JPA Board of Directors Meeting
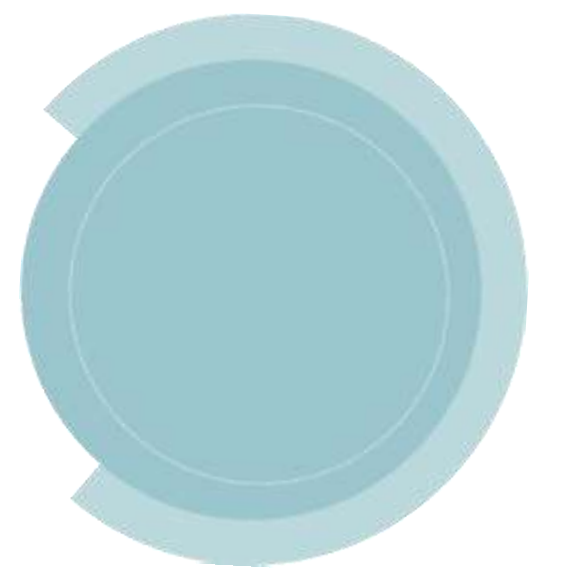
October 18, 2024

CalSAWS

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 the item is read, then requesting recognition from the Chair to speak.

   - To unmute:
     - When connected via computer – click the microphone icon.
     - When connected via telephone – press *6.
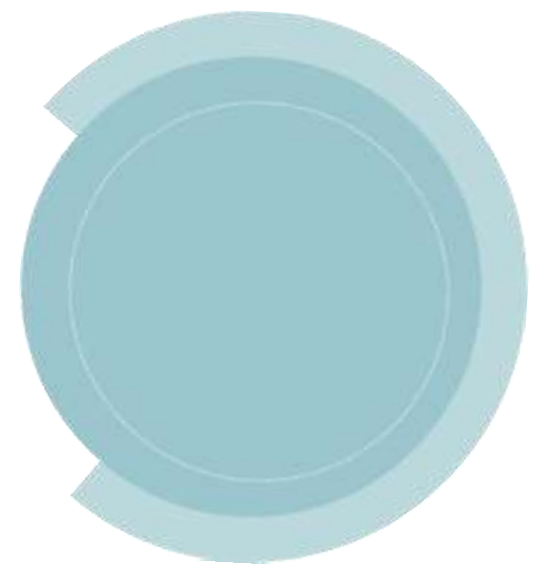
Action Items

Action Items
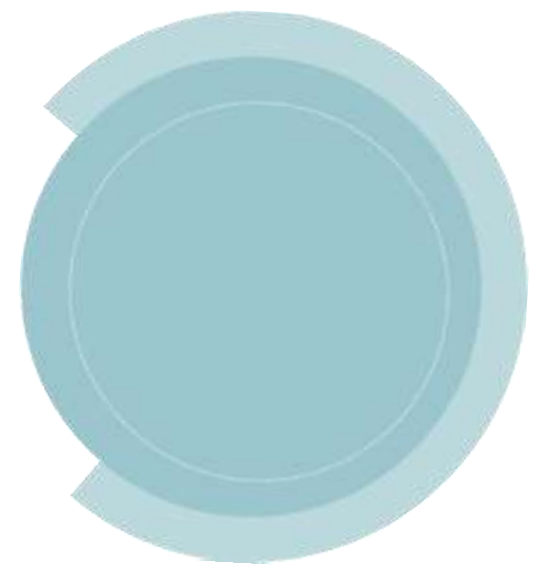
4. Approval of FCED Governance Committee Member Appointments:

    A. Christine Huber, Stanislaus County, effective immediately.

    B. Randy Morris, Santa Cruz, effective December 14, 2024.

Action Items

5. Approval of Consent Items:

   A. Approval of the ClearBest Work Order 7, which includes scope and cost to perform Quality Assurance (QA) Services for the Infrastructure Transition.

   B. Approval of ClearBest Work Order 8, which includes three (3) Premise items: Get CalFresh Parity items, Family Reunification, and Able Bodied Adults Without Dependents (ABAWD).

   C. Approval of Deloitte Portal Mobile Change Order 09, which extends the Agreement, increases the change order allowance, and incorporates administrative adjustments to Optional Enhancements.

   D. Approval of Deloitte Portal Mobile Work Order 17, which includes a request to add one (1) Premise item for ABAWD exemptions and time clocks.

Informational Items

Performance Trends

CalSAWS | JPA Board of Directors Meeting

Performance Trends
SLAs and Onshore/Offshore Hours

CalSAWS SLAs
July – Sept* 2024
Accenture

	Performance
✓ System Availability	100%
✓ Helpdesk Diagnosis	98.7%
✓ System Response	100%
✓ Batch Completion	100%
✓ Training Environment Availability	100%
✓ Standard Report Response	100%
✓ Security Incident Response	100%
✓ Disaster Recovery Response	100%
✓ ForgeRock	100%

* September Performance Report is pending review

BenefitsCal SLAs
July - September 2024
Deloitte

	Performance
✓ All Daily Transactions	100%

Imaging SLAs
July – September 2024
Hyland Solutions

	Performance
✗ Monthly Uptime	99.89%

07/11/24 - (85 minutes to resolve)
08/09/24 - (61 minutes to resolve)

	Performance
✓ Monthly Page Views	98.81%
✓ Monthly Database Transactions	99.91%

Onshore/Offshore Metrics
July – September 2024

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

CalSAWS Cost of Rework

	Onshore %	Offshore %
R24.07	0.31%	0.72%
R24.01 - R24.05	2.44%	2.40%
Target	**≤ 10% (combined)**	

BenefitsCal Update

BenefitsCal
Release of Information
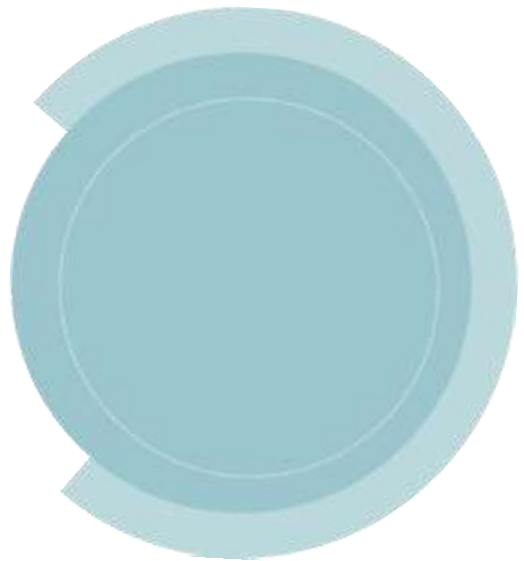
ROI Workgroup Update

ALL COUNTY LETTERS (ACL)

CDSS and DHCS are working on the final letters based on the input received
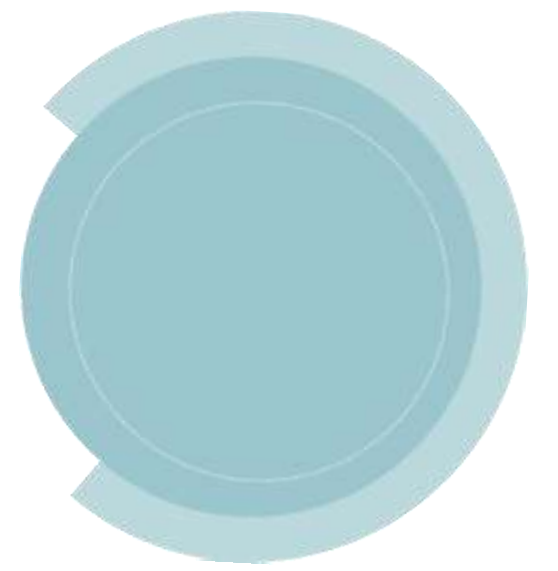
CBO INFORMATION & UX

Started discussions about the CBO information in the functionality and exploring the user experience

WORK GROUP MEETINGS

Most recent working session was on 10/7, and next session is scheduled on 10/28
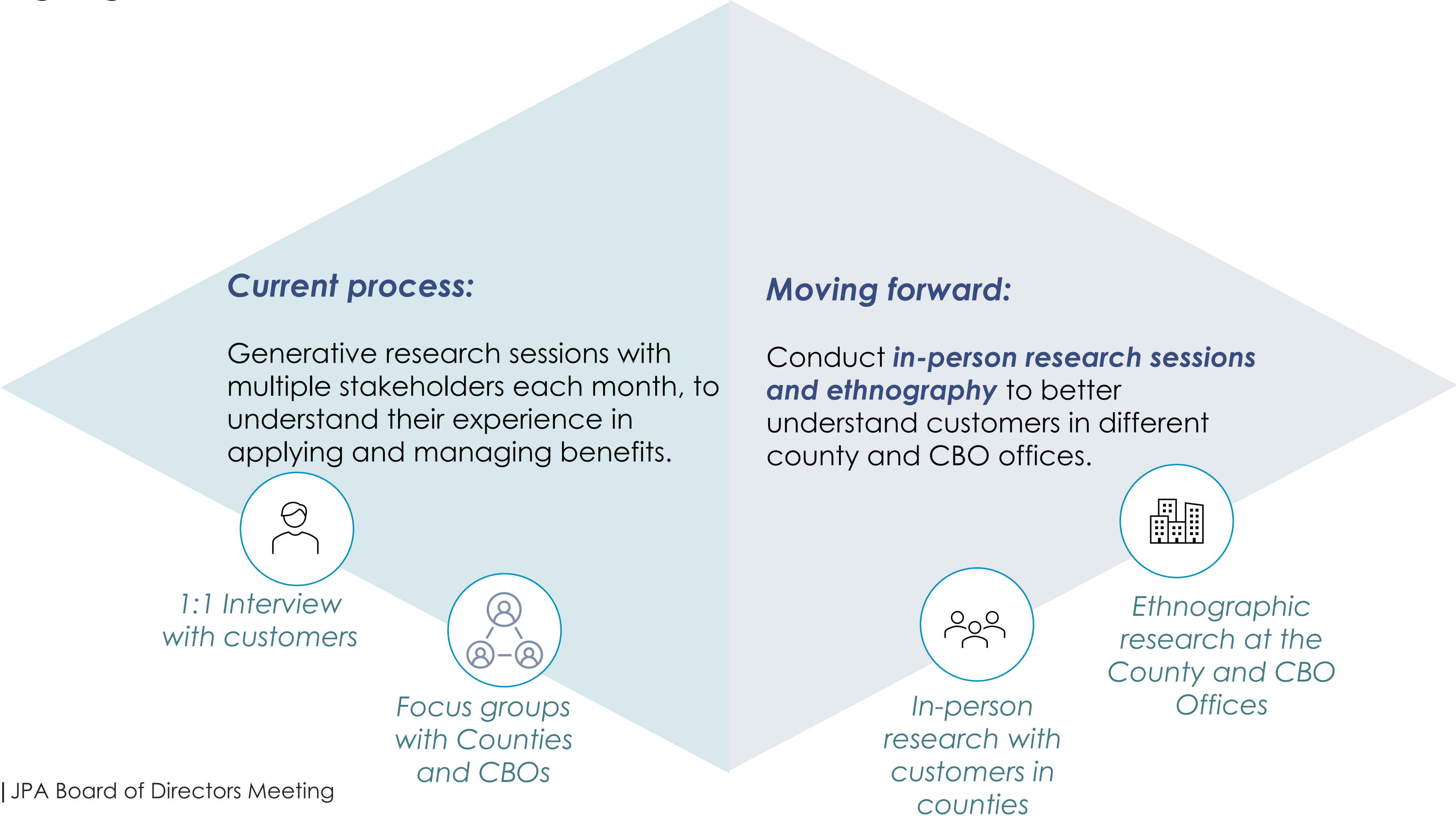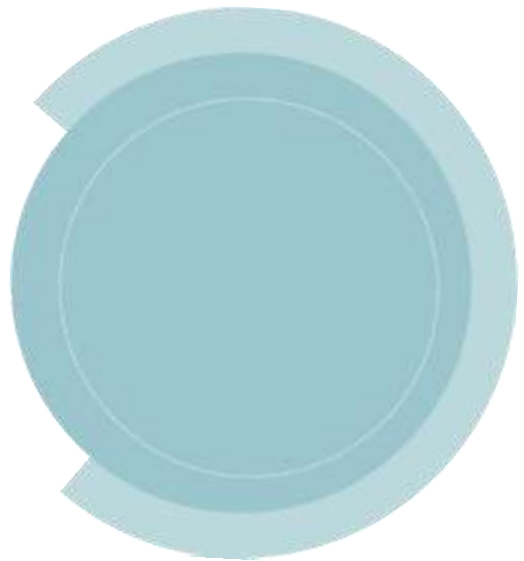
BenefitsCal Adoption

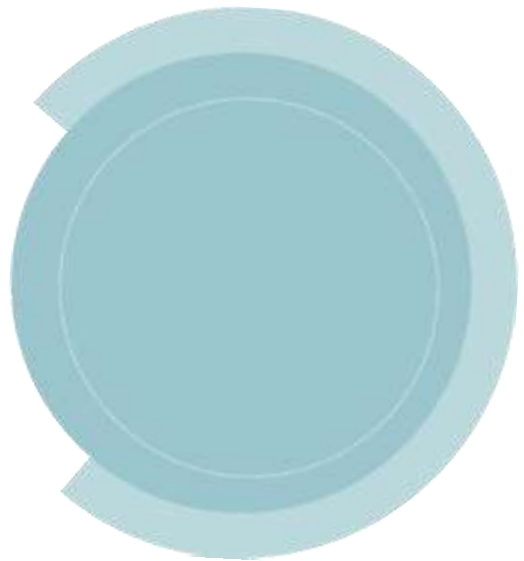## Marketing Email Campaigns encouraging users to complete online renewals

- 490,000 Marketing Emails Sent to encourage customers to use BenefitsCal to submit their renewals.

- Emails sent to:
  - Existing customers with an account and case linked on BenefitsCal.
  - Customers without an account on BenefitsCal.

- Emails sent on 10/15/2024.

- Emails were translated into the 20 threshold languages

- Trifolds materials are also being updated reflecting the latest features and improvements
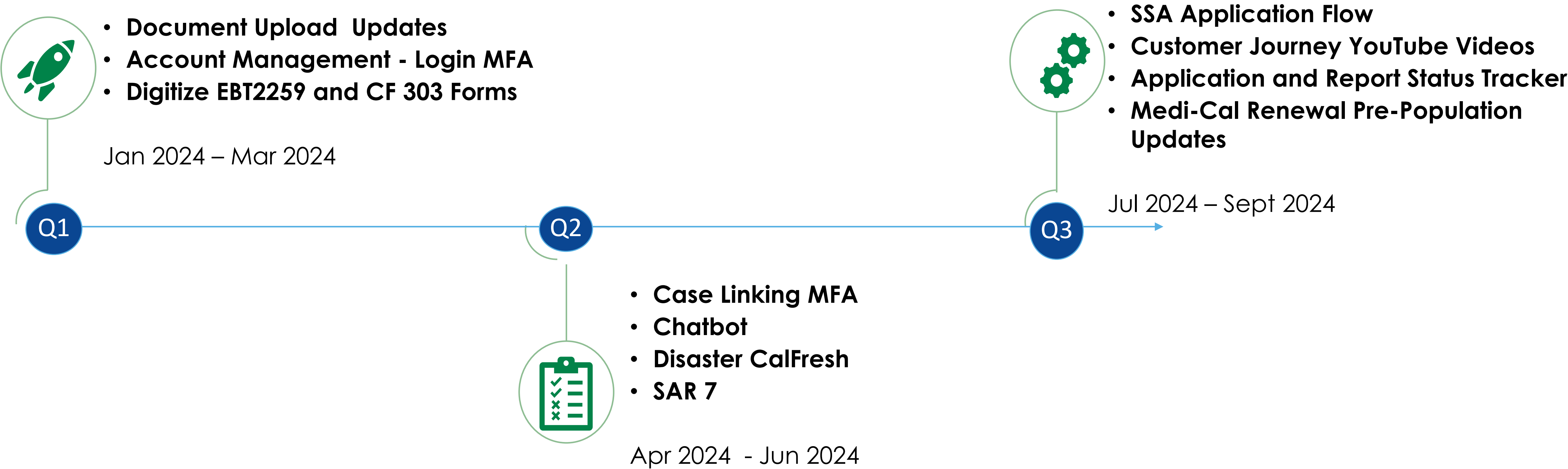
BenefitsCal Adoption

Engaging with Counties, Customers and CBOs

Current process:

Generative research sessions with multiple stakeholders each month, to understand their experience in applying and managing benefits.

1:1 Interview with customers

Focus groups with Counties and CBOs

Moving forward:

Conduct *in-person research sessions and ethnography* to better understand customers in different county and CBO offices.

In-person research with customers in counties

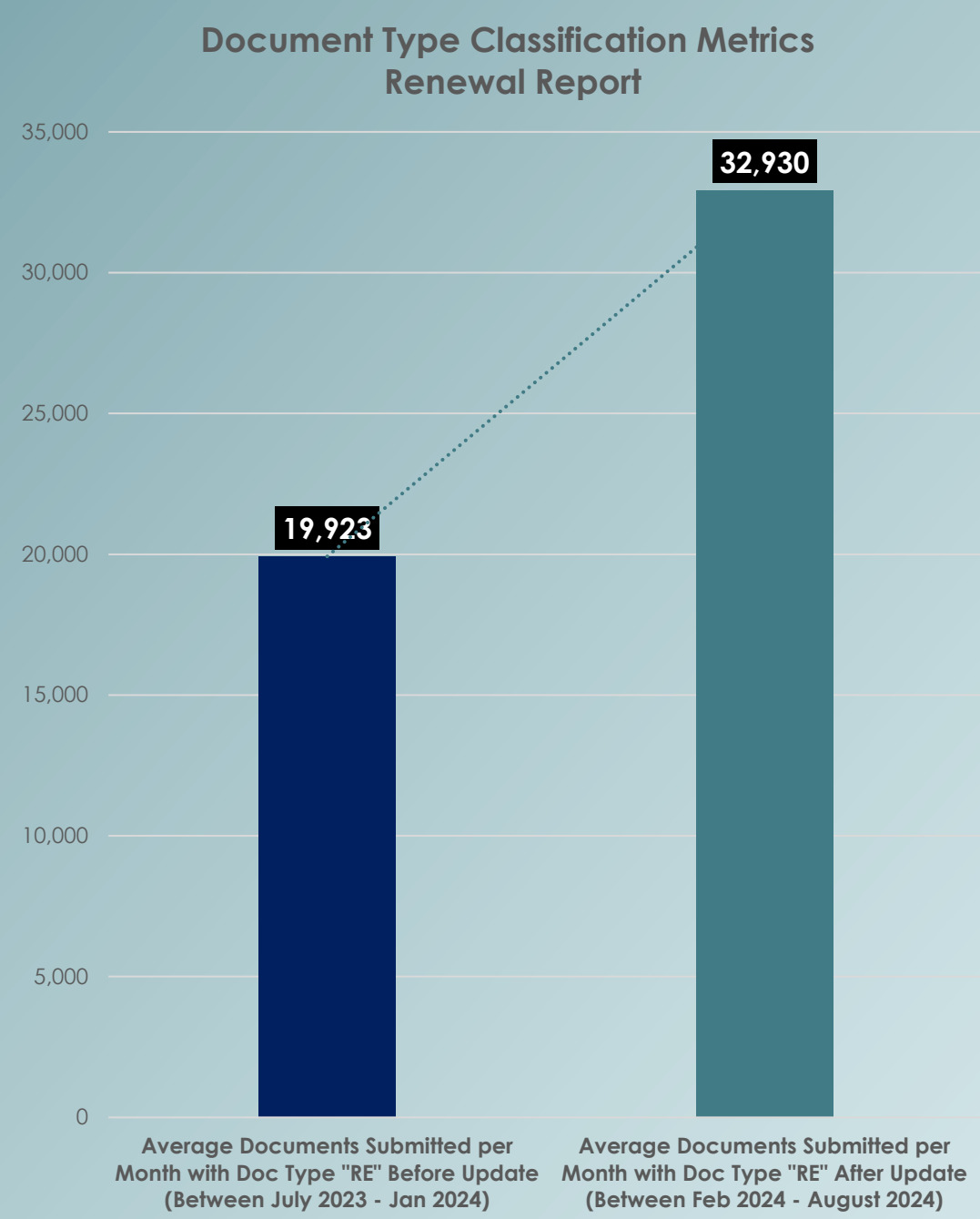*Ethnographic research at the County and CBO Offices*

BenefitsCal

## Features Implemented in 2024 Improving End-User Experience

Over 40 improvements delivered in the areas including document upload, case linking, account management, chatbot, renewals and series of policy & customer dashboard updates

- **SSA Application Flow**
- **Customer Journey YouTube Videos**
- **Application and Report Status Tracker**
- **Medi-Cal Renewal Pre-Population Updates**

Jul 2024 – Sept 2024

- **Document Upload Updates**
- **Account Management - Login MFA**
- **Digitize EBT2259 and CF 303 Forms**

Jan 2024 – Mar 2024

Q1 ──────── **Q2** ──────── **Q3** ────→

- **Case Linking MFA**
- **Chatbot**
- **Disaster CalFresh**
- **SAR 7**

Apr 2024 - Jun 2024

Document Type Classification Metrics Renewal Report

There is a **65.2%** increase in the number of Renewals uploaded after the update.

There is a **45.8%** increase in the number of Periodic Reports (SAR) uploaded after the update.

Document Type Classification Metrics Periodic Report
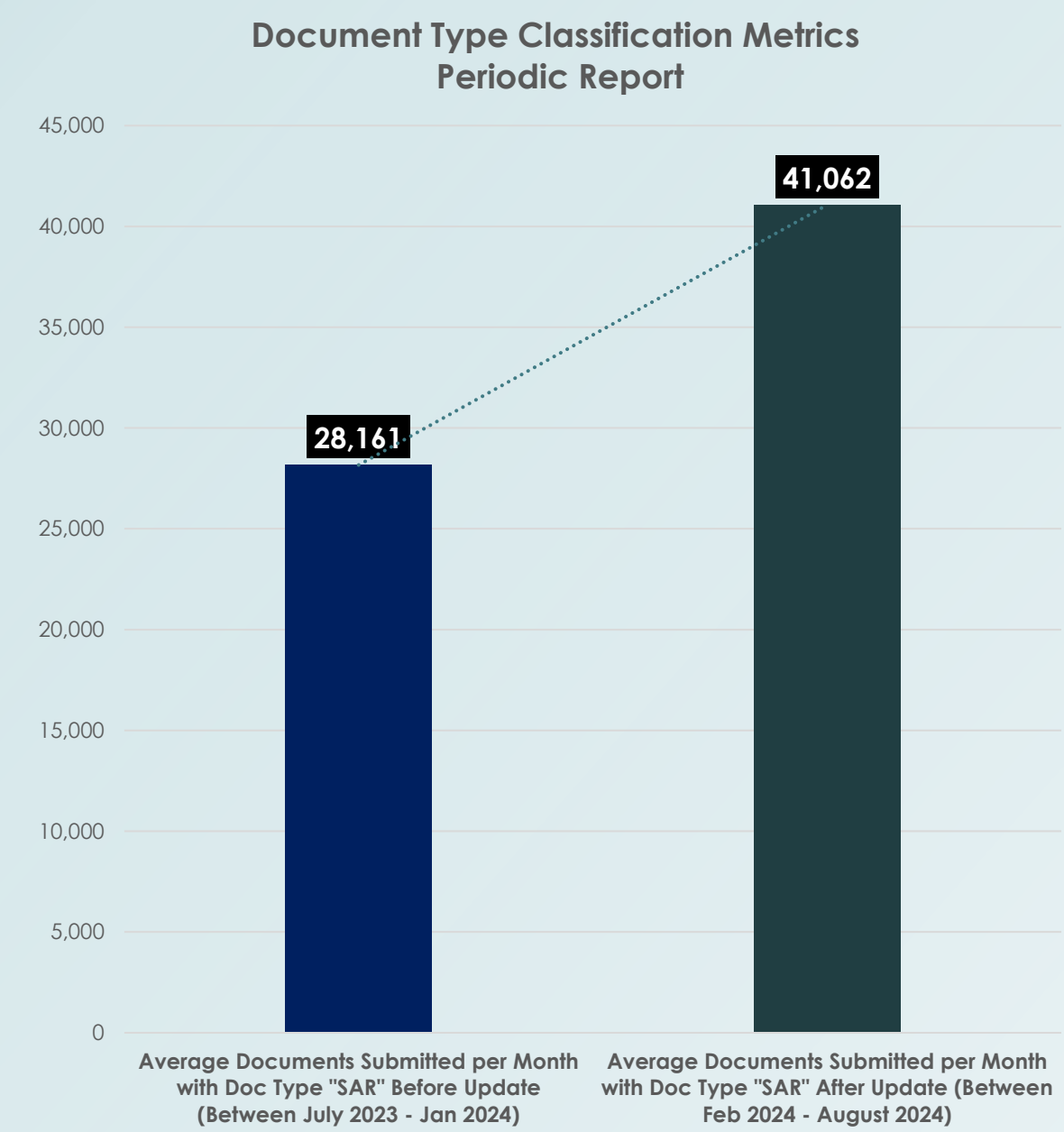
Document Upload Enhancement

Display Renewal and SAR 7 as the first drop down type during the Review period.

Use Case

Customers frequently upload renewal and SAR 7 documents under the "other" category or must scroll through a lengthy list of document types to locate the correct RE/SAR option.
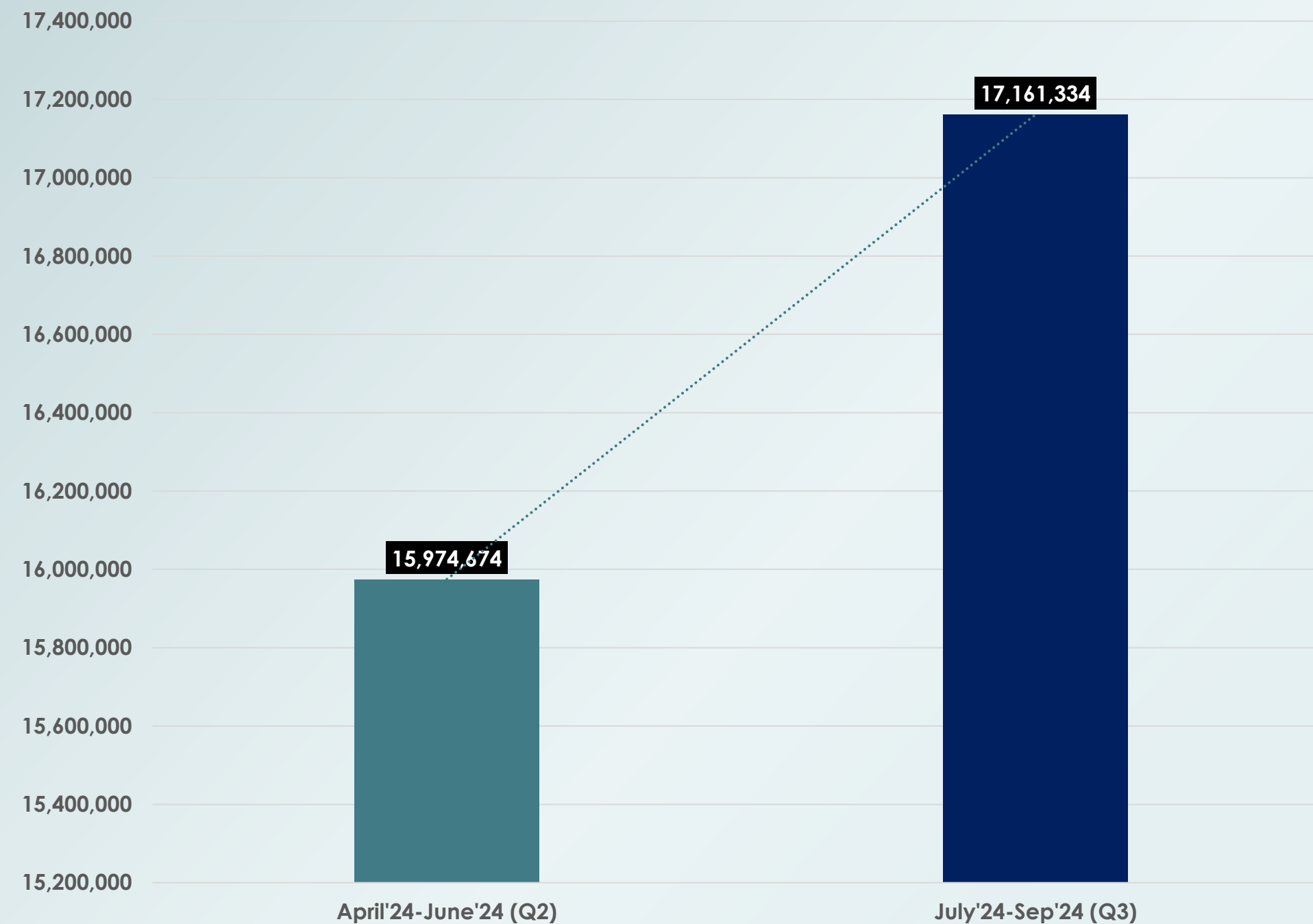
Solution

Update the dropdown list on the BenefitsCal document upload feature to display the RE/SAR categories at the top during the review period, implemented in **January 2024**

Impact

Improved CX as Customers no longer need to scroll down the drop-down list, making the document upload process quicker and more intuitive.

BenefitsCal Chatbot Engagement Before Vs. After "See If I Qualify".

17,400,000
17,200,000
17,000,000
16,800,000
16,600,000
16,400,000
16,200,000
16,000,000
15,800,000
15,600,000
15,400,000
15,200,000

15,974,674 — April'24-June'24 (Q2)

17,161,334 — July'24-Sep'24 (Q3)

Markable **7.3%** increase in the chatbot traffic after re-enabling "See if I Qualify" this quarter compared to the previous quarter

Chatbot Enhancement

RE-ENABLE "SEE IF I QUALIFY INTENT" on BenefitsCal Chatbot.

Use Case
"See If I Qualify" intent on Ask Robin was temporarily disabled between November 2023 – June 2024 due to limitation in income disregards consideration.

Solution
"See If I Qualify" intent was updated for income limits, additional sub-questions for CalFresh and CalWORKs, and income disregards for CalWORKs. Intent re-enabled in **June 2024**

Impact
- Increased customer engagement of the Chatbot feature since July'24 as compared to the previous months.
- Zero (0) help desk tickets or issue reporting for the re-enabled feature.

There was a **95%** increase in YouTube views after the changes, indicating a significant spike in engagement.

Cumilative YouTube Views
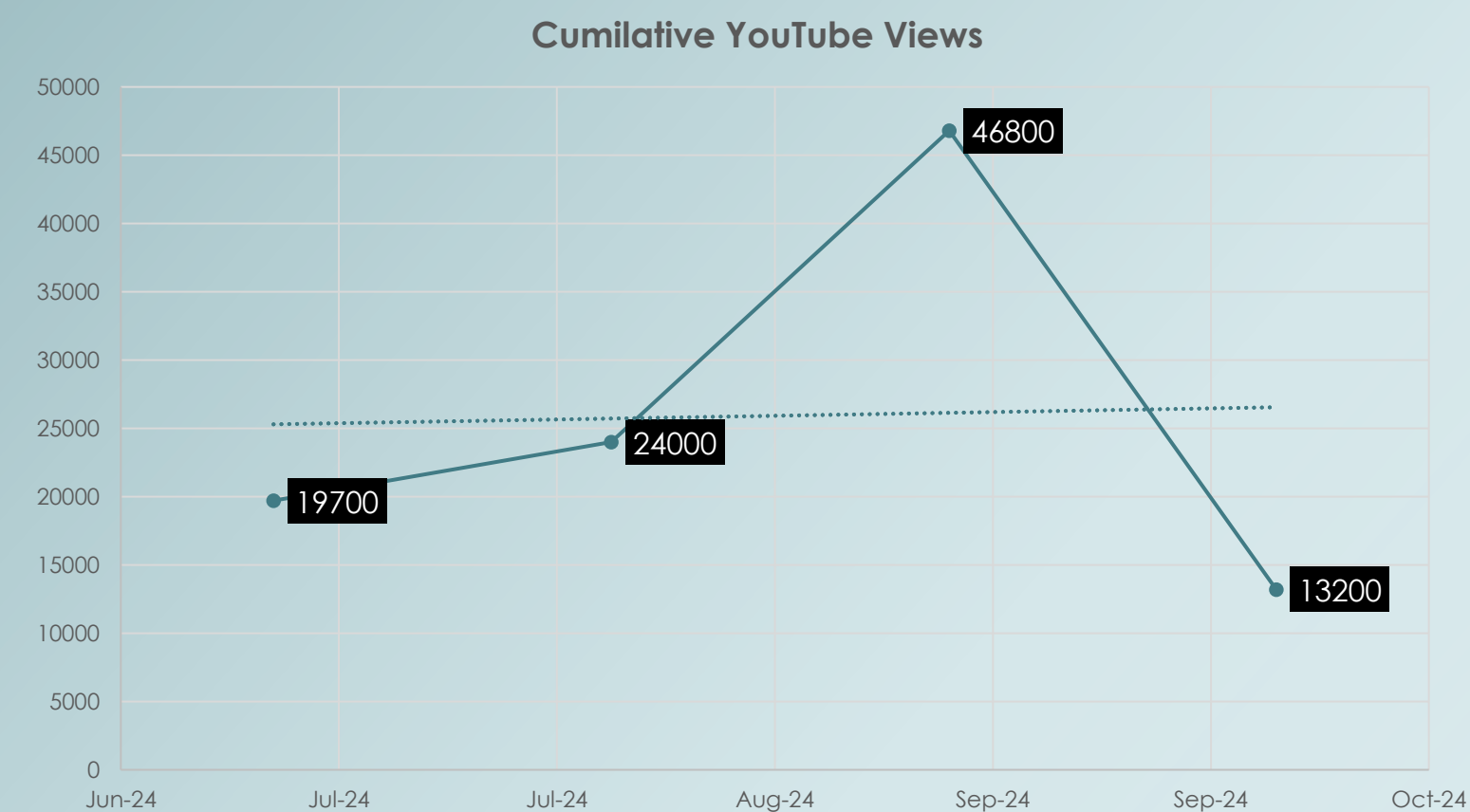
There was a **61.01%** increase in new subscribers, after the change, showing a strong growth trend.

Cumulative BenefitsCal Video Watch Time (In Hours)
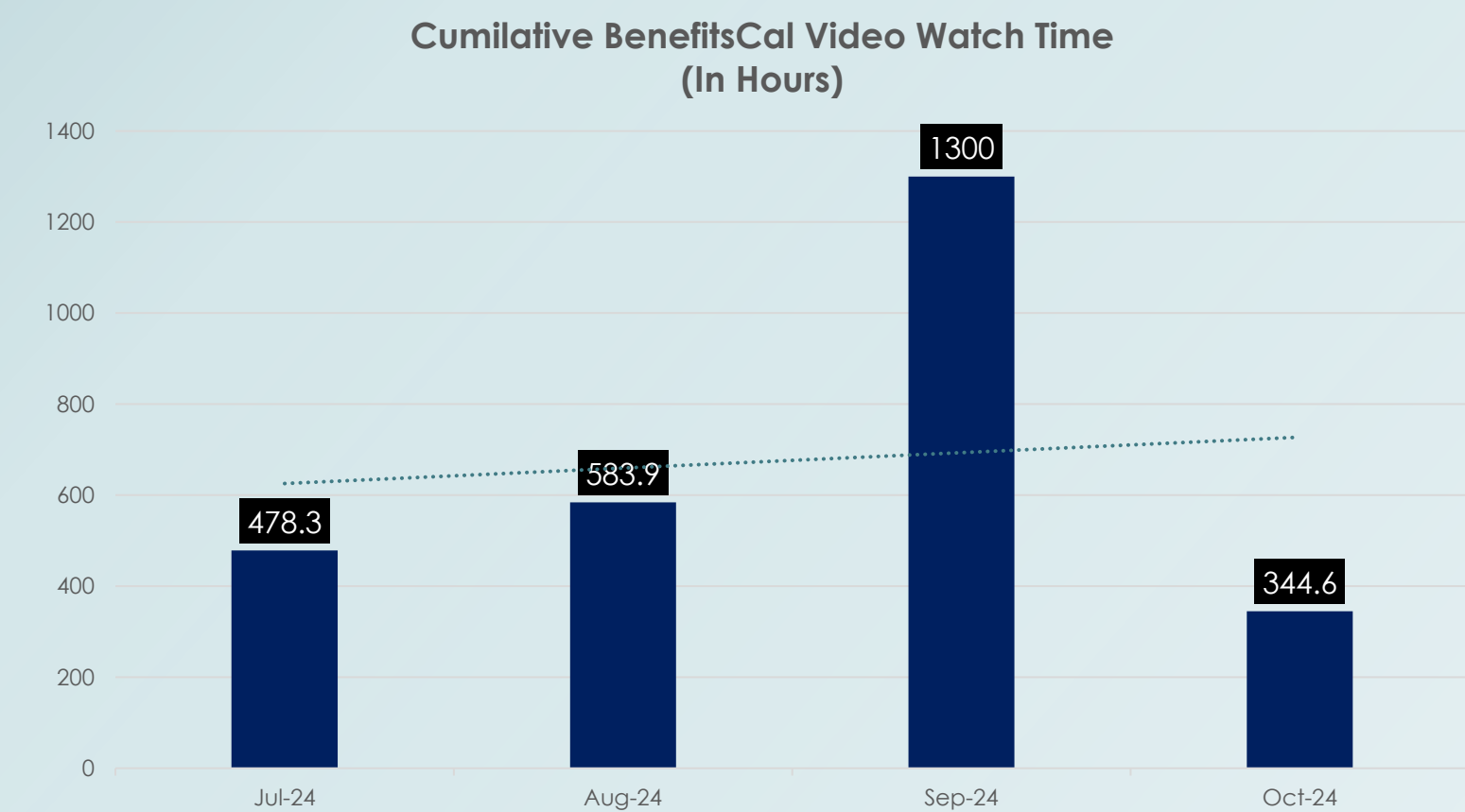
Link to YouTube on Dashboard & Banner

Add YouTube Links across the BenefitsCal application for easy access.

Use Case

The YouTube instructional videos are linked under the Help section. Locating these videos requires a few clicks. Some customers may miss these videos due to the navigation effort required.

Solution

Categorize the videos by benefit programs and organize them by customer journey phases like account creation, application, and renewal on **August 2024**
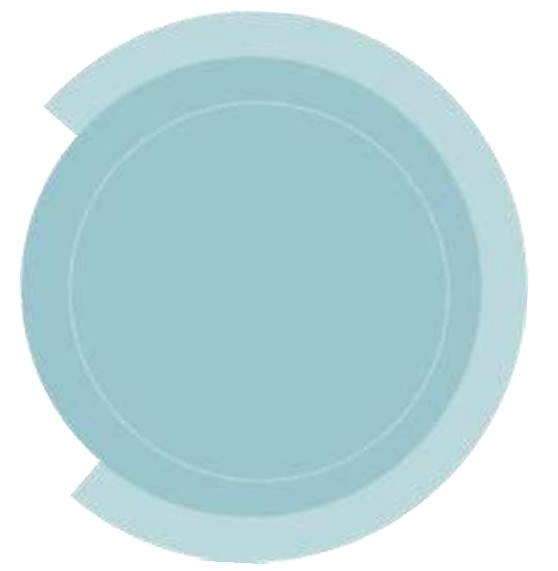
Impact

- In September 2024, there was a significant spike in engagement across Views and Watch Time.
- New subscribers increased to 598, up from 541 in August and 336 in July.
- Although October data is based on only 8 days, it already indicates a positive rise across all identified metrics.

	In Get CalFresh (GCF)	**In BenefitsCal**	**Counties**
Apply for Benefits	Customer applies online	GCF triggers an automated script to submit information in BenefitsCal	Receive the application data in CalSAWS
Document Upload	Customer uploads document	GCF manually uploads documents in BenefitsCal (using GCF CBO Account)	Receive the uploaded documents in Hyland imaging system
SAR 7 (Periodic Reports)	Customer applies online	GCF generates a PDF and uploads it as a document in BenefitsCal (using GCF CBO Account)	Receive SAR 7 document in Hyland imaging system

- All Get CalFresh transactions go to the counties through BenefitsCal
- The volume of the traffic to the Counties is not expected to increase after the GCF sunset since the requests are already routed through BenefitsCal for Counties to retrieve currently

Release & Policy Update

Release and Policy Update

Upcoming Releases

October Priority Releases	November Baseline Release (11/25/2024)	December Priority Releases	January Baseline (1/27/2025) and Priority Releases
• 10/3/2024: Mass Replacement of CF Benefits • 10/24/2025: ACIN I-42-24 FFY 2025 Disaster CalFresh COLA • 10/31/2024: ACL 18-75- Update CA 800 RIA to Add 5L aid code	• ACL 24-07 - Update CW 2186A and CW 2184 to include PFL and WTW pregnancy exemptions • ACL 23-94 - Family Reunification • MEDS Alerts – Add Program Prioritization to MEDS Alert Task Configurability • ACL 24-54 - Resource Limit Increase for CW/RCA • ACL 24-04 Dual Agency Rate Eligibility for Dual Agency Children & NMD's in Foster Family Agency Resource Homes	• 12/5/2024: ACIN I-41-24 - 2025 State Minimum Wage Values • 12/14/2024: ACIN I-41-24 - 2025 State Minimum Wage Run Batch EDBC • 12/XX/2024: ACIN I-XX-24 2025 CAPI COLA	• 1/XX/2025: SSI/SSA COLA • MEPM 19D - Multipurpose Senior Services Program (MSSP) Waiver • MEDIL I 21-33 - FFY Medi-Cal Updates Phase II • ACL 22-85 - CalFresh CF 296 and Expedited Service Redesign • BenefitsCal ABAWD Time Limits API

Release and Policy Update
Upcoming Releases – 24.11
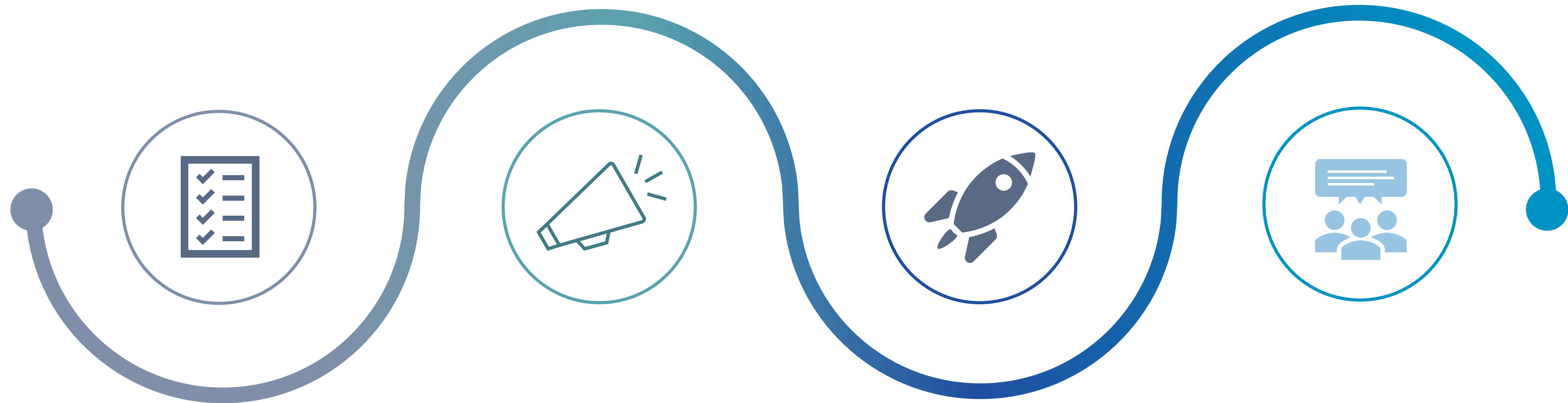
TESTING

System Test, QA, and county validation are all in progress

RELEASE COMMUNICATION

Webcast: *11/19/2024*

Newsletter and Release Notes: Week of 11/18/2024

DEPLOYMENT

Greenlight: 11/20/2024

Deployment: 11/24/2024

POST RELEASE

Post-Release Daily calls are scheduled for 11/25/2024-11/27/2024

# Release and Policy Update
CARES-FCED Update

- Real Time Integration via APIs to allow Social worker and Case worker to electronically share information
- New pages in CalSAWS to show data received/sent

| CARES System | ← → | Case Link
Individual Demographics
Case Worker
Request for Information
Eligibility Results
Placement
Placement Authority
Child Support Referral
Court Information
Extended Foster Care
Income
Assets
Documents
Imaging | ← → | CalSAWS System |

Release and Policy Update
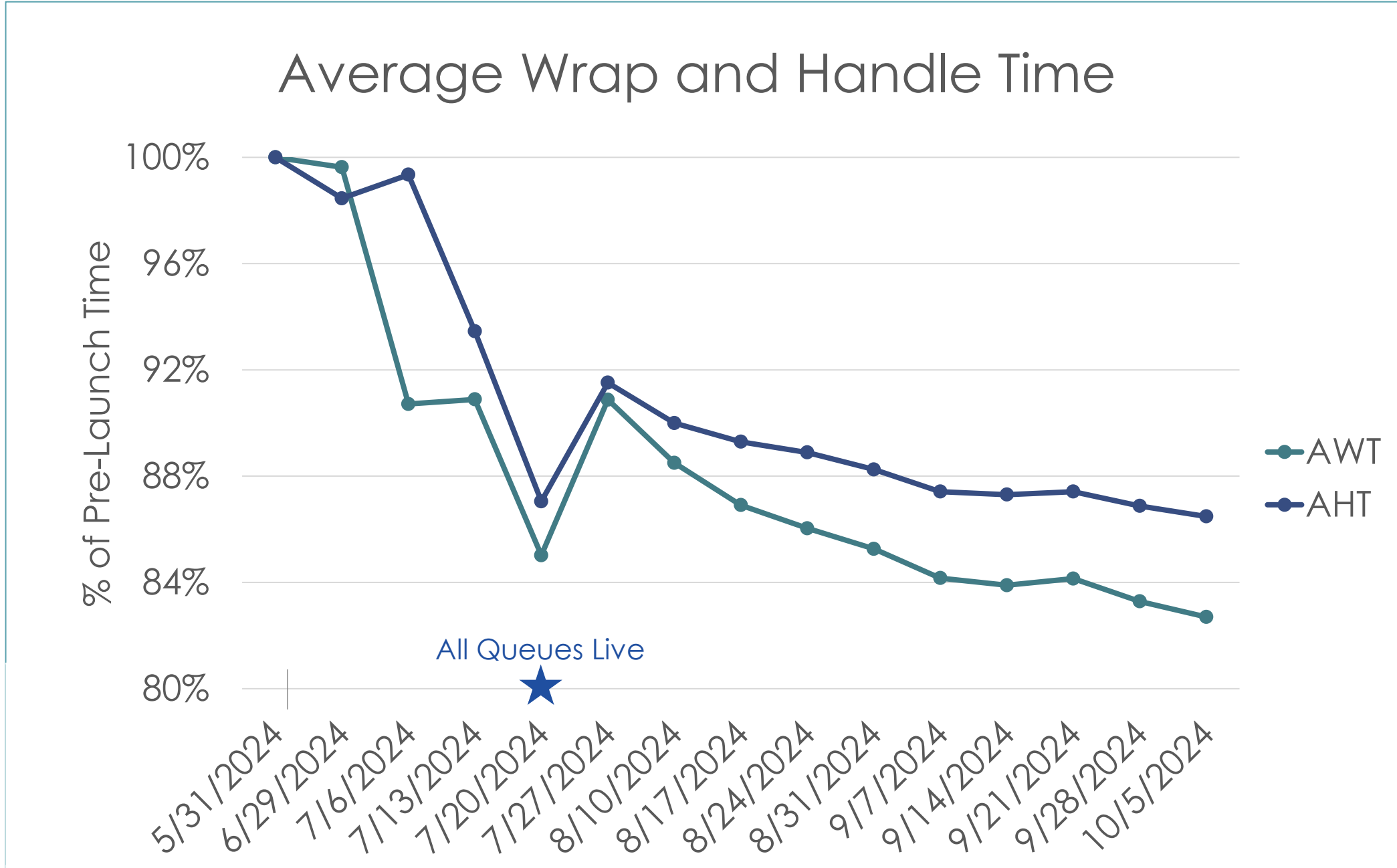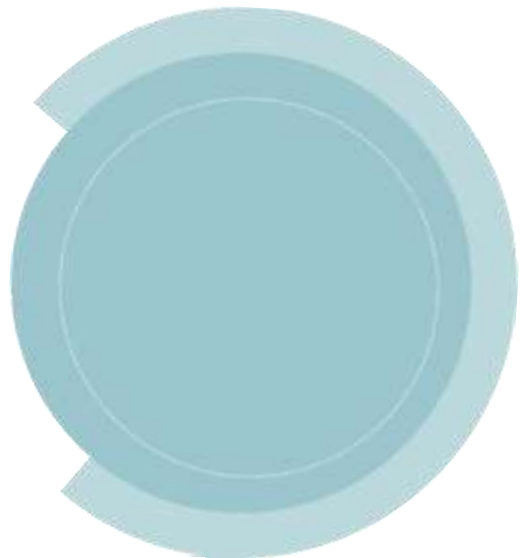
CARES-FCED Update

- API Build (14 CARES hosted, 14 CalSAWS hosted)
  - Design/Build complete for Initial Requirements
    - Integrated Assembly test of CalSAWS changes (targeted to begin 11/4/2024)
  - APIs going through additional coding for updated or new requirements
    - Inclusive of technical changes for easier consumption of data and business requirement changes

CalSAWS Build/Test Status
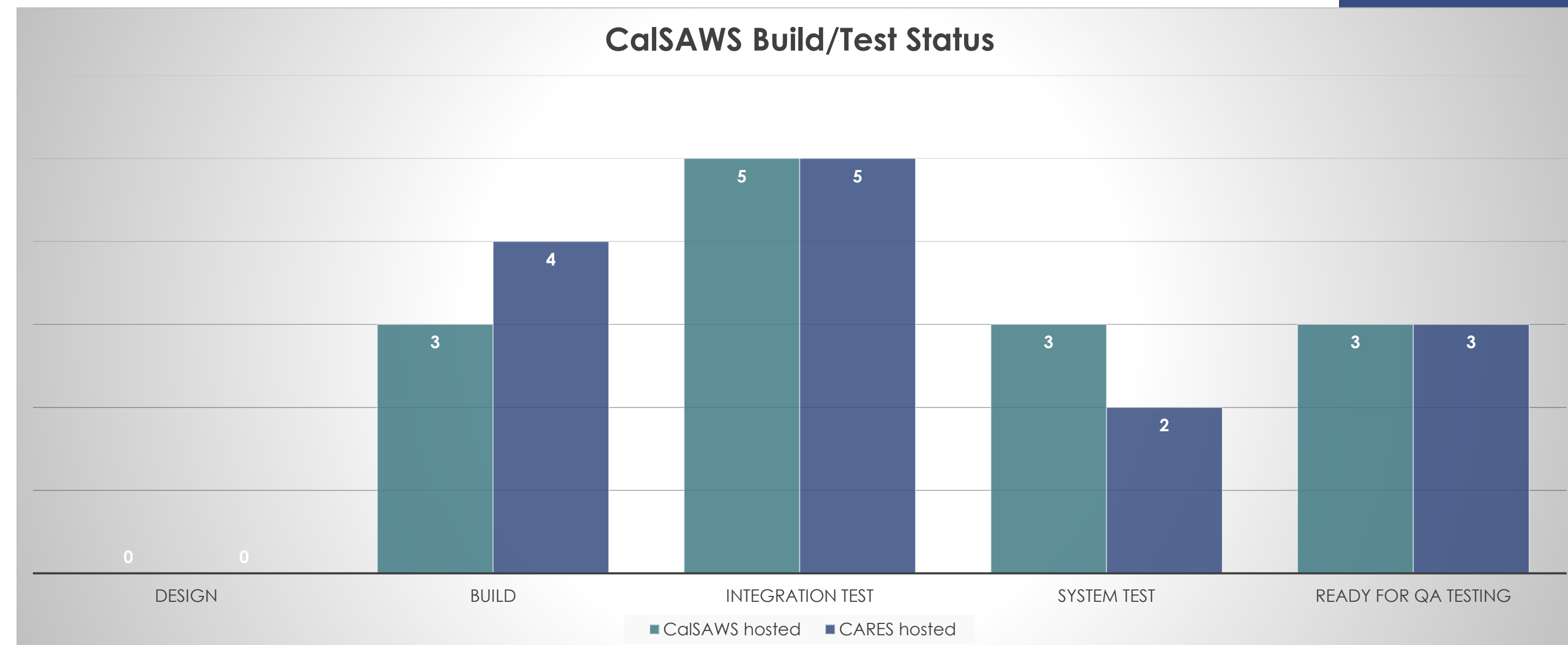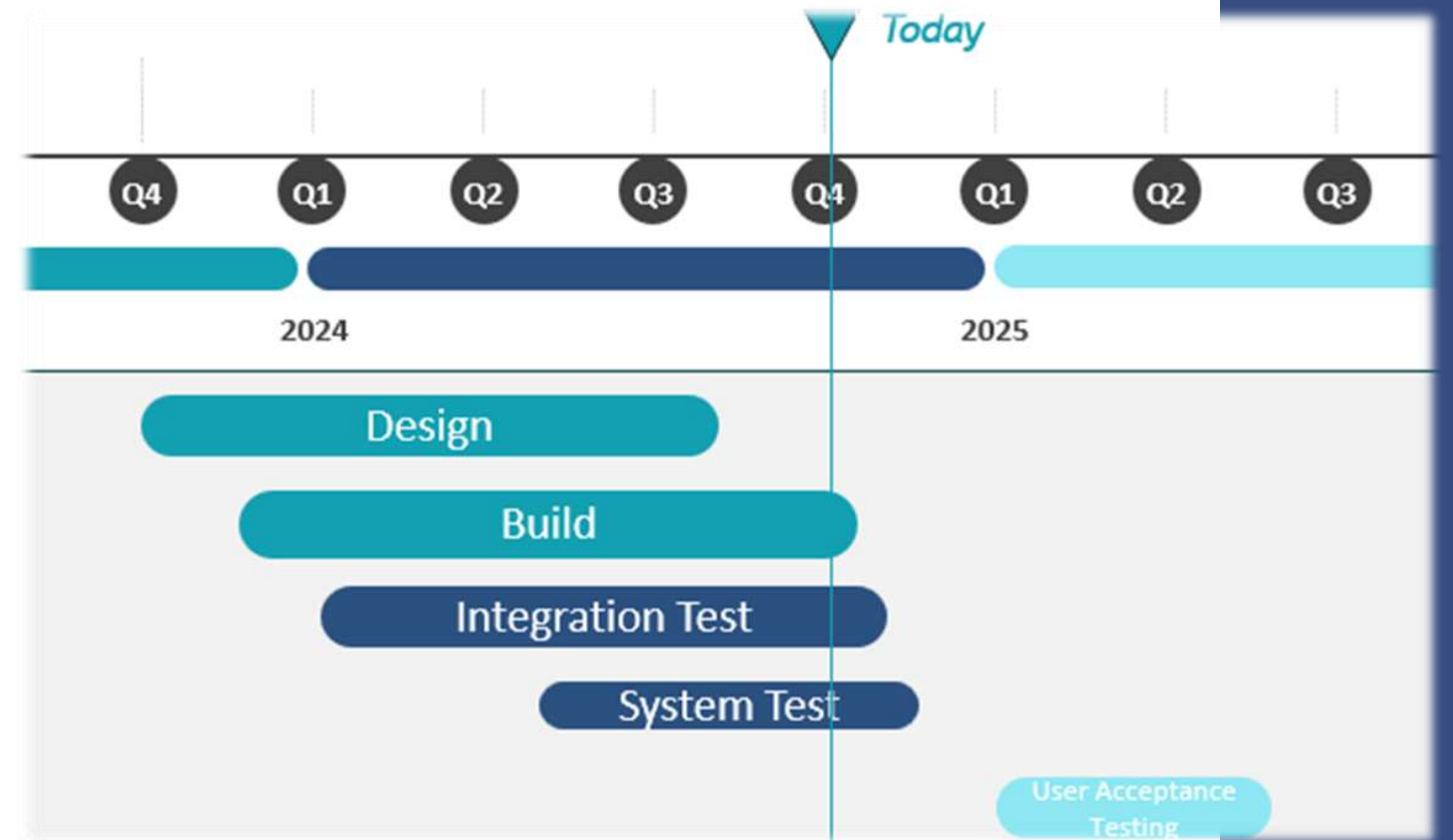
Fresno GenAI Update

Fresno GenAI Call Summary Assist

Below captures production metrics for the Fresno GenAI Call Summary Assist solution from **June 28, 2024 through October 5, 2024**:

Average Wrap and Handle Time

All Queues Live

AWT
AHT

17%
Reduction in Average Post-Call Wrap Time

AWT reduced by 6% since August

14%
Reduction in Average Handle Time

AHT reduced by 4% since August

Note: All percentages have been rounded to the nearest whole number

Key Performance Metrics (Since Launch)

77K+ Summaries Generated	**81%** GenAI Summary Content Unedited
100% Summaries Generated Within 60 seconds	**8 seconds** Average Call End to Summary End

Select Recent Enhancements

- Dictionary updates - added acronyms and program terms
- Improve distinction of which actions will be completed by EW after the call
- Improve recognition of when customer provides an updated phone number or address

Infrastructure Transition-In

CalSAWS | JPA Board of Directors Meeting

Infrastructure Transition-In

Concepts

Transition "In Place"

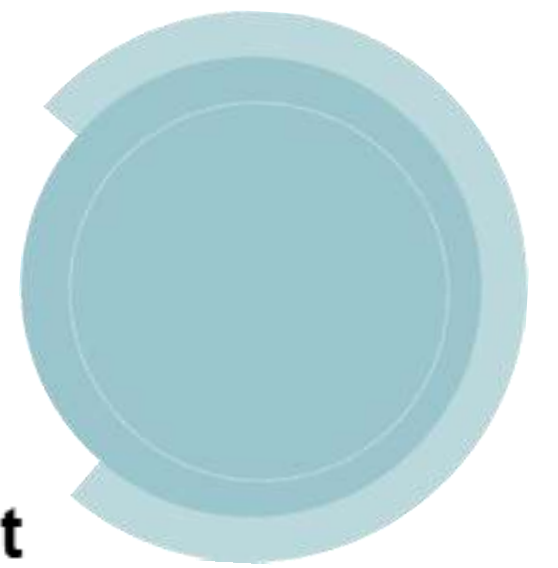- Largely use processes and procedures of the incumbent

Ongoing Staff

- Ongoing Infrastructure staff perform the tasks and activities to accomplish the transition resulting in better Infrastructure support following transition

Change Management

- Consider human factors related to change
- Coordinate with our Cultural Transformation Manager

"In Flight" Work

- Analyze in-flight work (changes, incidents, etc.) to determine which organization will complete the remaining work
- Identify the correct point of transition to prevent disruption to ongoing enhancement work and to the County users
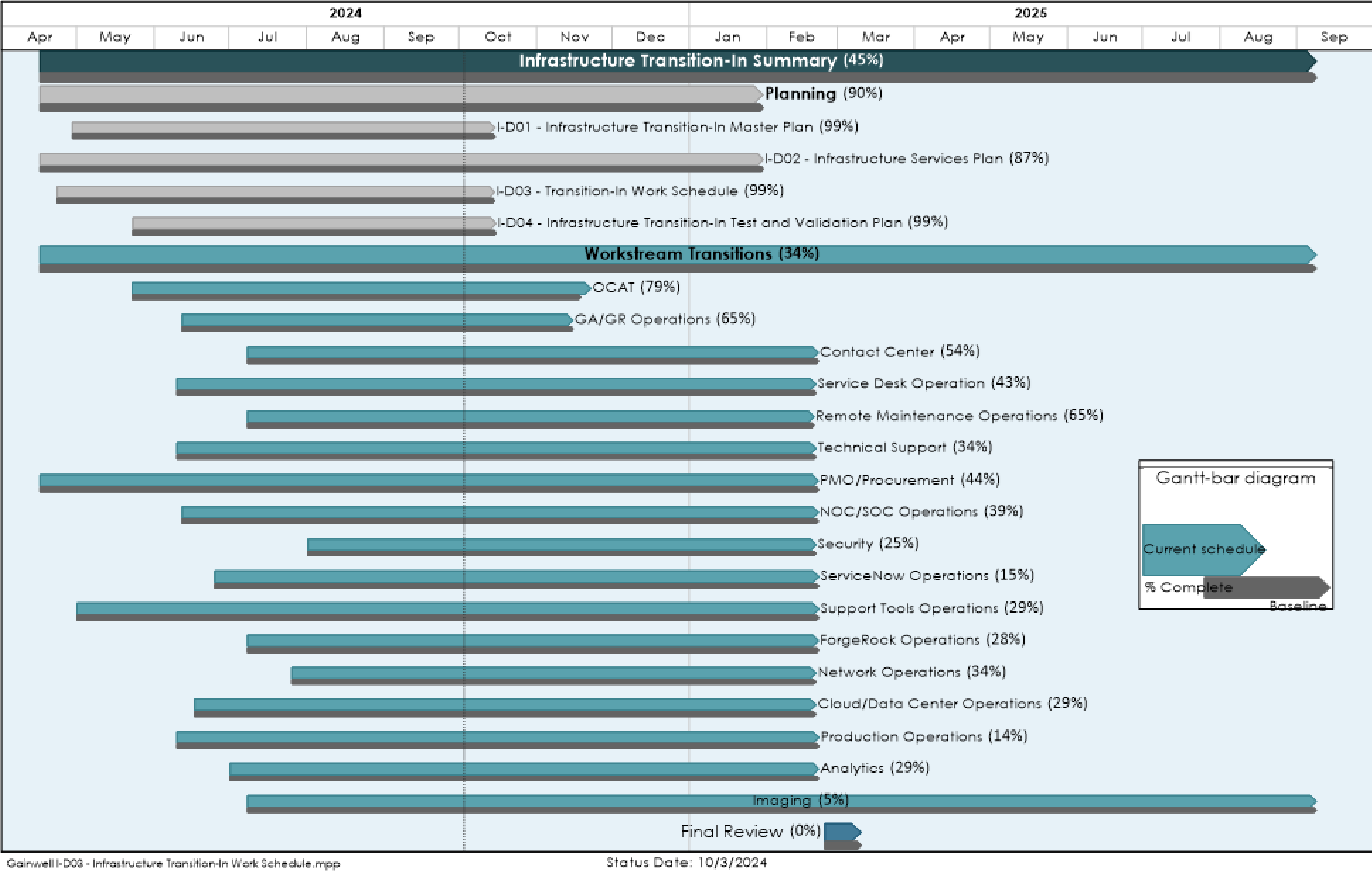
Governance

- Establish governance process for rapid escalation and decision making
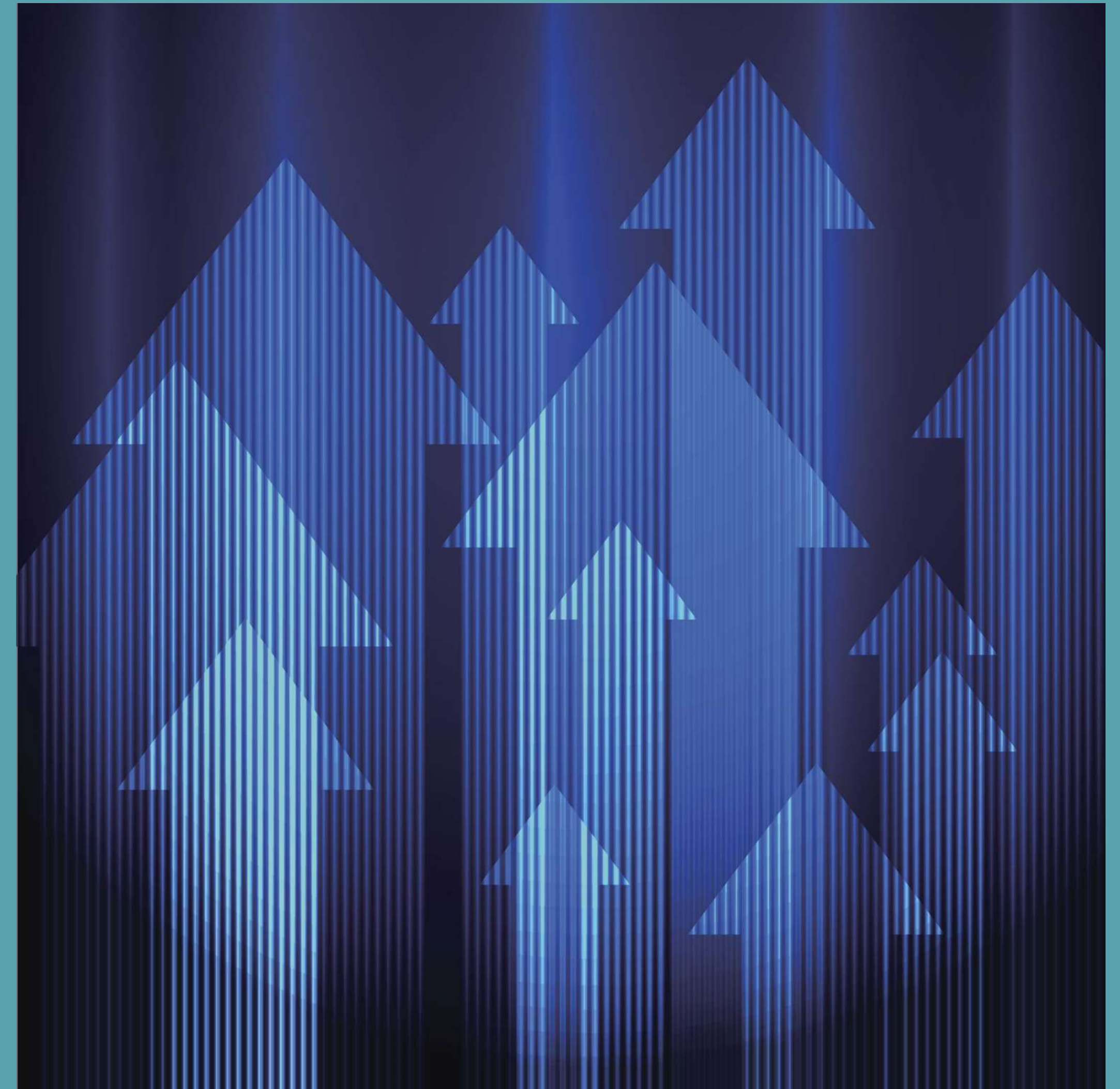
Infrastructure Transition-In

Timing

County Impact

- OCAT Help Desk
  - Consolidating into one process
  - Transitioning from Jira to ServiceNow
  - Counties will use the existing process to escalate incidents and requests in CalSAWS ServiceNow
  - CalSAWS Service Desk will route incidents and requests to the Infrastructure team

County
Highlight

Procurement Update

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	Consortium Issues RFP Addendum 4	September 17, 2024
11	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	July 31, 2024 – February 26, 2025
12	Prepare and Approve Vendor Selection Report	February 27 – April 7, 2025
13	Publish Notice of Intent to Award and VSR	April 8, 2025
14	Contract Negotiations	April 11 – 23, 2025
15	State Contract Approval	April 24 – May 23, 2025
16	Federal Contract Approval	May 27 – July 28, 2025
17	Contingency Period	July 29 – August 14, 2025
18	JPA BOD Approval	August 22, 2025
19	Contract Start	September 2, 2025
20	Transition-In Period	September 2, 2025 – February 27, 2026

Hyland Imaging Infrastructure Update

Hyland Imaging Infrastructure Update

OCR Processing Slowness
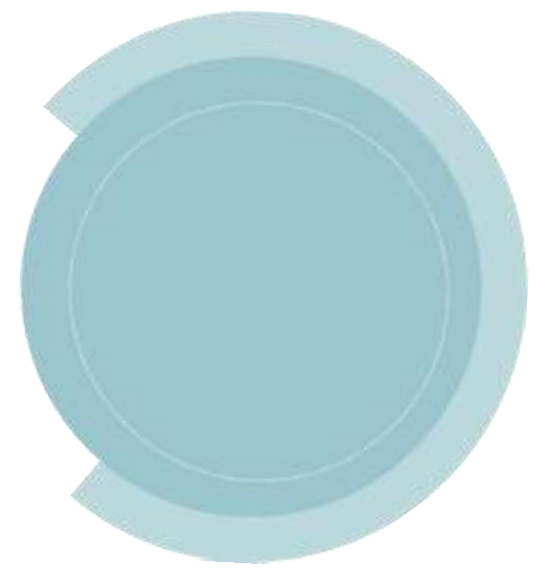
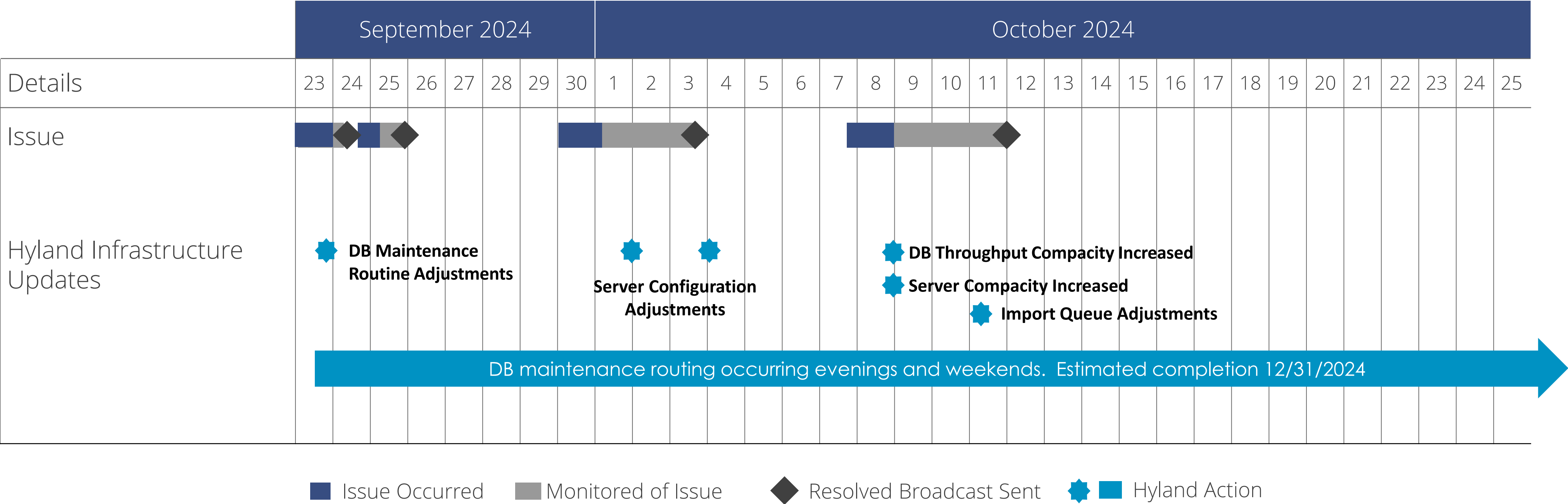- Timeframe:

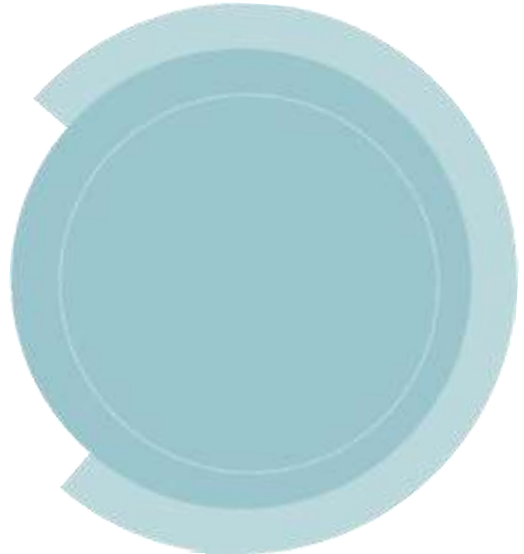 9/23-9/25, 9/30-10/1, 10/7-10/8

- Impact:

  - A subset of tasks and customer reporting updates routed via the OCR flow were delayed up to three hours during the impacted timeframes.

  - Documents were visible and searchable for workers during the impacted timeframes.

- Summary:

  - 9/23 – Due to a maintenance process running on the database, performance degradation led to a backlog of items in Brainware Import queues.

  - 9/24, 9/30, and 10/7: Performance related backlogging was seen during peak hours. It was identified that scaling alignment for the solution was necessary to ensure timely OCR processing.
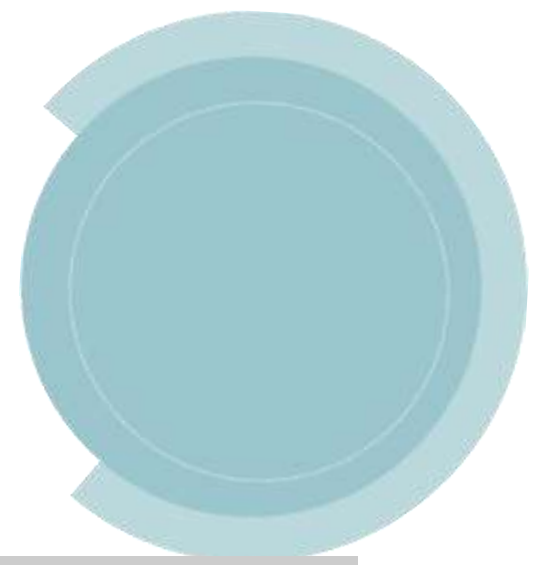
Hyland Imaging Infrastructure Update
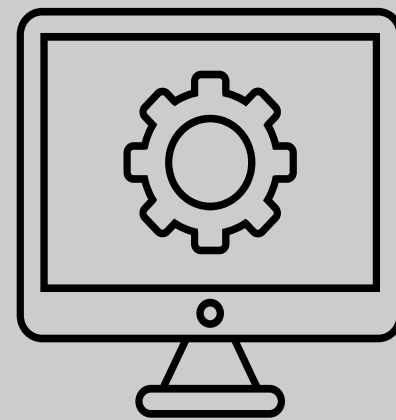## OCR Processing Slowness - Timeline

Details	September 2024							October 2024																								
	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25

Issue

Hyland Infrastructure Updates

DB Maintenance Routine Adjustments

Server Configuration Adjustments

DB Throughput Compacity Increased

Server Compacity Increased

Import Queue Adjustments

DB maintenance routing occurring evenings and weekends. Estimated completion 12/31/2024

■ Issue Occurred   ■ Monitored of Issue   ◆ Resolved Broadcast Sent   ✦ ■ Hyland Action

Hyland Imaging Infrastructure Update
Hyland OCR Improvement & Optimization

Scaling
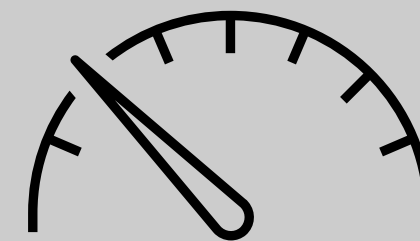
Added additional server capacity
- Four new servers dedicated to importing; 10 servers dedicated to processing
- Previously all servers were importing and processing
  - ➢ **COMPLETED – 10/10/2024**

Adjust import queues to scale horizontally
  - ➢ **COMPLETED – 10/11/2024**

Throughput

Database optimization
  - ➢ **COMPLETED 10/7/2024**

Database cleanup
  - ➢ **IN PROGRESS**
  Target completion 12/31/2024

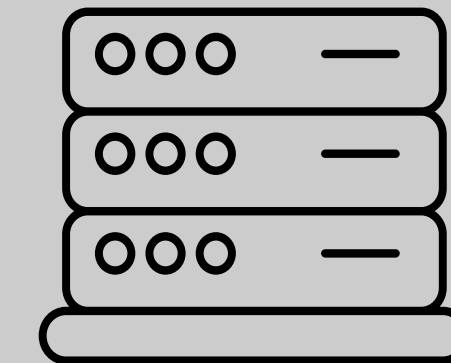Review of Solution design and architecture
  - ➢ **IN PROGRESS**
  Target completion 10/18/2024

Phase 1 Outcome Implementation
  - ➢ **IN PROGRESS**
  Target completion 10/25/2024

Prevention

Dashboards & monitoring for Architecture and Solution
- Visible to CalSAWS Project Administrators
  - ➢ **IN PROGRESS –**
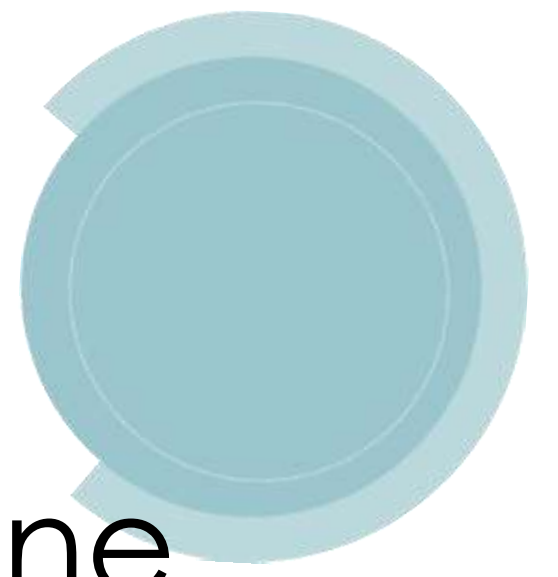 **Target completion approx. 30 days**

Additional Enhanced Monitoring
- Dependent on completion of Dashboards
  - ➢ **IN PROGRESS –**
  Target begin in approx. 30 days
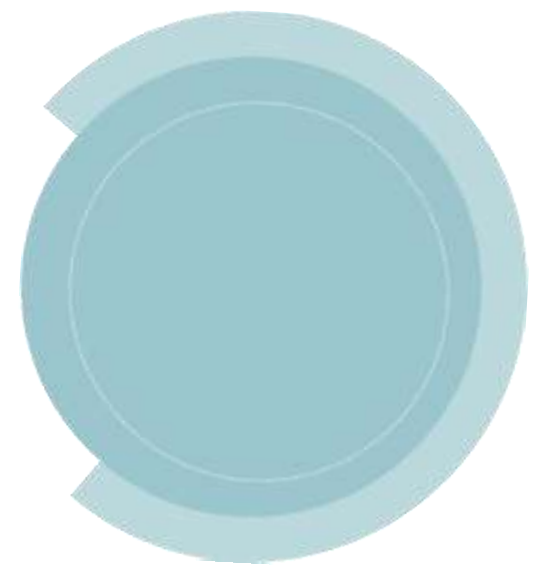
Closed Session

Closed Session

14. Conference with Legal Counsel – Contract Negotiations (One Item).

Reconvene
Open Session

Open Session

15. Announce action taken in Closed Session, if any.

Adjourn Meeting