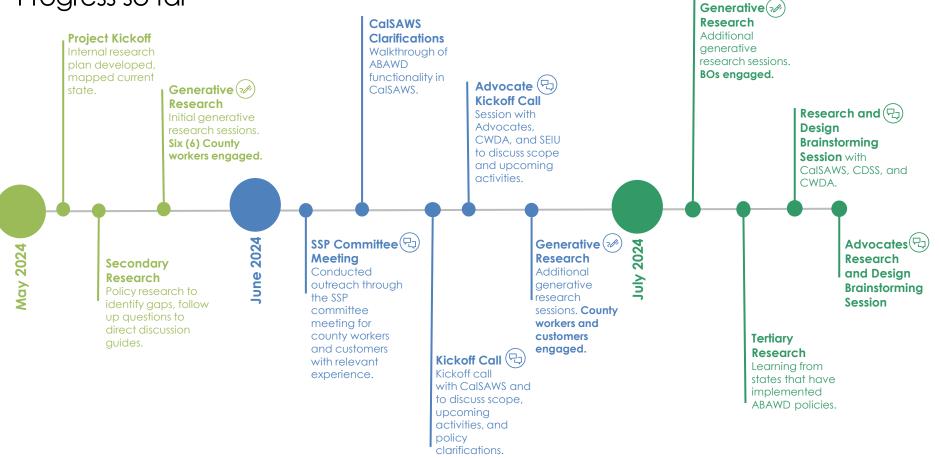
Customer Dashboard Update

1. Display ABAWD time limit information on the customer dashboard.
2. Applicable to logged in customers with a CalFresh Case Linked

Support Request Update

1. Add ability to report ABAWD exemptions, request corrections and report meeting the work requirement after initial application.
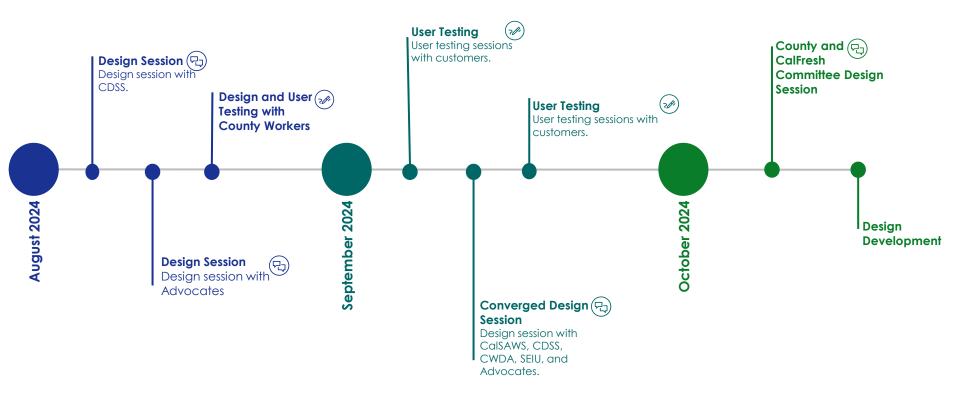2. Applicable to logged in customers with a CalFresh Case Linked

BenefitsCal

CalFresh Able Bodied Adults Without Dependents (ABAWD) Implementation Update
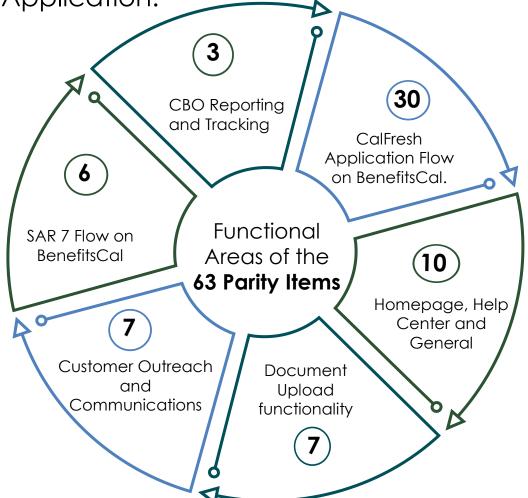
Progress so far

Project Kickoff
Internal research plan developed, mapped current state.

Generative Research
Initial generative research sessions. **Six (6) County workers engaged.**

Secondary Research
Policy research to identify gaps, follow up questions to direct discussion guides.

May 2024

June 2024

SSP Committee Meeting
Conducted outreach through the SSP committee meeting for county workers and customers with relevant experience.

Kickoff Call
Kickoff call with CalSAWS and to discuss scope, upcoming activities, and policy clarifications.

CalSAWS Clarifications
Walkthrough of ABAWD functionality in CalSAWS.

Advocate Kickoff Call
Session with Advocates, CWDA, and SEIU to discuss scope and upcoming activities.

Generative Research
Additional generative research sessions. **County workers and customers engaged.**

July 2024

Generative Research
Additional generative research sessions. **BOs engaged.**

Research and Design Brainstorming Session with CalSAWS, CDSS, and CWDA.

Advocates Research and Design Brainstorming Session

Tertiary Research
Learning from states that have implemented ABAWD policies.

BenefitsCal

CalFresh Able Bodied Adults Without Dependents (ABAWD) Implementation Update

Progress so far

August 2024

Design Session
Design session with CDSS.

Design Session
Design session with Advocates

Design and User Testing with County Workers

September 2024

User Testing
User testing sessions with customers.

Converged Design Session
Design session with CalSAWS, CDSS, CWDA, SEIU, and Advocates.

User Testing
User testing sessions with customers.

October 2024

County and CalFresh Committee Design Session

Design Development

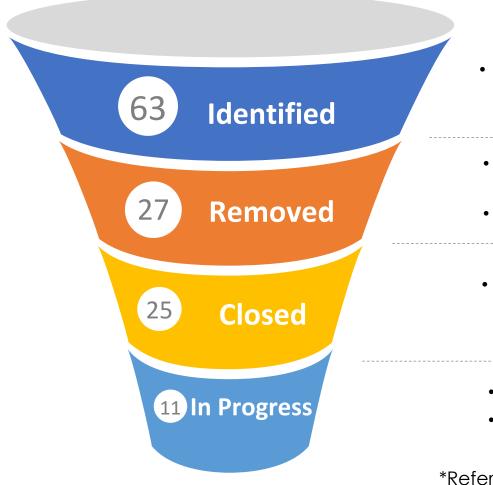# BenefitsCal

GCF Parity Update - Background

In March 2021, **63** items were identified by GCF as parity to BenefitsCal Application.

Functional Areas of the **63 Parity Items**

- **3** CBO Reporting and Tracking
- **30** CalFresh Application Flow on BenefitsCal.
- **10** Homepage, Help Center and General
- **7** Document Upload functionality
- **7** Customer Outreach and Communications
- **6** SAR 7 Flow on BenefitsCal

BenefitsCal

GCF Parity Update - Progress

Over a period of 36 months, BenefitsCal team worked with CDSS and GetCalFresh Teams.

63 Identified

27 Removed

25 Closed

11 In Progress

Comments

- 63 parity items were identified by CDSS and GetCalfresh Teams in 2021

- 27 items were identified as "not a gap" by CDSS
- 36 items remained on parity by end of 2022

- 25 items were worked on by the project team in collaboration with CDSS and closed them by mid-2024.

- 11 items remain on parity as of today
- GCF Sunsets in Sept 2025. Plan to meet Parity by May 2025.

*Refer next slide for details on In-progress items

BenefitsCal
GCF Parity Update – Planned Next Steps

In Progress Parity Items

Tracking ID	Functional Area	Description	Planned Closure Date
#20	Application Flow	SSA flow in BenefitsCal	Sept '24
#22, 44	Homepage, Help Center and General	Immigrant specific help and FAQs	Dec '24
#24	Application Flow	Update CalFresh Application Flow to reduce questions	Apr '25
#30, 32	Homepage, Help Center and General	Release of Information	TBD – Outcome of ROI Workgroup
#34	CBO Reporting and Tracking	CDSS Prime Contractor Reports	Jan '25
#46, 51	Customer Outreach and Communications	Automated reminder emails and text messages for customers	Mar '25
#52	Application Flow	Update utilities options for CalFresh applicants in BenefitsCal	Apr '25
#55	SAR 7 Flow	Suggest SAR 7 documents to be uploaded by the customers in BenefitsCal	Feb '25

BenefitsCal

Key Release Highlights and Upcoming Enhancements

24.09
September

24.10
October

24.11
November

- **Implement enhancements to SSA Assisted App Flow** in BenefitsCal & Turn on the flag so SSA Assisters can start submitting apps through BenefitsCal.
- I**mplementing a tracker to track applications** so that customers have the latest updates in their Dashboard.

- Update the Language options in BenefitsCal to include **Mandarin (Simplified Chinese)**
- Opportunity to explore methods/tools to expedite language updates
- Additional improvements for Customer's **Login Journey in BenefitsCal**

BenefitsCal
CalSAWS Outbound Call Campaign

- Updated Outbound Caller ID and phone number for outbound call campaigns/robocalls to BenefitsCal (SCR CA-239498 Released 24.07.11)

- Text and Outbound Help Line: 844-859-2100
  - Test short code requirement to have single phone number for Text Help (must be on all messages)
  - Customer is responsible for entering zip code to connect with County (no other options available)
    - If zip code exists in multiple counties the customer will be prompted to select from list of counties that share the zip code
    - Customer transferred to IVR for selected County from Zip Code

- Outbound Calls are not completed for ICT scenarios (from sending or receiving county).

Release and Policy Update

Release and Policy Update
CalSAWS Releases

Timeline dates: 9/5/24, 9/7/24, 9/23/24, 10/3/24, TBD, TBD, 11/25/24

September 2024 | October | November

Major Releases

September 2024

⭐ **R24.09 - 9/23/24**
Key Highlights
- 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

November

⭐ **R24.11 - 11/25/24**
Key Highlights
- 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
- ACL 24-54 - Resource Limit Increase for CW/RCA

Minor Releases

September 2024

◆ **R.24.09.05 – 9/5/24**
Key Highlights
- 2024 CF COLA, CW MAP & CW IRT Values

◆ **R.24.09.07 – 9/7/24**
Key Highlights
- 2024 CF COLA, CW MAP & CW IRT Batch

October

◆ **R.24.10.03 – 10/3/24**
Key Highlights
- ACL 24-62 - New State Food Benefit Type for CalFresh Replacements Due to Electronic Theft

◆ **R.24.10.XX – TBD**
Key Highlights
- ACL 18-75- Update CA 800 RIA to Add 5L aid code

November

◆ **R.24.11.XX – TBD**
Key Highlights
- ACIN I-XX-24 - 2025 State Minimum Wage Values

CalSAWS Release and Policy Update
CalSAWS Release Overview – 24.09

Testing Activities

☑ System Test
☑ QA Test
☑ County Validation

Release Communications

☑ Webcast
☑ Release Notes
☑ Release Newsletter

Deployment

Greenlight (9/18)
Code Deployment (9/22)
Daily Calls (9/23-25)

County Release Readiness Update
Background & Approach

- During the transition to the M&O phase of CalSAWS, the project has been actively reviewing current processes to identify areas for enhancement to better support and educate counties

- We have received input regarding counties preparedness for upcoming releases, including:

  - The pace of change in CalSAWS is faster than in legacy systems with more frequent releases

  - There were differences in release notes across the systems

  - Counties have limited access to Jira and are therefore not always able to self-serve on upcoming changes

- Based on feedback received to date, the project conducted several Release Readiness Discovery sessions

County Release Readiness Update
Background & Approach

A series of four (4) facilitated workshops including county participants, regional managers, and project staff were conducted in May 2024 to explore what is needed to better prepare counties for upcoming system releases
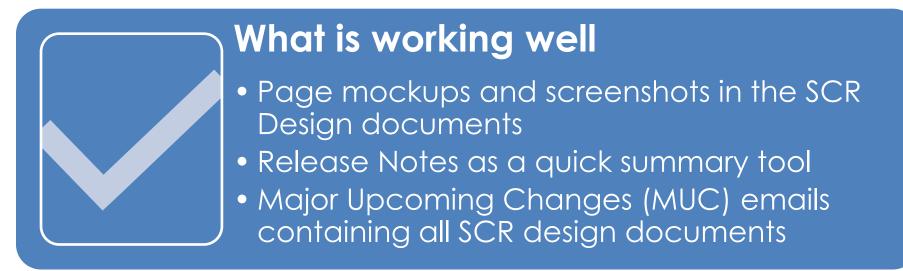
Five (5) participants from each region were recruited via CRFI

Interactive sessions were conducted via Microsoft Teams using a virtual whiteboard and polling feature

Topics included:

SCR Design Documents	Release Notes	Major Upcoming Changes (MUC)	Release Webcasts	Change Management

County Release Readiness Update
Common Themes

What is working well

- Page mockups and screenshots in the SCR Design documents
- Release Notes as a quick summary tool
- Major Upcoming Changes (MUC) emails containing all SCR design documents

Areas for Improvement

- County Action is sometimes unclear
- Language can be vague or too technical
- Jira access and training
- Timing of Materials
- Format of Release Webcast

County Release Readiness Update
Recommendation Highlights

County Action is unclear (Pilot 25.01)

- Add a user-friendly section within SCR Designs to call out County and User impacts, such as changes to Security and Tasks
- Use icons or other visual markers in SCR Designs to call attention to potential changes that may impact county business

Jira access and training

- Expand basic Jira training materials to include different levels (i.e., advanced features such as creating dashboards) **– DONE**
- Explore increased Jira access **– In Progress**
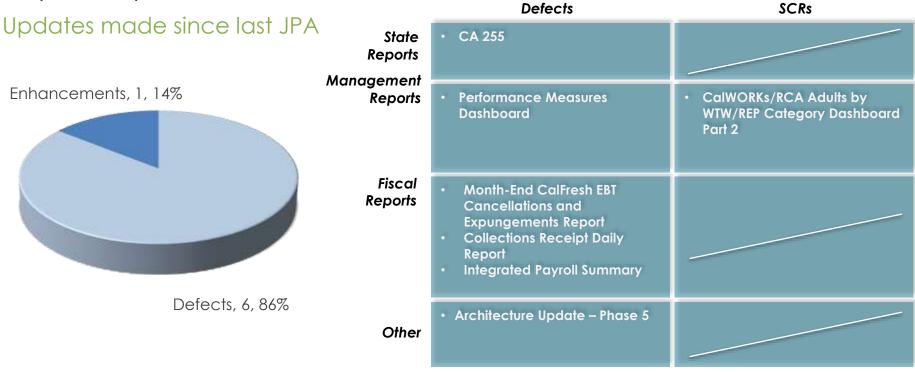
Release Webcast (DONE)

- Group topics by functional area; exclude county-specific changes
- Add Presenter Name to the agenda for each item

Reports Update

- Status of LA Reports for all counties

Reports Update

Updates made since last JPA

Enhancements, 1, 14%

Defects, 6, 86%

	Defects	SCRs
State Reports	• CA 255	
Management Reports	• Performance Measures Dashboard	• CalWORKs/RCA Adults by WTW/REP Category Dashboard Part 2
Fiscal Reports	• Month-End CalFresh EBT Cancellations and Expungements Report • Collections Receipt Daily Report • Integrated Payroll Summary	
Other	• Architecture Update – Phase 5	

Top Changes

SCR/Defect #	Summary
CA-280351	Architecture update - Phase 5 *Allows for re-running reports per county*
CA-264170	CalWORKs/RCA Adults by WTW/REP Category Dashboard Part 2 *Excluded individuals not eligible to WTW/REP services, adds new data points, updates to Sanction Effective Date selection*

* August 17 - September 19

Upcoming

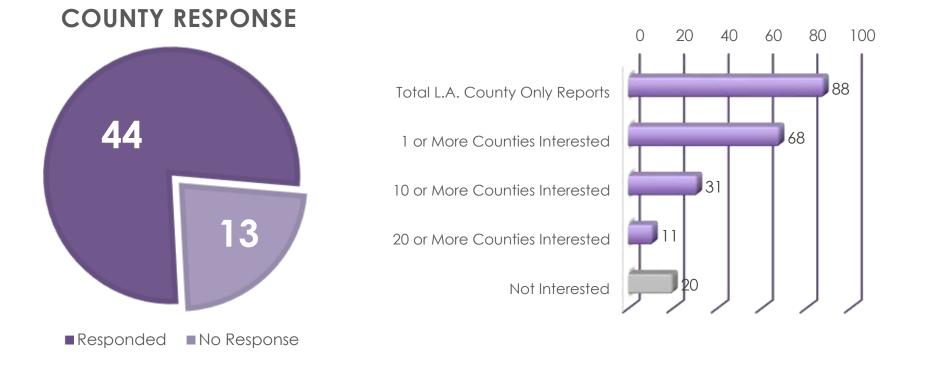| Summary |
|---|
| 9 SCRs and 19 Defects planned for release from Late September to mid-November |
| Functional Design Document Group 3 due 9/30/2024 |
| Second survey targeted for mid-Fall |

Report re-runs have dropped dramatically!
July: 45, August: 99, September: 17

Reports Update
Focus: L.A. County Only Reports Expansion

- Counties were sent a list of L.A. County reports to identify which reports may be considered for statewide expansion.
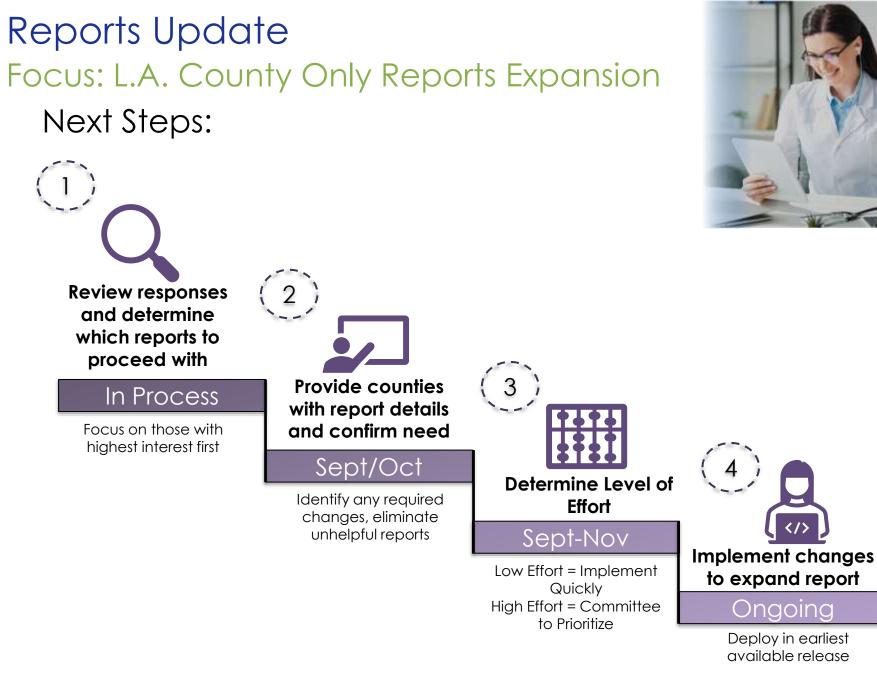 - CRFI 23-024 – Sent: 7/2/2024 | Closed: 7/23/2004

COUNTY RESPONSE

Pie chart: Responded 44, No Response 13

Bar chart:
- Total L.A. County Only Reports: 88
- 1 or More Counties Interested: 68
- 10 or More Counties Interested: 31
- 20 or More Counties Interested: 11
- Not Interested: 20

Reports Update
Focus: L.A. County Only Reports Expansion

Reports with the most interest:

Report Title	Category	L.A. County Usage	Counties Interested
Month-End CalFresh EBT Cancellations and Expungements Report	Fiscal	3	28
EBT Out of County State Transactions Report	Fiscal	17	27
SSI-SSP Activity Monthly Report	Management	72	26
CalFresh Quality Assurance Report	Management	8	23
Month End Authorization Report	Fiscal	2	23
Vendor Payment Report	Fiscal	0	23
Unclaimed Funds Report	Fiscal	1	21
National Voter Registration Act Report	Management	3	21
Monthly Collection Disposition Report	Fiscal	127	21
Unposted Receipts Monthly Activity Report	Fiscal	208	20
AB109 LRS Case Flag Detail Report	Management	17	20

Reports Update
Focus: L.A. County Only Reports Expansion

Next Steps:

1

Review responses and determine which reports to proceed with

In Process

Focus on those with highest interest first

2

Provide counties with report details and confirm need

Sept/Oct

Identify any required changes, eliminate unhelpful reports

3

Determine Level of Effort

Sept-Nov

Low Effort = Implement Quickly
High Effort = Committee to Prioritize

4

Implement changes to expand report

Ongoing

Deploy in earliest available release

Fresno Gen AI Initiative Update

Fresno GenAI Call Summary Assist
Post Go-Live Metrics
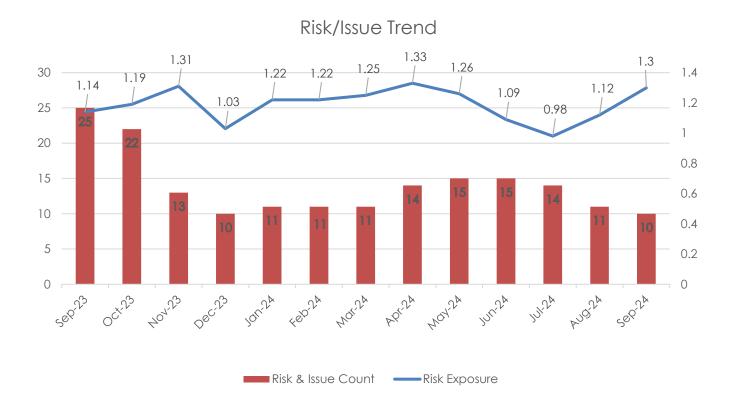
Below captures production metrics for the Fresno GenAI Call Summary Assist solution from June 28, 2024 through September 8, 2024:

Key Performance Metrics – Generative AI

53K+ Summaries Generated	**100%** Summaries Generated Within 60 seconds	**8 seconds** Average Call End to Summary End
16% Reduction in Average Post-Call Wrap Time	**13%** Reduction in Average Handle Time	**82%** GenAI Summary Content Unedited

Eligibility Worker Feedback

Highlights:
- "Good at organizing the flow of the phone call"
- "It is great, no suggestions"
- "I like it, makes my job easier"

Suggestions:
- Some words and names recognized incorrectly
- Ideas for improving the format and flow of the summary

Select Recent Enhancements

Content:
- Dictionary updates - added acronyms & program terms
- Updated so customer name appears once in summary
- Distinguished timing of worker actions

Format:
- Standardized number & address formats
- Added paragraph breaks to summaries

M&E Risks

CalSAWS Project Risks
Risk Exposure Trend

Risk/Issue Trend

Month	Risk & Issue Count	Risk Exposure
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	14	0.98
Aug-24	11	1.12
Sep-24	10	1.3

Legend: Risk & Issue Count, Risk Exposure

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	239	Lack of consistent State language translation approach may cause schedule delays and rework	**Low**
M&O Production Risks	246	Perceived gap in functionality with GetCalFresh may impact adoption of BenefitsCal	**Medium**
M&O Production Risks	290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	**Medium**
M&O Production Risks	296	Counties may not be prepared to reconcile Fiscal Reports and submit State Reports, timely	**Medium**
M&O Production Risks	297	Counties may face challenges in adopting management and ad hoc reports if additional support is not provided	**Medium**
M&O Production Risks	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	**Low**
M&O Production Risks	304	Unless production notification process is adapted to include BenefitsCal Training environment, end users may not receive timely notification of issues impacting the environment	**Low**

*Please note, low risks are not displayed.

ICT Status Update

ICT Status Update

County ICT Feedback – Approach

Gather feedback on ICT Process from Counties

Analyze feedback and Identify trends

Prepare Recommendations

ICT Status Update

County ICT Feedback – Next Steps

Identify Executive Sponsor ✅

- Provide executive level oversight and ensure alignment of ICT efforts
- Ryan Bishop (R3) has agreed to serve as Executive Sponsor

Convene Workgroup

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

Training

- Job Aid, WBT and Quick Guide updates in process
- Future CalSAWS Learning Exchange (CLE) session

ICT Protocol ✅

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

ICT Status Update

Executive Sponsor Role

Collaborate on the Vision

Support the ICT workgroup in developing the vision for this ICT effort

Communicate the Vision

Clearly articulate the workgroup vision, objectives, and importance to all stakeholders

Engage Stakeholders

Work with ICT workgroup owner to identify a representative group of key stakeholders to gain their support and commitment

ICT Champion

Help to gain and maintain the support and buy-in from other county executives throughout the ICT effort

Address Concerns/conflict, as needed

Act as a point of escalation for the workgroup owner

Make Strategic Decisions, as needed

Provide guidance on critical decisions

CalSAWS Learning Exchange (CLE) Update

CalSAWS Learning Exchange Sessions
Objective

We held Maintenance & Enhancement (M&E) Roadshows from 2023-2024 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.

Now that the M&E foundation has been set, ongoing the Project assesses topics that may present challenges for counties and, where appropriate, will hold focused CalSAWS Learning Exchange (CLE) sessions to better assist the counties in gaining a fundamental understanding of the respective topic matter.

CalSAWS Learning Exchange Sessions
August CalSAWS Learning Exchange – Jira Deep Dive

The August CalSAWS Learning Exchange covered the topic of Jira- Deep Dive and was held on three days; 8/27, 8/28, and 8/29/2024. The Jira Deep Dive sessions provided the counties an understanding of the intermediate and higher-level facets of Jira such as more complex queries, dashboard creation and SCR components tied to various fields.

- **334** participants attended
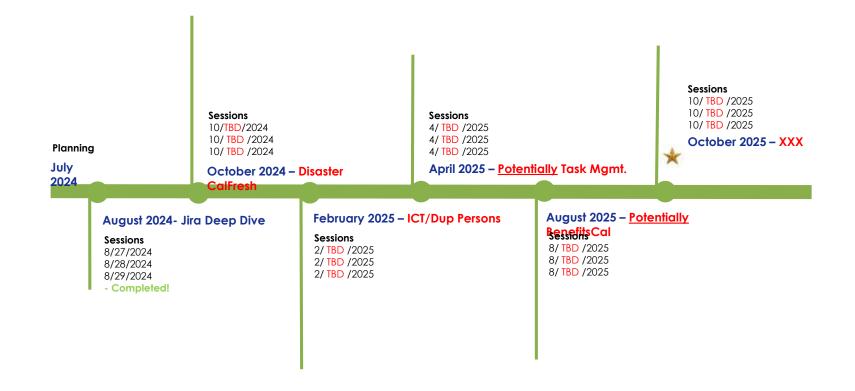- **40** counties represented

CalSAWS Learning Exchange Sessions

August CalSAWS Learning Exchange – Feedback

- "Very helpful training! Much appreciated."

- "Great information! Thank you!"

- "This is AWESOME. She [Lynnel] explains very well. Much gratitude here 😊"

- "Yayyyy, I was able to do it!"

- "Thank you. This was super helpful. There was so much great info. Thank you for recording."

- "I'm embarrassed to say, I think I am more confused now by JIRA than when we first started."

CalSAWS Learning Exchange Sessions

Planning and CalSAWS Learning Exchange Schedule 2024/2025 – Planning Stage

Planning

July 2024

August 2024- Jira Deep Dive

Sessions
8/27/2024
8/28/2024
8/29/2024
- Completed!

Sessions
10/TBD/2024
10/ TBD /2024
10/ TBD /2024

October 2024 – Disaster CalFresh

February 2025 – ICT/Dup Persons

Sessions
2/ TBD /2025
2/ TBD /2025
2/ TBD /2025

Sessions
4/ TBD /2025
4/ TBD /2025
4/ TBD /2025

April 2025 – Potentially Task Mgmt.

August 2025 – Potentially BenefitsCal

Sessions
8/ TBD /2025
8/ TBD /2025
8/ TBD /2025

Sessions
10/ TBD /2025
10/ TBD /2025
10/ TBD /2025

October 2025 – XXX

Next Steps

① **Counties may suggest Learning Exchange topics from their RMs via Regional Meetings/Site Visits for future CLE presentations.** These topic requests should include an overview of what the county would like to see along with a priority level (H/M/L) for the topic. Topic requests submitted to the Regional Managers will be evaluated for future CalSAWS Learning Exchange sessions.

Note: Counties may have valuable best practices or business processes to share on requested topics are encouraged to let their RMs know if they would like to be considered as potential volunteers to partner with the respective Project SMEs on an upcoming topic.

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

Regional Priorities

Adjourn Meeting