

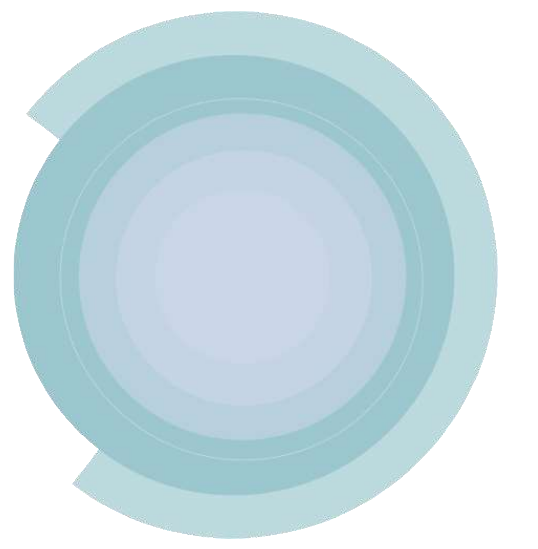
# Project Steering Committee Meeting

November 21, 2024



CalSAWS

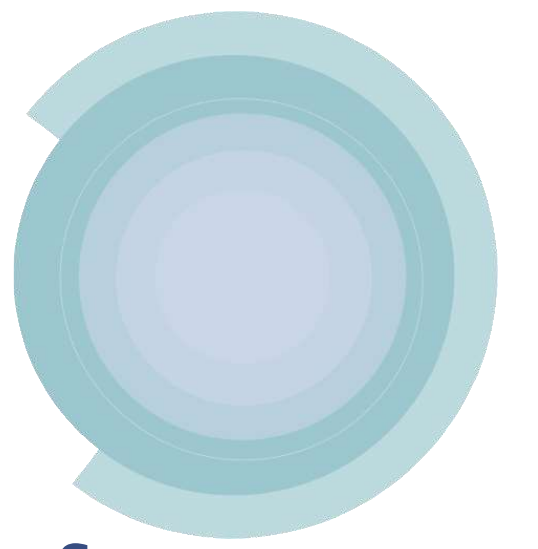
# Agenda



1. Call Meeting to Order.
2. Confirmation of Quorum and Agenda Review.
3. Public Comment: Public opportunity to speak on any item 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.

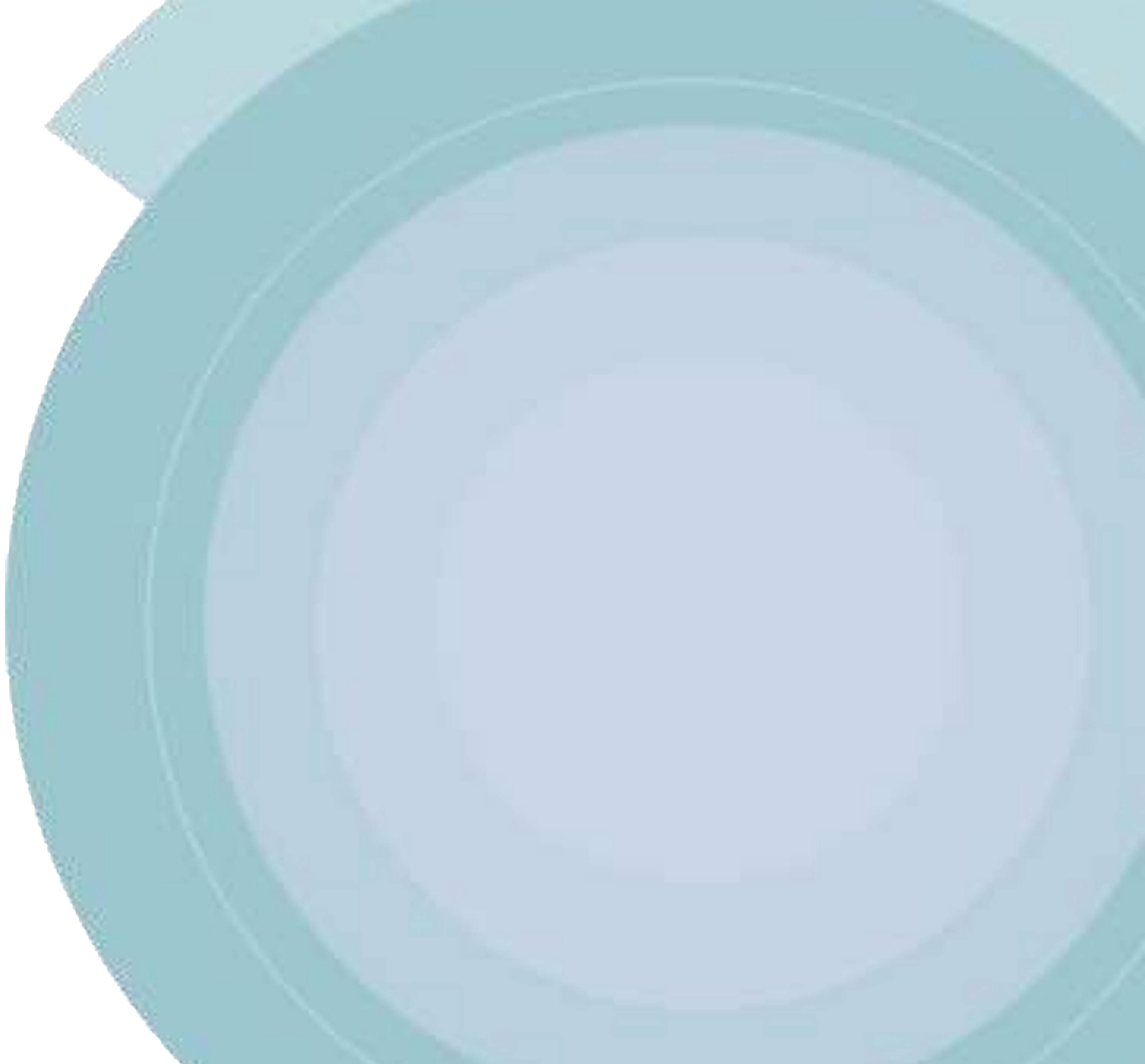
Note: The public may also speak on any Item ON the Agenda by waiting until that item is read, then requesting recognition from the Chair to speak.

# Action Items



4. Approval of the Minutes and review of the Action Items from the October 17, 2024 PSC Meeting.

# Informational Items



# Introduction of new staff

# Sandeep Aji

Chief Technology Officer (CTO)

## Primary Focus

- Strategic Leadership
- Innovation
- Stakeholder Engagement
- Technology Oversight
- Team Development

## Key Responsibilities

- Develop & Implement the tech roadmap
- Oversee data & analytics initiatives to leverage insights for decision-making
- Foster innovation through the adoption of emerging technologies
- Manage procurement processes for tech solutions & partnerships



# Robert Lusk

Technology & Operations Director

## Primary Focus

- Operational Management
- Project Oversight
- Process Improvement
- Team Coordination

## Key Responsibilities

- Oversee CalSAWS production & tech ops, including lobby management, contact centers, imaging, & help desk functions
- Ensure the reliability & availability of systems & services
- Collaborate with the CTO on strategic technology initiatives
- Monitor performance metrics to report on operational effectiveness



# Performance Trends



# Performance Trends

## SLAs and Onshore/Offshore Hours

### CalSAWS SLAs

Aug – Oct\* 2024

Accenture

	Performance
✗ System Availability <b>10/11/24 - (eCCP outage took 60 minutes to resolve)</b>	99.7%
✓ Helpdesk Diagnosis	99.0%
✓ System Response	100%
✓ Batch Completion	100%
✓ Training Environment Availability	100%
✓ Standard Report Response	100%
✓ Security Incident Response	100%
✓ Disaster Recovery Response	100%
✓ ForgeRock	100%

\* October Performance Report is pending review

### BenefitsCal SLAs

Aug - Oct 2024

Deloitte

	Performance
✓ All Daily Transactions	100%

### Imaging SLAs

Aug – Oct 2024

Hyland Solutions

	Performance
✗ Monthly Uptime <b>08/09/24 - (61 minutes to resolve)</b>	99.95%
✓ Monthly Page Views	98.97%
✓ Monthly Database Transactions	99.93%

### Onshore/Offshore Metrics

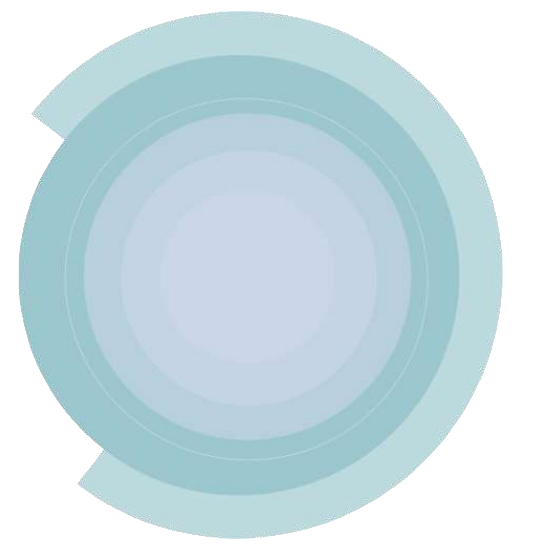
Aug – Oct 2024

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

### CalSAWS Cost of Rework

	Onshore %	Offshore %
R24.07	0.31%	0.72%
R24.01 - R24.05	2.44%	2.40%
<b>Target</b>	<b>≤ 10% (combined)</b>	

# BenefitsCal Update



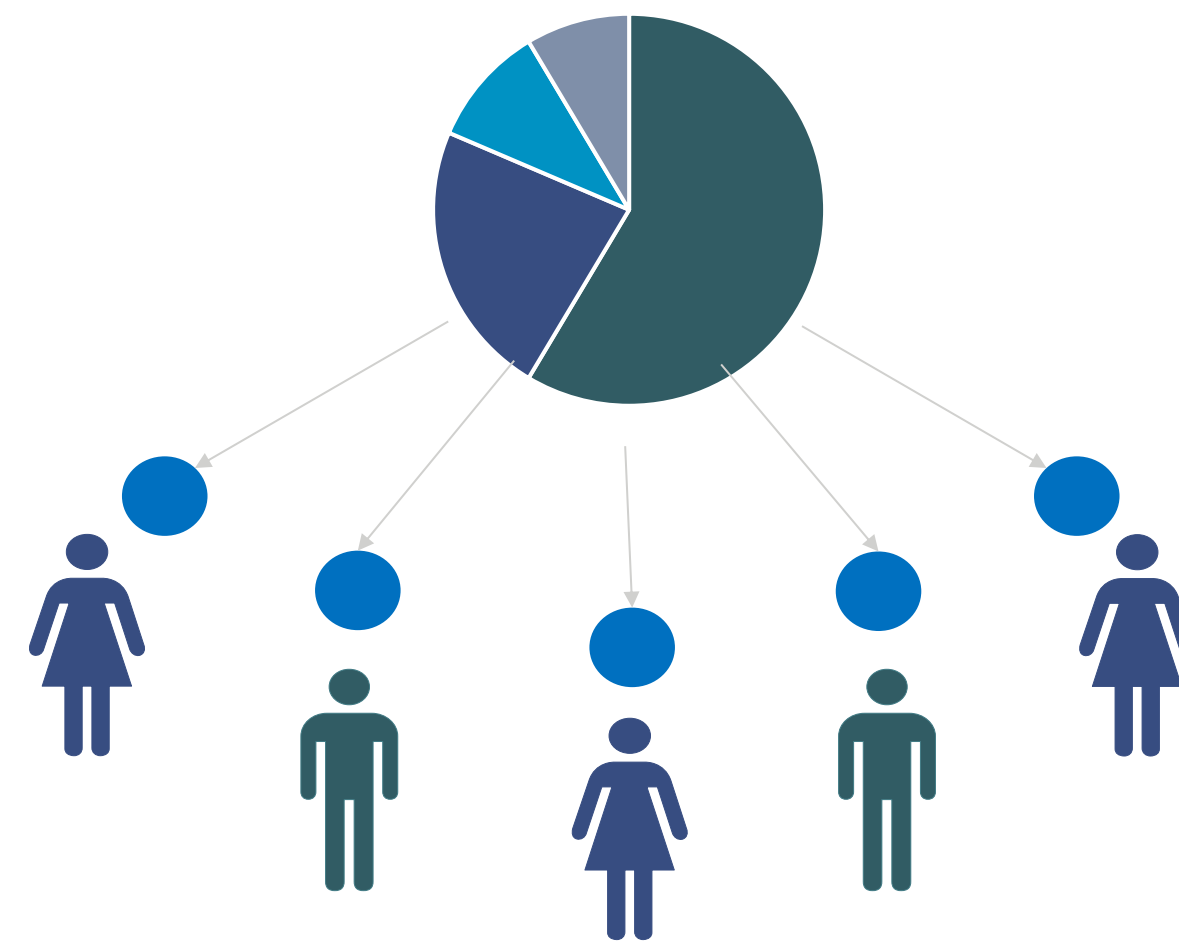
### ALL COUNTY LETTERS (ACL)

The final ACLs are being working on by CDSS and DHCS based on the input received from the Stakeholders



### CBO INFORMATION & UX

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



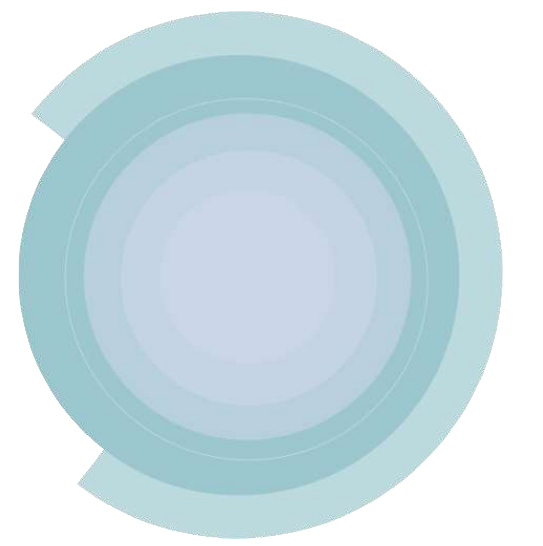
### ROI WORK GROUP MEETINGS

Most recent working session conducted on 11/18, and next session to be scheduled in December



# BenefitsCal

## CalFresh Able Bodied Adults Without Dependents (ABAWD) Implementation



### ■ Background – base requirements

- The scope for 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

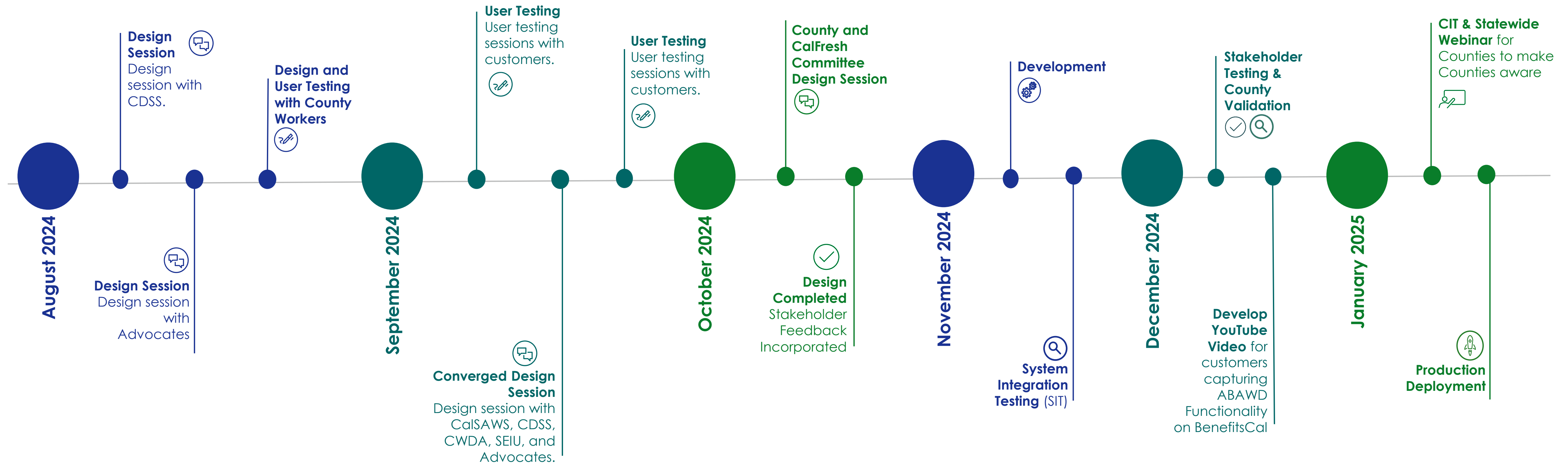
1. Add ability to report ABAWD exemptions, request corrections and report meeting the work requirement after initial application.
2. Applicable to logged in customers with a CalFresh Case Linked

- ABAWD waiver is expected to expire October 2025

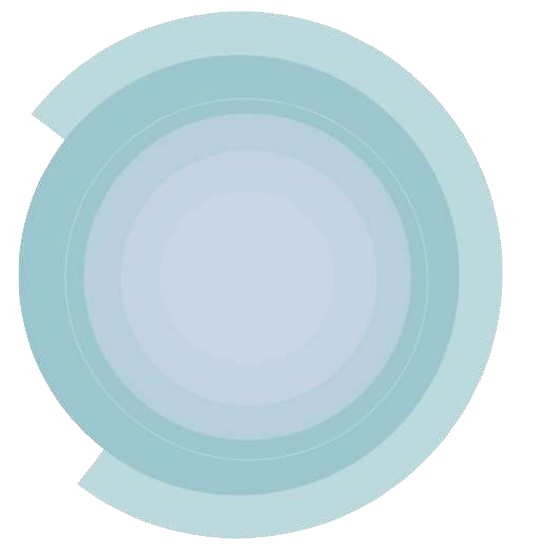
# BenefitsCal

## CalFresh Able Bodied Adults Without Dependents (ABAWD) Implementation Update

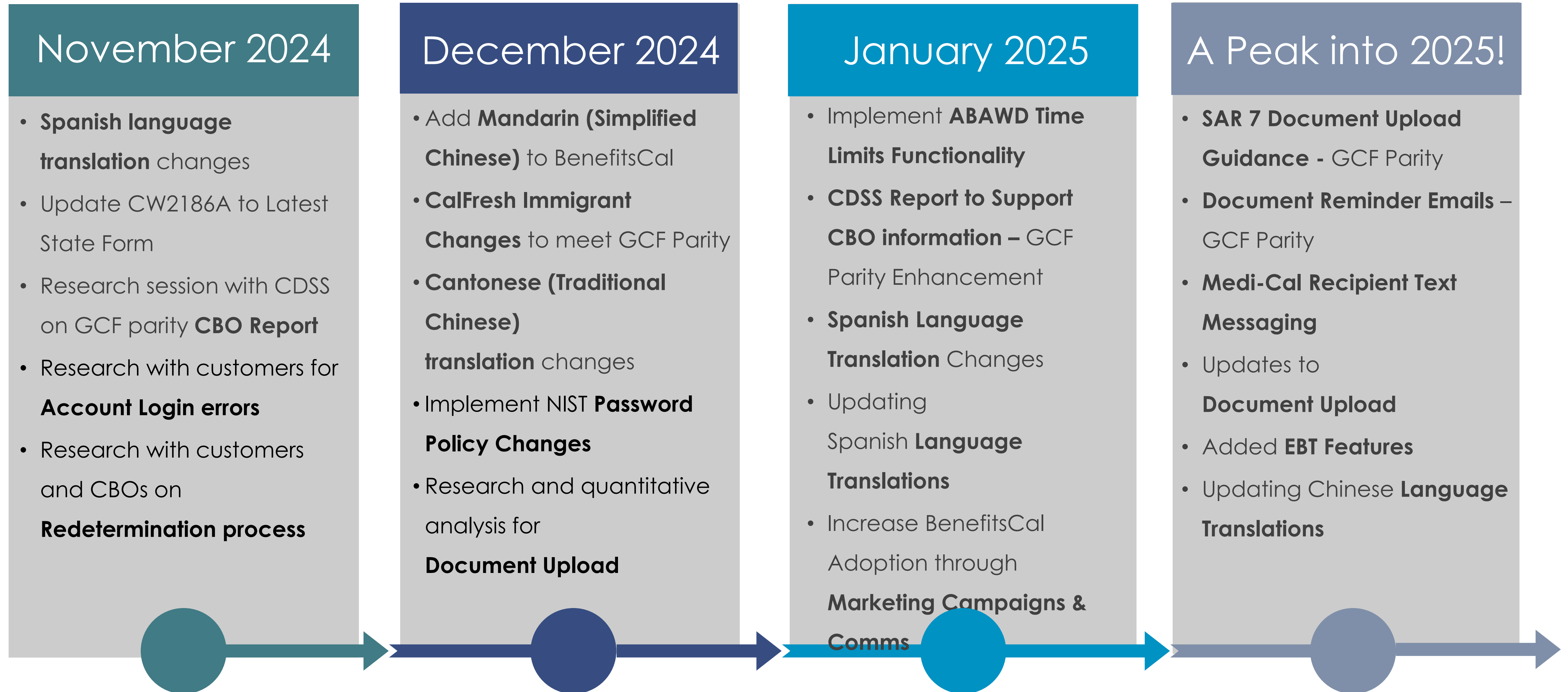
### Progress so far



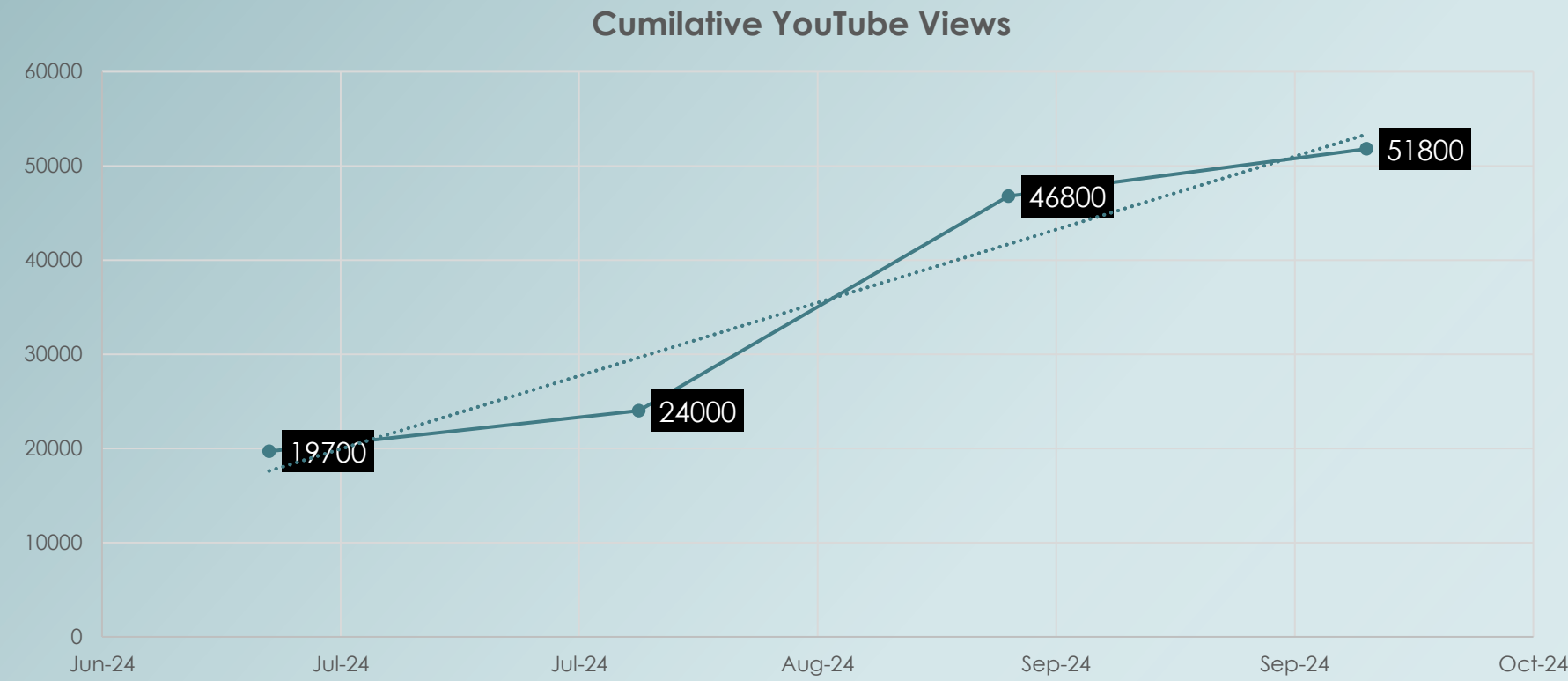
# BenefitsCal – Upcoming Enhancements



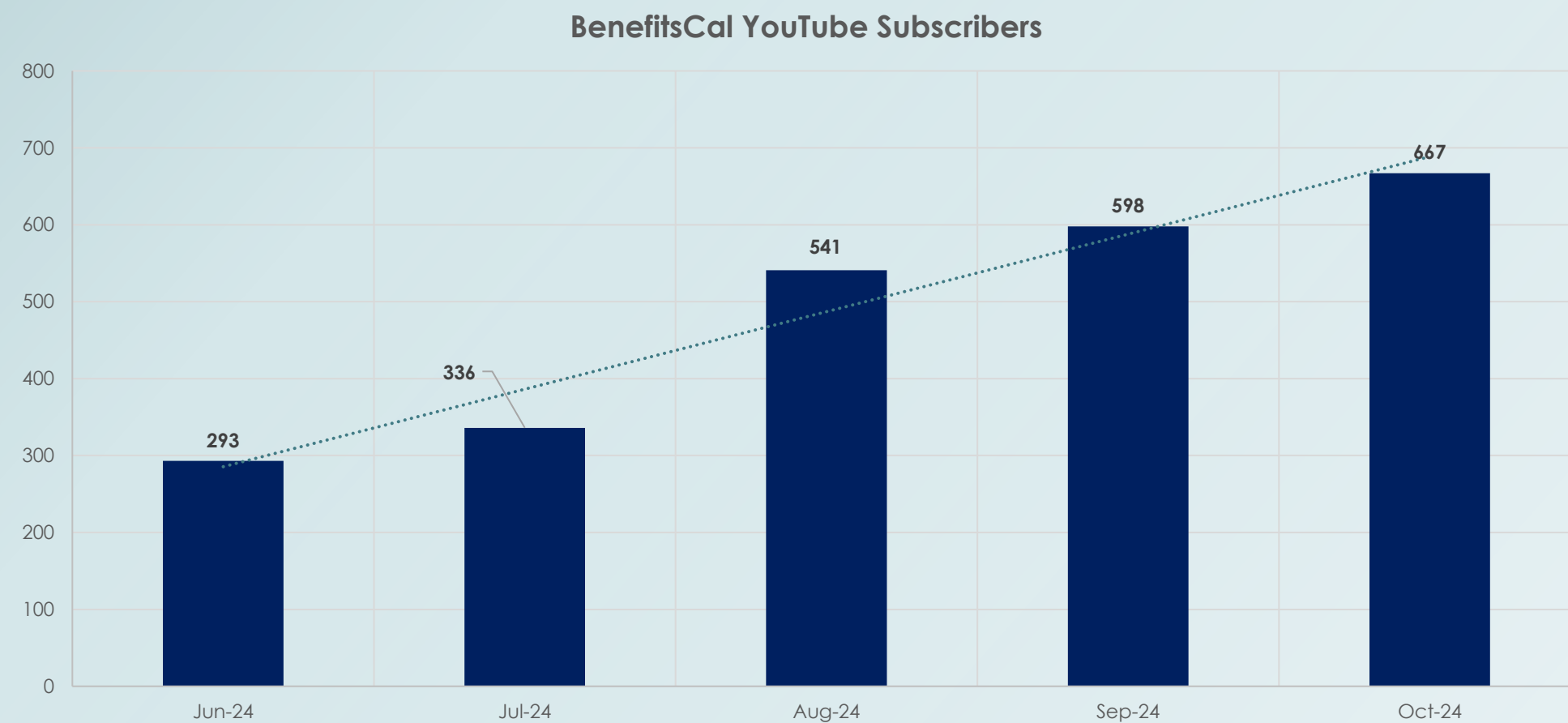
## Items on the Horizon



116% increase in YouTube views from August'24 to October'24 indicating a significant spike in engagement.



23% increase in new subscribers from August'24 to October'24, showing a strong growth trend post the improvement(s).



# Link to YouTube on Dashboard & Banner

Add YouTube Links across the BenefitsCal application for easy access.



## Situation

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

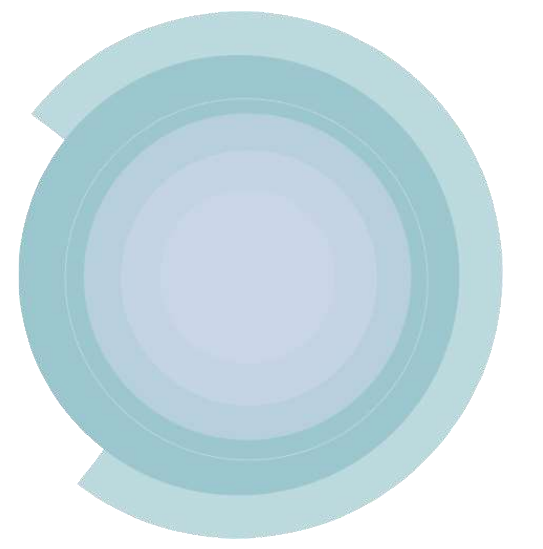
Categorize the videos by benefit programs and organize them by customer journey phases like account creation, application, and renewal on **08.24.2024**.



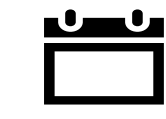
## Impact

- In September and October 2024, there was a significant spike in engagement across Views and Watch Time.
- 667 New subscribers were added in the month of October
- Watch time increased from 583.9 hours in August to 1400 hours in October 2024

# BenefitsCal – Top 5 Customer Favorites



Around 20% of all logged in customer events checking EBT Balance was the top used functionalities, with others being Program Details, Case Details, Message Centre and Document Centre

 **Time period of analysis**  
Apr '24 – Sept '24

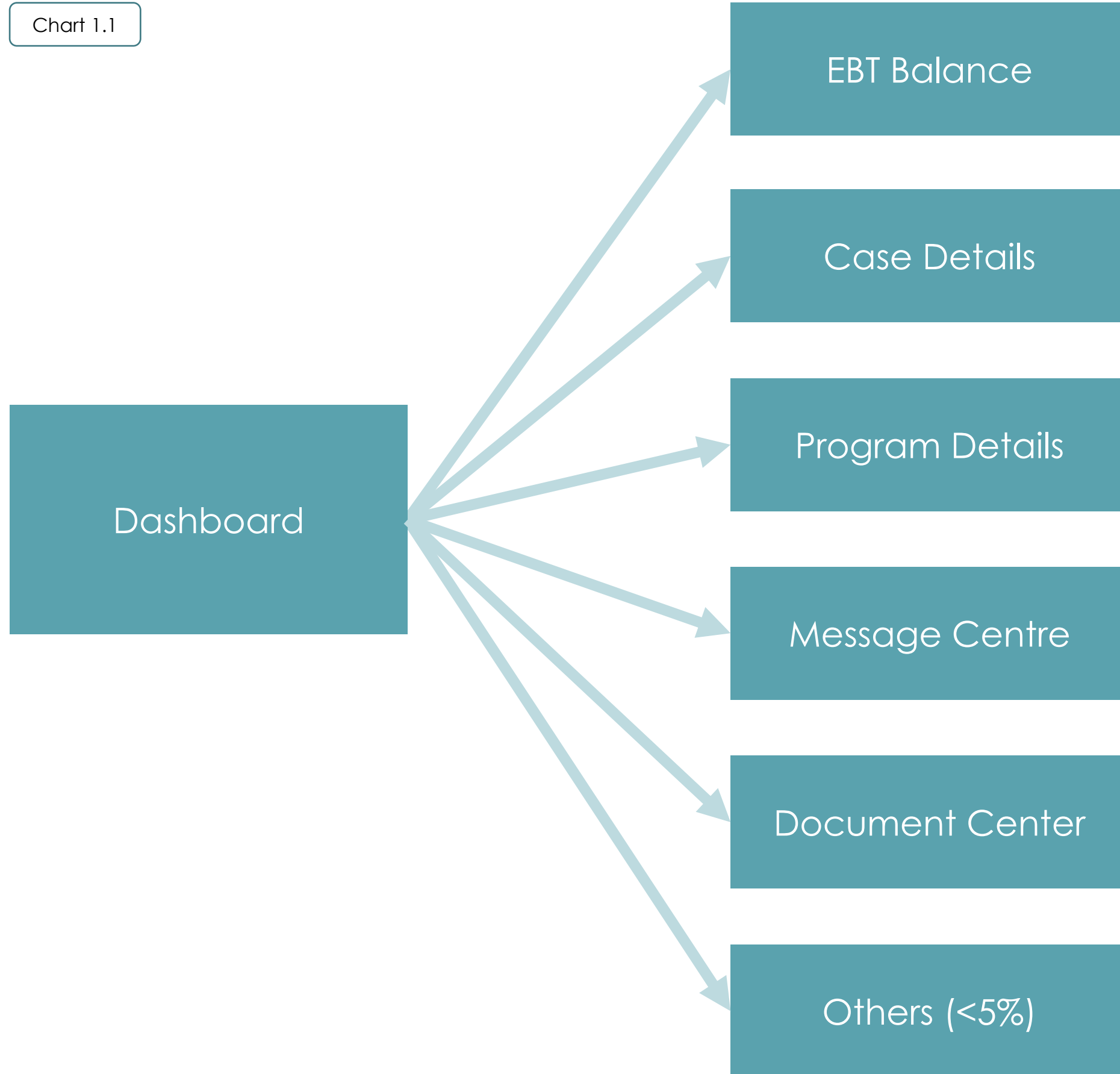


Table 1

Customers events						
Page ID	April	May	June	July	August	September
EBT Balance	22% (1.7M)	22% (1.7M)	22% (1.7M)	22% (1.9M)	22% (1.9M)	22% (1.9M)
Program Details	11% (850K)	11% (865K)	11% (859M)	12% (1.1M)	13% (1.1M)	12% (1.06M)
Case Details	11% (890K)	11% (890K)	11% (873K)	12% (1M)	12% (1.1M)	12% (1.03M)
Message Centre	11% (900K)	11% (900K)	11% (890K)	11% (960K)	11% (994K)	12% (1.04M)
Document Center	7% (550K)	7% (580K)	7% (563K)	7% (605K)	7% (604K)	7% (592K)

Other pages visited by customers include Your Appointments, Important Updates and Report Change.

\*An event in Amplitude captures user actions; i.e., users visiting different pages(EBT Balance, Case details, etc) from the Dashboard.



# Release and Policy Update

# Release and Policy Update

## Upcoming Releases

November Baseline Release (11/25/2024)	December Priority Releases	January Baseline (1/27/2025) and Priority Releases	February Baseline (2/9/2025) and Priority Releases
<ul style="list-style-type: none"><li>• <b>ACL 24-07</b> - Update CW 2186A and CW 2184 to include PFL and WTW pregnancy exemptions</li><li>• <b>ACL 23-94</b> - Family Reunification</li><li>• <b>MEDS Alerts</b> – Add Program Prioritization to MEDS Alert Task Configurability</li><li>• <b>ACL 24-54</b> - Resource Limit Increase for CW/RCA</li><li>• <b>ACL 24-04</b> Dual Agency Rate Eligibility for Dual Agency Children &amp; NMD's in Foster Family Agency Resource Homes</li></ul>	<ul style="list-style-type: none"><li>• <b>12/5/2024</b>: ACIN I-41-24 - 2025 State Minimum Wage Values</li><li>• <b>12/5/2024</b>: MEDIL I 24-17 - SB 311 Phase 2 - SSI/SSP QMB/SLMB Discontinuances</li><li>• <b>12/7/2024</b>: 2025 SSA COLA Values</li><li>• <b>12/14/2024</b>: ACIN I-41-24 - 2025 State Minimum Wage Run Batch EDBC</li><li>• <b>12/14/2024</b>: 2025 SSA COLA Batch EDBC</li><li>• <b>12/XX/2024</b>: ACIN I-XX-24 2025 CAPI COLA Values</li></ul>	<ul style="list-style-type: none"><li>• <b>1/11/2025</b>: 2025 CF SSI Batch EDBC</li><li>• <b>1/27/2025</b>: MEPM 19D - Multipurpose Senior Services Program (MSSP) Waiver</li><li>• <b>1/27/2025</b>: MEDIL I 21-33 - FFY Medi-Cal Updates Phase II</li><li>• <b>1/27/2025</b>: ACL 22-85 - CalFresh CF 296 and Expedited Service Redesign</li><li>• <b>1/27/2025</b>: BenefitsCal ABAWD Time Limits API</li></ul>	<ul style="list-style-type: none"><li>• <b>2/9/2025</b>: MEDIL I 21-31 - CalHEERS eHIT: Alternate Format Options Phase II</li><li>• <b>2/9/2025</b>: Allow additional County of Responsibility Changes and Case Linkage Updates</li><li>• <b>2/XX/2025</b>: 2025 FPL COLA Values</li></ul>

# Release and Policy Update

Upcoming Release – 24.11



## TESTING

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

## RELEASE COMMUNICATION

Major Upcoming Changes Final - 10/7/2024

Webcast: 11/05/2024

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

Demos: Duplicate Person 11/6 & Family Reunification 11/19

## DEPLOYMENT

Greenlight: 11/20/2024

Deployment: 11/24/2024

## POST RELEASE

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

A magnifying glass is positioned over a document. The document has a section titled "Today's Tasks" in a pinkish box. The magnifying glass is focused on a specific area of the document, which appears to be a form or a list of tasks. The background is a light green color.

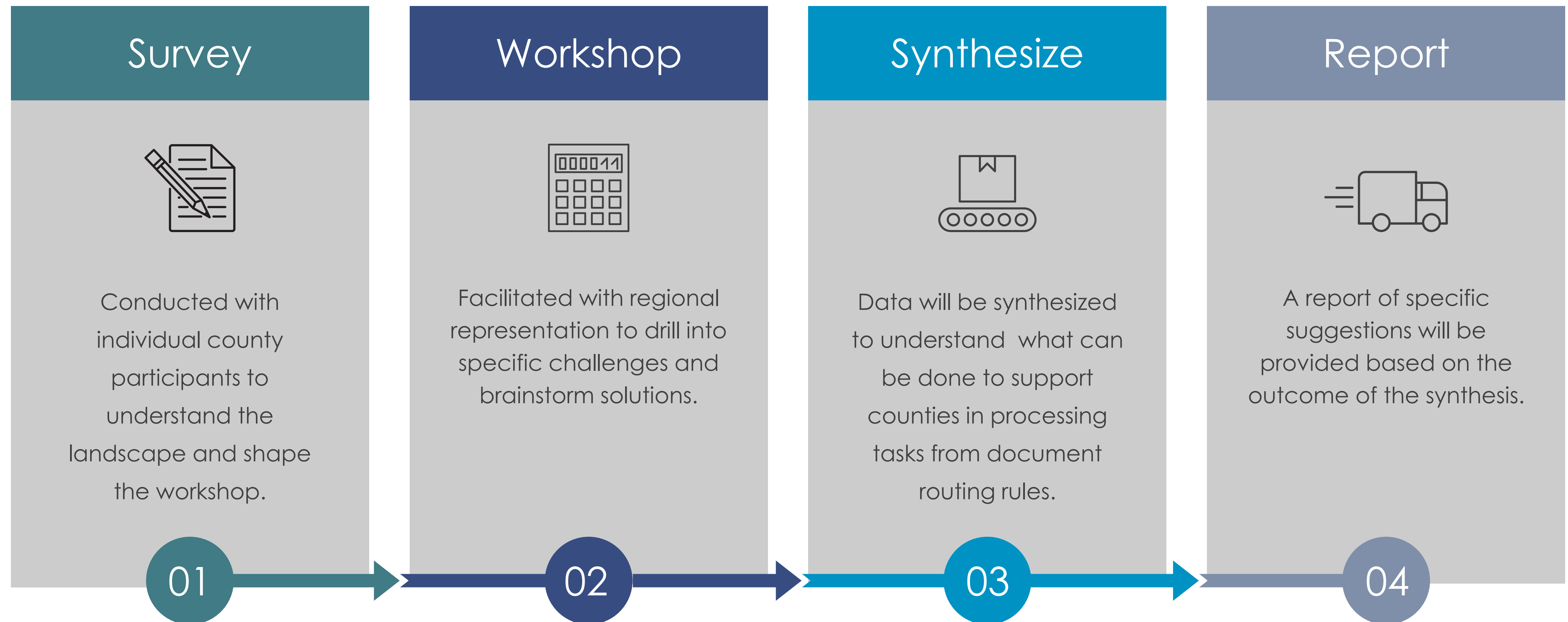
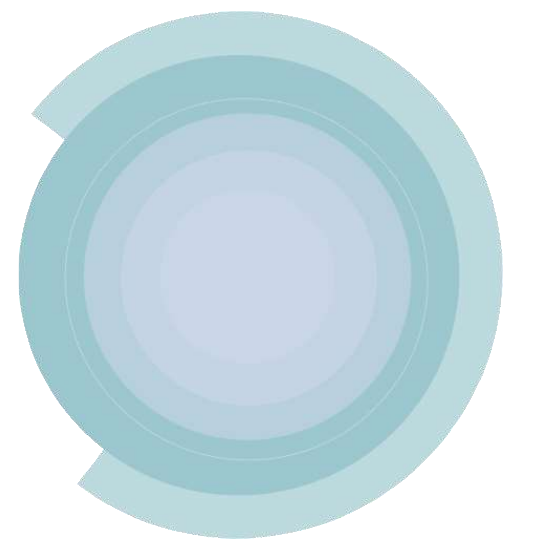
# Document Routing Rule Discovery

## Background

- Tasks configured to be created when images are scanned into the system.
- Notify workers when specific forms or verifications are received.
- Effort is to understand the county landscape for documents related tasks to proactively understand if there is anything that can be done to help manage these tasks.

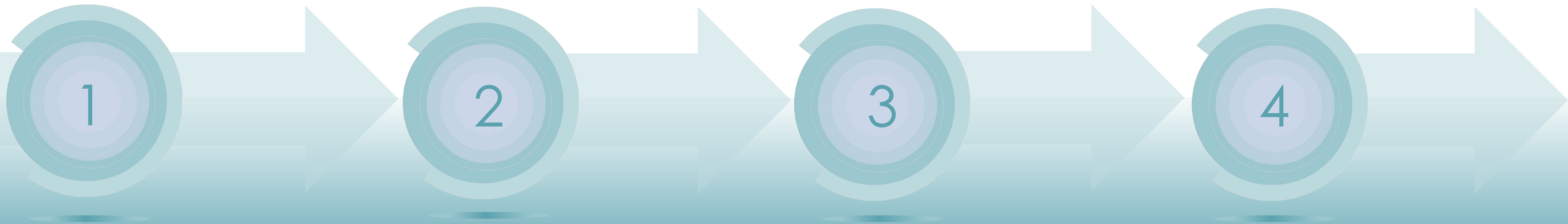
# Document Routing Rule Discovery Session

## Process



# Next Steps

- CRFI 24-034 submitted to counties on November 1, 2024 to identify county survey participants. CRFI due November 15, 2024.
- Survey sent to participants week of November 18, 2024. Includes approximately 15 questions.
- Subsequent CRFI will be sent to identify regional workshop participants. Approximately 2 per region.
- Workshop targeted for December.

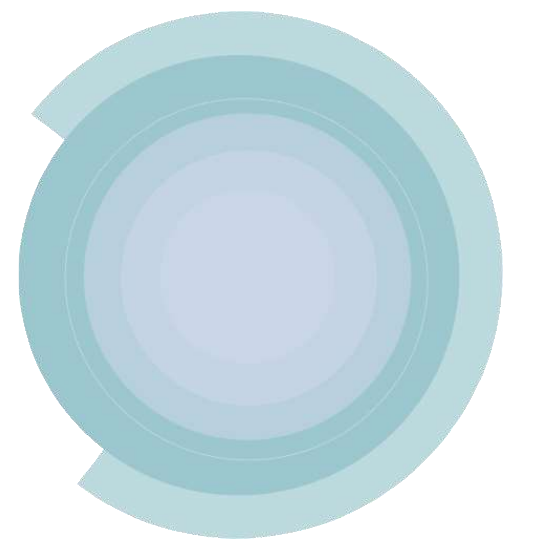


# Gainwell Infrastructure Transition-in Discussion

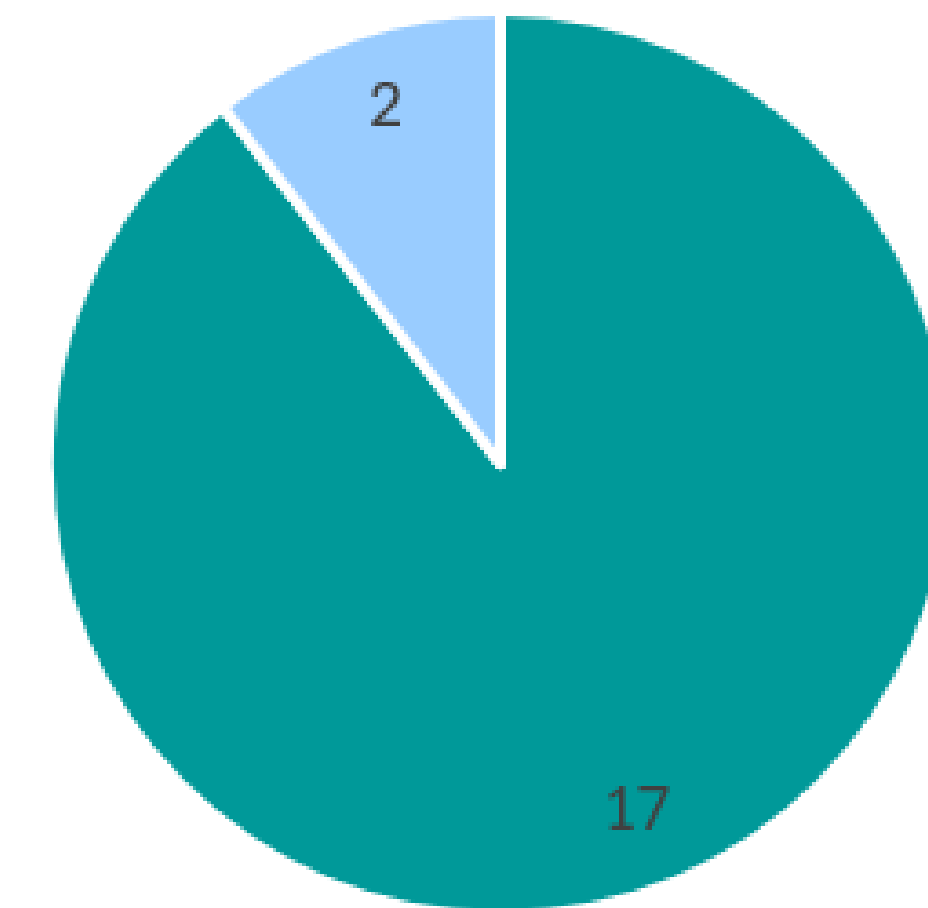
# Infrastructure Transition

## Completed Workstreams

- GA/GR Correspondence (Noticing Solution)
- OCAT
  - Operations underway
    - ❖ Service Desk
    - ❖ Change process
  - Moving to CalSAWS processes



Workstream Status

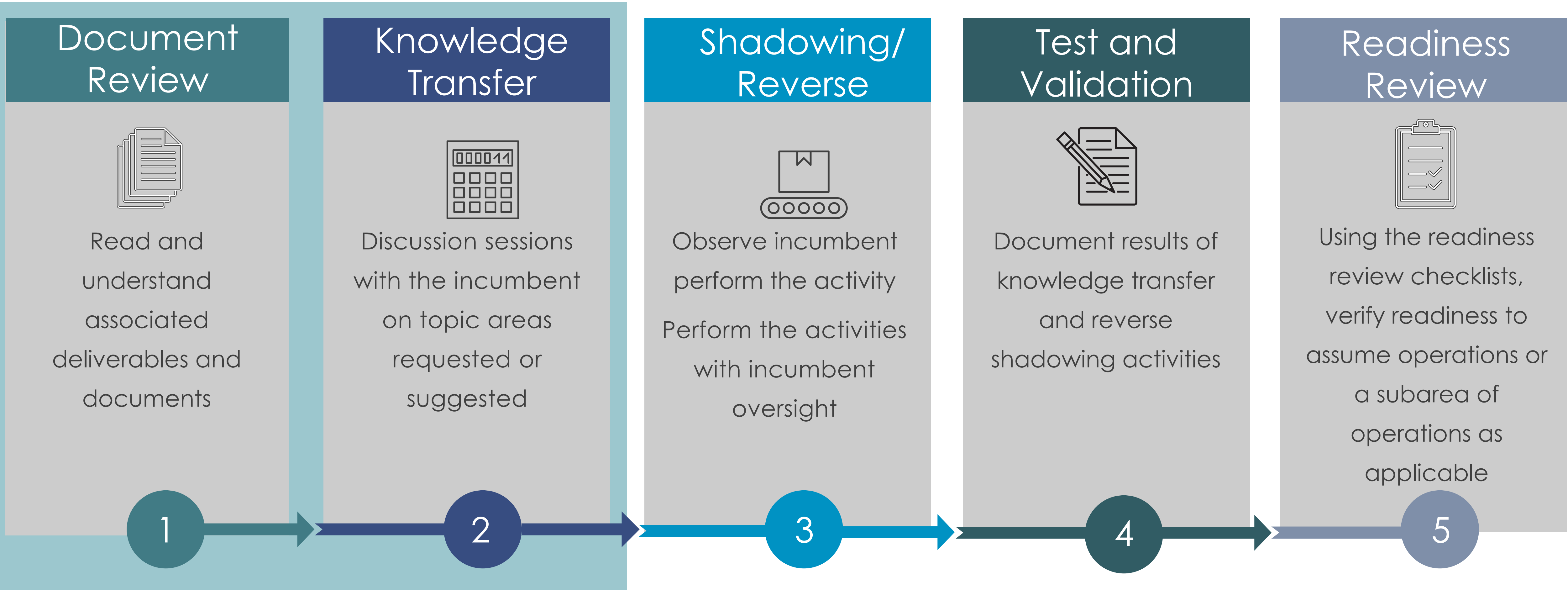
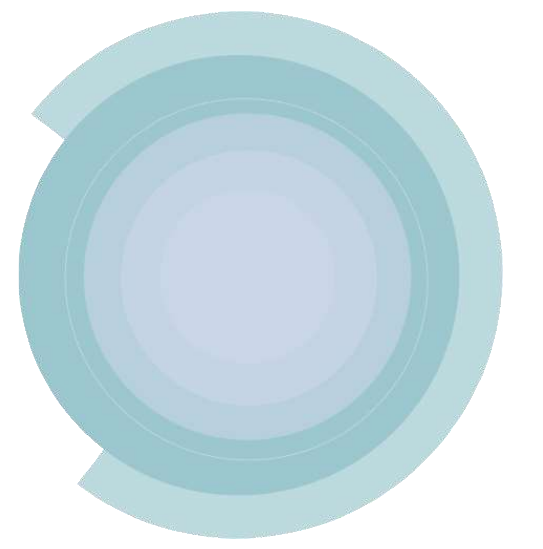


■ Workstreams ■ Completed



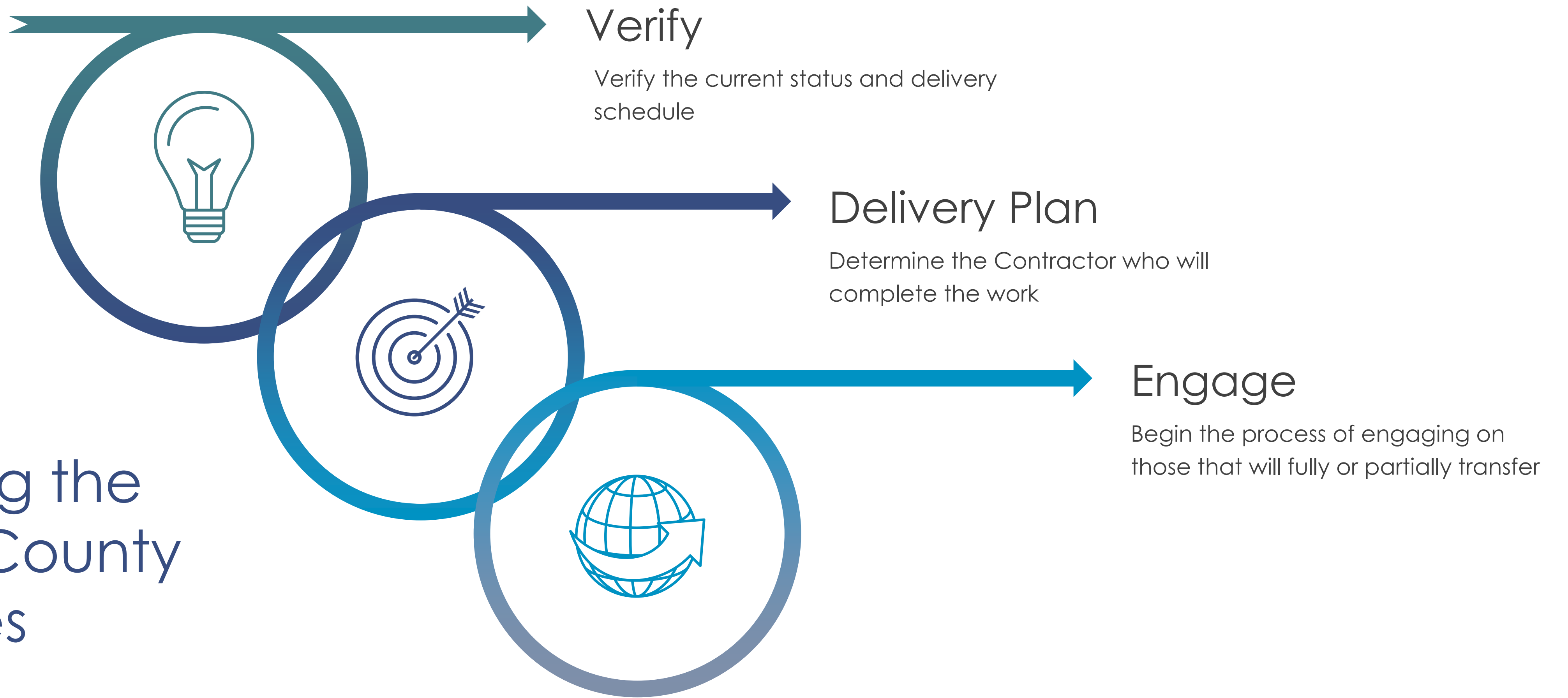
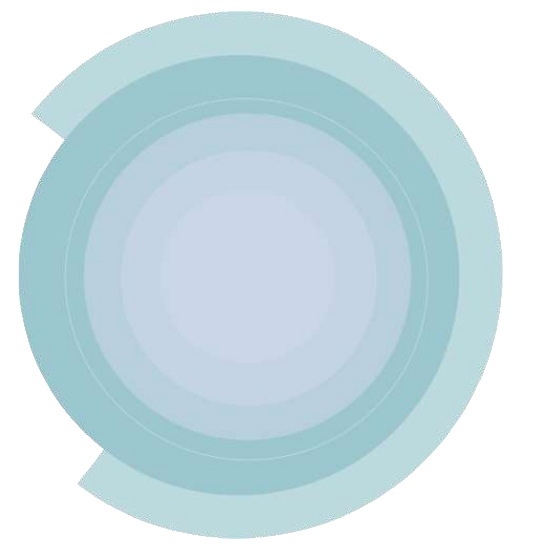
# Infrastructure Transition

## Remaining Workstream Status

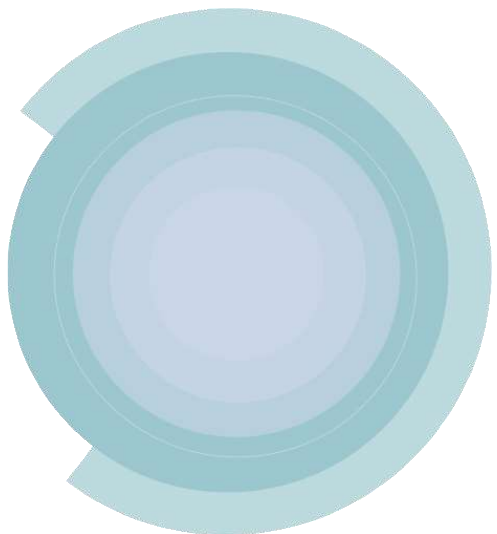


# Infrastructure Transition

## County Impacts



# ICT Update



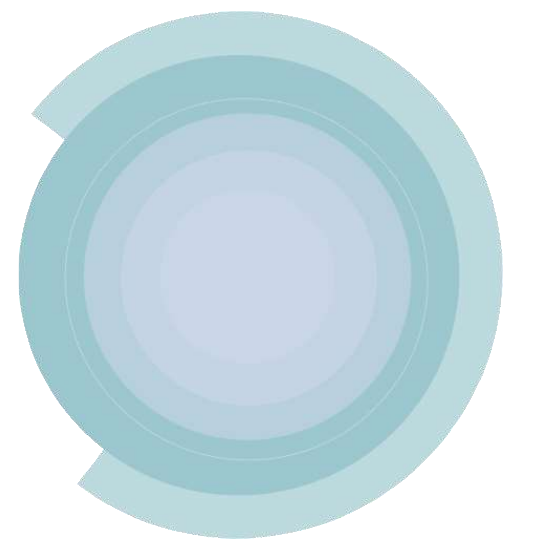
# County ICT Feedback Approach

Gather feedback on ICT Process from Counties

Prepare Recommendations



Analyze feedback and identify trends



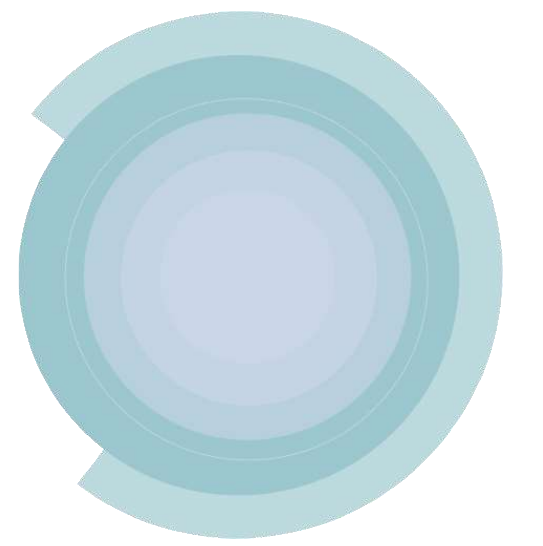
# County ICT Feedback – Next Steps



## ICT Update

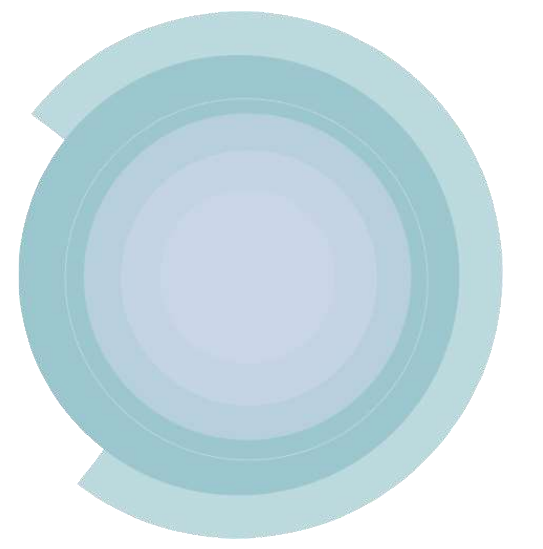
### Next Steps

- CRFI Request for Counties to Identify Participants for Inter-County Transfer Workgroup was sent on Wednesday October 16, 2024
- Seeking 5 participants per Region – Completed 11/07/2024
- Workgroup Kickoff Thursday, November 21<sup>st</sup>; engage bi-weekly



# CalSAWS Learning Exchange (CLE) Update

# CalSAWS Learning Exchange Sessions



## Objective

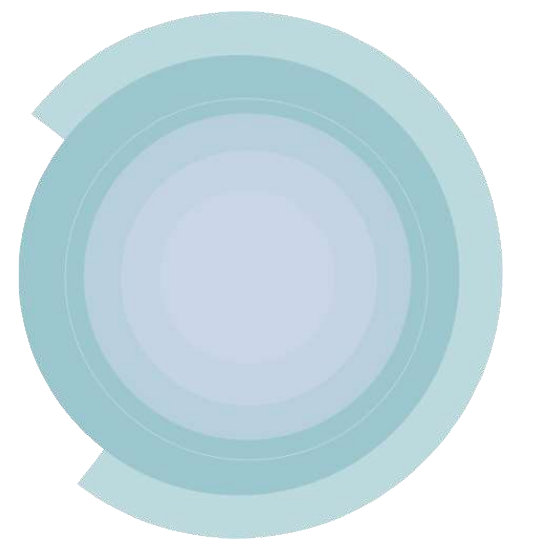
We held Maintenance & Enhancement (M&E) Roadshows from 2023-2024 to level set current state M&E to provide consistent education to the regions on a variety of topics and allow the Project to be responsive to county questions.

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, which kicked off in August 2024, to better assist the counties in gaining a fundamental understanding of the respective topic matter.



# CalSAWS Learning Exchange Sessions

## October CalSAWS Learning Exchange – Disaster CalFresh (DCF)



The October CalSAWS Learning Exchange covered the topic of Disaster CalFresh (DCF) and was held on three days, 10/22/2024, 10/23/2024, and 10/24/2024. The DCF Overview had presentations from CDSS, CalSAWS, and San Diego and provided the counties an understanding of the DCF process from the time a disaster occurs and the functionality path from the time the DCF switch is turned on through the required reporting obligation.

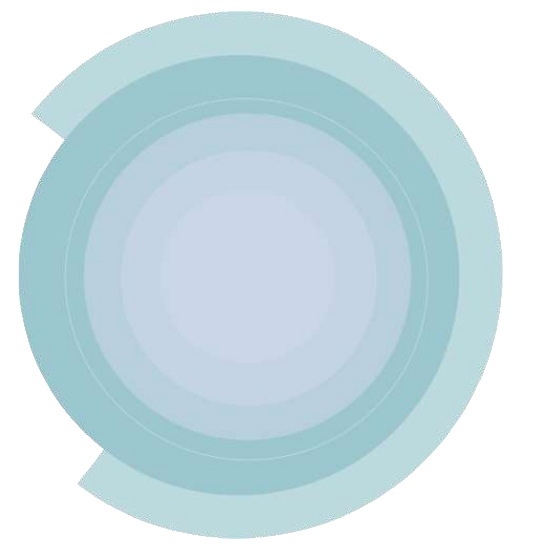
- 541 participants attended
- 49 counties represented

The materials for CalSAWS Learning Exchange sessions are stored on the CalSAWS Web Portal in the respective topic folders here:

[CalSAWS Web Portal > Resources > CalSAWS Learning Exchange > Disaster CalFresh 10-2024](#)

# CalSAWS Learning Exchange Sessions

## October CalSAWS Learning Exchange – Feedback



- “This was a very well-presented learning exchange.”
- “Appreciated the video demos!”

- “The session went well. The CalSAWS and BenefitsCal presentations were great.”

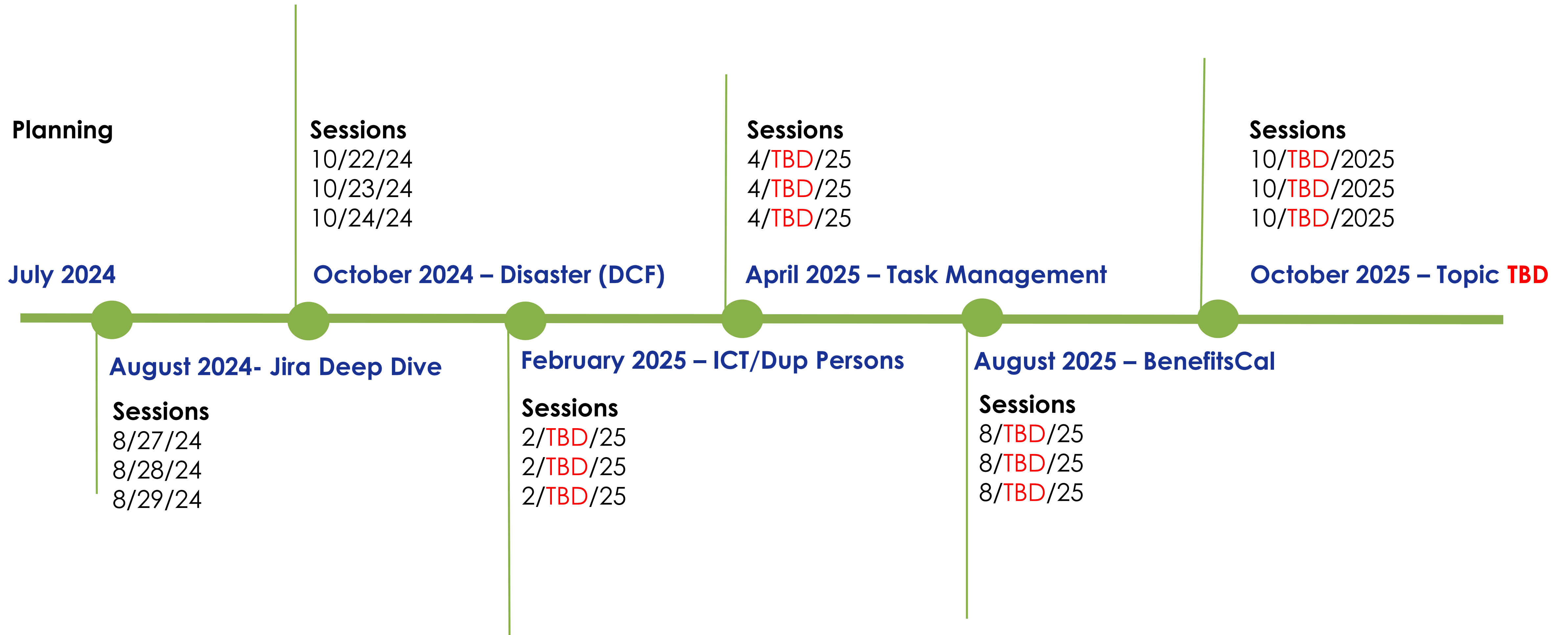
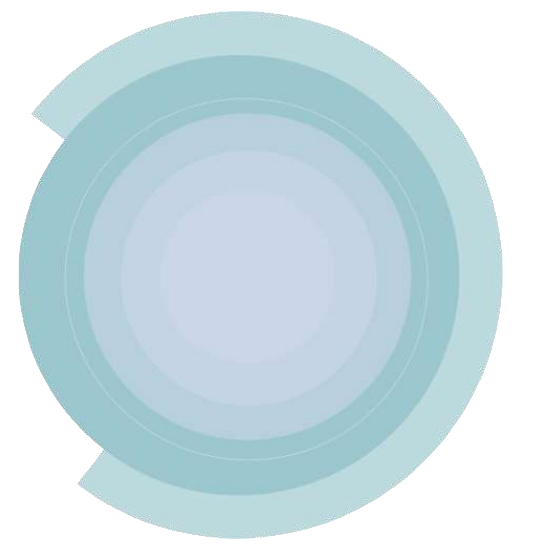
- “Very informative”
- “Excellent Presentation”

- “Keep up the good work!”
- “The visuals and step-by-step are super helpful.”

- “Would like the slides ahead of time”
- “Too much time spent on basic data entry”

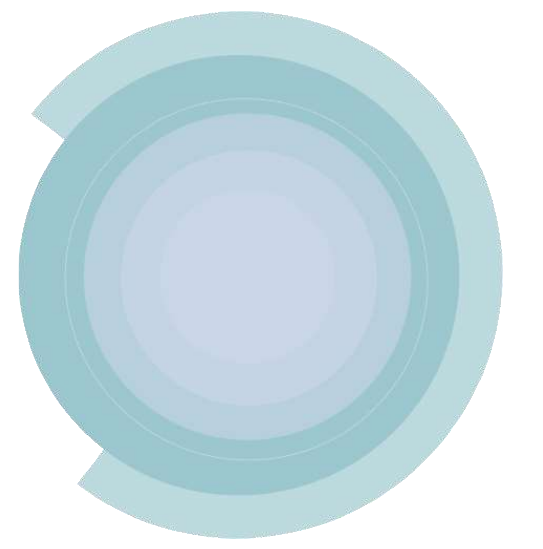
# CalSAWS Learning Exchange Sessions

## MONTH CalSAWS Learning Exchange – Timeline



# CalSAWS Learning Exchange Sessions

## Next Steps



Counties may suggest CalSAWS Learning Exchange topics to 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

# Procurement Update

## BenefitsCal Key Procurement Tasks

	<b>BenefitsCal Procurement Event</b>	<b>Dates</b>
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 Issues RFP Addendum 1	June 14, 2024
5	Consortium Issues RFP Addendum 2	June 25, 2024
6	Consortium Publishes Final Q&A and RFP Addendum 3	July 3, 2024
7	Bidders Submit Request to OTSI for Proposal Folder	July 15, 2024
8	Proposals Due	July 30, 2024
9	Consortium Issues RFP Addendum 4	September 17, 2024
10	Consortium Issues RFP Addendum 5	October 4, 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

# State Partners Updates



# State Partners Updates



# Regional Priorities

- Reports

- Demographic Reports
- CalFresh Reporting Improvements
- State & Management Reports

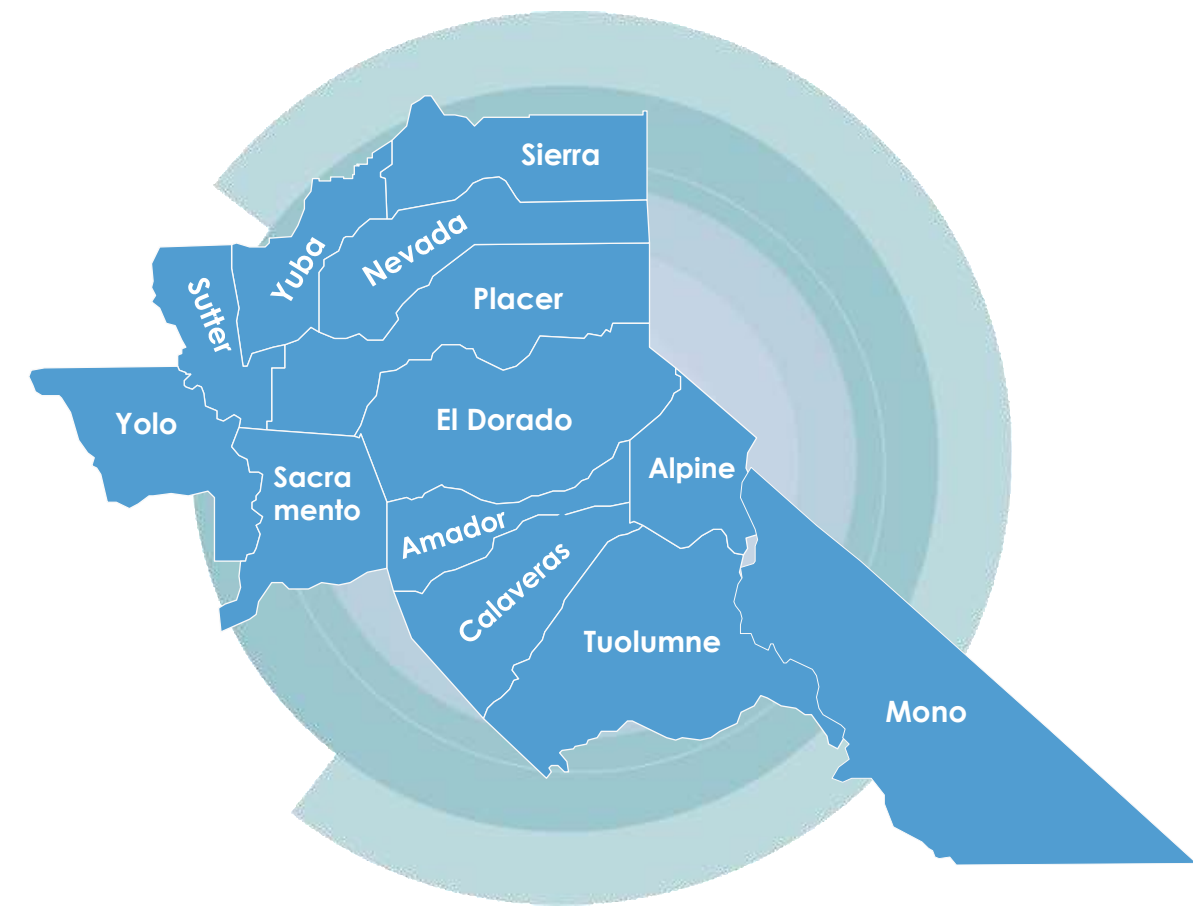
- ICTs

- Including Duplicate Persons

- ROI



- Update State and Management Reports
- Modernize ICT protocol guidelines
  - With all counties under CalSAWS the prior county protocol document needs updating
- Coordination with the State on new policy implementation



## Region 2 PSC Update

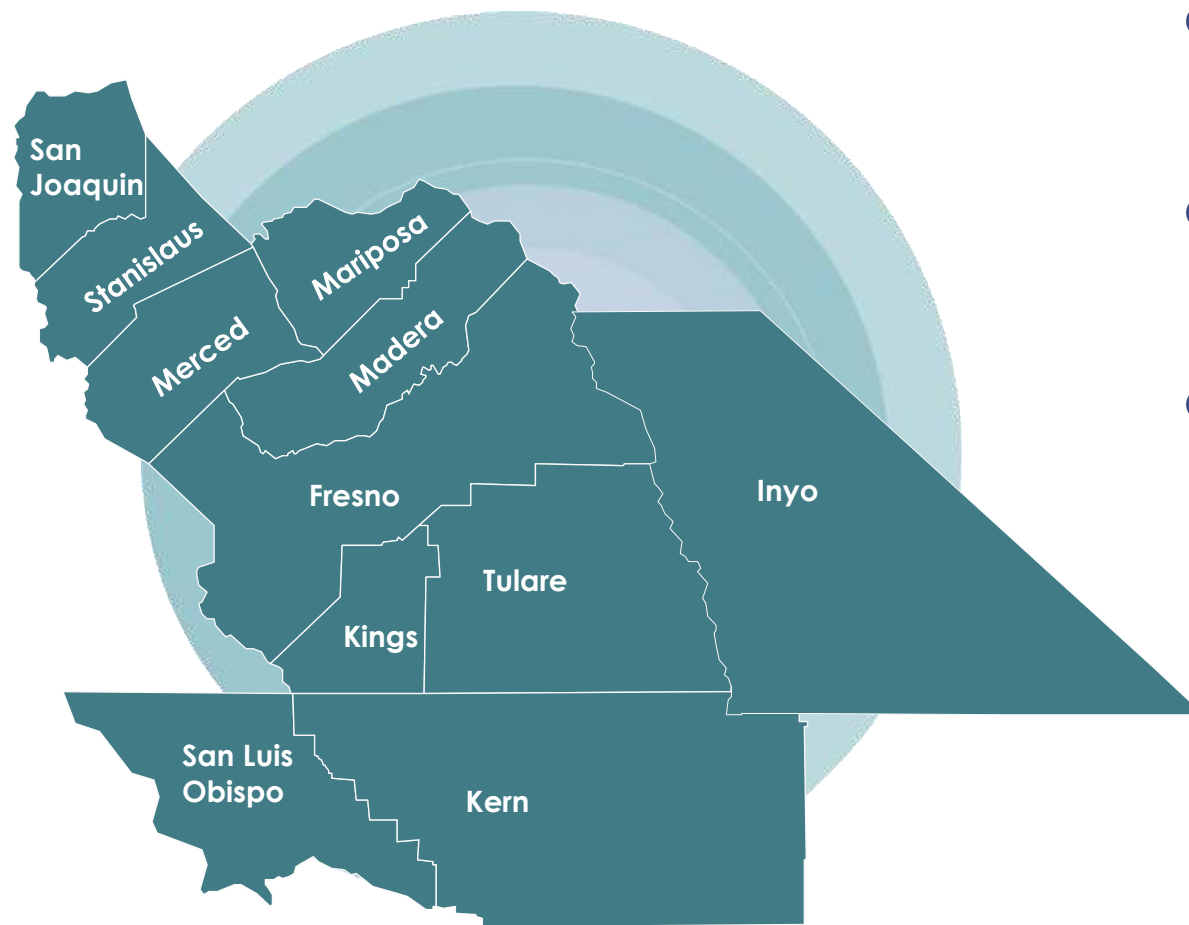


- Manual NOAs and Manual EDBC's
  - NOAs with up-to-date regulations that generate at the appropriate time
  - A lot of time spent creating manual NOAs ex: MC and FC
- ICTs
  - Communication, strategic alignment on protocol guidelines, refresher training
- Duplicate Persons
  - Merging duplicate people, time consuming, multiple steps
- Mid Period Actions
  - Positive changes don't take
  - Verified Upon Receipt (VUR) not recognized by system
  - Too many workarounds
- Reports
  - Ad hoc, usability, lack of documentation, training, turnaround time for ad hoc report requests
- System Configurability
  - Emphasizing the importance of system flexibility, ensuring the ability to opt in/out of features as needed remains a priority for Region 3.

# Region 3

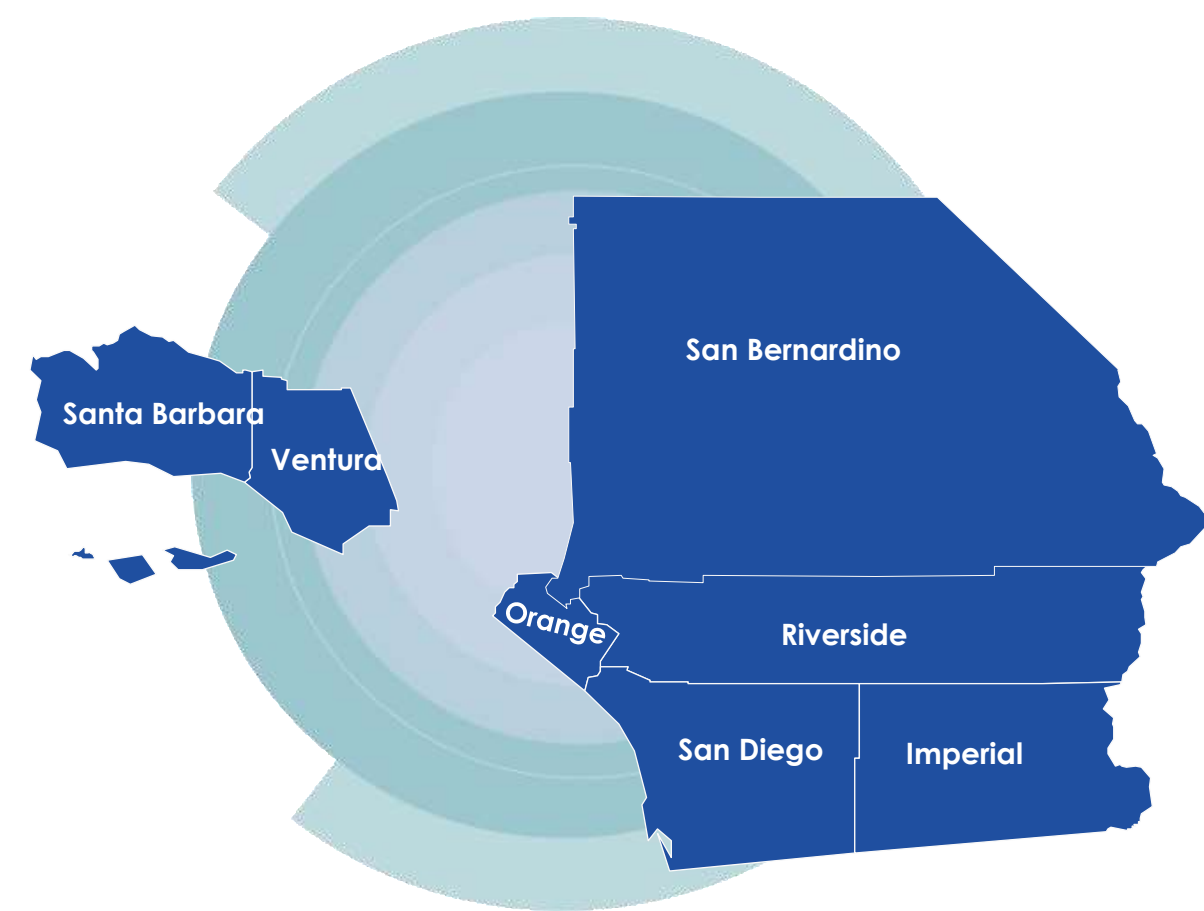
## PSC Update

- ICT Process
- Reports
- Enhance Release Communications
- Contact Center
- Duplicate Person Record Reconciliation



# Region 4

## PSC Update



- **Session Management/Logout Issues**
  - Not all CalSAWS services are synced to the same session. Workers experience frequent logouts if services are not refreshed regularly.
- **Workload Management/Intake Scheduling**
  - Improve pages and tools in CalSAWS to help counties efficiently manage and maintain employee workloads, automate intake assignment, and maintain appointment schedules.
- **County Filter on Person Search Pages**
  - Adding a county filter on the person search pages will help narrow down a search when we receive limited customer information, helping workers identify correct records quickly.
- **Intake Informational Packets**
  - Time saver for staff and will target quality issues ensuring that staff send informational packets for intake applications. This targets Medi-Cal, CalFresh, and CalWORKs programs.



- DCFS

- Working on the improving our foster care hotline for caregivers (this is not the hotline to report abuse) by working with AWS team and are looking forward to incorporating AI in the future to this program to help enhance the customer experience as well as a tool for our agents.

- DPSS

- ABAWD Procedural Automation
- Contact Center Enhancements
  - Courtesy Call Back
  - Reporting

December 12,  
2024 PSC  
Meeting is  
**CANCELLED**



# Adjourn Meeting