CalSAWS | Project Steering Committee Meeting



Agenda

- Call Meeting to Order
- 2. Agenda Review
- 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 that item is read then requesting recognition from the Co-Chair to speak.

- All lines will be muted when meeting begins.
- To unmute:
 - → When connected via computer click the microphone icon.
 - When connected via telephone press *6.

Action Items

Action Items

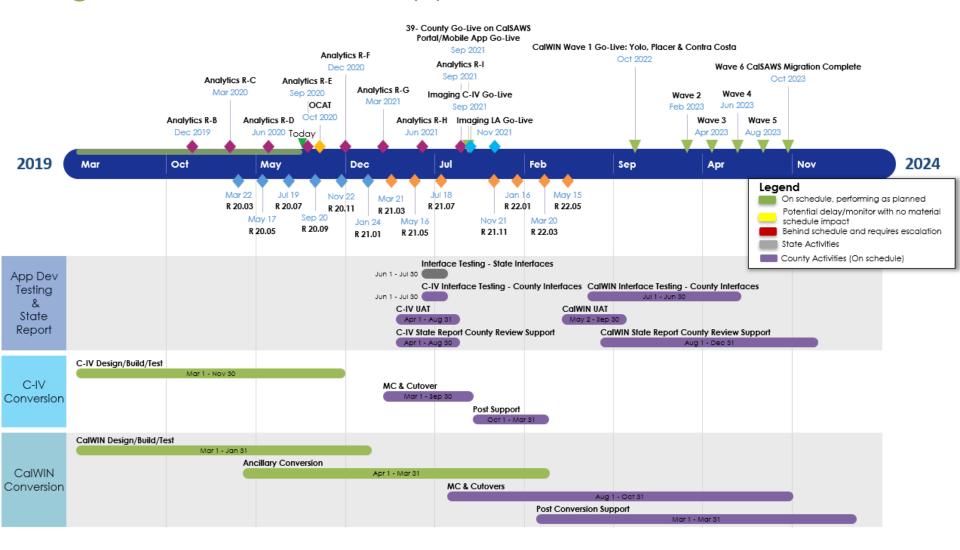
4. Approval of the Minutes of the July 16, 2020 PSC Meeting and review of Action Items.

Informational Items

CalSAWS Gantt Chart Update

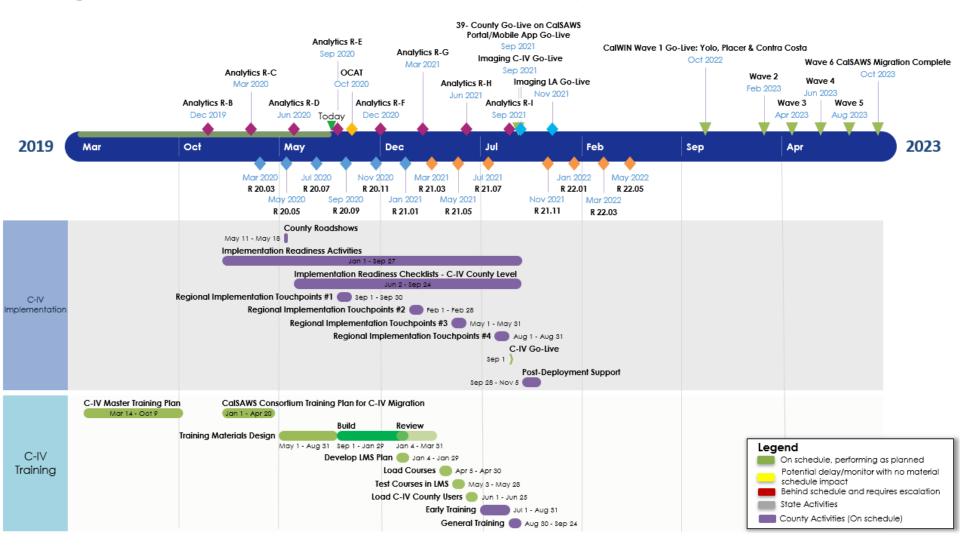
CalSAWS Project Gantt

High Level Overview - App-Dev and Conversion



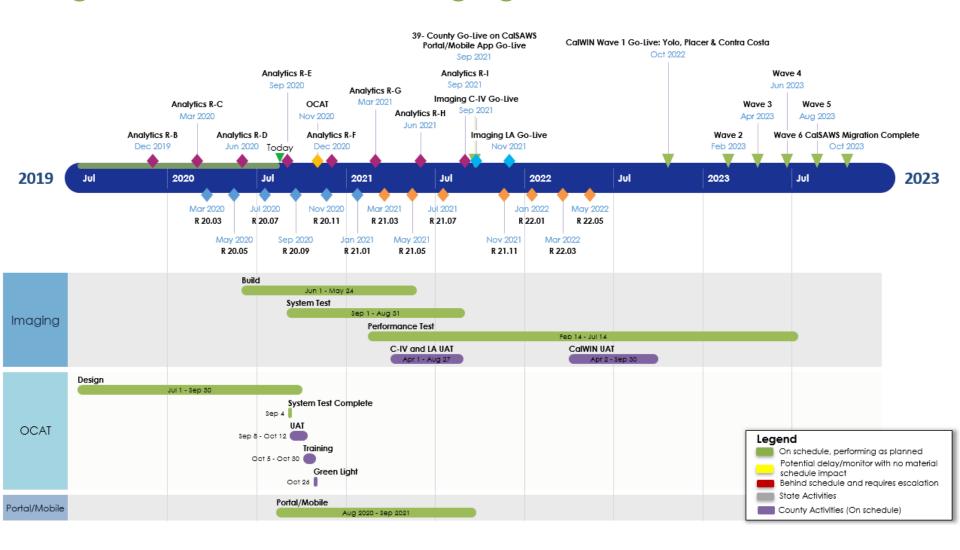
CalSAWS Project Gantt

High Level Overview - C-IV and Implementation



CalSAWS Project Gantt

High Level Overview - Imaging, OCAT, and Portal/Mobile



Application Development and Test Update for DD&I, M&O/M&E (Policy Update)

Upcoming DHCS Policy Implementation

Restoring Discontinued Medi-Cal Beneficiaries

- DHCS has determined that over the months of April, May, June and July a number of Medi-Cal beneficiaries appear to have been discontinued for non-valid reasons and will need to be reinstated to coverage as quickly as possible
- DHCS has been working with the SAWS to match MEDS and SAWS data in order to identify individuals whose discontinuances do not appear to follow the policy guidelines in EO N-29-20, MEDIL I-20-07 and MEDIL I-20-08
 - The discontinuances that appear to be allowable per the EO have already been removed from the lists that were sent to counties
- DHCS will be sending out policy clarifications this week
 - DHCS has changed course on discontinuances that were set to occur prior to the EO. They are now instructing that coverage should be reinstated for everyone who was discontinued after March 17, unless they meet one of the allowable reasons
 - DHCS verbally indicated on a call with the counties on August 12, 2020, that when programs that include cash linked Medi-Cal are terminated, the individuals' Medi-Cal should continue on aid code 38
- To reduce future clean up activities, we recommend counties reinforce with staff that renewals and negative actions should not be processed during the public health emergency and ensure that staff working in cash linked programs (CalWORKs, Foster Care, AAP, etc.) are aware of this policy

Upcoming DHCS Policy Implementation

Restoring Discontinued Medi-Cal Beneficiaries

<u>Processing Deadline/MEDS Reinstatement of Outstanding Beneficiaries:</u>

- DHCS will reinstate coverage directly in MEDS for all individuals who have not been reinstated by the counties by Friday, August 21
- Counties have an opportunity to reinstate as many cases as possible in SAWS until August 21. Doing this will reduce the amount of cleanup needed later, since it will keep SAWS and MEDS in synch
- Counties will be able to provide DHCS with a list of CINs for cases that were discontinued for an allowable reason during the PHE
- SAWS System Availability:
 - All three SAWS Systems (CalWIN, CalSAWS/LRS, C-IV) will be available this Saturday and Sunday, August 15-16, 2020

Upcoming DHCS Policy Implementation

ABD and Medicare Part B 'Flippers'

- Both the APD and Medicare Part B changes are currently targeted for the November release for all SAWS systems with a December 2020 benefit month effective date
 - Medicare Part B final policy is pending
 - Batch EDBC will be run for the December 2020 and January 2021 benefit months
 - Positive changes will result in the action being taken
 - Negative results will be held in a 'read-only' status with no action taken

Completed Policy Commitments

Program	Budget Proposal	Implementation Month	What system will implement?
CalFresh	ABAWD Discretionary Exemptions and Notices	March 2020	CalSAWS CalWIN C-IV
CalWORKs, CalFresh, Medi- Cal	COVID 19 Efforts including suspending renewals and reporting requirements	March 2020	CalSAWS CalWIN C-IV
CalWORKs	CalOAR – Phase 2	May 2020	CalSAWS CalWIN C-IV
CalWORKs	Home Visiting Data Collection	May 2020	CalSAWS CalWIN C-IV
CalWORKs	Earned Income Disregard and Income Reporting Threshold changes	May 2020	CalSAWS CalWIN C-IV
CalFresh	Automate Disaster CalFresh	July 2020	CalSAWS

August 2020

Sunday	Monday	Tuesday	Wed	Thursday	Friday	Saturday
2	3	4	5	6	7 ForgeRock implementation (CalSAWS)	8
9	10	11	MC Discontinuance lists posted Cour		Deploy AAP/FC/KG CNI values C Discontinuance	CalWIN FC Clothing Allowance; CF COVID EA Payments All SAWS
16	17	18	19 C Discontinuand	20 Deploy CW/CF values*	21 Workers can run for October	22
23	24	25	26	27	28	29
30	31	* Assume final	CW/CF letters a	re published by	8/20/2020	

September 2020

Sunday	Monday	Tuesday	Wed	Thursday	Friday	Saturday
30	31	1	2	3	4	5 LRS/CIV Run EDBC for AAP/FC/KG & CW/CF* CalWIN CW IRT & CF COLA
6 CalSAWS Disaster Recovery Test	7	8	9	10	11	12 CF COVID EA Payments All SAWS
13	14	15	16	17	18	19
20 20.09 Release Deployment (CalSAWS and C-IV)	21	22	23	24	25	26
27	28	29	30	* CalSAWS Batch S	Starts at 1:00 PM; C-I	V Down Day

COLAs/Mass Updates

Policy Change	Programs Impacted	SCRs / PPM #/Change Order (CO)	Policy	Effective Month
CalWORKs Income Reporting Threshold (IRT)	CalWORKs	CA-218277/CIV-107685 CA-213274/CIV-106259 #55682/CO 3671	ACL 20-XX8/3/2020 – draft values received	October 2020
CalFresh SUA/LUA/TUA and Allotment amounts	CalFresh	CA-213273/CIV-106258 CA-213274/CIV-106259 #55753/CO 3672	 ACL 20-XX 7/29/2020 - Draft for Allotment amounts 7/31/2020 - draft values for SUA/LUA/TUA 	October 2020
California Necessities Index and Rate Increases	Adoptions Assistance	CA-210584 CA-217269 #55114/CO 3531	ACL 20-68, Published 6/26/2020	July 2020
California Necessities Index and Rate Increases	Foster Care, Kin-GAP	CA-210559/CIV-106141 CA-213274/CIV-106259 #55681/CO 3670	ACL 20-78, Published 7/1/2020	July 2020
Covid Emergency Assistance Maximum Allotments	CalFresh	CA-218299/CIV-107689 #54649/CO 3337	ACWDL issued 08/03/2020 • 7/29/2020 - August payments approved	August (1 st), July (2 nd), June (3 rd)

COLAs/Mass Updates Continued

- CalSAWS:
 - No downtime requested
 - Batch starts 5 hours early at 1:00 PM on September 5, 2020
 - Necessary as the following day will be the disaster recovery testing, which typically happens on a long weekend
- C-IV: System Down Day
 - Downtime requested for September 5-6, 2020
- CalWIN
 - Downtime requested for September 6-7, 2020

Upcoming Policy Commitments

Program	Budget Proposal	Targeted Release	What system will implement?
Medi-Cal	ABD Expansion - 12/2020 Benefit Month	20.11	CalSAWS CalWIN C-IV
Medi-Cal	Flippers – Medicare part B Disregard – 12/2020 Benefit Month	20.11	CalSAWS CalWIN C-IV
CalWORKs	Stage 1 Child Care Automation Changes (report and online search screen for Stage 2 administrators, automation of child care informing notices and 18 month post aid notice)		CalSAWS CalWIN C-IV
CalWORKs	Changes to Vehicle & Resource Asset Limits	20.11	CalSAWS CalWIN C-IV
Foster Care	Foster Care Eligibility Determination "FCED"	21.03	CalsAWs
Medi-Cal	Asset Verification Program	21.03 CalSAWS/C-IV Nov 2020 CalWIN	CalSAWS CalWIN C-IV
CalWORKs	Support for CalOAR data validation and continued development of performance indicators	21.05	CalsAWs

Upcoming Policy Commitments

Program	Budget Proposal	Targeted Release	What system will implement?
CalFresh	ABAWD Phase 3	21.05	CalSAWS CalWIN
Medi-Cal	Mixed Household Renewal Packets	21.07	CalSAWS CalWIN
CalFresh	Safe Drinking Water Pilot	21.11	CalSAWS
CalWORKs	Child support disregard pass-through - increase the pass-through payment to families in the CalWORKs program, effective January 1, 2022	21.11	CalSAWS CalWIN
CalWORKs	Eliminate 24 month Welfare to Work clock and increase 48-month time on aid clock to a single 60-month CalWORKs time limit	22.03	CalSAWS CalWIN
Foster Care	AB 2880 - Transitional Housing Placement Program. Supplemental rate structure for housing supplements for NMDs, with two levels of supplement per county, depending on NMD's parental status.	22.07 CalSAWS July 2021 CalWIN	CalSAWS CalWIN
CalFresh	CalFresh Simplifications: AB 2413 More CalFresh less hunger act Eligibility and Reporting targets 1/1/2024 for the implementation of the pre-pop SAR form and the pre-pop applications with Medi-Cal Renewals.	23.11	Calsaws

58 County Approach

- Have one set of Non-State/County forms in the system
- Individual County forms will be maintained by the counties and not included in CalSAWS. Exceptions: GA/GR and current LA County forms
- The CalSAWS Imaging System will allow counties to easily save/upload county forms into CalSAWS with a "print to CalSAWS" option

Background

- In the Summer of 2019, participants from the 58 counties met to review high volume, Non-State forms
 - Over 200 forms were reviewed during the seven week, functional design session (FDS)
 - The attendees agreed on over 100 forms to be used in the CalSAWS system and developed a set of requirements for the implementation of these forms
- In April 2020, State partners and advocates requested a review of each Non-State form
 - In May 2020, CalSAWS began sending proposed Non-State forms for State sponsors review
 - All Non-State forms from FDS have been through State sponsors review and all have been submitted for stakeholder review (excluding obsolete NSF)

Background

Form Dispositions

Disposition	Description
New State Form	State partners will convert a form into a new, no substitutes permitted, State form
Existing State Form	During the seven week county review process, county participants agreed to use a State form. No additional review is required on these State forms at this time, unless the counties and/or State proposed a change
Non-State Form	State partners deemed a form to be acceptable for use but not required to be made into a State form
Obsolete Form	State partners recommended obsoleting a Non-State form
In Review	State partners are reviewing the form

Current Status

Disposition	Form Count	In Review	Ready for Design	In Process (Design /Build/ Test)
New State Form	39	39	0	0
Existing State Form	13	2	1	10
Non-State Form	35	27	0	8
Obsolete Form	20	N/A	N/A	N/A
In Review	1	1	N/A	N/A
Total	108	69	Ĩ	18

Background

- Obsolete Form
 - For Non-State forms that are recommended to be made obsolete, communication will be sent out to the impacted counties
 - The communication will include any recommended State forms that should be used in place of the obsoleted form
 - Form mapping will also be provided via Change Management activities
 - If the Non-State form is already in CalSAWS, the form will only be obsoleted when the recommended State form is implemented (if not already available)
 - Legacy System impacts: Unless explicitly directed by State partners, counties may use Non-State forms in their existing Consortia system until they migrate to the CalSAWS system

Next Steps: Communication

- Provide the appropriate committees and counties updates on Non-State form dispositions in September 2020. The update will include:
 - Mapping of current Non-State forms to the future form
 - Mock-up of the revised form, if applicable
- Send CITs to counties, where appropriate e.g. CIT 0127-20 already sent on the C-IV NA RE Y

Next Steps: New State Forms

New State Forms

- Forms will go to CDSS Forms Management Unit (FMU)
- Once the forms are finalized into the new format, the forms will be prioritized for Spanish translations. Both English and Spanish versions will be provided to CalSAWS immediately
- Additional threshold languages will be provided on a flow basis

Going Forward

- When counties wish to create a new form or update an existing one, they may submit a CER for consideration
 - The committees include state staff who can assist with determining whether the form should be a state form
 - If determined to be a state form, it will follow existing state form processes
 - If determined to be a non-state form, it will follow the SCR process which will include state and advocate review of the new form

Revised OCAT Timeframe Update



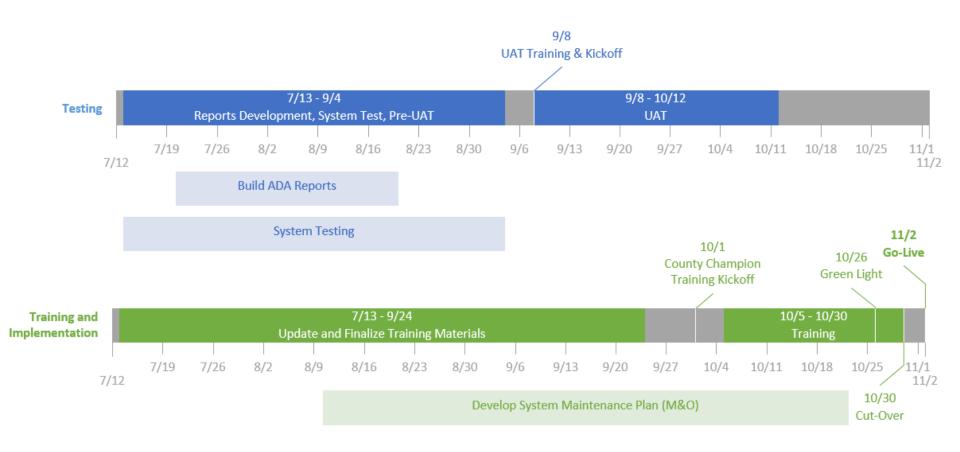
OCAT Project Update

Executive summary

- Cambria and Consortium have worked together to develop a revised project plan and timeline to address quality and readiness concerns
- Revised timeline includes:
 - System Test Complete: 9/4
 - County UAT (5 weeks): 9/8 10/12
 - County Training: 10/5 10/30
 - Green Light: 10/26
 - Go-Live: 11/2
- Key inclusions in revised plan
 - Re-develop reports in CalSAWS enterprise tool (Qlik) to fully meet requirements for reports and ADA
 - Additional testing to increase quality and confidence for UAT
 - Additional time for deliverable creation, comment resolutions, collaborative reviews, and formal approval
 - System Test Results
 - Training Materials
 - System Documentation and Maintenance Plan (M&O)

OCAT Schedule

Revised timeline



OCAT Project Update

System test

- Functional System Test
 - Testing extended to include:
 - New reports developed in Qlik
 - Data extracts
 - + Chatbot
 - Business Rules Management (for Consortium Admin)
 - Pre-UAT script validations
 - Regression tests
- Security Penetration Test
 - Engaged third-party vendor with specialization to conduct independent and objective testing for vulnerabilities
 - Completed test #1 and identified 30 findings
 - Cambria shared and resolved necessary findings and test #2 began 8/12. Vendor will confirm findings are resolved and prepare final report.

OCAT Project Update

System test

- Performance Test
 - Performance testing and tuning continues to be conducted to achieve required response times per SLAs, such as:
 - + Transactions within two (2) seconds for at least 98% of daily load
 - Display ASR within three (3) seconds for at least 98% of daily load
 - Test for average daily workload (480 users, 240 interviews)
 - Test for peak workload (e.g., mass login after an outage)
- Disaster Recover Test
 - Test #1 conducted (7/12 7/24) with failover to AWS east region
 - Test #2 planned (8/17 8/28) to be conducted prior to end of system test with expanded scenario validations
 - Test #3 planned (9/28 10/9) to be coordinated and conducted with CalSAWS prior to Go-Live

OCAT User Acceptance Test

Preparation activities



- Pre-UAT Activities
 - Extended time for Project team in UAT environment to dry run UAT scripts and resolve defects
 - End-to-end scenarios with OCAT, LRS, C-IV, and CalWIN
- Logistics
 - Planning for remote testing
 - Preparing tools and support resources needed
 - Testing with CalWIN, C-IV, and LRS Counties
- Testers
 - Up to 35 testers identified
 - Testers will be trained by the OCAT team on UAT execution on OCAT system, tools, and processes
 - Kickoff and training will be conducted on the first day of UAT

OCAT Training and Implementation

Key county activities and milestones



Activity	Date
Training Materials Complete	Thu, 9/24
County Champion Training Kickoffs	Wed, 9/30 - Thu, 10/1
Training (Self-paced)	Mon, 10/5 – Fri, 10/30
Green Light	Mon, 10/26
Cutover	Fri, 10/30 – Sun, 11/1
Go-Live	Mon, 11/2

County Readiness Tracking

Planning and preparation tasks

#	Task	Start Date	End Date	Status
1	Define Your Project Team & Communication Plans	4/9/2020	5/7/2020	Complete
2	Know Your Stakeholders	4/9/2020	5/7/2020	Complete
3	Identify & Prepare for Process Changes	5/7/2020	6/11/2020	Complete
4	Prepare for Connectivity	6/11/2020	10/2/0202	In Process
5	Prepare for Training	6/11/2020	10/2/0202	In Process
6	Execute Self-Paced Training	10/5/2020	10/30/2020	Not Started
7	Prepare for Cutover to New System	10/8/2020	11/1/2020	Not Started
8	Engage with Post-Go-Live Support	11/2/2020	12/4/2020	Not Started

Statewide Portal/Mobile Update

- Scope and Timeline
- Major Milestones
- Communications Strategy

The Statewide Portal/Mobile project is responsible for performing activities required to design, develop, and implement the Portal/Mobile infrastructure and application solution. All Portal/Mobile App development will adhere to current program policy. Consortium, County, state, advocate and user engagement is expected throughout the design, development and testing aspects of the project.

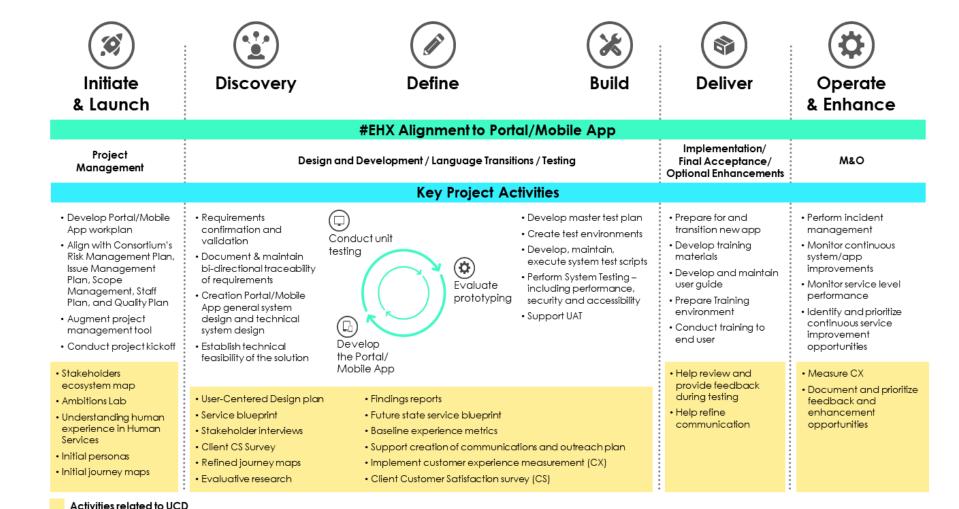
There are three phases to this project:

- Phase 1 Design, Development and Implementation (DD&I)
- Phase 2 Enhancements
- Phase 3 M&O (Maintenance & Operations)

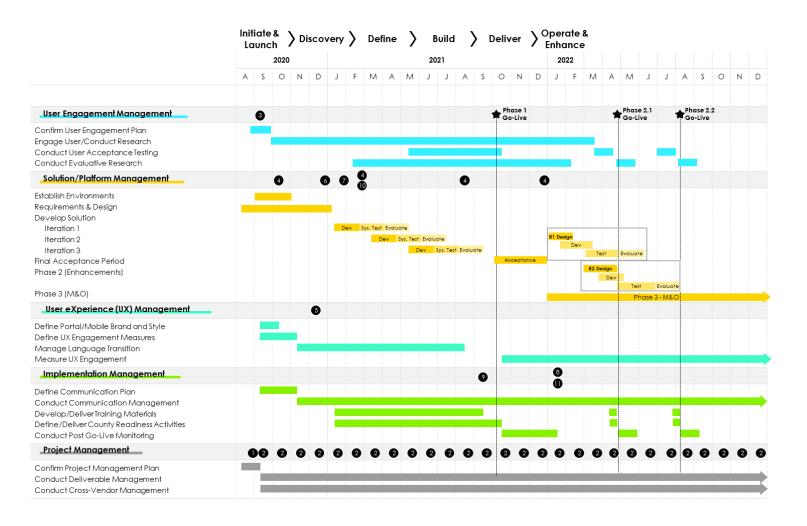
Solution Scope



Elevating the Human Experience



Timeline and Major Milestones



Deliverables

- Work Plan
- 2 Status Report
- User-Centered Design Plan
- Requirement Traceability Matrix
- 5 Portal General System Design
- 6 Portal Technical System Design
- Master Test Plan
- Masici restria
- Portal Implementation
 Completion Report
- Maintenance and Operations Plan
- Mobile App General and Technical System Design
- Mobile App Implementation Completion Report

Tenets of the Portal/Mobile Communications Approach

The approach to project communications will be grounded in the following objectives:



Transparent



Inclusive



Mode of "no surprises"



Give everyone a voice



Integrated with the existing communications plans

Tools we'll use to support a Virtual Environment

Zoom

Besides having the traditional video call, Zoom offers other features that engage whoever is on the call such as white board and voting sessions



Jira

A software that allows the team to plan, manage, and track your project requirements, test cases, and development



Teams

A collaborative platform that combines different tools in one location such as chat, file storage, and application integration



IdeaBoardz

A collaborative application that encourages your team to share ideas in one location



FunRetro

An online tool that enables remote teams to hold organized sprint retrospectives. We also use it to brainstorm collaboratively.



Mural

A digital workspace for visual collaboration using sticky notes and tools that allow for quick consensus and ideating.

Project Meetings



Invitations

- Will include an Agenda
- Will be shared one week in advance
- Will include requirement numbers from the RTM to reference



Meetings

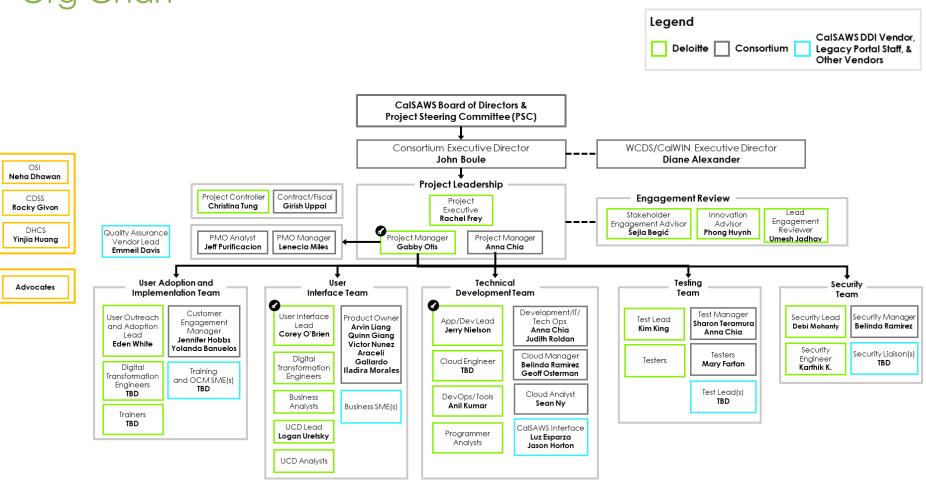
- Will include a designated facilitator and a scribe
- We may record some meetings, and we will announce for those cases.
- We'll store content within consortium repositories.



Follow Up

- Will distribute minutes within 24 hours
- Minutes will focus on key decisions and action items
- Minutes will include individuals invited, attended.

Org Chart



C-IV Migration Implementation, Change Management, and Training Update

Initiating IPOC Engagement

Topics Covered

- Began IPOC engagement through the Monthly Implementation Readiness Checkpoint meetings
- Began assessing COVID-19 impact on C-IV Migration (staff working remote vs. onsite) to determine Engagement and Implementation Support Strategies
- Provided IPOCs with County-level Implementation Readiness Checklists, Web Portal Access and IPOC Orientation Presentation deck
- Provided IPOCs with the Imaging Training/Change Management Overview and Approach for C-IV Migration

Next Steps

- Conduct County-level meetings with IPOCs to review County-level Implementation Readiness Checklist (Aug. 17 – Sept. 4, 2020)
- Host first Quarterly Regional Touchpoint (targeted for September 2020)

County Engagement

IPOC Engagement

Distributed Regional Support
Infographic that contains key
Project support contacts and a
listing of CalSAWS tools and
information resources

*Note: An infographic specific to each Region was distributed to the 39 C-IV Counties

WORKING HAND-IN-HAND WITH COUNTIES CalSAWS Region 5 Support Targeted On-Site Support (TOSS) Team Your Go-To CalSAWS Project Contacts for Implementation Josh Harpster Email: HarpsterJ@CalSAWS.org Phone: (916) 318-0360 Valerie Martinez Email: MartinezV@CalSAWS.ora Phone: (562) 201-9092 Kristi Rodriguez Email: RodriguezK@CalSAWS.org Phone: (760) 927-6573 **Regional Managers** Martha Zepeda Email: ZepedaM@CalSAWS.org Phone: (909) 522-8270 Ricardo Miranda Email: MirandaR@CalSAWS.org Phone: (510) 847-9214 JR Dessai Email: DessaiJ@CalSAWS.org Phone: (707) 849-3924 Veronica Lara Email: LaraV@CalSAWS.org Phone: (805) 701-0885 **Tools and Information Sources Web Portal** CalSAWS.org Website LRS WBT Videos CalSAWS Buzz Newsletter · Readiness Checklists Migration Videos Taraeted Topic Recordinas www.CalSAWS.org FAQ documents Sandbox Environment **Learning Mgmt. System** LRS WBTs A non-Production environment of LRS Job Aids the LRS Application (3 Generic Accounts per County) Other Training-related Materials www.SB.CalSAWS.net (3 Generic Accounts per County) www.LMS-CA.CalSAWS.net Preparing for Go-Live: September 2021 Contact Us: Implementation@CalSAWS.ora

C-IV County Efforts for CalSAWS Implementation

Region 1



Region 2



Region 3



Region 4



Region 5



Marin County is working on a demonstration of select LRS functions and considering a bulletin for their Staff. Implementation Team is working collaboratively with Marin to develop additional engagement materials

El Dorado County
has been
primarily working
on streamlining
communications
based on the
results of the User
Readiness survey
and has some
staff working
remotely.

Humboldt County
has created a
Countdown to
CalSAWS
newsletter. In
addition, they
have also
created a
calendar for staff
to use the
Sandbox
Environment.

San Joaquin plans to begin sending information out to staff via "Link a Mail," and have an icon that staff can click on to get information about CalSAWS, including the Buzz newsletters and videos.

Riverside
leveraged the
User Readiness
survey to
develop a
Newsletter to
aid in County
Communication
s and
Engagement
discussions.

Upcoming Engagement/Outreach

Upcoming Meetings and Support Roles	Target Date
Monthly Implementation Readiness Checkpoint (39 Counties)	September 2, 2020
IPOC / TOSS Initial Meetings (per County)	August 17- September 4, 2020
First Quarterly Regional Touchpoint (per Region)	September 2020
Identification of TPOCs (Technical Points of Contact)	September 2020
Identification of CNCs (Change Network Champions)	September 2020

- IPOC / TOSS Initial Meetings
 - Discuss current and future Implementation readiness efforts
 - Provide a detailed overview of the County-level Implementation Readiness Checklist
- First Quarterly Regional Touchpoint
 - Hosted per Region
 - Implementation Timeline and Project Updates
 - Details on upcoming role recruitments

C-IV Migration Change Management

Change Management – C-IV Migration

Updates



Change Readiness Assessment Surveys

- Baseline Survey Distributed in June 2020
- Upcoming Survey to be Distributed in September 2020
 - Intended to gather feedback from C-IV end-users on the effectiveness of CalSAWS communications and the progression of User awareness, understanding, and acceptance since June
- Communications Strategies will be updated as applicable based on results



Upcoming Change Communications

- Infographics
 - CalSAWS Implementation Support (Team and Tools)
 - "What is CalSAWS?"
- Spotlight on CalSAWS Enhancements
- Videos
- Implementation News Bulletin



Establishing the Change Network

- CRFI to be distributed in September 2020 for participation in the Change Network
 - Details on recommended background and number of individuals per County to be included in CRFI
- Kick-off Change Network Meeting will be hosted in October 2020
- Monthly meeting frequency to follow until Go-Live

C-IV Migration Training



Training – C-IV Migration Training Materials

Key Takeaways

- 26 Training Topics have been discovered as part of the overall C-IV Migration Training program
- Training Material delivery ranges from Web-based Training (WBTs) to Supplemental "CalSAWS Quick Guides" (or both)
- Most Training materials are currently in the General/Detailed Design phase
- Training is being evaluated for functional areas currently in design (e.g. Task Management, FCED, GA/GR)
- Analysis will continually be conducted to discover additional Supplemental training topics for C-IV Migration

Training – C-IV Migration Training Materials

Name/Topic	Training Material Type
Intro to CalSAWS	WBT
Multi-month EDBC	WBT
Non-Compliance	WBT
WTW Non-Compliance	WBT
WTW AU Summary Page	WBT
Change Reason	WBT
Homeless Assistance	WBT
Notices of Action (NOAs) – Preview	Supplemental
General Assistance/General Relief (GA/GR)	WBT
FCED	WBT
Supervisor Authorization	WBT/Supplemental
Sponsorship/Deemed Income	Supplemental
Appointment Scheduling	WBT
SAR 7 Processing	WBT
Pregnancy Special Need	WBT/Supplemental
Rescind Reason	WBT/Supplemental
Sponsorship/Deemed Income	Supplemental
Verifications	WBT/Supplemental
Imaging - Navigation	WBT
Imaging - Overview	WBT
Imaging - Single Case Capture	WBT
Imaging - Multi-Case Capture	WBT
Imaging - Virtual Printer Capture and Import	WBT
Imaging - Return Mail Capture	WBT
Imaging - Document Retrieval	WBT
Imaging - Exception with No Case Capture	WBT

^{*}The above list of Training Materials are subject to change depending on outcomes of ongoing impact analysis (Name/Topic, Training Material Type, etc.)

Reports Replatform and Analytics Update

Analytics Reports Replatform

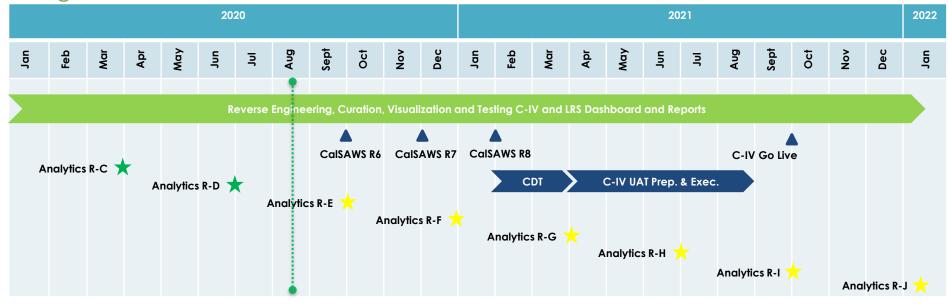
Migrating C-IV and LRS Dashboards, State, & Mgmt. Reports to AWS

- Milestones Achieved
 - Release C and D have been Designed, Developed, Tested (both System and County), and are Ready for Deployment:
 - + 6 Dashboards; and,
 - 33 State & Mgmt. Reports.
- Release E In-Progress and On-Schedule for County Testing
 - + 7 Dashboards; and,
 - + 60 State & Mgmt. Reports.
- Next Webinars Scheduled for Aug. 19th and 26th
 - CalSAWS Dashboard Portfolio Feedback; and,
 - CalSAWS State & Fiscal Reports Portfolio Feedback.
- User Acceptance Testing (UAT)
 - C-IV Scheduled between June and August 2021; and,
 - CalWIN Scheduled between July and September 2022

...and represents the Counties opportunity to view the reports with their converted data.

Analytics Reports Replatform

High Level Release Plan and Overall Status

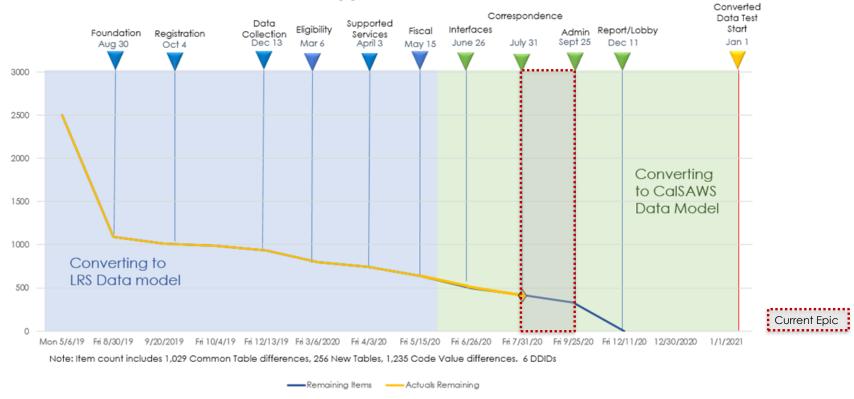


Analytics Release	Status	Soft Launch Date	Dashboards	State & Mgmt. Reports	Total Reports	Notes
С	Approved for	3/30/20	2	0	2	All C-IV Reports Deployed
D	Production Deployment	6/30/20	4	33	37	prior to CalSAWS C-IV CDT
Е	In Development	9/30/20	7	60	67	
F		1/15/21	3	59	62	
G		3/30/21	3	97	100	
Н	Future Development	6/30/21	6	68	74	
T		9/30/21	2	68	70	
J		1/15/22	0	65*	65	*All Mgmt. Reports
Total Reports			27	450	477	

Conversion Team Activities

C-IV Conversion

Burndown Chart and Progress

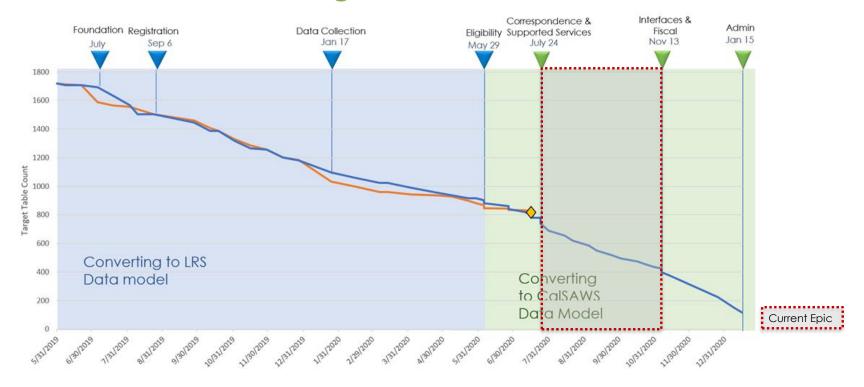


C-IV Conversion Continues On-Schedule with:

- Foundation, Registration, Data Collections, Eligibility, Supported Services, Fiscal, Interfaces, and Correspondence areas Assembly Test Complete;
- Admin. is In-Progress; and,
- Reports, and Lobby areas On-Schedule to Complete Prior to the next C-IV Conversion Phase/Milestone(s) → Conversion System Test, Converted Data Test (CDT) and Mock Conversion(s); and,
- EDBC Match has begun.

CalWIN Conversion

Burndown Chart and Progress



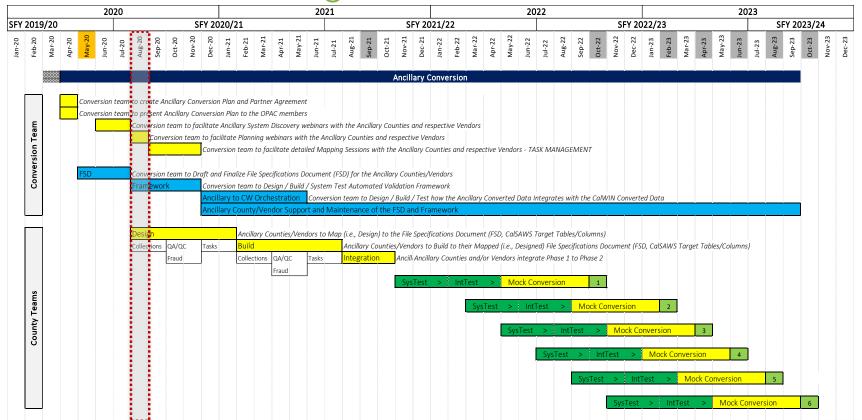
Note: 1718 is the cumulative tables to be looked at. This includes looking at tables multiple times as tables cross functional area. There are 708 unique tables identified for conversion evaluation

CalWIN Conversion Continues On-Schedule with:

- Foundation, Registration, Data Collections, and Eligibility areas Assembly Test Complete;
- Supported Services and Correspondence areas in Completing; and,
- Fiscal and Interfaces are In-Progress
- Admin, Reports, and Lobby areas On-Schedule to Complete Prior to the next CalWIN Conversion Phase/Milestone(s) → Conversion System Test, Converted Data Test (CDT) and Mock Conversion(s).

Ancillary Systems Conversion

Gantt Chart and Progress



Ancillary Systems Conversion executing in the Planning Phase:

- Discovery Sessions facilitated and completed in the month of July;
- Planning Sessions scheduled for August; and,
- Data Mapping Support Sessions planned to begin in September/October.

Current Month

Additional Conversion Status

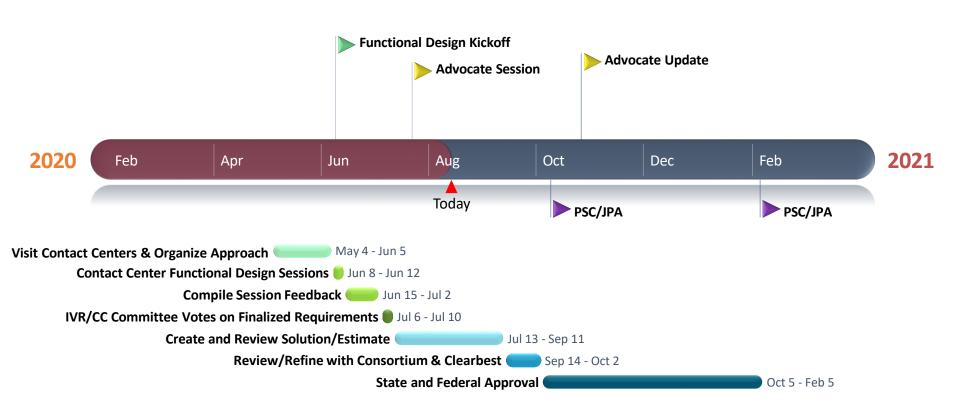
Duplicate Person Update

- Duplicate Persons
 - Generated CalSAWS De-Duplication Report and posted to the CalSAWS Web Portal;
 - CIT 0150-20 was sent to the Counties on August 7, 2020 communicating the same;
 - CalSAWS De-Duplication Report will be generated and provided to the counties on a monthly basis.

CalSAWS Contact Center Update

IVR and Contact Center

Requirements Approval Timeline



IVR and Contact Center

Requirements and Next Steps

- Contact Center/IVR Requirements Total: 61
 - Interactive Voice Response (IVR)/Self-Service 15
 - Outbound IVR 6
 - External Party Access IVR 2
 - Telephonic Signature 3
 - Other Customer Facing CC Related 2
 - Contact Center Administration and Configuration 19
 - Operations Reporting and Management 5
 - Telephonic Signature Application Configuration 6
 - Regional Call Center/Covered California Configuration 2
 - Environment Configuration 1
- IVR/Contact Center Committee Reviewed and Approved all requirements July 2020
- Customer Facing Technology Advocate Session July 2020
- Next Steps: Estimates and Review

CalSAWS Imaging Solution Update

Imaging

Design Progress Update

- Development and Test Environments Created
 - Incremental releases of functionality being tested starting with 20.09
- Phase 1 (Technical Design) of detail design documents have been reviewed and approved (June 2020).
- Phase 2 (Application Development) in progress.
 - Approved 2
 - Pending Approval 3
 - Draft in progress 9

Imaging

Document Migration Update

- Los Angeles Document Migration Discovery Sessions
 - In Progress (bi-weekly sessions)
 - Engaged with Open Text Content Bridge
- C-IV Document Migration
 - In Progress Document Mapping
 - Document migration from Centera On-track
- Wave 1 Counties Contra Costa, Placer, Yolo
 - Kick offs completed and discovery sessions scheduled

County Wave	Kick off Month	Document Migration Duration (Export/Import)
1	July 2020	Sep. 2020 – Oct. 2022
2	Oct. 2020	Dec. 2020 - Jan. 2023
3	Jan. 2021	Mar. 2021 – Apr. 2023
4	Mar. 2021	May 2021 – Jun. 2023
5	May 2021	Jul. 2021 – Aug. 2023
6	July 2021	Sep. 2021 – Oct. 2023

Staffing Update



CalSAWS Staffing Update

Status

- Completed review of 96 applicants (43 candidates)
- Completed candidate interviews and selections
- Notifications to Directors and Director Confirmation in process, to continue through 8/21 as needed
- Candidate Notifications in process, to continue through 8/28 as needed

August						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						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	26	27	28	29
30	31					

Procurement Update

- CalWIN BPR, Training, OCM & Implementation Support
- Central Print Services

CalWIN Training, OCM & Implementation Support

Timeline

PROCUREMENT EVENT	DATE
Released RFP	December 17, 2019
Contractor Proposal Due Date	April 23, 2020
Evaluate Proposals and Prepare Vendor Selection Report	April 24 – August 5, 2020
Consortium Issues Notice of Intent to Award	August 6, 2020
Contract Negotiations	August 10 – August 18, 2020
State, Federal and Consortium JPA Board of Directors Approval of Agreement	August 19 – December 1, 2020
Planned Start Date of CalWIN Contractor	December 2, 2020

- Deloitte was notified as the selected vendor on August 6.
- The Vendor Selection Report was distributed and made public on August 6.
- Contract negotiations were completed earlier than planned.

Central Print Procurement

Timeline

PROCUREMENT EVENT	DATE
Develop Requirements and RFP	January 21 – April 22, 2020
Consortium RFP Review and Approval	April 23 – May 5, 2020
State RFP Review and Approval	May 6 – July 6, 2020
Federal RFP Review and Approval	July 8, 2020
RFP Release	July 8, 2020
Bidder's Conference	July 16, 2020
Contractor Proposal Due Date	September 8, 2020
Evaluate Proposals and Prepare Vendor Selection Report	September 9 – October 30, 2020
Consortium Issues Notice of Intent to Award	November 2, 2020
Contract Negotiations	November 4 – 12, 2020
State, Federal and Consortium JPA Board of Directors Approval of Agreement	November 16, 2020 – February 9, 2021
Planned Start Date of Central Print Contractor	February 22, 2021

- Consortium responded to 70 vendor questions and issued RFP Addendum 1 on Friday, July 31.
- Five vendors submitted a Letter of Intent to Bid

State Partners Updates

- OSI
- CDSS
- DHCS

Regional Updates

JPA Board August Meeting Overview

Adjourn Meeting