

Project Steering Committee Meeting

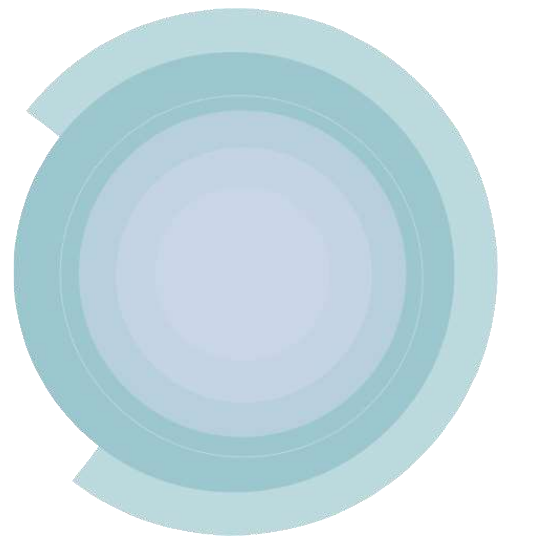
May 15, 2025



CalSAWS



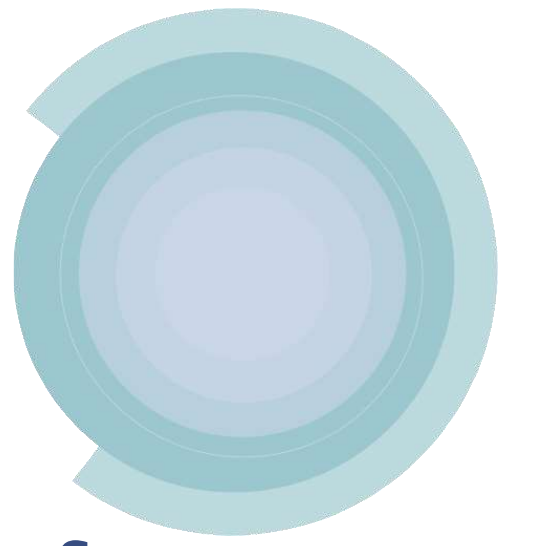
Agenda



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 March 20, 2025 PSC Meeting.

Informational Items

CalSAWS Staffing Update

CalSAWS Priorities and Objectives Discussion

Objective Alignment

Objective 1: **Enhance Self-Service Access**

This objective is about increasing the adoption of BenefitsCal and other ancillary features that may be available through CalSAWS, as well as continuously improving the self-service experience.

Objective 2: **Streamline Administrative Processes**

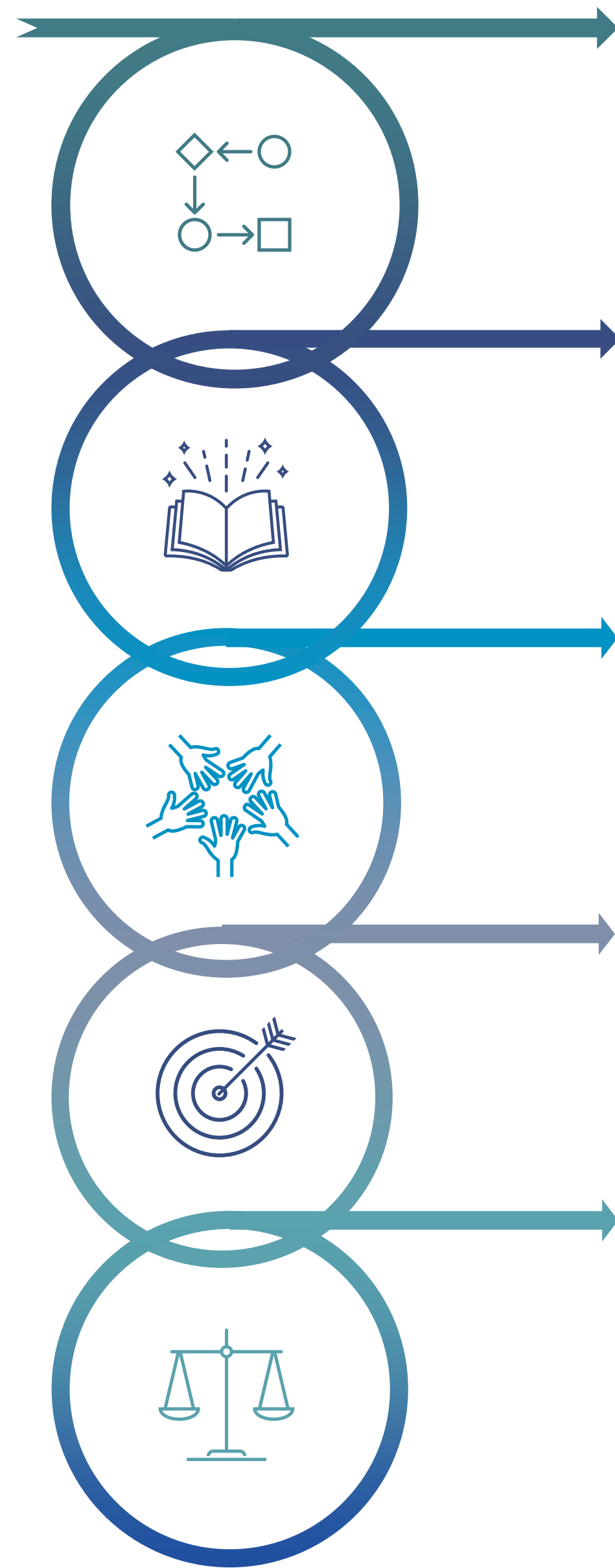
This objective includes reducing the time spent on administrative tasks by eligibility staff through automation. Assisting with the accuracy of data entry, imaging, and processing in the system through error checking/quality control alerts. Workload management and Inter-county transfers (ICTs) would also fall under this objective.

Objective 3: **Enhance User Experience & Support**

This could include increasing the intuitive nature of CalSAWS through Contextual Assistance: The system offers real-time help, explanations, or tips tailored to the user's actions. This could be in the form of tooltips, brief descriptions, or visual cues that explain what each step does and why it is necessary, helping users understand the process as they go. Or, implementing a comprehensive online self-help portal and guided navigation for BenefitsCal, reducing the need for phone or in-person support.

Objective 4: **Enhance Reporting, Analytics, and Client Communication Capabilities for Greater Flexibility and Insights**

This includes improved ad hoc reporting functionality and evaluating current reporting needs. Streamlining to client correspondence/notices.



CER Evolution

The ability to collectively achieve the JPA-approved CalSAWS objectives requires an evolution of how system enhancement requests are identified, prioritized and processed.

History

Historically, this activity has been managed through the CER process, which is currently being redesigned.

Benefits

The benefits achieved through these process refinement efforts will be realized by both the counties and CalSAWS project.

Operational Efficiencies

Streamlining the full lifecycle will directly support operational efficiencies, empower regions to define collective business needs, and realign decision and prioritization authority within the PSC.

Balanced Approach

This will result in a thoughtful and inclusive approach to balancing the volume of requests against anticipated capacity, ensuring the priority remains achieving the highest business value.

CER Process Evolution - Goals

Primary Goal

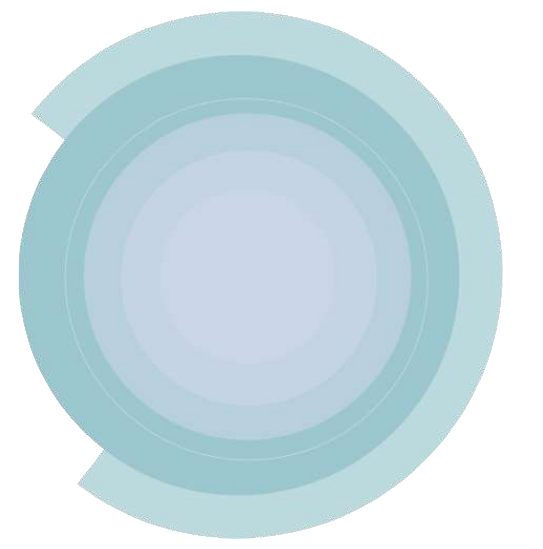
Evolve the regional process to identify business needs that are organized by the collective regions to represent system enhancements that yield the highest value from a Statewide perspective.

1. County need is communicated from a business perspective
2. Requests directly support advancing CalSAWS Objectives
3. Business needs discussed internally at Regional level, grouping ideas when possible
4. Regional business cases reflect cross-regional themes
5. Volume of requests are balanced to focus on highest value and anticipated capacity

CER to Business Case Request (BCR) Process Update

CER to Business Case Request (BCR)

Update



Since last JPA meeting

- PPOC session held 4/29/2025 on proposed changes to move from CERs to BCRs
- Q&A document from PPOC Session in progress
- CER Handbook- new BCR process revisions in progress
- CE Team BCR Leads: Henry Arcangel (CEM) & Yolanda Banuelos (RM)

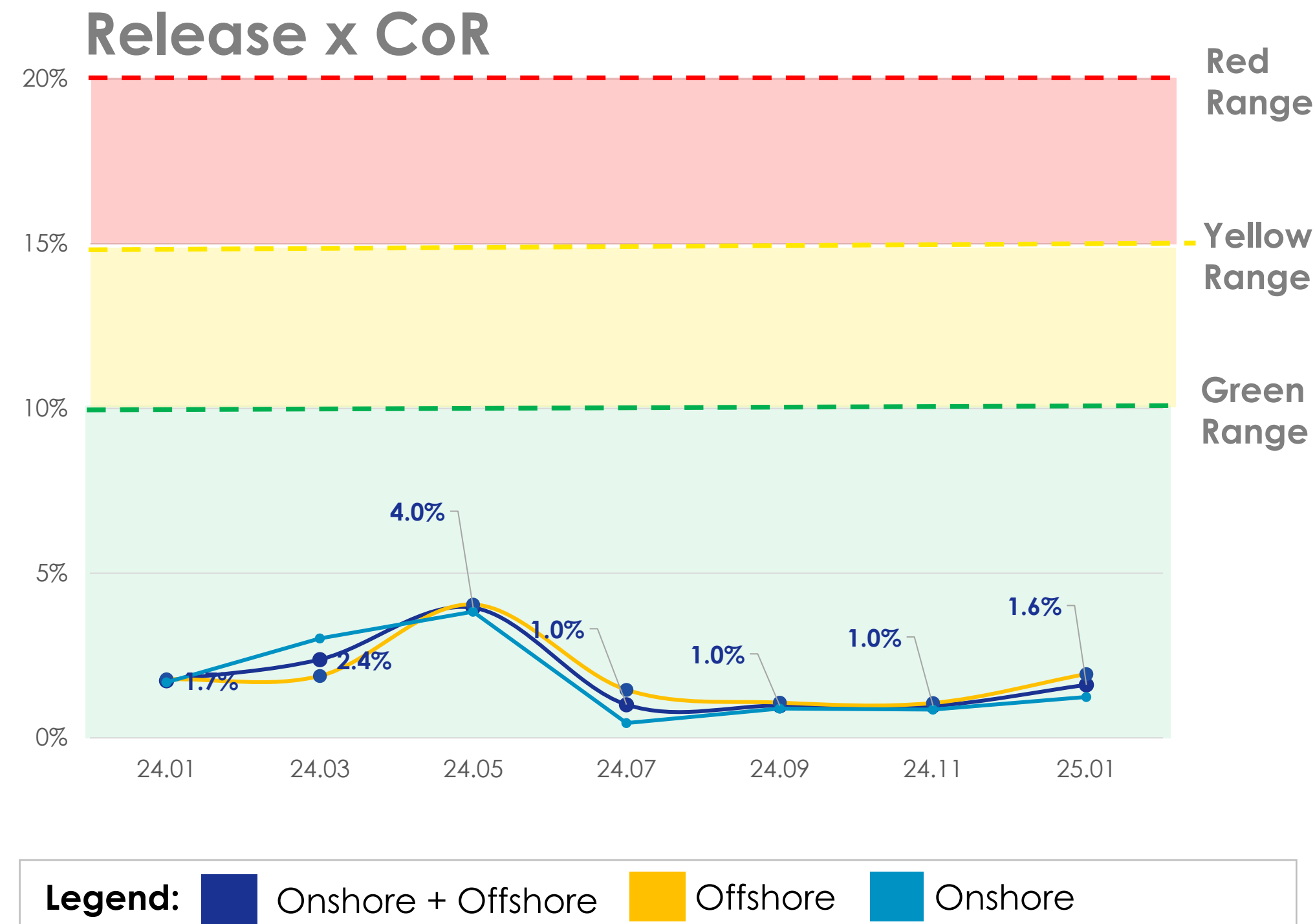
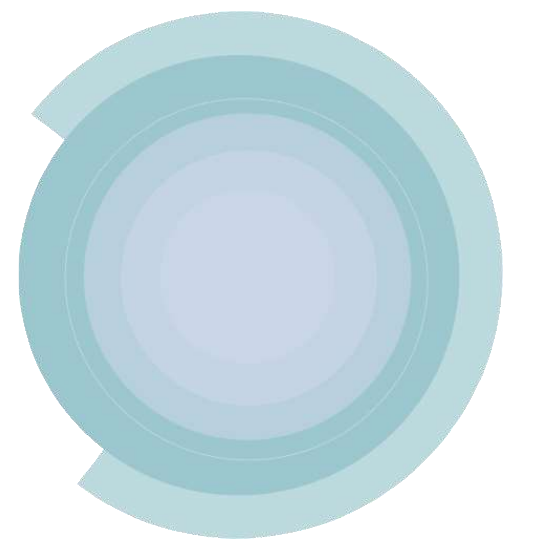
Next step efforts

- BCR Training and Overview
- CIT- BCR Form & Instructions
- Timeline
- Communications

Quarterly Performance Trends

CalSAWS Quarterly Statistics

CalSAWS Application Release Quality Metrics



TYPICAL RANGES

GREEN: The amount of time being spent on rework is lower than expected. This will enable the project to be completed faster and more efficiently.

AMBER/RED: The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

Cost of Rework (CoR) is the ratio of effort spent performing rework on deliverables to the total effort to Date

$(\text{Actual Rework effort Hours} / \text{Actuals To Date Hours}) * 100$

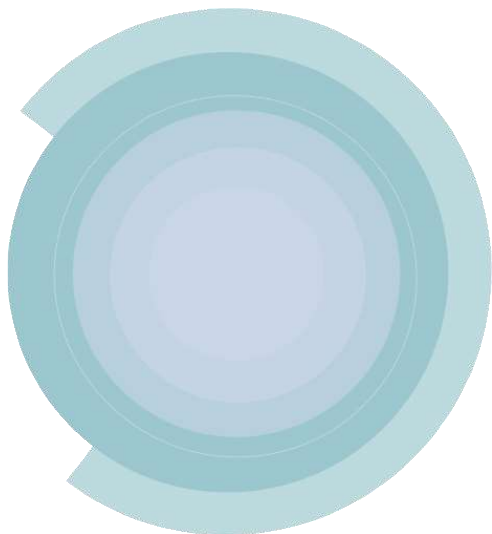
The combined onshore and offshore CoR for CalSAWS code release deployment remains low across releases indicating high quality releases with the additional offshore team

The CoR line graph may increase for the releases if additional defects are found in the future

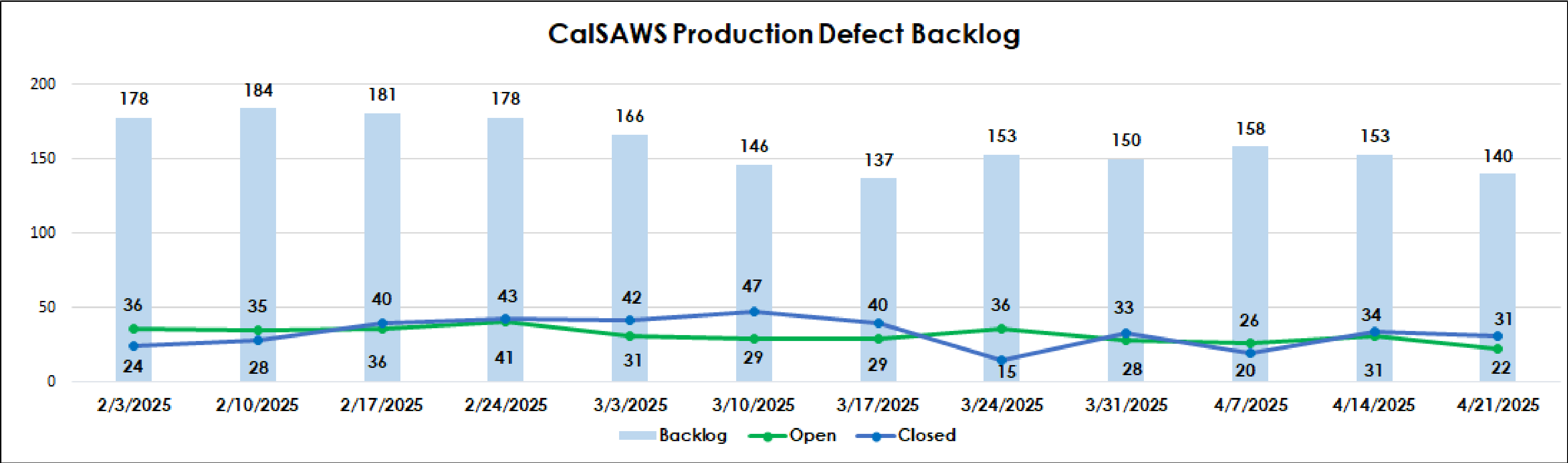
New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 25.03 COR numbers will be available after 25.05 goes live

CalSAWS Quarterly Metrics

Production Defects Backlog



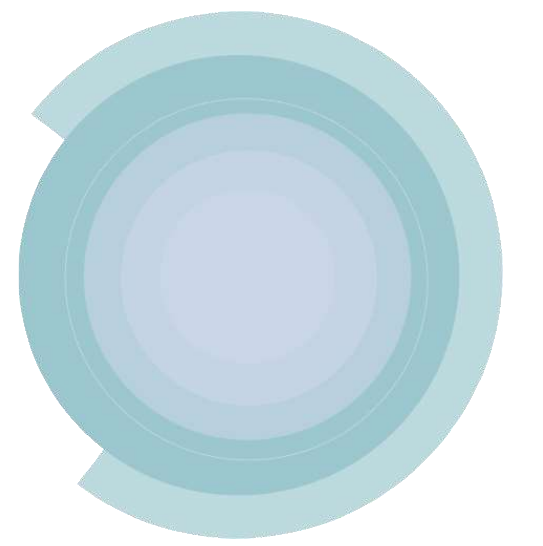
Open production defect rate has remained level, demonstrating system stability with no major spikes outside of normal ranges



The Production defect backlog bar-chart depicts the balance of open (unresolved Production defects) and closed defects, week-over-week. Defects are closed upon system test validation and release deployment to Production

CalSAWS Quarterly Metrics

Production M&E SLA Metrics



| Perf Req # | LD Applies | Performance Requirement Title | June | July | Aug | Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr* |
|------------|------------|--|------|------|-----|------|-----|-----|-----|-----|-------|-------|-------|
| 1 | | Monthly Off Prime Business Hours Availability | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 2 | | Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 3 | | Monthly Deficiency Notification Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 4 | | Monthly Helpdesk Diagnosis Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 5 | ✓ | Daily Peak Usage Hours Availability | ✗ | ✓ | ✓ | ✓ | ✗ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 6 | ✓ | Daily Prime Business Hours Availability | ✓ | ✓ | ✓ | ✓ | ✗ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 7 | ✓ | Daily Peak Usage Hours ED/BC Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 8 | ✓ | Daily Prime Business Hours ED/BC Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 9 | ✓ | Daily Peak Usage Hours Screen to Screen Navigation Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 10 | ✓ | Daily Prime Business Hours Screen to Screen Navigation Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 11 | ✓ | Daily Batch Production Jobs Completion | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 12 | | Daily Off Prime Business Hours ED/BC Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 13 | | Daily Off Prime Business Hours Screen to Screen Navigation Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 14 | | Daily Unbounded Search Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 15 | | Daily Prime Business Hours Availability of CalSAWS Training Environments | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 16 | | Daily Peak Usage Hours Standard Report Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 17 | ✓ | Security Incident Notification | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✗ | ✓ | ✓ | ✓ | ✓ |
| 18 | ✓ | Security Incident Reporting | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 19 | ✓ | Security Incident Negligence | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| 20 | | Disaster Recovery Response Time | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | N/A** | N/A** | N/A** |

*April SLA Metrics are still being formally reviewed

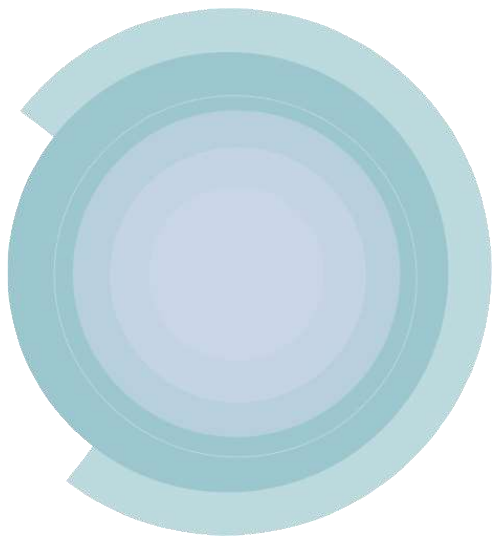
**N/A SLA no longer applies after Infrastructure Transition

Legend: ✓ SLA Met ✗ SLA Not Met ✓ LD Applies



CalSAWS Quarterly Metrics

Infrastructure



| Perf Req # | Performance Requirement Title | Feb | Mar | Apr |
|------------|--|-----|-----|-----|
| 1 | Daily Prime Business Hours Availability | ✓ | ✓ | ✓ |
| 2 | Monthly Prime Business Hours Availability, Non-Production Environments | ✓ | ✓ | ✓ |
| 3 | Monthly Off Prime Business Hours Availability | ✓ | ✓ | ✓ |
| 4 | Local Repair Services | ✓ | ✓ | ✓ |
| 5 | Daily Prime Business Hours Availability of CalSAWS Training Environments | ✓ | ✓ | ✓ |
| 6 | Monthly Deficiency Notification Response Time | ✓ | ✓ | ✓ |
| 7 | Monthly Service Desk Diagnosis Time Tiers 1 and 2 | ✓ | ✓ | ✓ |
| 8 | Daily Prime Business Hours Standard Report Response Time | ✓ | ✓ | ✓ |
| 9 | Disaster Recovery Response Time | ✓ | ✓ | ✓ |
| 10 | Failure to Complete Access Control Audits | ✓ | ✓ | ✓ |
| 11 | Security Information and Event Management System Uptime | ✓ | ✓ | ✓ |
| 12 | Scheduled Asset Inventory Audits | ✓ | ✓ | ✓ |
| 13 | Completion of Root Cause Analysis | ✓ | ✓ | ✓ |
| 14 | Privileged Access Audit | ✓ | ✓ | ✓ |
| 15 | Security Vulnerability Scans | ✓ | ✓ | ✓ |
| 16 | Security Incident Notification | ✓ | ✓ | ✓ |
| 17 | Security Incident Reporting | ✓ | ✓ | ✓ |
| 18 | Security Incident Negligence | ✓ | ✓ | ✓ |

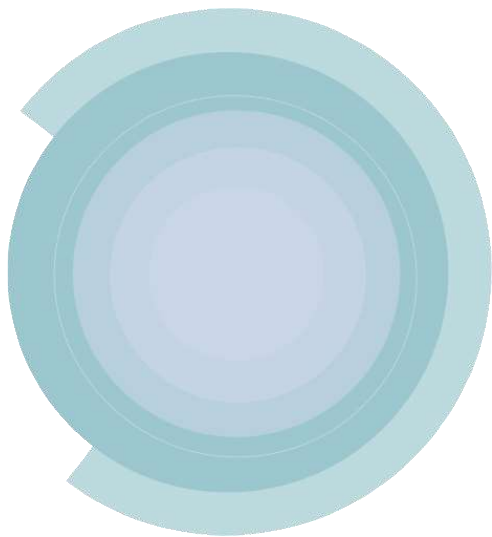
SLA Metrics are still being formally reviewed
LD's apply to all SLA Metrics

Legend: ✓ SLA Met ✗ SLA Not Met



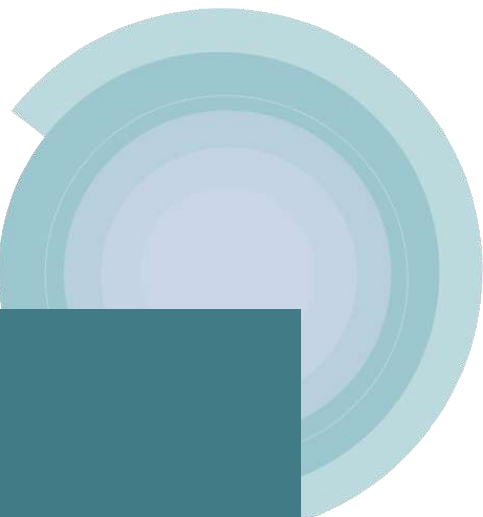
Hyland Quarterly Metrics

Hyland Imaging Performance Metrics



| Hyland Imaging SLAs Feb – April 2025 | Monthly SLA Target | February 2025 | March 2025 | April 2025 | 3-Month Average | SLA Met |
|---|-----------------------|------------------|---------------|---------------|--------------------|---------|
| Uptime | 99.90% | 100% | 100% | 100% | 100% | ✓ |
| Page Views | 90% | 99.25% | 99.46% | 99.26% | 99.32% | ✓ |
| Database Transactions | 90% | 99.96% | 99.99% | 99.97% | 99.98% | ✓ |
| Brainware Processing | 97% | 99.87% | 99.86% | 99.90% | 99.87% | ✓ |
| Technical Resource Response Time | 30 minutes | N/A | N/A | 100% | 100% | ✓ |

BenefitsCal Performance Metrics



SLA #1: Daily Online Transactions – inquiry screens (bounded)

Target: 98% with an average response time < 2 seconds

Actual: **Exceeded daily online transaction (bounded) response time at no less than 99.92% since January 2023.**
Measured daily and reported on Monthly.

Monthly View: Jan 2023 – April 2025

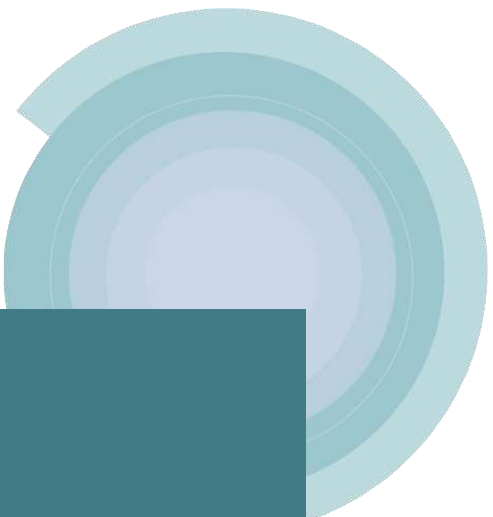


Daily View: April 2025



Legend: Target Met Target Not Met Weekend

BenefitsCal Performance Metrics (continued)



SLAs and Performance

SLA #2:

Daily Online Transactions – inquiry screens (unbounded)

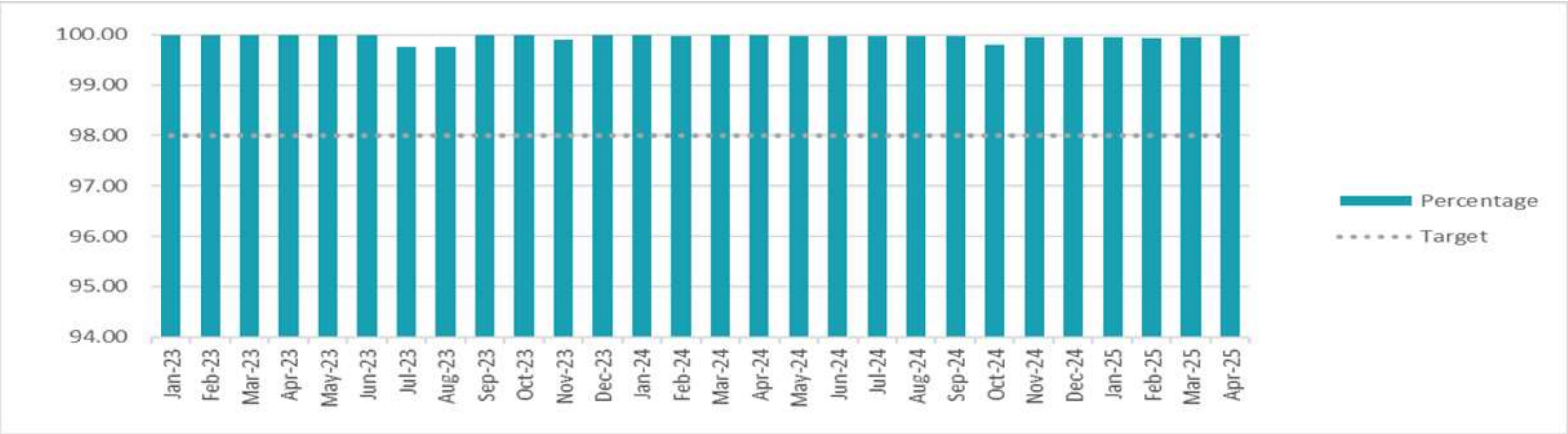
Target:

98% with an average response time <10 seconds

Actual:

Exceeded daily online transaction (unbounded) response time at no less than 98.62% since January 2023.
Measured daily and reported on Monthly

Monthly View: Jan 2023 – April 2025

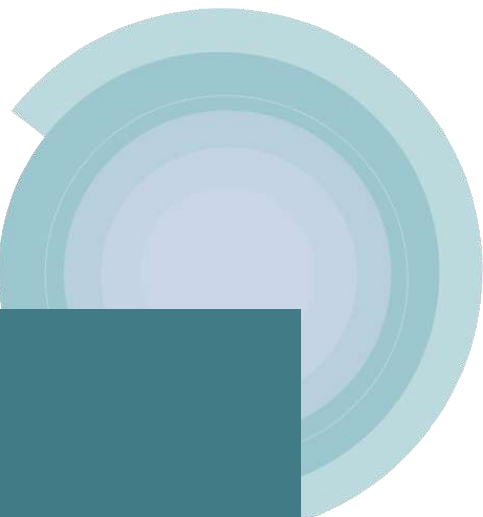


Daily View: April 2025



Legend: ■ Target Met ■ Target Not Met ■ Weekend

BenefitsCal Performance Metrics (continued)



SLAs and Performance

SLA #3: Daily BenefitsCal Hosted API Transactions

Target: 98% with an average response time <2 seconds

Actual: **Exceeded daily API transaction response time at no less than 99.97%** since January 2023.
Measured daily and reported on Monthly

Monthly View: Jan 2023 – April 2025

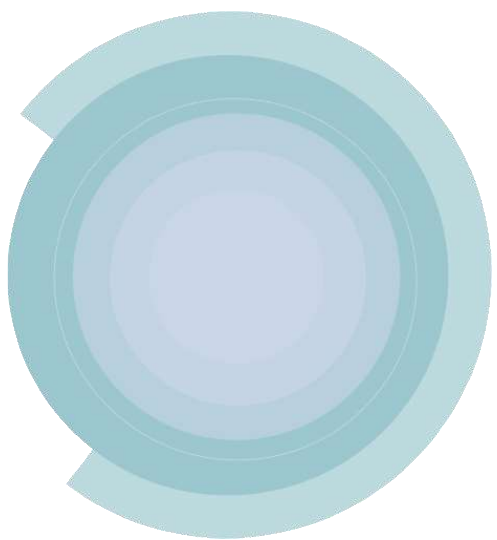


Daily View: April 2025



Legend: Target Met Target Not Met Weekend

BenefitsCal Update



ROI Workgroup Update



ALL COUNTY LETTERS (ACL)

CDSS and DHCS published the final letters.
ACL 24-91 and ACWDL 24-21

CBO INFORMATION & UX

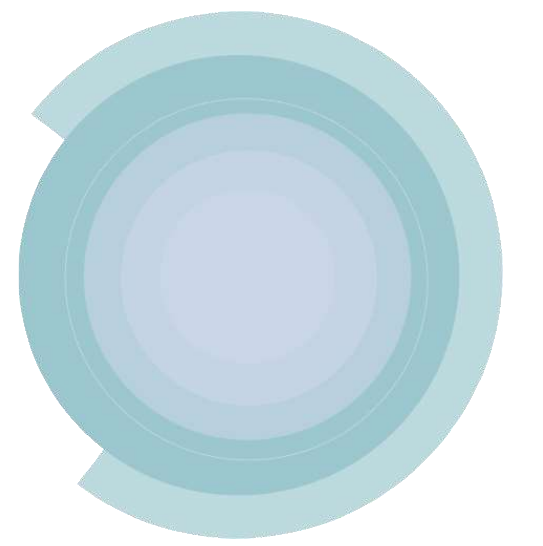
Discussions focusing on the CBO information currently available and what may be needed in the future to support customer, county and CBO needs. Will be followed by user experience explorations.

WORK GROUP MEETINGS

Latest meeting held 4/7
May Session: TBD.

Customer Engagement Initiatives

The User Centered Design and UX teams have developed a strategy to engage more customers in research initiatives.



Adoption Research

Description

A representative sample of **30 individuals** receiving Medi-Cal, CalFresh, or CalWorks were engaged in hour-long ethnographic interviews to uncover their **attitudes, needs, and barriers** to **adopting the BenefitsCal portal** vs. managing benefits via phone, mail, or in person.

Preliminary Takeaways

- Preference for **simple web design** and functionality, even amongst the tech-savvy.
- An appreciation for the **convenience of using BenefitsCal** is balanced with a **desire for human connection, real-time answers, and personalized information.**
- Interest in **proactive notifications** and greater support **managing deadlines.**
- Frequent **lack of distinction between BenefitsCal and benefits programs,** or even between BenefitsCal and medical services.

Unmoderated User Testing

Description

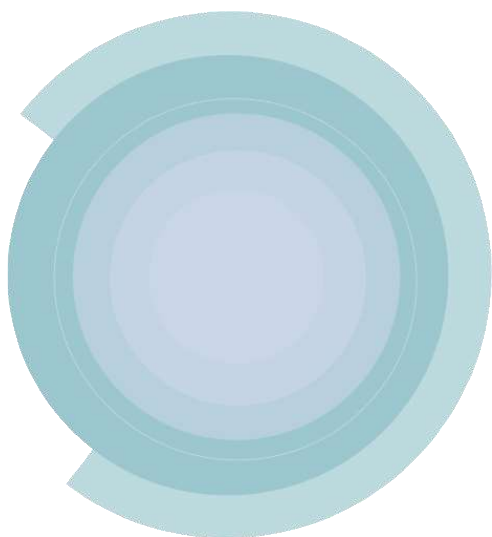
A representative sample of **150 individuals** receiving CalFresh and/or CalWorks are currently being recruited to participate in **self-guided sessions** to evaluate *Document Upload: List of Options* and complete **surveys** on their **perceptions and preferences.**

Benefits

- Ability to efficiently obtain high-volume response rates, giving more of a quantitatively significant understanding of customer experience.
- Ability for team to evaluate customer feedback in a rapid manner.
- Ability to tailor enhancements in real-time to customer preferences.
- This yields a truly customer-centric platform.

BenefitsCal Public Facing Enhancements

Public Facing Feature Updates



2025-Q2

April Release 25.04 (complete)

- ✓ **Document Upload Self-Service:** Allow upload of multiple document types within a session
- ✓ **CBO Experience:** Display inactive account message during password reset
- ✓ **GetCalFresh (GCF) Sunset Readiness:** Update application language and simplify questions

June Release 25.06 (upcoming)

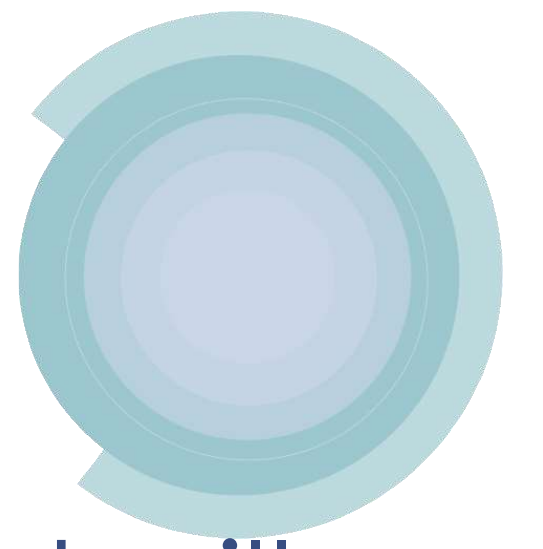
- **Document Upload Self-Service:**
 - Redesign and categorize the **list of document type**
 - Consolidate the functionality across the portal to provide consistent user experience
- **Customer dashboard Re-design:**
 - **New hierarchy** and additional features for better user experience
 - **Reorder linked cases** by case recency, simplify case view
 - Provide customers with information and notice links for their **Medi-Cal Accelerated Enrollment status**

May Release 25.05 (upcoming)

- **Customer Enhancements:**
 - **Periodic Report (SAR7):** Display family size, current income, and IRT
- **Customer, County Efficiency:** Enhance the **TWM (e-Message)** display to include two new statuses “Action Overdue” and “Action Expired”
- **Customer, CBO Experience:** Display CBO information on “Before We Begin screen” for applications submitted through referral campaigns

Release & Policy Updates

Statewide Cash Aid Time Limit (SCATL) Implementation

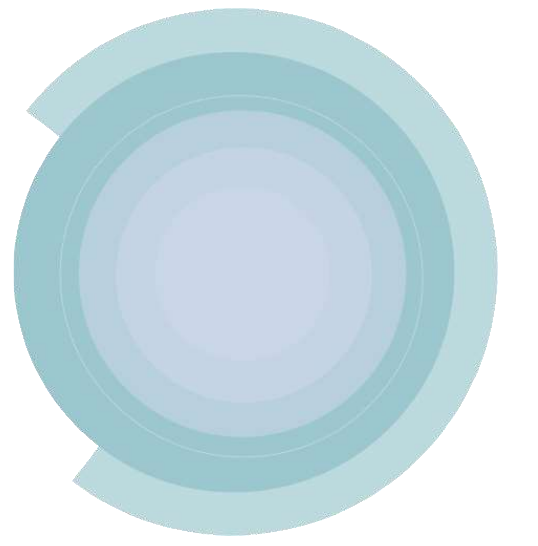


Key Dates

- WDTIP TRAC will go into read only mode starting May 23, 2025, and will remain available until June 30, 2026, for review (read only)
- CalSAWS Cash Aid Time limit pages will be set to read only mode starting May 23, 2025, and will be retained for review for 18 months
- Data Conversion and Migration will occur over the long weekend May 24 - 25, 2025
- Statewide Cash Aid Time Limit (SCATL) application will be available starting May 26, 2025

Statewide Cash Aid Time Limit (SCATL) Implementation

Organization Change Management Materials



Training and Online Help Updates

- ❖ Time Limit job aids and Online Help
- ❖ Web-Based Training (WBT) – WBTs will be available in the LMS starting 05/16/2025

Reference Materials

- ❖ Page-to-Page Mapping Reference
- ❖ Definitions of Related Terms
- ❖ Question and Answer Document

Pre-recorded Demos

- ❖ Short (2–3 minute) topic-specific demos
- ❖ Covers functionality demonstrated during live sessions

County Readiness Checklist

The reference materials, recorded demos and readiness checklist can be found: CalSAWS Web Portal/Resources/Resources by Functional Area/WDTIP Time Limits/SCATL Reference Materials

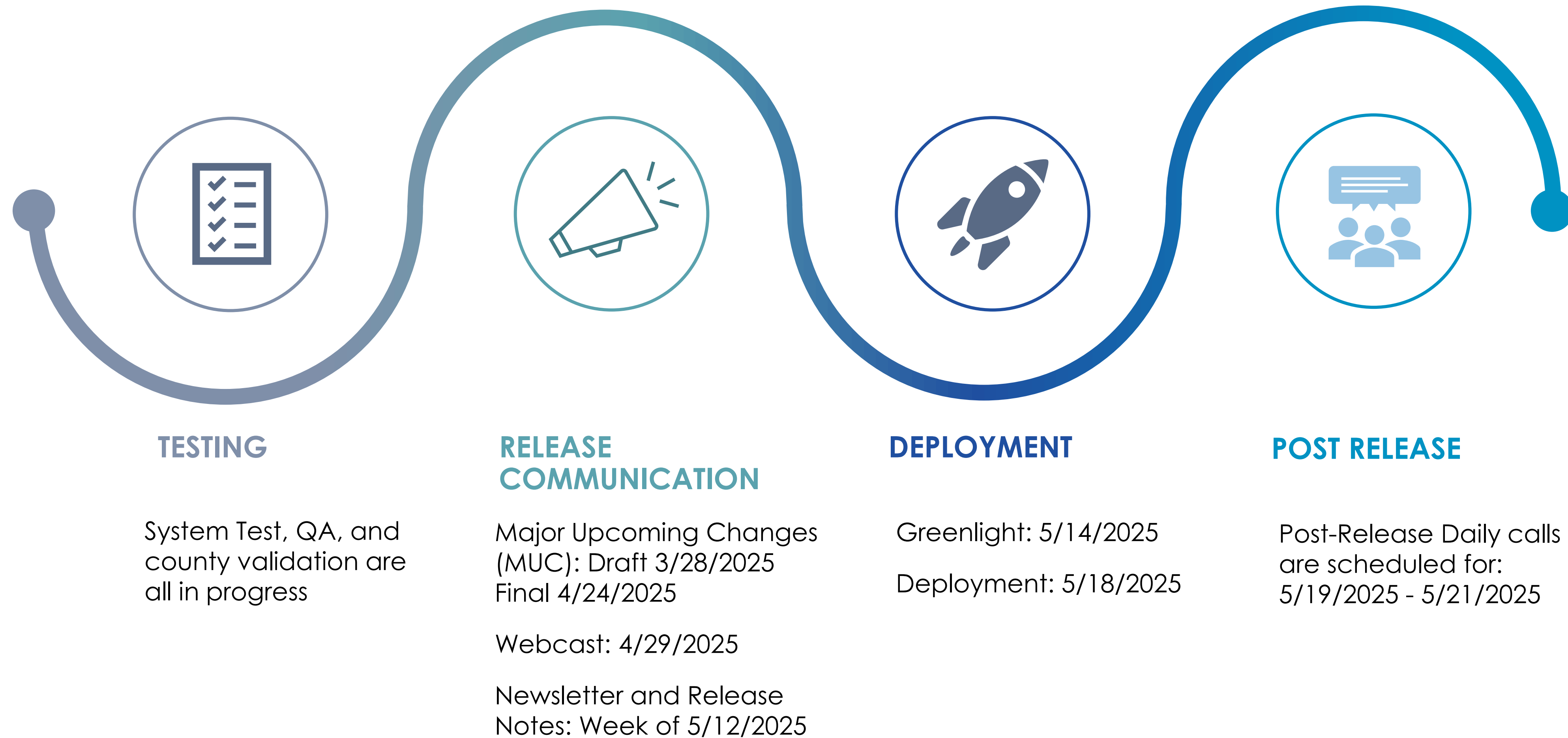
Release and Policy Update

Upcoming Releases

| May Baseline (5/19/2025) and Priority Releases | June Baseline (6/16/2025) and Priority Releases | July Baseline (7/21/2025) and Priority Releases | August Priority Releases |
|--|---|---|--|
| <p>5/19/2025:</p> <ul style="list-style-type: none">• ACL 24-01 - CF Restaurant Meals Program Eligibility Program Updates and CF 889• ACL 23-79 Add IRT and Budget to CF 377.1, CF 377.1 A, and CF 377.4 SAR• MEDIL I 21-31 - Alternate Formats Request Process for Visually Impaired Applicants and Beneficiaries Phase II <p>5/25/2025:</p> <ul style="list-style-type: none">• Migrate WDTIP Data and Online Screens to CalSAWS | <p>6/6/2025:</p> <ul style="list-style-type: none">• One time Batch EDBC run for all the non TCVAP CW CF cases with R1/R2 aid code <p>6/16/2025:</p> <ul style="list-style-type: none">• CalHEERS eHIT: Inclusion of Reasonable Explanation to CalHEERS | <p>7/XX/2025:</p> <ul style="list-style-type: none">• ACL 25-XX AAP, FC, KG, CNI Rate Increase for Year 2025-2026 COLA Values• ACL 25-XX AAP, FC, KG, CNI Rate Increase for Year 2025-2026 - Batch EDBC COLA <p>7/21/2025:</p> <ul style="list-style-type: none">• ACL 22-85 - CalFresh CF 296 and Expedited Service Redesign• ACL 10-01, ACL 15-94, ACL 15-94E - CF 387 CalFresh Request for Information for Residency | <p>8/XX/2025:</p> <ul style="list-style-type: none">• ACL 21-45 - Add new CW and WTW Notices• 2025-2026 CalFresh COLA; ACL 25-XX Update CalWORKs (CW) MAP for 2025-2026; Update CalWORKs (CW) IRT Levels for 2025-2026 |

Release and Policy Update

Upcoming Releases – 25.05



Transition Update

Infrastructure Transition

Future Transitions – Transition In Place



Imaging

- Transition of ticket triage and response completed April 1, 2025
- Transition of custom application components planned for June 1, 2025
- SaaS and hosting services continue to be provided by Hyland



Contact Center

- Infrastructure transitioned February 1, 2025
- Transition of application and remaining services planned for July 11, 2025
- Transition of Call Summarization (Gen AI) on July 31, 2025



Access Mgmt

- Ping Identity formerly known as ForgeRock
- Infrastructure transitioned February 1, 2025
- Transition of custom application components planned for June 2, 2025

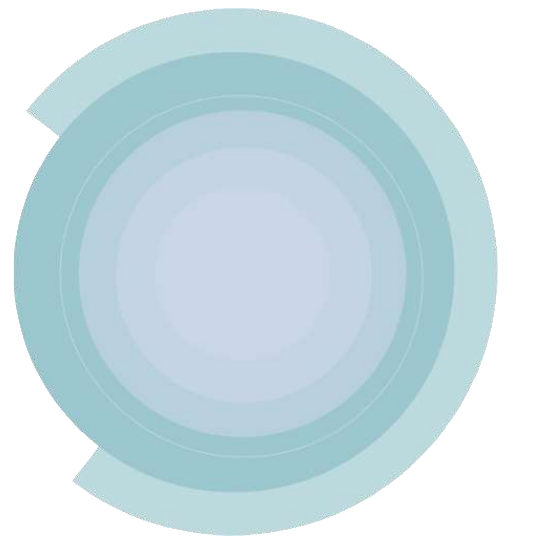
M&E Transition-In Progress

3-Month M&E Major Project Accomplishments



| Accomplishment | Details | Impact |
|--|--|--|
| Established M&E Transition Dashboard | <ul style="list-style-type: none">Launched a comprehensive dashboard that provides transparent tracking of tasks and activities, achieving over 73% completion of Transition Knowledge Transfer sessions.Additionally, all transition deliverables (transition-in master plan, work schedule, and test & validation plan) have been approved. | <ul style="list-style-type: none">Allows for streamlined project management and accountability, facilitating smoother transitions and enhancing project execution efficiencyThe approval of key deliverables further solidifies our strategic planning and operational readiness, positioning the team for continued success. |
| Setting up the Sandbox Environment | <ul style="list-style-type: none">Successfully established the Sandbox environment, enabling the team to access the application for code review and 25.05/07 practice | <ul style="list-style-type: none">This setup is crucial for fostering a robust development and testing process, allowing for early identification and resolution of issues, improving code quality, and accelerating project timelines.The Sandbox environment also empowers the team to experiment and innovate without impacting live systems, thereby enhancing overall project reliability and performance. |
| Completed OCAT Cutover | <ul style="list-style-type: none">Seamlessly assumed control of the OCAT system, allowing for robust monitoring for incidents and maintaining operational integrity.Additionally, completed two rounds of testing and continue to perform ongoing monthly testing for defect resolution. | <ul style="list-style-type: none">These efforts resulted in a seamless transition on the security and incident management front, thus reducing risks and ensuring system reliability. |
| Completed SIRFRA/SCERFRA – Part 1 Cutover | <ul style="list-style-type: none">Effectively took over responsibilities for SIRFA/SCERFA, delivering in-depth policy analysis that supports informed decision-making and strategic planning. | <ul style="list-style-type: none">This takeover provides critical insights that enhance our policy framework, driving more effective strategies and operational efficiency. |
| Initiated CalSAWS Releases | <ul style="list-style-type: none">Successfully kicked off the Job Shadow/Reverse Job Shadow for the CalSAWS Release 25.09, started planning for the CalSAWS Release 25.11 and the joint application design sessions for CalSAWS-CalHEERS Release 26.02. | <ul style="list-style-type: none">This provides an early start on design and development activities, helping to facilitate quality delivery of our initial releases. |
| Initiated Development of System Security Plan (SSP) | <ul style="list-style-type: none">Began mapping to revision 5 controls, including the completion of Assessment, Authorization, and Monitoring controls, and initiated development of 'Response Group A' controls in the Planning family. | <ul style="list-style-type: none">This foundational work is crucial for allowing for compliance and strengthening our security framework, safeguarding our systems against potential threats. |

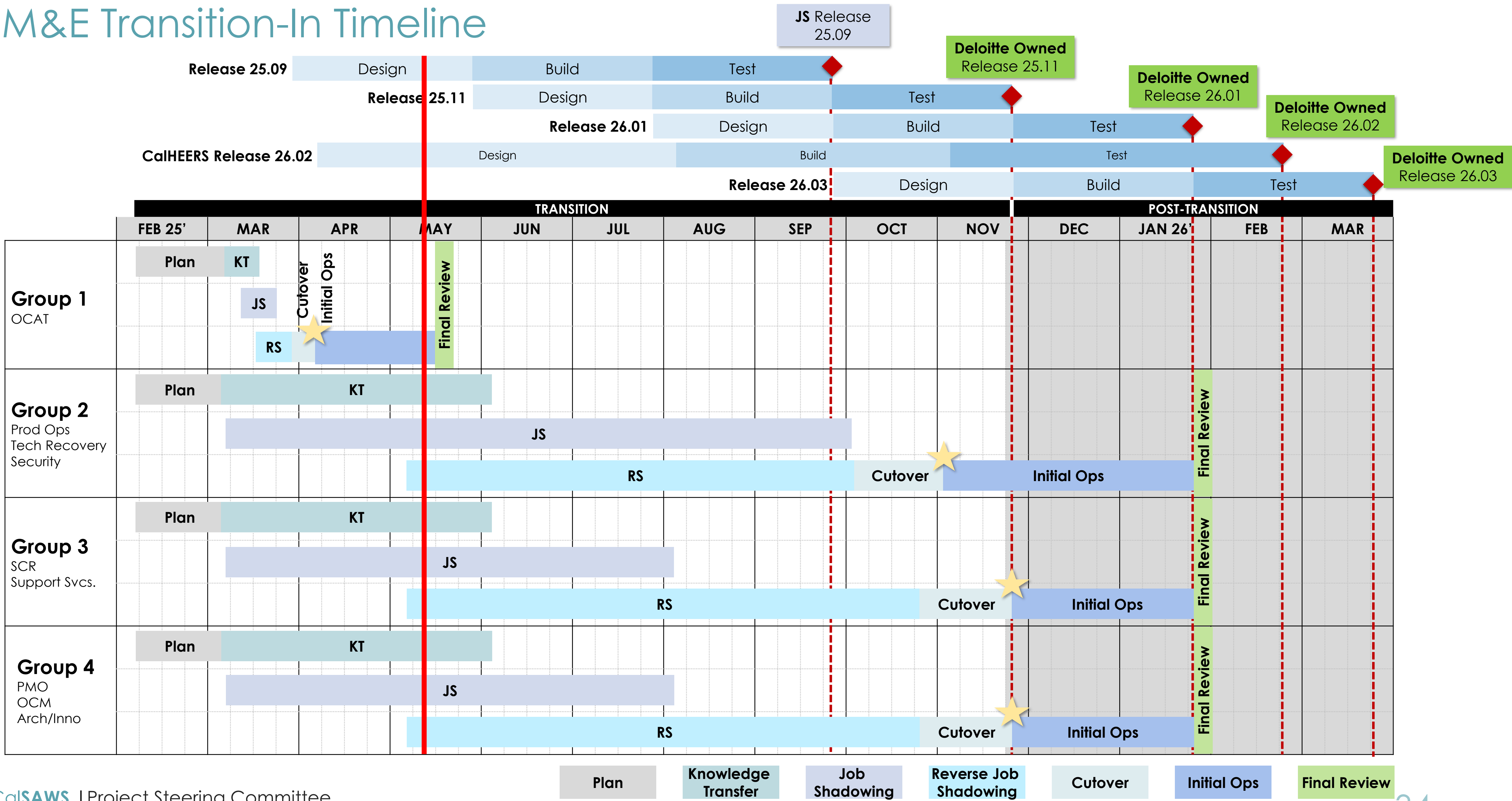
M&E Transition-In Progress



Looking Forward:

- Continue detailed planning for Release 25.11
- Conduct CalHEERS JAD sessions for Release 26.02 (to begin in May)
- Align on path forward to build out an Analytics Platform – beginning process of approvals, detailed planning, and collecting feedback from Counties

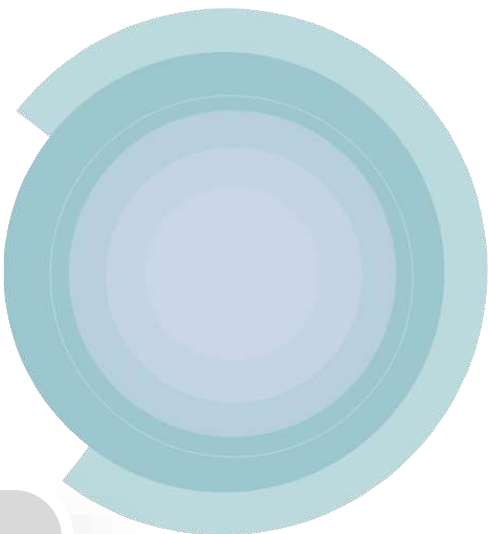
M&E Transition-In Timeline



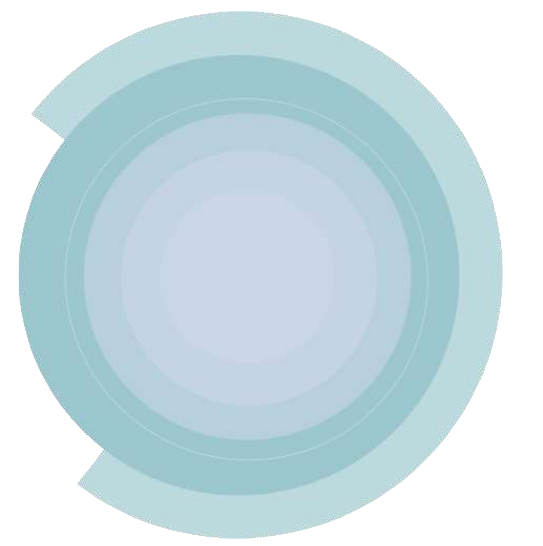
M&E Transition-In Progress

As of 5/2/2025

= On Schedule = Behind less than 15 days = Behind Greater than or = to 15 days



Summary of Logged M&E Risks



| Risk ID | Risk Level | Description | Mitigation Plan | Latest Updates |
|-----------------------------|------------|---|--|--|
| ID: 313 Status: 2 – Open | Medium | Failure to provide M&E team timely access to environments and tools may impact transition | <ul style="list-style-type: none">• Daily meetings between vendor partners to address outstanding access issues• Utilize exception process where needed | 4/28/2025: Access for AWS Accounts and Database completed. Access for Amazon Q for Developer Workspaces in progress. |
| ID: 314 Status: 2 - Open | Medium | Limited Availability of Accenture Staff May Impact the M&E Transition Schedule | <ul style="list-style-type: none">• For KT: Record KT sessions, collapse duplicate KT sessions, do cascade KT.• For RS: Stagger RS one month after JS for each function/services. | <p>4/30/2025: Accenture continues to provide KT/JS as planned. Commenced providing JS for Release 25.09.</p> <p>4/15/2025: Accenture and Deloitte have finalized the list of SCRs and the approach to JS and RJS for and KT Release 25.09.</p> |

ICT & CLE Update

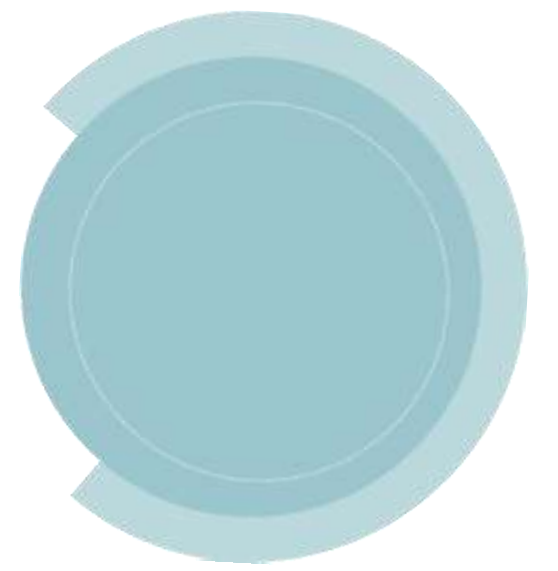


County ICT Feedback – Next Steps

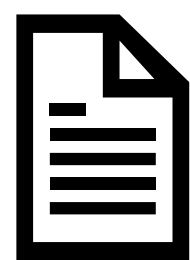


CalSAWS ICT Protocol Document

CIT # 0053-25



The ICT Protocol document was completed by the ICT Workgroup in March and final review took place throughout April. The ICT Protocol document was published on 5/01/2025 via CIT #0053-25-CalSAWS Inter County Transfer (ICT) Protocol. Counties should review, update and train impacted staff who touch the ICT process in any way on the ICT Protocol which was developed and approved by the 58 counties, CWDA, and the state.

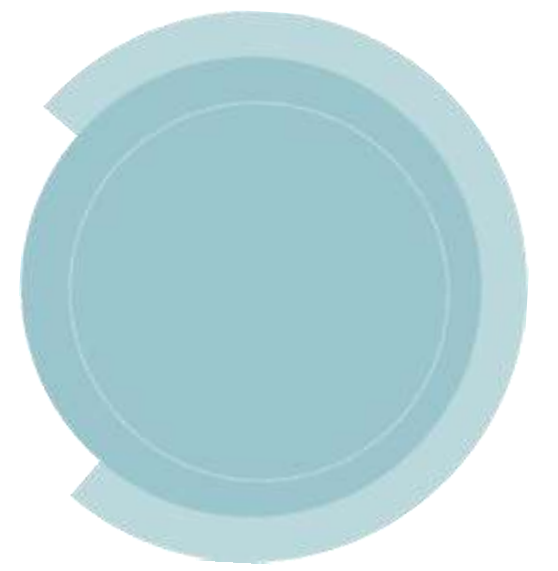


Path to the CalSAWS ICT Protocol document:

[CalSAWS Web Portal > CRFIs & CITs > CalSAWS Information Transmittals \(CIT\) > 2025 > CIT 0053-25](#)

CalSAWS ICT Workgroup

Workgroup Member Feedback



“Participating in this workgroup was awesome! We covered a lot of the pain points and got to a good place.”

“The ICT Protocol should help counties to approach the ICT process in a consistent and more efficient way.”

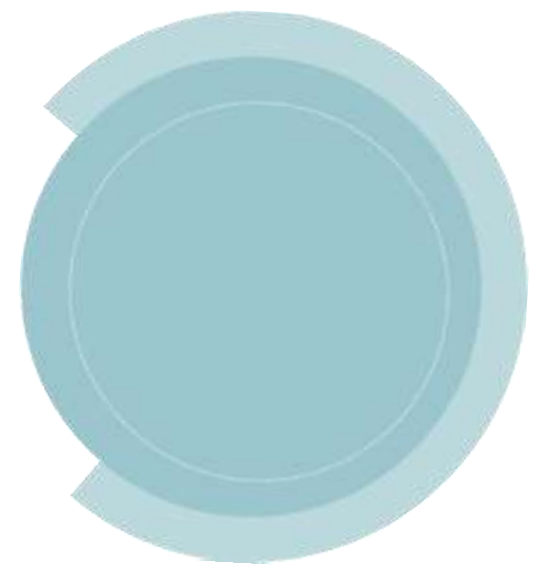
“It was nice to collaborate with other county workgroup members and the state too. We look forward to a smoother road for our ICTs.”

Daisy & Bobbi did a great job keeping us on track!

“CalSAWS and counties did an excellent job in engaging stakeholders, facilitating, and providing knowledge and expertise to streamline the ICT Protocol document.” – CDSS CalWORKs



ICT Update- Next Steps



- Hand off document to ICT Committee to take ownership for maintenance of ICT Protocol- End of April 2025
- Pulse check to occur 6 months out in the ICT Committee to fine-tune the ICT protocol document, if needed. Target- November 2025

Thanks County Regional ICT experts and state stakeholders for your collaboration in revamping the ICT Protocol to be a Power of 58 work product.

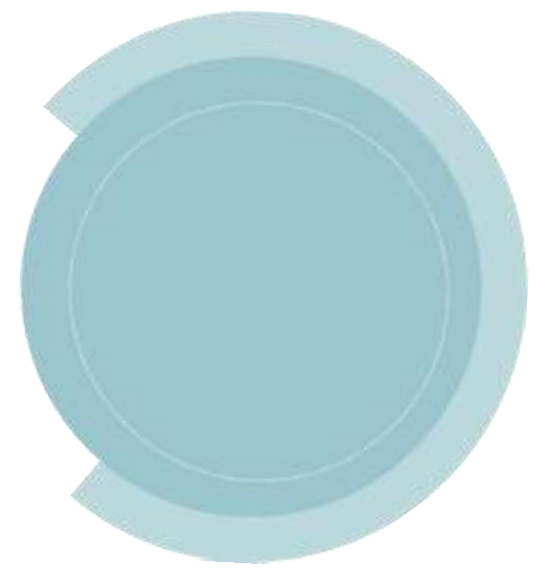
Reminder- Imaging CLE Dates:

- Tuesday, June 3 -- 1:30 PM-4:00 PM
- Thursday, June 5 -- 9:00 AM-11:30 AM



CalSAWS Learning Exchange Sessions

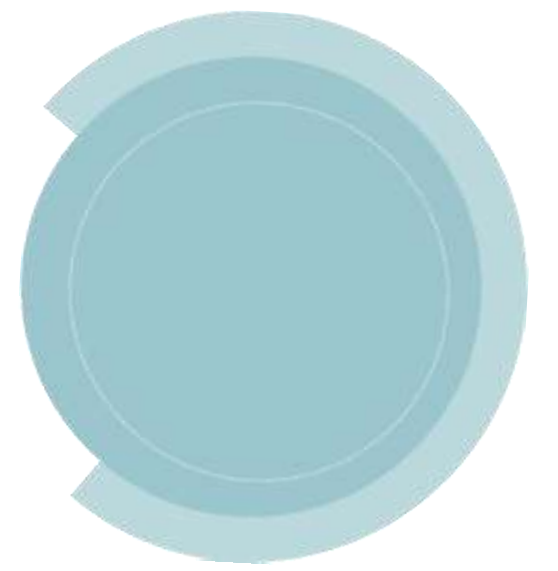
Objective



- CalSAWS Learning Exchange (CLE) sessions provide timely, relevant education for regions on identified topics and allows for Q&A with counties.
- Assess topics ongoing that present challenges for counties and, where appropriate, hold focused CLE sessions to better assist counties in gaining a fundamental understanding of the identified topic(s).
- When possible, the sessions may include willing county partner/s to highlight best practices and lessons learned.

CalSAWS Learning Exchange Sessions

April Task Management CLE



The April 2025 CalSAWS Learning Exchange covered the topic of Task Management and was held on two days, 04/22/25, and 04/23/25. The Task Management sessions provided the counties an understanding and demonstrations of Task Management features such as: Document Routing Rules, Task Bundling, Appending Task, Sibling Task, and Task Expiration. The topic arose from the Document Routing Rule Task Survey (CFRI 24-034) conducted in December 2024 and the Documents Received Task Workgroup (CRFI 24-038) which met in January 2025.

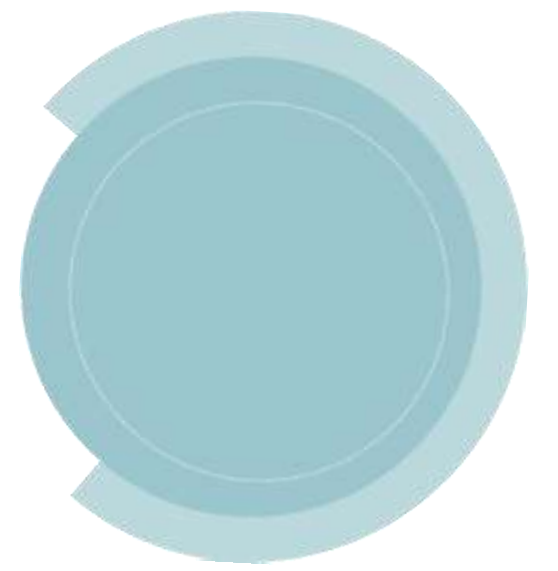
- **567 participants attended**
- **50 counties represented**

Path to the CalSAWS Learning Exchange session materials:

[CalSAWS Web Portal > Resources > CalSAWS Learning Exchange > Task Management](#)

CalSAWS Learning Exchange Sessions

April Task Management CLE – Feedback



“Great information showing us some features our county may not currently use and may benefit from to assist with task management.”

“Great session. It would be ideal to have a tool built that helps to build the processes. There are so many intricacies that cause decision paralysis and underutilization of the system.”

“Thank You!!”

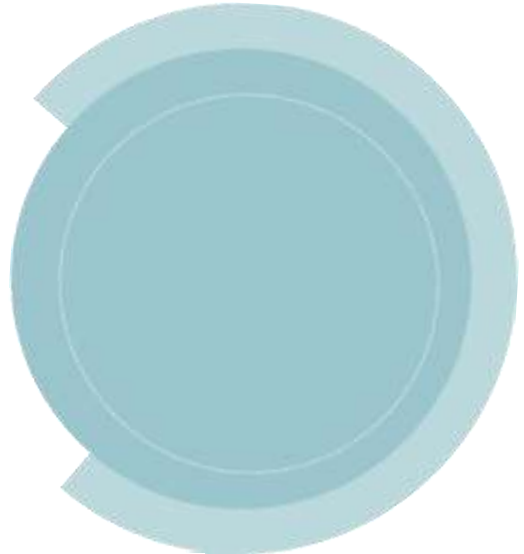
“Great overview. Perhaps, the counties can share some lessons learned with some of the functionality being used.”

“The information that was discussed along the visuals made it easier to understand.”



CalSAWS Learning Exchange Sessions

CLE Planning Schedule 2024/2025



Next Steps

- **Upcoming Sessions-** Counties receive notification of upcoming CLE activities via Broadcast Notifications followed by meeting invites being sent to County PPOCs to forward to their county staff who they believe who benefit from the respective sessions.
- **County Collaboration-** Counties who have valuable best practices, lessons learned, or business processes to share on requested topics are encouraged to let their RMs know they would like to be considered for inclusion in a specific presentation.
- **Request a CLE Topic-** Via Regional Meetings or contacting your region's RM team; include content desired and priority level (Low, Medium, High) for the topic.



Procurement Update

Procurement Timeline

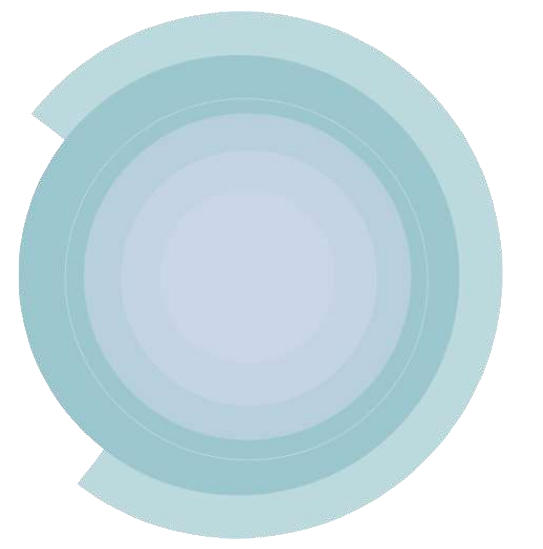
Key Procurement Tasks

| | QA Procurement Event | Dates |
|----|---|-------------------------------------|
| 1 | RFP Development | December 11, 2024 – April 14, 2025 |
| 2 | Consortium Review and Approvals | April 15 – 23, 2025 |
| 3 | State Review and Approvals | April 29 – May 30, 2025 |
| 4 | Federal Review and Approvals | June 4 – August 5, 2025 |
| 5 | Release RFP | August 11, 2025 |
| 6 | Conduct Bidder's Conference | August 19, 2025 |
| 7 | Bidder Question and Answer Period | August 11 – September 2, 2025 |
| 8 | Consortium Publishes Final Q&A and RFP Addendum | September 16, 2025 |
| 9 | Proposals Due | October 20, 2025 |
| 10 | Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs | October 21, 2025 – May 27, 2026 |
| 11 | Prepare and Approve Vendor Selection Report | May 28 – July 1, 2026 |
| 12 | Publish Notice of Intent to Award and VSR | July 2, 2026 |
| 13 | Contract Negotiations | July 7 – 15, 2026 |
| 15 | State Contract Approval | July 20 – August 19, 2026 |
| 16 | Federal Contract Approval | August 20 – October 20, 2026 |
| 17 | Contingency Period | October 21 – November 13, 2026 |
| 18 | JPA BOD Approval | November 20, 2026 |
| 19 | Contract Start | December 1, 2026 |
| 20 | Transition-In Period (2 Months) | December 1, 2026 – January 29, 2027 |

2025 CalSAWS Conference Update

2025 CalSAWS Conference

June 26-27, 2025 | San Diego, CA



- Registration Closes May 23, 2025
 - 270 Attendees as of 5/12/25
 - Quorum of Directors is on track, but it is close.
 - Quorum of PSC is on track.
- Hotel room block is full, but rooms are still available at full price
- Links to register:
 - [Click here for Eventbrite Registration](#)
 - [Click Here for Westin San Diego Gaslamp Quarter Reservations](#)

State Partners Updates



State Partners Updates

Adjourn Meeting