CalSAWS | Project Steering Committee Meeting

March 18, 2021

Agenda

1. Call Meeting to Order
2. Agenda Review
3. Public Opportunity to speak on items NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six 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

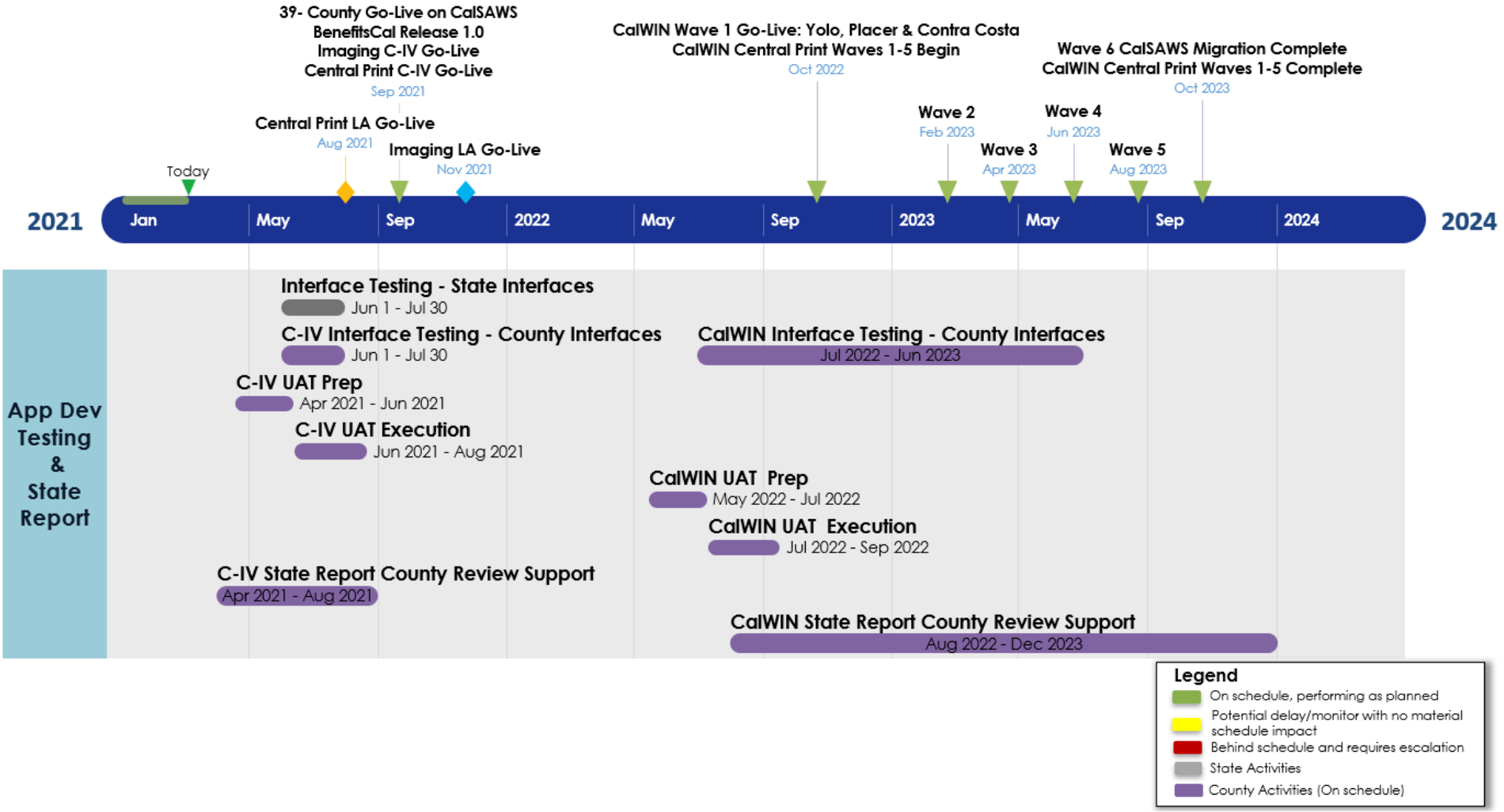
4. Approval of the Minutes of the February 11, 2021 PSC Meeting and review of Action Items.

Informational Items

CalSAWS Gantt Chart Update

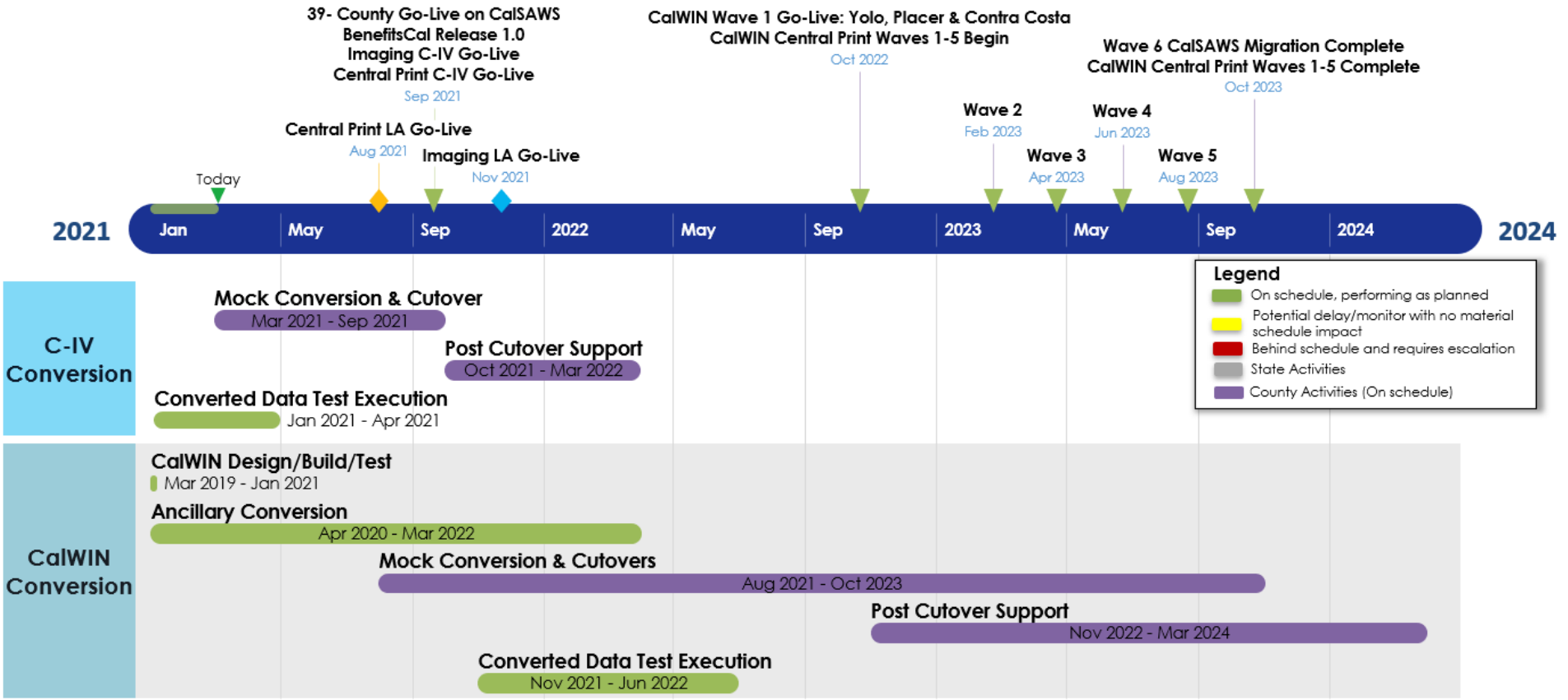
CalSAWS Project Gantt Chart

High Level Overview – App-Dev & Test



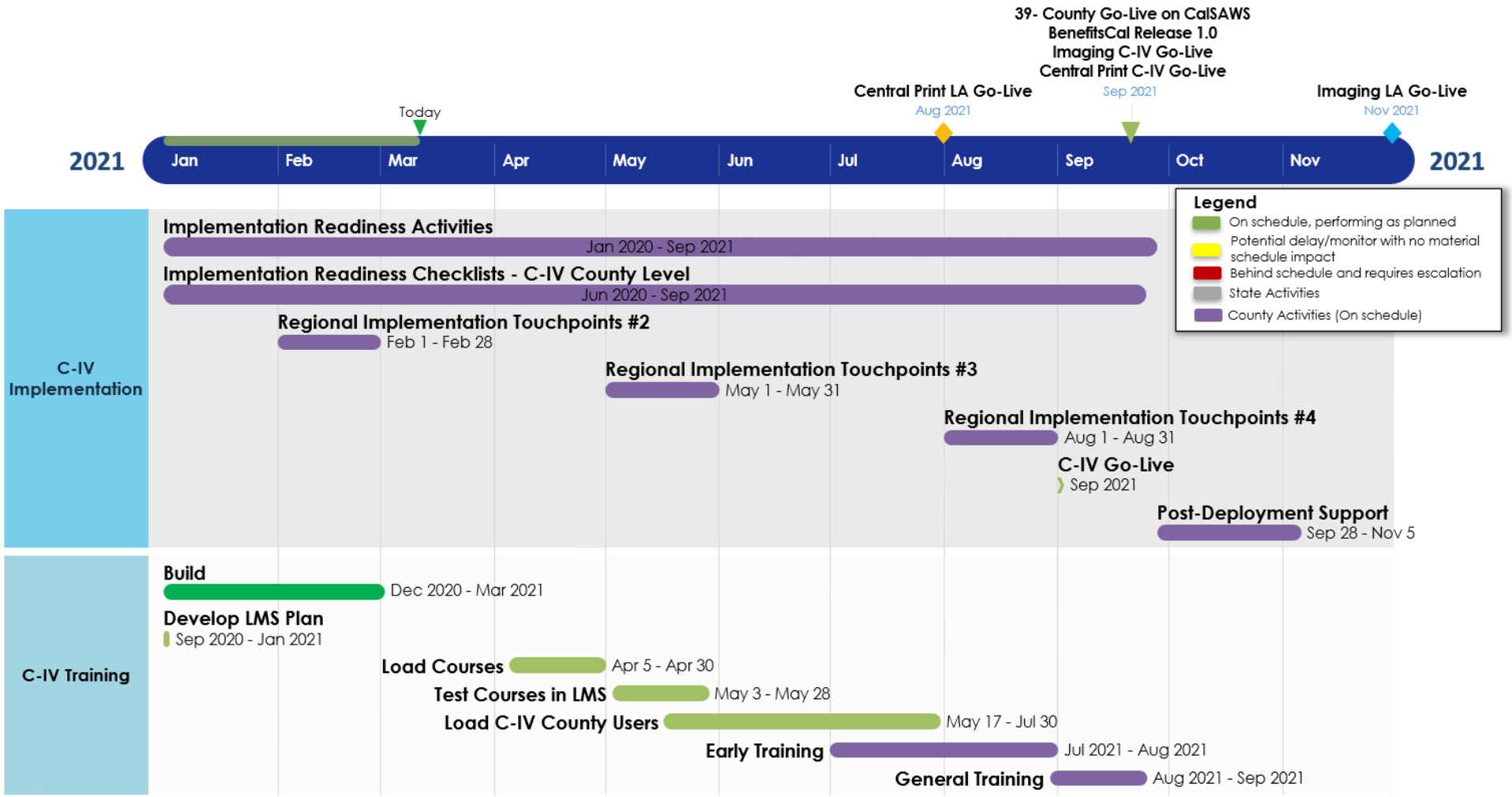
CalSAWS Project Gantt Chart

High Level Overview – Conversion



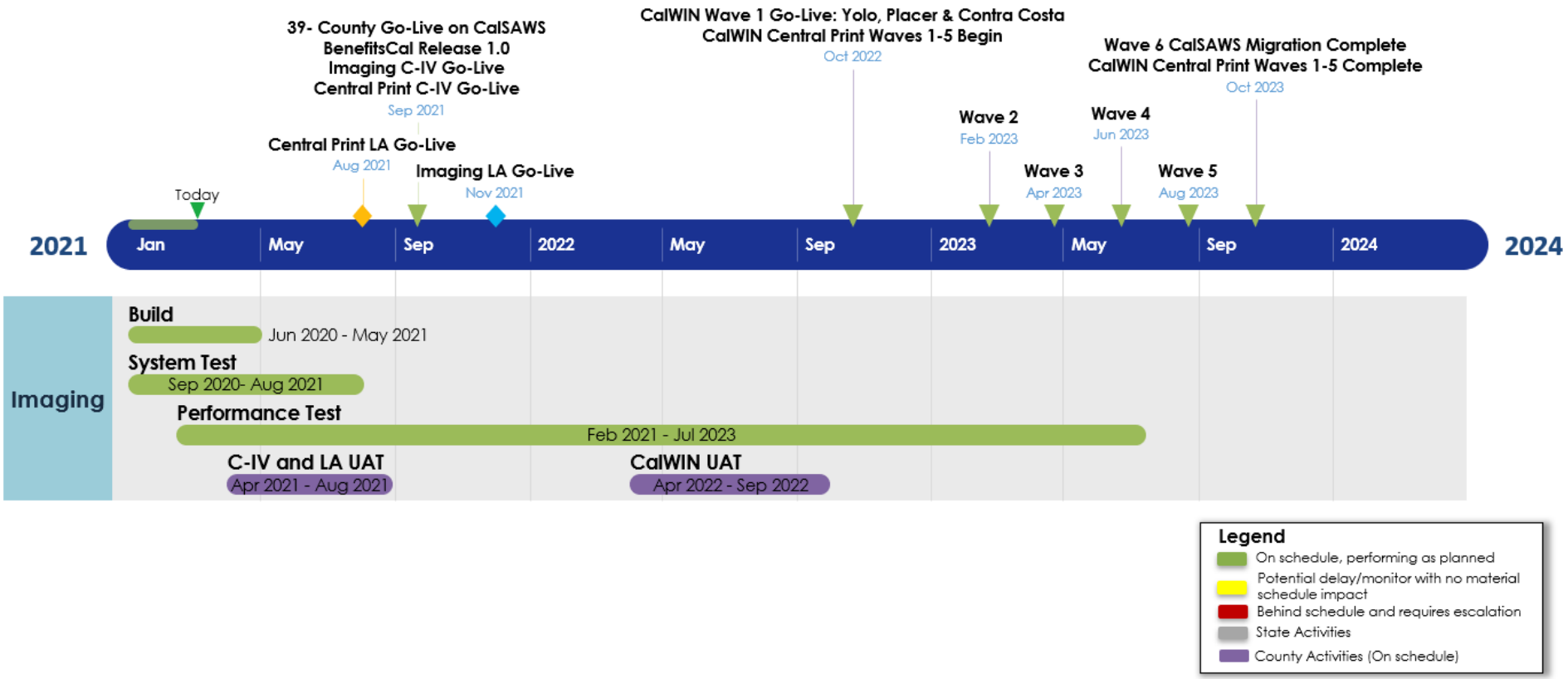
CalSAWS Project Gantt Chart

High Level Overview – C-IV & Implementation



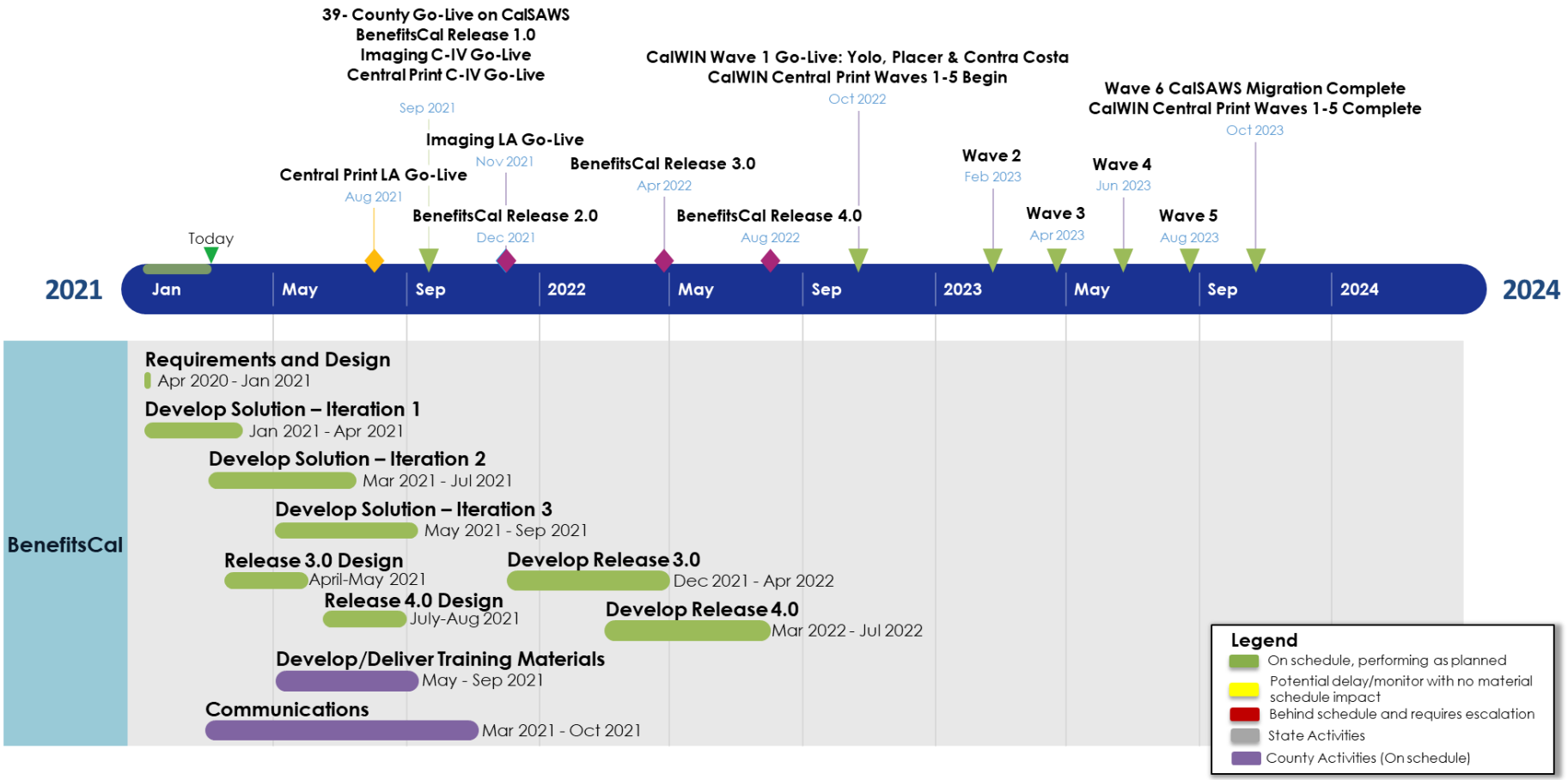
CalSAWS Project Gantt Chart

High Level Overview – Imaging



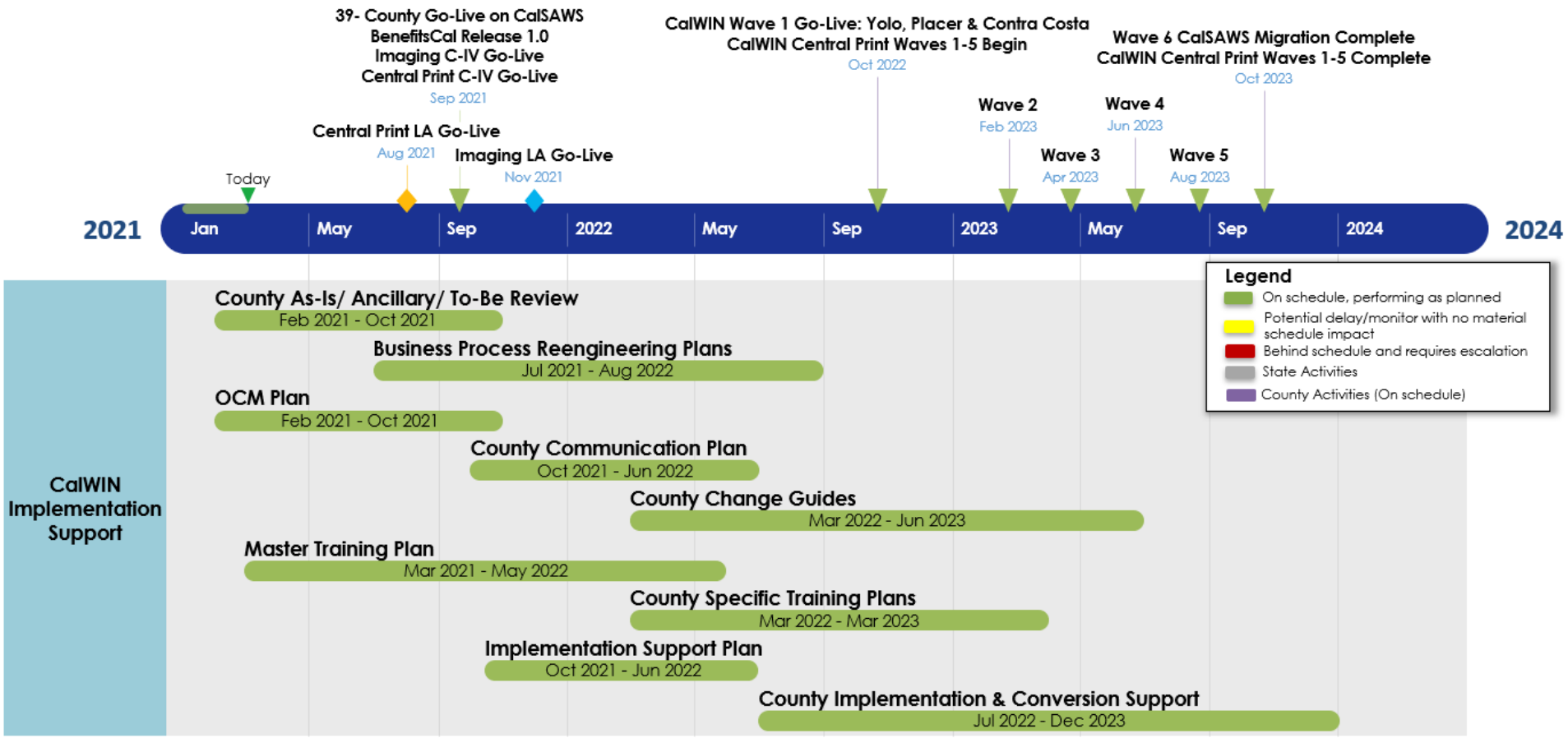
CalSAWS Project Gantt Chart

High Level Overview – BenefitsCal



CalSAWS Project Gantt Chart

High Level Overview – CalWIN OCM



CalWIN Implementation Support Services

- CBOs perspectives on Business Process redesigns

BPR As-Is Discovery Sessions

- Delivered Contra Costa, Placer, Tulare and Yolo County-Specific As-Is BPR Sessions.

- Adjusting schedule for remaining BPR Sessions:
  - Counties could benefit from a 2-week lead time to arrange for Subject Matter Expert (SME) participation in As-Is Sessions, Focus Groups and Interviews

  - Counties could benefit from a 1-week lead time to Pre-Review the baseline BPR materials and share those with their SMEs in advance of sessions.

  - Adding an additional week for sessions that are not completed in the first week.

  - There is significant benefit in allowing the County BPR leadership to meet with and coordinate with the RMs and Implementation Team 1-2 weeks in advance of their BPR sessions. This has been accommodated in the revised schedule.

Organizational Change Management

- CalWIN Organizational Change Management (OCM) County Point of Contact (POC) Working Session Kick-off
  - CalWIN OCM POC CRFI in review, targeting distribution by March 19th
  - OCM Working Session Kick-off tentatively planned for Wednesday, April 14th from 1:30 – 3:30pm
  - Twice monthly OCM POC working sessions planned for April thru October

- CalWIN OCM Plan to be submitted in October 2021

Training Update

The Training Advisory Council (TAC) Kick-Off Meeting was held on February 17th

- All 18 counties were represented in the TAC Kick-Off
- Reviewed the CalSAWS Blended, Hands-on Training Approach for CalWIN Counties

- Received good feedback and suggestions during the meeting

Training Advisory Council Update

- March 17, 2021 meeting was held
- TAC Agenda Topics from March and next 2 months

March	April	May
• Demonstration - Learning Journey Map • Tools & strategies for preparing staff *early* for learning CalSAWS	• Training Roles – Audience Analysis • Curriculum Mapping	• Training Customizations based on BPR and OCM • Review of Instructional Design Maps & ILT Templates

Visioning Lab Update

- Visioning Lab successfully completed on February 24th
- Almost 70 participants from the Counties and their representatives, Regional Managers and Consortium
- Key topics included:
  - Understand what **success** means
  - High performing teams: following the **me to we to purpose** approach
  - Walking in their shoes! Understanding the modes and preferences of stakeholders
- Visioning Lab Packet will be distributed to participants

BenefitsCal Update

- Project Status Update
- Make-up of the "Other" 12.1% for the survey question, "How did you learn about the CA Benefits Website?"
- Document Upload Screens

BenefitsCal Operational Readiness

Project Status as of 03/05/21

Area	Categories	Status	
		Current Period	Previous Period
Application	Design	C	G
	Development	G	G
	System Test	G	NS
	User Acceptance Test	NS	NS
	Usability Test	NS	NS
Integration	Design	C	G
	Development	G	G
	System Test	NS	NS
	Interface Partner Test	NS	NS
Technical	Infrastructure	NS	NS
	Security Testing	NS	NS
	Performance Testing	NS	NS
Conversion	Conversion Readiness	NS	NS
	Converted Data Test	NS	NS
Training	Training Plan	NS	NS
	Training Materials	NS	NS
	Training Delivery	NS	NS
Implementation	Service Desk	NS	NS
	System Operations	NS	NS
	Prod Deployment Plans	NS	NS
Change Readiness	Communications	NS	NS
	Partner Readiness (County)	NS	NS

Key Milestones

Key Decisions	Status	Evaluation Start Date	Decision Date	Go?
Exit SIT	NS	07/12/21	07/16/21	
Exit UAT	NS	08/16/21	09/03/21	
Prod Dry Run	NS	08/06/21	08/13/21	
Green light for Production	NS	09/06/21	09/13/21	

Executive Highlights

- **Development** of the first of three increments (1 of 3) completed on-schedule on 02/26/21.
- **Functional and Technical Design** deliverables are due for final approval on 03/10/21. The Part II design deliverables were initially submitted on 02/05/21 and final versions were submitted on 03/01/21.
- **System Test** for the first increment began on Monday, 03/01/21. A sprint-zero System Test phase was added from 03/01/21 to 03/19/21 to allow time for the BenefitsCal team to allow time to incorporate the changes from the final design deliverable: General Systems Design – Part II, scheduled for approval on 03/10/21.
- User Centered Design (UCD) **usability tests** continue to continuously validate and measure the current system designs.
- Looking ahead to the next reporting period, key activities will begin related to defining the **Communications Strategy**, as well as the **Production Go-Live Activities List** to plan the detailed events during the go-live weekend (09/24/21 – 09/27/21).

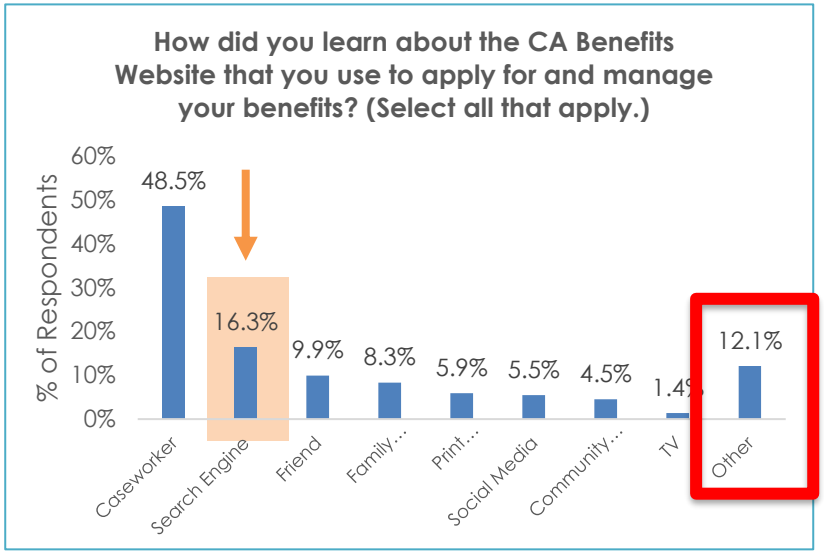
Project Status	G	On Track	Y	< 14 Days	R	>=14 Days	C	Complete	NS	Not Started

BenefitsCal User Research

"Other" Category

Action Item from February JPA:
What is the definition of the "other" response category within the customer survey question (How did you learn about the CA Benefits Website)?

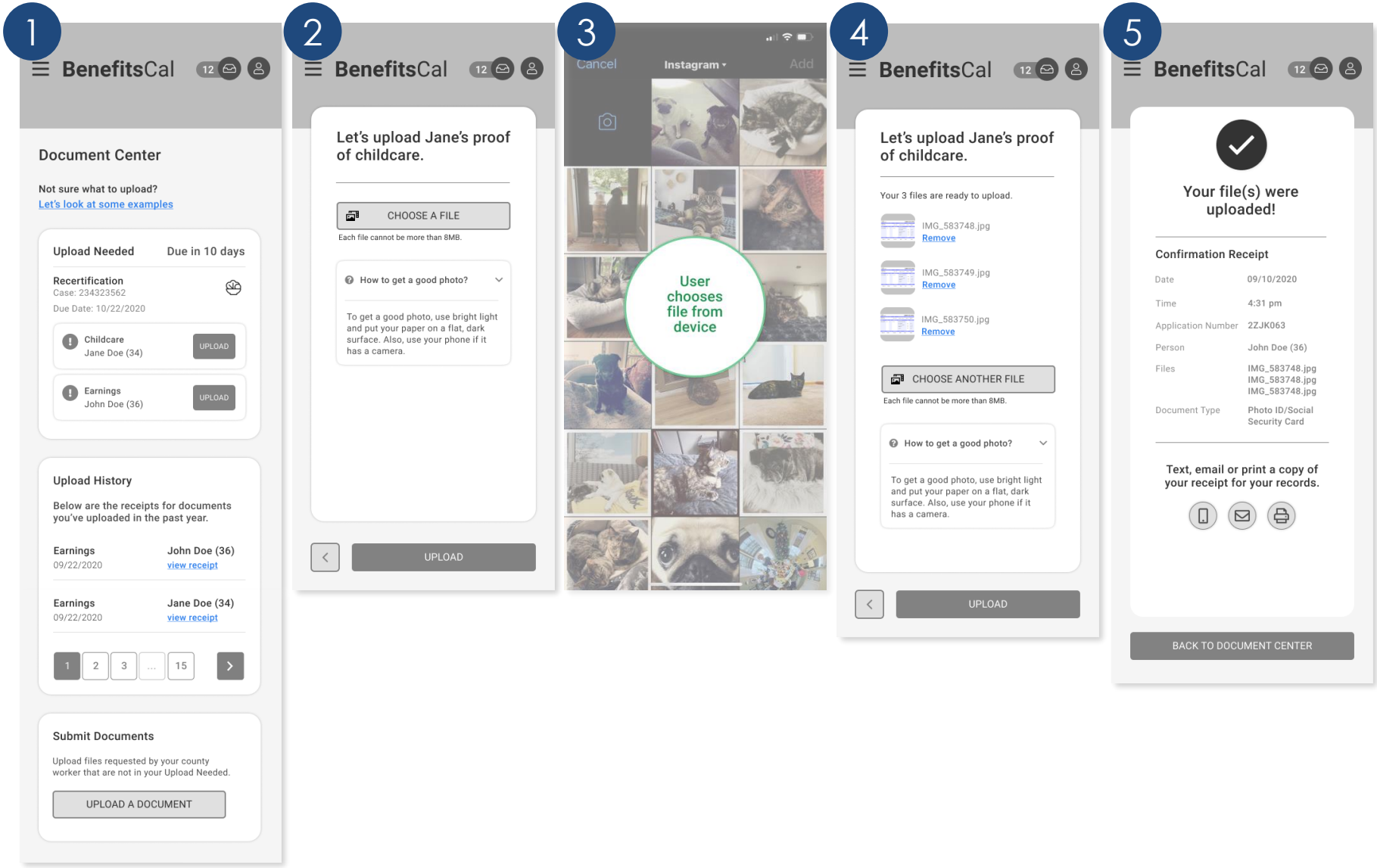
Answer: "Other" was an option within the survey.



Above, results from our survey of 7,000+ customers. Of those who use a CA Benefits Website to apply for benefits, the second-best way that respondents found out about the CA Benefits Website was through a Search Engine (e.g., Google). Optimizing the search engine experience for BenefitsCal is needed.

BenefitsCal Document Upload

Wireframes and Process



Contingency Plans

By failing to prepare, you are preparing to fail.

- Benjamin Franklin
Founding Father

Potential Cause of Challenge (PCOC):
C-IV Conversion Cutover Execution

ID	Readiness Area		Contingency Plan
	Critical / Must-Have (Date Shift)	Important or Nice-to-Have (No Date Shift)	
2	C-IV Conversion Cutover Execution		**Contingency Scenario – C-IV Converted Data Not Ready** During the C-IV Conversion Cutover, the team has defined Stage Gate activities (throughout the cutover schedule) to perform, assess, and report Validation Checkpoints during the Window. If material issues are identified, preventing Conversion Activities from progressing, then the following actions will be taken by the project: **Contingency Actions** 1. Facilitate a cross-team call with respective C-IV Cutover activities owners and team leads to assess issue(s), identify possible resolutions, and determine if actions are recoverable (within the Cutover Window) 2. Evaluate potential Cutover Window schedule impacts 3. Communicate Issues, Impacts, and Resolution with Executive Leadership and deploy technical staff to execute identified resolution(s) 4. Schedule hourly meetings to review progress and assess critical path to Cutover Complete **Contingency Plan Development Trigger Event/Date** If the resolution is not known/identified or the exceeds the Cutover Complete past the Window (i.e., Monday, 8am), a meeting and communication with Executive Leadership will assess the desire and decision (needed) to execute Rollback activities (in the C-IV and LRS systems). **Contingency Plan Execution Trigger Event/Date** As a result, and decision from the Executive Leadership communication, then the contingency plan will be executed. **Resolution Time to Complete Contingency - TBD** Dependent on the Stage Gate Validation Checkpoint and when the decision is made to execute Rollback activities. **Impacts of Contingency Execution - TBD** • There could be an impact when C-IV and LRS Counties would have access to SAWS given the length of time it will take to complete the Rollback activities and when the Contingency plan is executed. • This will also impact when the C-IV Counties will migrate to CalSAWS.

Potential Cause of Challenge (PCOC): **CalSAWS/BenefitsCal Performance**

ID	Readiness Area		Contingency Plan
	Critical / Must-Have (Date Shift)	Important or Nice-to-Have (No Date Shift)	
1	Performance – online and batch transactions		**Contingency Scenario – Performance is degraded** If the performance of online transactions (e.g., login, navigation, EDBC execution) and batch execution impacts the ability of county workers to serve the public, the following Contingency Actions would be taken: **Contingency Actions** 1. Isolate the potential area(s) of system stress causing one or more performance metrics to not be met. 2. Identify remediation for specific online or batch transaction, which could include increasing capacity, scaling of the underlaying architecture, concurrently executing batch jobs, or identifying batch jobs that can be run throughout the day. 3. Shift go-live date if performance is degraded by TBD% and a cure cannot occur in time for scheduled cutover. **Contingency Plan Development Trigger Event/Date** If performance is degraded by TBD% at T-45 Days, which impacts county workers' ability to serve the public, create a detailed contingency plan. Align delivery dates for remaining items to support communication. **Contingency Plan Execution Trigger Event/Date** If the resolution of the identified remediation items is not completed by T-15 days, then enact contingency plan **Resolution Time to Complete Contingency** Estimate 45 – 90 days, but actual time is based on specific contingency employed **Impacts of Contingency Execution** Dependent upon specific contingency employed; however, time and funding could be impacted.

Potential Cause of Challenge (PCOC):
BenefitsCal: Document Upload (Imaging Readiness)

ID	Area Readiness		Contingency Plan
	Critical / Must-Have (Date Shift)	Important or Nice-to-Have (No Date Shift)	
3	Ability to Upload Documents (Imaging Readiness)		**Contingency Scenario – Users are not able to upload documents** If there are significant defect(s) discovered that would prevent a customer from uploading document(s) from the BenefitsCal system into the CalSAWS Imaging Solution, then the following actions will be taken: **Contingency Actions** 1. Facilitate a cross-team call with the Imaging team to evaluate the impact. 2. Evaluate the feasibility of alternatives to submit documents, including the ability to submit documents via local offices, via mail, and other methods. 3. Assemble a dedicated strike team of developers and testers to resolve, deploy, and retest. 4. Evaluate potential schedule impacts, including shifting the go-live date. **Contingency Plan Development Trigger Event/Date** If the resolution of the API integration defect(s) is behind schedule by more than two weeks from the planned resolution date (one test sprint), detailed contingency planning will commence. **Contingency Plan Execution Trigger Event/Date** If the resolution of the API integration defect(s) is not ready for UAT validation by 08/06/21, four weeks prior to UAT exit, then the contingency plan will be executed. **Resolution Time to Complete Contingency** The time to resolve is dependent upon the contingency selected. Manual transmittal of documents from BenefitsCal to the imaging system may be selected instead of a rollback. **Impacts of Contingency Execution – TBD** TBD – Dependent on the contingency method selected.

Potential Cause of Challenge (PCOC):
BenefitsCal: CalSAWS Interface Readiness

ID	Area Readiness		Contingency Plan
	Critical / Must-Have (Date Shift)	Important or Nice-to-Have (No Date Shift)	
4	Ability to Submit an Application/ Renew/ Recertify: CalSAWS (Interface Readiness)		**Contingency Scenario – Users are not able to submit applications** If the development of CalSAWS/BenefitsCal APIs is behind schedule, or significant defects are discovered within testing that prevent users from submitting an application, recertifying and/or renewing, then the following actions will be taken: **Contingency Actions** 1. Evaluate impact (within a core or ancillary business process) 2. Evaluate the feasibility of alternatives, including the ability to manually transfer application data to the CalSAWS system. 3. Facilitate a cross-team call to assess the impact to both the CalSAWS and BenefitsCal timelines, and to identify mitigation options to recover 4. Evaluate potential quality and schedule impacts **Contingency Plan Development Trigger Event/Date** If the API development is behind schedule by more than two weeks from plan, or if the number of critical defects would delay the planned SIT and UAT sprint plans, detailed contingency planning will commence. **Contingency Plan Execution Trigger Event/Date** If the API development is not completed by the baselined/planned date, or if there are critical defects that are not resolved within one test sprint (two weeks), then the contingency plan will be executed. **Resolution Time to Complete Contingency** TBD based on specific finding and contingency plan selected, though a roll-back is probable based on the impact of the issue. **Impacts of Contingency Execution** Depending on the contingency plan selected, there may be a roll-back, or a manual process to transmit applications while the issue is resolved.

Potential Cause of Challenge (PCOC):
BenefitsCal: Login (Security Readiness)

ID	Area Readiness		Contingency Plan
	Critical / Must-Have (Date Shift)	Important or Nice-to-Have (No Date Shift)	
5	Ability to Login (ForgeRock Readiness)		**Contingency Scenario – Users are not able to login** If the significant defects are discovered that would prevent users from logging into the BenefitsCal system, then the following actions will be taken: **Contingency Actions** 1. Facilitate a cross-team call with the ForgeRock team to assess the security defects, to confirm that the root cause is known and validated 2. Assemble a dedicated strike team of developers and testers to resolve and retest in rapid, continuous motion 3. Evaluate potential schedule impacts **Contingency Plan Development Trigger Event/Date** If the resolution of the login-related defects is behind schedule by more than two weeks from the planned resolution date (one test sprint), detailed contingency planning will commence **Contingency Plan Execution Trigger Event/Date** If the login function does not pass testing by 04/30/21 (the first week of SIT Increment 2), then the contingency plan will be executed. **Resolution Time to Complete Contingency** TBD based on specific finding and contingency plan selected. **Impacts of Contingency Execution** A rollback is possible if users are not able to login; however, given the severity of the issue, a strike team and immediate resolution would be scheduled.

County Purchase Guidelines

County Purchase Guidelines

Background

- The C-IV, LRS/CalSAWS, and CalWIN agreements include provisions for county purchases (aka "county directs" for CalWIN).
- Counties have used these provisions to achieve preferred pricing available to the Consortium for purchase of hardware and software or services which are outside the scope of the project and project IAPDU but required at the local county level to support operations.
- In order to prepare for CalSAWS implementation, CalWIN counties require access to certain suppliers available to the Consortium (via the Accenture prime contracts) that are not available via local procurements.
- In order to support ongoing operations, the LRS/CalSAWS contract will need to be amended to support hardware/software purchases via Proquire as of October 2021 when the C-IV contract expires.
- In order to accommodate AWS cost impacts related to county purchases, the Consortium must establish a process for review, approval, and subsequent county payment for the additional AWS costs.

County Purchase Guidelines

Criteria

County Purchases must meet at least one the following criteria:

- The required product or service is **only available from one source** (e.g., maintenance and/or upgrades of existing proprietary software in circumstances where a competitive bid is not feasible, Original Equipment Manufacturer, etc.).
- Sole source procurement is needed to **avoid financial loss to the Consortium or member counties** (e.g., interruption of essential operations, damage to existing resources, etc.).
- **Exercise of an option to extend the term of a contract** for a reasonable period (considering the nature of the procurement) when the terms of the original contract provided for extension and the option was evaluated during the bid process.

County Purchase Guidelines

Examples

1. Kiosks, which are customized for use in lobbies, may be procured through the county purchase process if the county does not have access to the vendor (Meridian). The customized software must be purchased through the county purchase process.
2. FACT Tablets based on project specifications will need to be procured outside the contract, though the services to configure and install the customized software may be procured through the county purchase process.
3. Workstations and laptops based on project specifications must be procured outside the contract, though the managed counties may procure the services to configure the workstations/laptops via county purchase.
4. Equipment, such as printers, require no special software and must be procured outside the contract.
5. Services for enhancements to the application which counties need prioritized beyond the 15K hours/month must be purchased via county purchase process.
6. Services related to migration of images is related to existing work and may be purchased via county purchase process.
7. Services through vendors that are not already contracted with CalSAWS must be procured separately.

County Purchase Guidelines

Process Enhancement for CalSAWS County Purchases

Counties to document justification with the Service Now request.

The required **product or service is only available from one source.** Yes ☐ No ☐

The required **product or service is required to avoid financial loss** (e.g., interruption of essential operations, damage to existing resources, etc.). Yes ☐ No ☐

If yes, please describe: _____

Please describe **unique performance factors of the product:**_____

Why is the acquisition **limited to a particular supplier**? Is the sole source acquisition necessary because of compatibility with existing hardware, software, or other resources?

_____

Identify **consequences** of not obtaining the commodity from the sole source (cost, loss of business continuity, undue delay, etc.)

_____

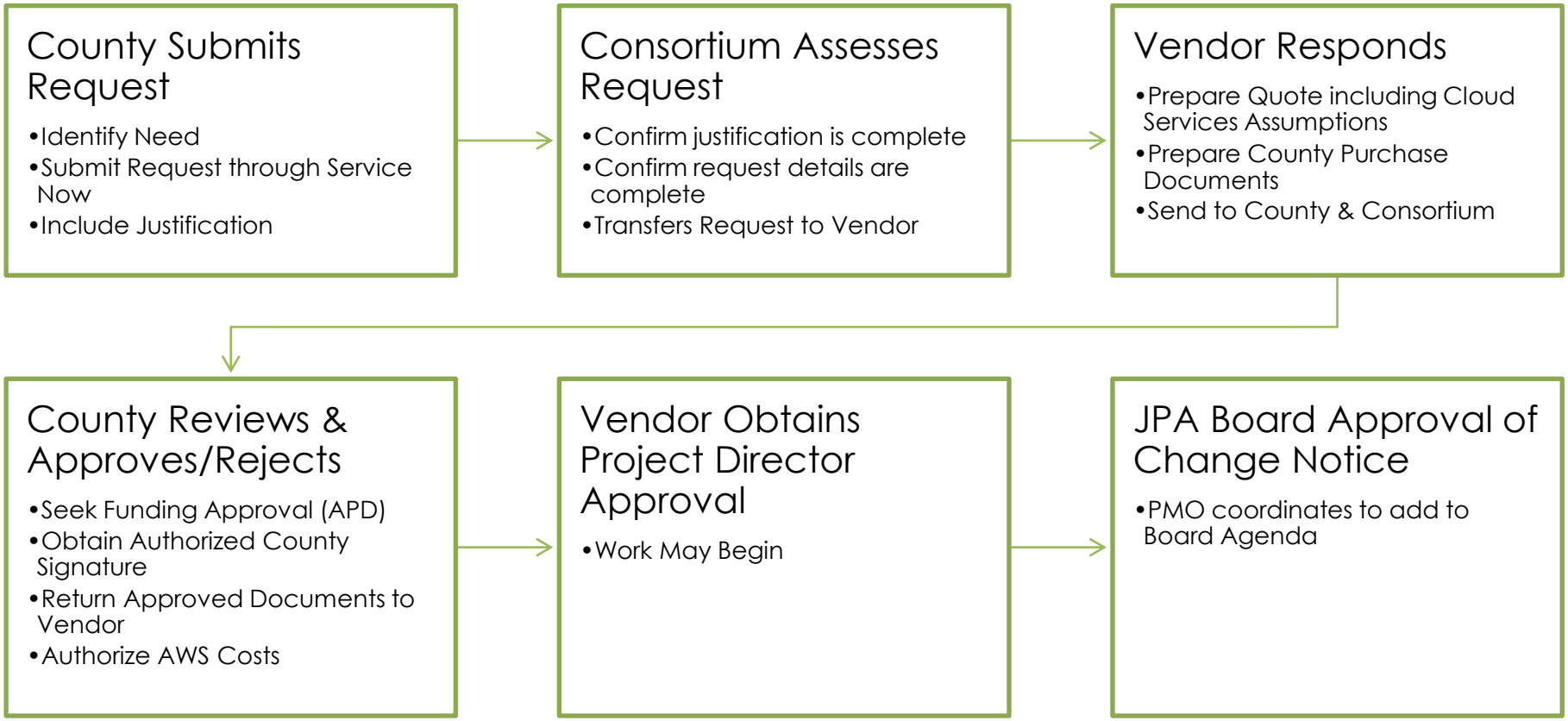
County Authorization_____

Consortium Authorization_____

EXAMPLE

County Purchase Guidelines

Process for CalSAWS County Purchases



County Purchases

Next Steps

- Amend LRS/CalSAWS Agreement to accommodate hardware/software purchases (add Proquire) by June 2021
- Update tools to support the enhanced process, including county approval for AWS costs
- Issue detailed instructions via CIT to all counties once the amendment and tools are in place

Cross County Sharing Opportunities – What & How

CalSAWS Cross County Support

Introduction

- CalSAWS supports county sharing of information, training, county handbook material and other county materials.
- Removal of Desk Aides/TIPS/HINTS from Online Help and the Learning Management System (LMS) with Release 21.05 via CA-224492.

Cross County Support – Opportunities

Desk Aids/User Guides

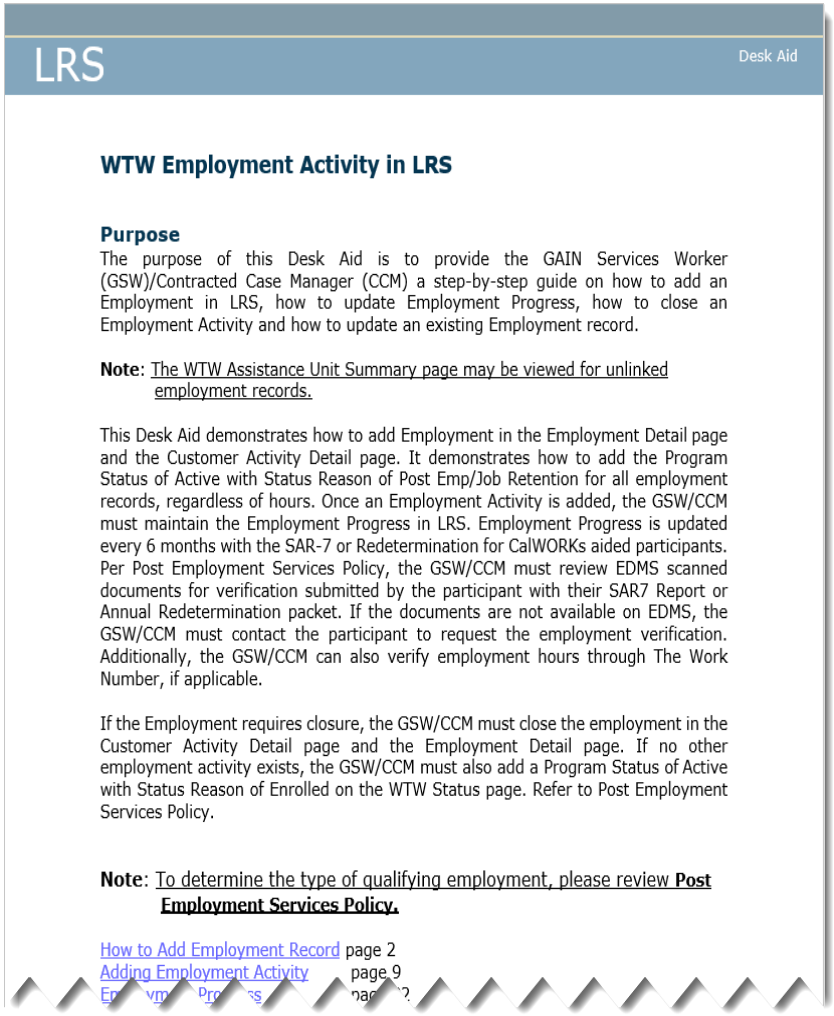
- Counties create county specific instruction materials for their staff.
- For LRS Go-Live LA County developed Desk Aids / TIPS / HINTS and since they were the only county in the system, these documents were available from Online Help (OLH) and the LMS.
  - As part of preparation for Go Live, the LA County materials will be removed from OLH and placed on their ePolicy County platform (Release 21.05) and on the WebPortal*.
  - Some C-IV Counties individually create C-IV User Guides to provide specific county instruction on some topics or actions. These documents are generally shared on County intranets.

* See Slide 4

Samples

Desk Aids and User Guides

- LRS Desk Aids



LRS

Desk Aid

WTW Employment Activity in LRS

Purpose

The purpose of this Desk Aid is to provide the GAIN Services Worker (GSW)/Contracted Case Manager (CCM) a step-by-step guide on how to add an Employment in LRS, how to update Employment Progress, how to close an Employment Activity and how to update an existing Employment record.

Note: The WTW Assistance Unit Summary page may be viewed for unlinked employment records.

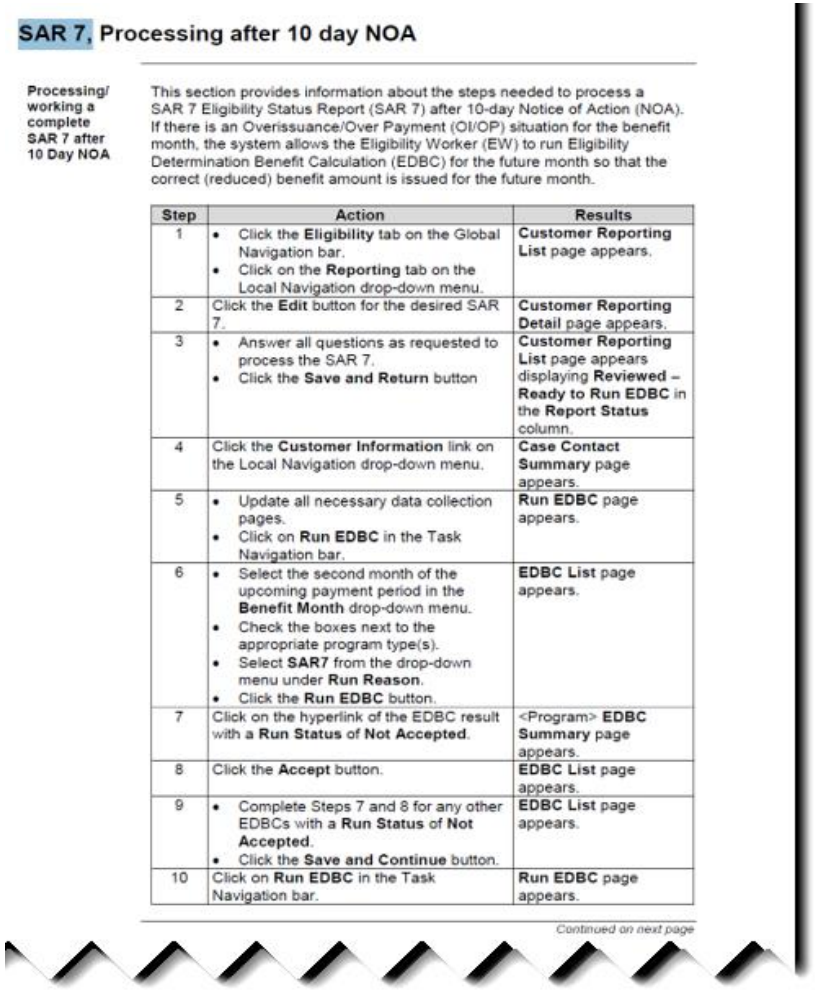
This Desk Aid demonstrates how to add Employment in the Employment Detail page and the Customer Activity Detail page. It demonstrates how to add the Program Status of Active with Status Reason of Post Emp/Job Retention for all employment records, regardless of hours. Once an Employment Activity is added, the GSW/CCM must maintain the Employment Progress in LRS. Employment Progress is updated every 6 months with the SAR-7 or Redetermination for CalWORKs aided participants. Per Post Employment Services Policy, the GSW/CCM must review EDMS scanned documents for verification submitted by the participant with their SAR7 Report or Annual Redetermination packet. If the documents are not available on EDMS, the GSW/CCM must contact the participant to request the employment verification. Additionally, the GSW/CCM can also verify employment hours through The Work Number, if applicable.

If the Employment requires closure, the GSW/CCM must close the employment in the Customer Activity Detail page and the Employment Detail page. If no other employment activity exists, the GSW/CCM must also add a Program Status of Active with Status Reason of Enrolled on the WTW Status page. Refer to Post Employment Services Policy.

Note: To determine the type of qualifying employment, please review **Post Employment Services Policy.**

How to Add Employment Record page 2
Adding Employment Activity page 9
Em[illegible] Pro[illegible] pag[illegible]

- C-IV User Guide



SAR 7, Processing after 10 day NOA

Processing/ working a complete SAR 7 after 10 Day NOA

This section provides information about the steps needed to process a SAR 7 Eligibility Status Report (SAR 7) after 10-day Notice of Action (NOA). If there is an Overissuance/Over Payment (OI/OP) situation for the benefit month, the system allows the Eligibility Worker (EW) to run Eligibility Determination Benefit Calculation (EDBC) for the future month so that the correct (reduced) benefit amount is issued for the future month.

Step	Action	Results
1	• Click the **Eligibility** tab on the Global Navigation bar. • Click on the **Reporting** tab on the Local Navigation drop-down menu.	**Customer Reporting List** page appears.
2	Click the **Edit** button for the desired SAR 7.	**Customer Reporting Detail** page appears.
3	• Answer all questions as requested to process the SAR 7. • Click the **Save and Return** button	**Customer Reporting List** page appears displaying **Reviewed – Ready to Run EDBC** in the **Report Status** column.
4	Click the **Customer Information** link on the Local Navigation drop-down menu.	**Case Contact Summary** page appears.
5	• Update all necessary data collection pages. • Click on **Run EDBC** in the Task Navigation bar.	**Run EDBC** page appears.
6	• Select the second month of the upcoming payment period in the **Benefit Month** drop-down menu. • Check the boxes next to the appropriate program type(s). • Select **SAR7** from the drop-down menu under **Run Reason**. • Click the **Run EDBC** button.	**EDBC List** page appears.
7	Click on the hyperlink of the EDBC result with a **Run Status** of **Not Accepted**.	<Program> **EDBC Summary** page appears.
8	Click the **Accept** button.	**EDBC List** page appears.
9	• Complete Steps 7 and 8 for any other EDBCs with a **Run Status** of **Not Accepted**. • Click the **Save and Continue** button.	**EDBC List** page appears.
10	Click on **Run EDBC** in the Task Navigation bar.	**Run EDBC** page appears.

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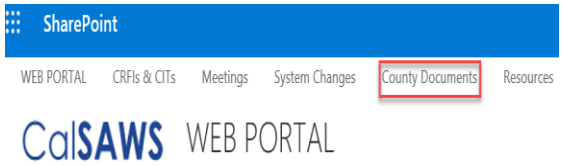
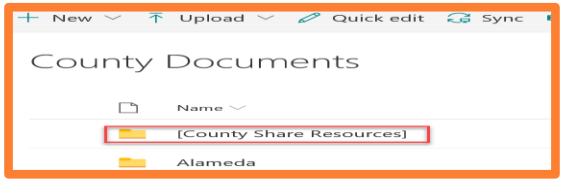
Cross County Support
Using the Web Portal - County Documents





- There is an existing resource used to store/share information for/with other Counties on the CalSAWS Web Portal.
- Who can access: Only CalSAWS County staff and Project staff with CalSAWS Web Portal access can view/download folders/contents on the Portal.
- The County Documents tab has two (2) types of folders within it;
  - **County-Specific folders**; one folder per every CalSAWS County. Ex. Los Angeles folder- Only LA County staff with Web Portal access can view this folder's contents (including any sub-folders therein). Other counties won't even 'see' the LA folder.
  - **County Share Resources**; This main folder contains many subfolders by functional area. These folders allow all Counties to share information their counties have created with each other. *Note: What is stored here is NOT vetted by the CalSAWS Project; counties will need to vet materials themselves.*

Cross County Support

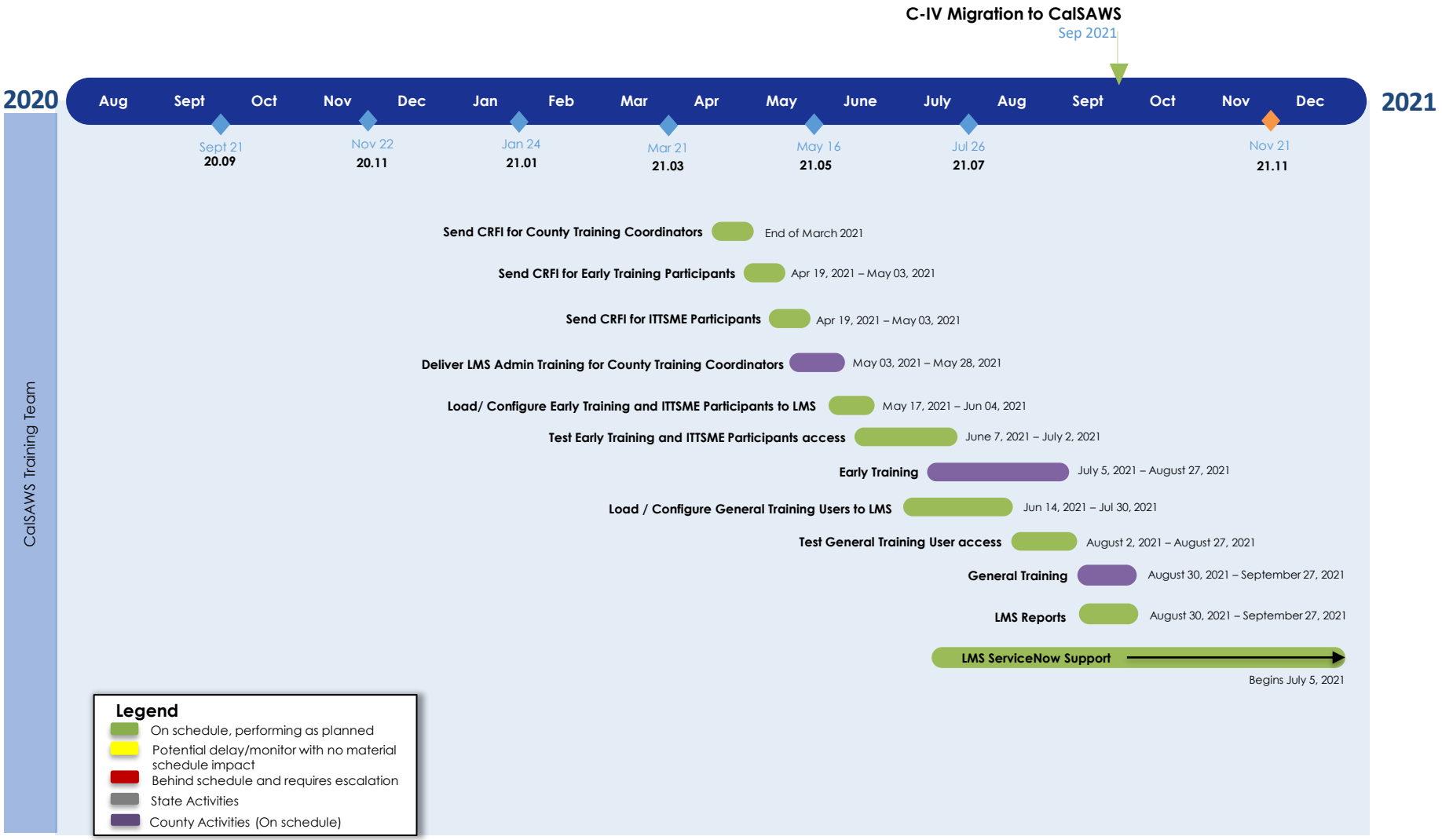
Next Steps

- LRS Desk Aids will be posted in the County Sharing folder on the CalSAWS Web Portal
- As Counties create/update internal materials to support migration, change management, training, and other processes, please consider posting materials for other counties to leverage.
- Communicate and share during regional meetings
- WE are ONE!

Training

- LMS User Loading
- Course Loading Strategy
- County Training Coordinator Positions
- Training Materials

Learning Management System (LMS) Timeline



***Exact dates are tentative and subject to change**

CalSAWS Learning Management System (LMS)

One-stop shop for C-IV Migration Training

CalSAWS Learning Management System

Web Based Trainings (WBTs) will provide end-users with the key functional changes between C-IV and CalSAWS. The WBTs will also contain new CalSAWS functions.

CalSAWS Quick Guides will provide the end-user with functional instructions on the differences between C-IV and CalSAWS. New CalSAWS functionality may also be included.

CalSAWS Migration Training Guide (MTG) will provide the end-user with a list of training materials, including WBTs and supplemental training guides, by topic/area.

CalSAWS Reference Guides will contain new terminology, name changes, or Questions & Answers (Q&A). They may also provide topic-specific and high-level mappings of existing C-IV fields, drop list values, sections, etc. with new CalSAWS fields, drop list values, sections, etc.

C-IV User Access to the CalSAWS LMS

Enabling Migration Training through the CalSAWS LMS

Active Users that have access to C-IV today will be granted access to the LMS for Migration Training. Access will remain during C-IV Migration Post-Deployment period.

Early Training Participants will receive access to the CalSAWS LMS on **July 5, 2021**. General Training (all remaining C-IV active users) will receive access to the CalSAWS LMS between **August 23 – August 30, 2021**.

The Project is currently working with the County TPOCs (Technical Points of Contacts) to strategize CalSAWS LMS URL/icon distribution. A formal CIT will be distributed containing the LMS URL.

*LMS – Learning Management System

Customized Enrollment

Enhancing the experience for Learners

- Customized Course Enrollment is the **registration of specific Curriculum** to a User or a set of Users in the LMS
- The Project will be providing recommendations on the types of Curriculum County staff should be enrolled in
  - A CRFI will be sent out detailing the Training recommendations and a **Curriculum Enrollment form** for the Counties to complete for confirmation and updates, if needed. If no changes are needed based on the recommendations, *then the Project will proceed enrolling County staff* as recommended and as confirmed by the County.
  - The Curriculum Enrollment form will be sent out in **April 2021** and Counties will have **6-8 weeks to complete** it.
  - The Project will then register training to users as specified/confirmed by Counties for General Training

*LMS – Learning Management System

CalSAWS Learning Management System

Course Enrollment Strategy

- Individual Web-based Trainings (WBTs) will be categorized into various curriculums
- Users will be registered to Curriculum based on the **Curriculum Enrollment form** that is confirmed/updated by the County
  - Counties will have the opportunity to make changes directly in the CalSAWS LMS or request changes through the Project (ServiceNow)
  - LMS Reports distributed to the Counties during the General Training window will reflect user completion of ***required*** training
- Users will have access **to all** Migration Training and existing LMS training materials

Example of Curriculum/Course flow

CURRICULUM #	WBT*	WBT TITLE
030 - Imaging	Imaging 01	Navigation
030 - Imaging	Imaging 02	Overview
030 - Imaging	Imaging 03	Single Case Capture
030 - Imaging	Imaging 04	Multi-Case Capture
030 - Imaging	Imaging 05	Virtual Printer Capture and Import
030 - Imaging	Imaging 06	Return Mail Capture
030 - Imaging	Imaging 07	Document Retrieval
030 - Imaging	Imaging 08	County-Maintained Workflow Queues
030 - Imaging	Imaging 09	Specialty Scan Modes

*WBT – Web-based Training

County Training Coordinator

Optional role for the Counties

- Option to customize enrollment, as needed
- Option to generate reports in the CalSAWS LMS
- Serve as a liaison between the County and the Project
- Assist in confirming CalSAWS LMS access

A CRFI will be distributed (late March 2021) to request County Training Coordinators.

- The **Project is planning to fully support CalSAWS LMS administrative activities**, even if the Counties do not provide a County Training Coordinator
- The County Training Coordinator role is **intended to empower the Counties** to make changes as they wish in real-time in the CalSAWS LMS

  Example: User no longer requires Curriculum A because their role changed and now requires Curriculum B. The County Training Coordinator can either update the User's registered curriculum directly in the CalSAWS LMS *or* submit a ServiceNow ticket to the Project to make the update.

- Live Training and support materials will be provided on CalSAWS LMS applicable admin functions

Recommended number of County Training Coordinators by County size:
Large – 2-3 Coordinators
Medium – 1-2 Coordinators
Small – 1-2 Coordinators

*LMS – Learning Management System

C-IV Migration Training Materials – WBTs

Web-Based Training (WBT):	Audience	Approximate Duration
BenefitsCal Changes in CalSAWS	Eligibility	TBD
C-IV Migration Training Introduction	All users	TBD
Cal-Learn Non-Compliance	Cal-Learn Staff/Supervisors	~1 hour
CAPI	Eligibility (CAPI specific) Staff/Supervisors	~1 hour
Change Reason	Eligibility Staff/Supervisors, Employment Services and Child Care Staff/Supervisors	~40 min
Child Welfare Programs (AAP)	Eligibility (AAP specific) Staff/Supervisors	TBD
Child Welfare Programs (ARC)	Eligibility (ARC specific) Staff/Supervisors	TBD
Homeless Assistance 1	Eligibility (CalWORKs) Staff/Supervisors	~1 hour 20 min
Homeless Assistance 2	Eligibility (CalWORKs) Staff/Supervisors	~45 min
Imaging – Navigation	All Imaging users	TBD
Imaging – Overview	All Imaging users	TBD
Imaging – Single Case Capture	All Imaging users	TBD
Imaging – Multi-Case Capture	All Imaging users	TBD
Imaging – Virtual Printer Capture and Import	All Imaging users	TBD
Imaging – Return Mail Capture	All Imaging users	TBD
Imaging – Document Retrieval	All Imaging users	TBD
Imaging – County-Managed Workflow Queues	All Imaging users	TBD
Imaging – Specialty Scan Modes	SIU, RDB, and Hearings staff	TBD
Managing Worker Assignment Designations	Eligibility Supervisors	~45 min

C-IV Migration Training Materials – WBTs

Web-Based Training (WBT):	Audience	Approximate Duration
Managing Worker Schedules	Eligibility Supervisors/Admin	~1.5 hours
Multi Month EDBC	Eligibility Staff/Supervisors	~45 min
Non-Compliance	Eligibility (Cash, CF, MA, CAPI, GA/GR) Staff/Supervisors	~2 hours
Task Management Overview	Eligibility Staff/Supervisors	~45 minutes
Task Management for Administrators	Administrators	~1 hour
Qlik Sense Overview	Management and Supervisors	TBD
Qlik Sense Story-telling	Management and Supervisors	TBD
Supervisor Authorization	Eligibility and Fiscal Supervisors	~1.5 hours
WTW AU Summary	WTW Staff/Supervisors	~30 min
WTW Non-Compliance	WTW Staff/Supervisors	~2 hours
Verifications	Eligibility and Clerical Staff/Supervisors	~30 min

30 WBTs in progress

WBTs will be accessible via the CalSAWS **Learning Management System** (LMS) during Early and General Training

The CalSAWS **Migration Training Guide** (MTG) will **provide details on WBT description**, **duration** and **intended audience**

*Additional Training Materials may be added as needed, depending on outcomes of ongoing impact analysis.

C-IV Migration Training Materials – Quick Guides

Quick Guides:	Audience
Appointments and Scheduling	Eligibility Staff/Supervisors
Auto Case Assignment	System Administrators, Eligibility Supervisors and Managers
Cal-Learn Non-Compliance	Cal-Learn Staff/Supervisors
Change Reason	Eligibility Staff/Supervisors, Employment Services and Child Care Staff/Supervisors
Child Welfare Programs- Kin-GAP	Kin-GAP Staff/Supervisors
Child Welfare Programs- Foster Care	Foster Care Staff/Supervisors
Child Welfare Programs- Foster Care- RDB	Foster Care Staff/Supervisors
Child Welfare Programs- Legal Guardianship	Foster Care Staff/Supervisors
Child Welfare Programs- Non-Minor Dependents	Foster Care and Kin-GAP Staff/Supervisors
Child Welfare Programs- Home Approvals	ARC and Foster Care Staff/Supervisors
Employment Services Enrollment	Employment Services Staff/Supervisors
GA/GR- Root Questions and Guided Navigation	Eligibility (GA/GR) Staff/Supervisors
Homeless Assistance – Permanent – Data Collection	Eligibility (CalWORKs) Staff/Supervisors
Homeless Assistance – Permanent – EDBC	Eligibility (CalWORKs) Staff/Supervisors
Homeless Assistance – Temporary – Data Collection	Eligibility (CalWORKs) Staff/Supervisors
Homeless Assistance – Temporary – EDBC	Eligibility (CalWORKs) Staff/Supervisors
Homeless Assistance – Voucher Vendor Payment	Eligibility (CalWORKs) Staff/Supervisors
MAGI	Eligibility (Medi-Cal) Staff/Supervisors

*Additional Training Materials may be added as needed, depending on outcomes of ongoing impact analysis.

C-IV Migration Training Materials – Quick Guides

Quick Guides:	Audience
Multi Month EDBC	Eligibility Staff/Supervisors
Non-Compliance	Eligibility (Cash, CF, MA, CAPI, GA/GR) Staff/Supervisors
Notices of Action (NOAs) - Preview	Eligibility Staff/Supervisors
Pregnancy Special Need	Eligibility Staff/Supervisors
Rescind Reason	Eligibility Staff/Supervisors
SAR7 Processing	Eligibility (CW, CF & RCA) Staff/Supervisors
Sponsorship/Deemed Income	Eligibility (CW, CF, GA/GR and CAPI) Staff/Supervisors
Supervisor Authorization- Admin User	Supervisor Authorization Administrators, Eligibility/Employment Services/Fiscal Supervisors
Supervisor Authorization- Worker Level	Eligibility, Employment Services and Fiscal staff
Task Management – Appending Tasks	Administrators
Task Management – Documenting Routing Rules	Administrators
Task Management – High Risk and Error Prone Administration Page	Administrators
Task Management – Task Images Buttons	Eligibility Staff/Supervisors
Verifications	Eligibility and Clerical Staff/Supervisors
WTW Non-Compliance	WTW Staff/Supervisors

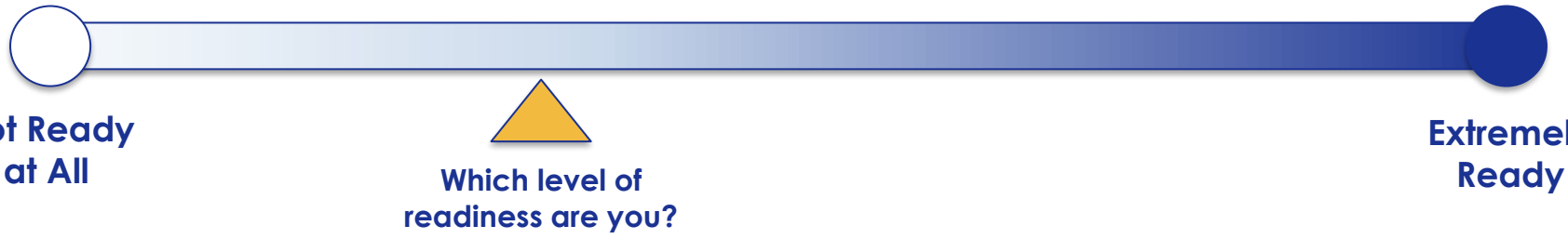
*Additional Training Materials may be added as needed, depending on outcomes of ongoing impact analysis.

Change Management Topic

- Upcoming Change Readiness Assessment Survey
- Recent Imaging Roadshows

T-6 Month Change Readiness Assessment Survey

Time to check-in, we're only 6 months away!



Purpose

To understand where individuals in your County sit on the spectrum of readiness for the CalSAWS Migration

Why it's Important

To **measure** the **readiness** gap between where people are compared to where they need to be for CalSAWS Migration

The Results

The outcome helps guide future Change Management decisions

Key Details

When: March 16, 2021 - March 30, 2021

Who: Active C-IV Users and select County Executives

How: Survey Monkey Link via NoReply@CalSAWS.org

What: Change Management and Imaging Content

***CRFI with survey details and associated instructions distributed to C-IV County PPOCs on March 1, 2021.**

Imaging Roadshows

The Imaging Change Management Team hosted a series of Imaging Roadshows for the C-IV Counties and LA County between February 22 and March 11, 2021

Purpose

- 1.5-hour sessions designed to provide Counties with an overview of Imaging efforts and updates on Imaging activities

Target Audience

- IPOCs, PPOCs, Change Network, RMs
- County Management (Managers and Supervisors)
- Imaging Stakeholders (County-identified End Users)

Topics

- Imaging Team introductions
- Imaging Solution Overview
  - Glimpse into the CalSAWS Imaging Solution and associated functional changes
- Imaging Project Overview
  - Updates on Imaging Change Management, Training, and Readiness
  - Technical updates, including document migration
- Imaging Support Network Overview
  - Information on materials, resources, and tools for Imaging support

Attendance Information

- Regions 1&2 (combined session): 352
- Region 3: 225
- Region 4: 245
- Region 5: 277
- Region 6 #1: 233
- Region 6 #2: TBD

Up Next:

Imaging Demonstrations in May 2021

C-IV/CalSAWS Implementation Metrics Update

- Path to Greenlight Governance Timeline

UAT Update

C-IV UAT Communications

CIT/CRFI #	Date Distributed	Date Due	Purpose of communication	Activities	
				Test Preparation	Test Execution
CIT 0038-21	Feb 9, 2021	N/A	Provide information regarding CalSAWS Migration UAT to C-IV Users		
CRFI 21-012	Feb 22, 2021	Mar 5, 2021	Request participation from C-IV counties for CalSAWS User Acceptance Test. The activities will include:	Kick-off: Mar 18, 2021	Kick-off: Jun 7, 2021 Updated!
			• CalSAWS Migration UAT (C-IV) *includes Imaging	Mar 18 – May 28, 2021	Jun 14 – Aug 20, 2021
			• CalSAWS Imaging Admin (C-IV)		Jun 28 – Jul 2, 2021 Jul 19 – Jul 23, 2021
			• CalSAWS Portal/Mobile (BenefitsCal) - Release#1 (C-IV)		Jun 14 – Sep 3, 2021 Updated!
			• State Reports (C-IV)	N/A	Aug 2 – Aug 13, 2021

UAT Update

LA UAT Communications

CIT/CRFI #	Date Distributed	Due Date	Purpose of communication	Activities	
				Test Preparation	Test Execution
CIT 0044-21	Feb 24, 2021	N/A	Provide information regarding CalSAWS Imaging UAT to LA Users		
CRFI 21-014	Mar 1, 2021	Mar 19, 2021	Request participation from LA county for CalSAWS User Acceptance Test. The activities will include:	Kick-off: Apr 19, 2021	Kick-off: Jun 7, 2021
			• LA CalSAWS Portal/Mobile (BenefitsCal)	Apr 19 – May 28, 2021	Jun 14 – Sep 3, 2021 Updated!
			• LA CalSAWS Imaging	Aug 2 – Aug 6, 2021	Aug 9 – Aug 18, 2021 Aug 30 – Sep 3

CalWIN UAT Communications

CIT/CRFI #	Date Distributed	Due Date	Purpose of communication	Activities	
				Test Preparation	Test Execution
CIT 0051-21	Mar 4, 2021	N/A	Provide information regarding BenefitsCal UAT to CalWIN Users		
CRFI 21-018	Mar 12, 2021	Mar 5, 2021	Request participation from CalWIN counties for BeneftisCal User Acceptance Test. The activities will include:	Kick-off: Apr 19, 2021	Kick-off: Jun 7, 2021
			• CalSAWS Portal/Mobile (BenefitsCal) - Release#1 (CalWIN)	Apr 19 – May 28, 2021	Jun 14 – Aug 20, 2021

UAT Update

Regional and County Touchpoints

Meeting with Regional Managers
March 1, 2021

Regional Manager Meeting
- Regions 1-5 attended
- UAT Overview provided with all regional managers
- Q&A

Meeting with C-IV County PPOC
March 2, 2021

County Meeting
- 94 participants with all counties represented
- 63 questions received
- Responses sent to all C-IV County PPOCs via email on March 3, 2021

Lots of County Interest

County UAT Volunteers				
CalSAWS	State Reports	BenefitsCal	Imaging	Triage Team
305	27	45	31	24

UAT Update

Preparation → Getting Participants Ready!

March 18 – April 16, 2021 – UAT participants will have the opportunity to:

- Participate in the UAT Kick-Off
- Complete self-paced reviews of Training Materials and Design Documents
- Review available UAT scenarios to become familiar with them
- Attend remotely conducted Preparation Support meetings, as needed

April 19 – May 28, 2021 – UAT participants will have the opportunity to:

- Participate in a UAT Kick-Off Refresher, if needed
- Validate County VPN and UAT CalSAWS environment access
- Review, update, and create UAT scenarios and data based on UAT baseline scripts
- Attend remotely conducted Preparation Support sessions, as needed

June 7 – 11, 2021 (One week prior to UAT execution)

- Attend the CalSAWS UAT Execution Kick-Off
- Validate access and work on final preparatory activities

June 14 – August 20, 2021

- CalSAWS UAT Execution

June 14 – September 3, 2021

- BenefitsCal UAT Execution

C-IV/CalSAWS Implementation Update

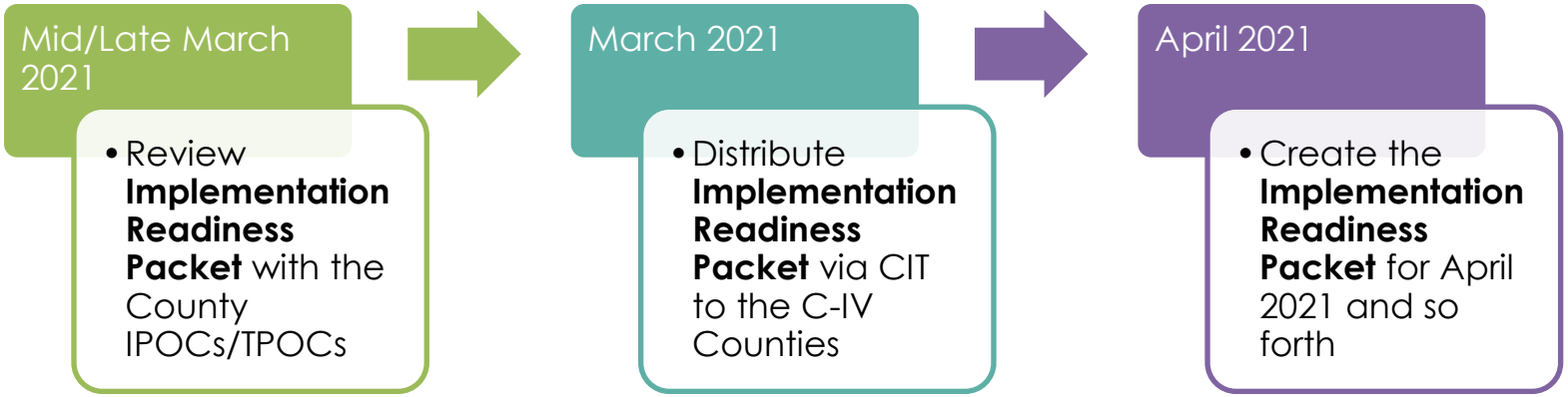
Path to Greenlight

Refer to the
Path to Greenlight Governance Timeline handout.

Implementation Readiness Packet

Update

The purpose of the **Implementation Readiness Packet** is to provide C-IV Counties with information related to the operational readiness of the Projects within the CalSAWS Portfolio, including the C-IV Migration and BenefitsCal. Status will include key metrics related to the overall "health" of the Implementation effort based on measurable metrics and milestones.



Implementation Readiness Packet

Executive Dashboard

Area	Category	CalSAWS	BenefitsCal	Comments
Application	Design	G	G	
	Development	G	G	
	System Test	G	G	
	User Acceptance Test	NS	NS	
	Usability Test	N/A	NS	
Integration	Design	G	G	
	Development	G	G	
	System Test	G	NS	
	Interface Partner Test	NS	NS	
Technical	Infrastructure	G	NS	
	Security Testing	G	NS	
	Performance Testing	G	NS	
Conversion	Conversion Readiness	G	NS	
	Converted Data Test	G	NS	
Training	Training Plan	G	NS	
	Training Materials	G	NS	
	Training Delivery	NS	NS	
Implementation	Service Desk	G	NS	
	System Operations	G	NS	
	Prod Deployment Plans	G	NS	
Change	Communications	G	NS	
	Partner Readiness (County, etc.)	G	NS	

NS	Not Started	G	On Schedule	Y	<14 Days Late	R	>=14 Days Late	C	Complete

Implementation Readiness Packet

CalSAWS Dashboard

Area	Category	Start Date	End Date	Current Period	Previous Period
Application	Design	04/23/2019	03/26/2021	**G**	**G**
	Development	05/25/2019	09/22/2021	**G**	**G**
	System Test	07/18/2019	09/17/2021	**G**	**G**
	UAT	04/1/2021	08/31/2021	**NS**	**NS**
	Usability Test	N/A	N/A	N/A	N/A
Integration	Design	01/27/21	03/10/21	**G**	**G**
	Development	01/04/21	06/11/21	**G**	**G**
	System Test	04/26/21	07/16/21	**NS**	**NS**
	Interface Partner Test	03/1/2021	08/27/2021	**G**	**G**
Technology	Infrastructure	03/1/2019	09/15/2021	**G**	**G**
	Security Testing	11/5/2019	09/24/2021	**G**	**G**
	Performance Testing	05/1/2019	09/24/2021	**G**	**G**
Conversion	Conversion Readiness	03/4/2019	08/31/2021	**G**	**G**
	Converted Data Test	12/15/2020	07/20/2021	**G**	**G**
Training	Training Plan	07/15/2019	01/29/2021	**C**	**C**
	Training Materials	01/01/2019	08/01/2021	**G**	**G**
	Training Delivery	09/03/2019	09/17/2021	**G**	**G**
Implementation	Service Desk	01/01/2021	04/30/2021	**G**	**G**
	System Operations	05/31/2021	08/02/2021	**NS**	**NS**
	Prod Deployment Plans	09/23/2019	05/31/2021	**G**	**G**
Change Readiness	Communications	05/4/2020	04/09/2021	**G**	**G**
	Partner Readiness	N/A	N/A	N/A	N/A

Implementation Readiness Packet

Project Checklist

Issue Statistics: Implementation - Packet - Project Milestones All (Status)

Status	Count	Percentage
IN PROGRESS	19	15%
NOT STARTED	29	22%
COMPLETED	82	63%
Total	**130**	

Two Dimensional Filter Statistics: Implementation - Project All Items

Implementation Readiness Category	Milestone	Task	T:
Conversion Readiness	19	9	**28**
Implementation Readiness	4	78	**82**
Integration Readiness	5	4	**9**
Change Readiness	3	40	**43**
Application Readiness	45	23	**68**
Technical Readiness	41	38	**79**
Training Readiness	13	103	**116**
Total Unique Issues:	**130**	**295**	**425**

Grouped by: Activity Type

Showing **7** of **7** statistics.

Implementation Readiness Packet

Key Project Milestones Completed

Readiness Area	Milestone Description	Start Date	End Date
Application	Design, Development, Testing, and Deployment of CalSAWS Releases 19.11 – 21.01	06/01/2019	1/25/2021
	Planning, Testing, and Execution of CalSAWS Cloud Migration	09/10/2019	03/01/2019
Integration	N/A*	N/A	N/A
Technical	Delivery of System Test, Performance, Development and Conversion Environments	06/24/2019	10/152019
	Delivery of Golden Data Set #1 (for use in CDT and Performance Testing)	11/09/2020	12/15/2020
Conversion	Completion of C-IV Conversion Epics, aligned to 10 functional areas	05/06/2019	12/11/2020
	Deliver C-IV Converted Data for Conversion Data Test Execution	12/15/2020	12/15/2020
Training	Complete Consortium Training Plan for C-IV Migration	03/24/2020	04/16/2020
	Completion of Imaging WBT Detailed Designs	05/18/2020	01/29/2021
Implementation	Provide C-IV Counties access to the Sandbox Environment	12/01/2019	01/06/2020
	Delivery of 2 of 4 CalSAWS Implementation Regional Touchpoint for the C-IV Counties	09/21/2020	02/03/2021
Change	Distribution of Change Readiness Assessment Surveys	09/01/2020	09/29/2020
	Delivery of Targeted Topic Sessions (9 Total)	05/12/2020	08/18/2020

* Integration Readiness Milestones have not yet begun

Implementation Readiness Packet

Key Project Milestones In Progress and Upcoming

Readiness Area	Milestone Description	Start Date	End Date
Application	Deploy CalSAWS Release 21.05	9/4/2020	5/24/2021
	Complete C-IV User Acceptance Test (UAT)	4/30/2021	8/31/2021
Integration	Partner Enablement - Establish CalSAWS Connectivity with C-IV Partner - CalHEERS	3/1/2021	8/27/2021
	Partner Enablement - Establish CalSAWS Connectivity with C-IV Partner - EBT (FIS)	3/1/2021	8/27/2021
Technical	Complete SD-WAN & Extranet Network enablement, for all C-IV Counties	11/1/2020	4/30/2021
	Complete Performance and Stress Testing	9/13/2021	9/17/2021
Conversion	Execution of Converted Data Test	12/15/2020	4/30/2021
	Complete Conversion Cutover 1A	8/28/2021	8/31/2021
Training	Complete and support General Training	8/23/2021	9/17/2021
	Complete and support Early Training	6/28/2021	8/20/2021
Implementation	Engage the Counties on staff profile/security administration updates	5/3/2021	8/2/2021
Change	Submit FCED Plan for Change Management	3/29/2021	4/9/2021

Implementation Readiness Packet

County Milestones

Readiness Area	Status	Milestone Description	Start Date	End Date
Application	Completed	Approve C-IV Document Type to CalSAWS Form Name Mapping	6/30/2020	8/14/2020
County Resource Requests	Completed	Identify Deduplication Point of Contact	3/16/2020	3/31/2020
	Completed	Identify County Implementation Point of Contact	5/26/2020	6/9/2020
	Completed	Identify C-IV Imaging Point of Contacts (PICs)	6/1/2020	6/15/2020
Technical	Completed	Attend C-IV data migration kick off	06/29/2020	07/01/2020
	Completed	Attend data migration discovery sessions metadata configuration for C-IV Counties	06/30/2020	08/14/2020
	Not Started	Complete "C-IV to CalSAWS Migration - Application Reference List"	3/1/2021	3/19/2021
	In Progress	Complete Extranet Testing & validate access to CalSAWS	12/1/2020	5/1/2021
	Not Started	Confirm that CalSAWS Desktop Icon has been pushed to User Workstations	8/11/2021	9/15/2021
Conversion	Not started	Security Administrators to update county user profiles during the 1A period	8/27/2021	9/23/2021
	Not started	Confirm county workers have logged in during 1A period	8/27/2021	9/27/2021
Training	Not started	Participate in General Training	8/30/2021	9/24/2021
Implementation	Completed	Attend first County occurrence of Monthly Implementation Readiness Checkpoint Meeting with the Project Implementation Team and RMs	7/9/2020	7/9/2020
	Completed	RMs and IPOCs receive C-IV Imaging Overview	8/25/2020	8/5/2020
	Completed	Attend Monthly Implementation Readiness Checkpoint Meeting with the Project Implementation Team and RMs and provides County updates as applicable: October 2020	10/7/2020	10/7/2020
	Not Started	Process all C4Yourself eApplications prior to Cutover	4/1/2021	9/23/2021
Change	Completed	Identify Change Network Champions and Attend Orientation	10/28/2020	10/28/2020

Application Development & Policy

Application Development

Policy Updates

- DHCS PHE Update
- SSI COLA Update
- SAWS is monitoring and providing feedback on many budget/legislative proposals
- Minimizing changes to C-IV
  - Critical/High SCRs from Legislation
  - Critical/High SIRs from Production
- Remaining SCRs from C-IV
  - C-IV specific or already in CalSAWS, close SCR
  - Potential enhancement not in CalSAWS, create CalSAWS SCR

Application Development

SAWS Implementation Timeline

Date	Event
March 21, 2021	CalSAWS Release 21.03 C-IV Release 21.03 (C-IV down)
March 27, 2021	$600 Golden State Grant for CW cases
April 16-17, 2021	CF Emergency Allotments (Jan/Feb/Mar)
May 10, 2021	CalWIN R65 FC Non-Minor Dependents Housing Supp (CalWIN only)
May 8 – 10, 2021	CalHEERS move to Cloud (EDRs/DERs on hold)
May 14-15, 2021	CF Emergency Allotments (Feb/Mar/Apr) Tentative
May 23, 2021	CalSAWS Release 21.05 C-IV Release 21.05 (C-IV down)

CalSAWS Analytics & Reports Update

- Ad Hoc Specifics for Implementation Team Tracking (Action Item from February PSC Meeting)

Analytics Reports Replatform

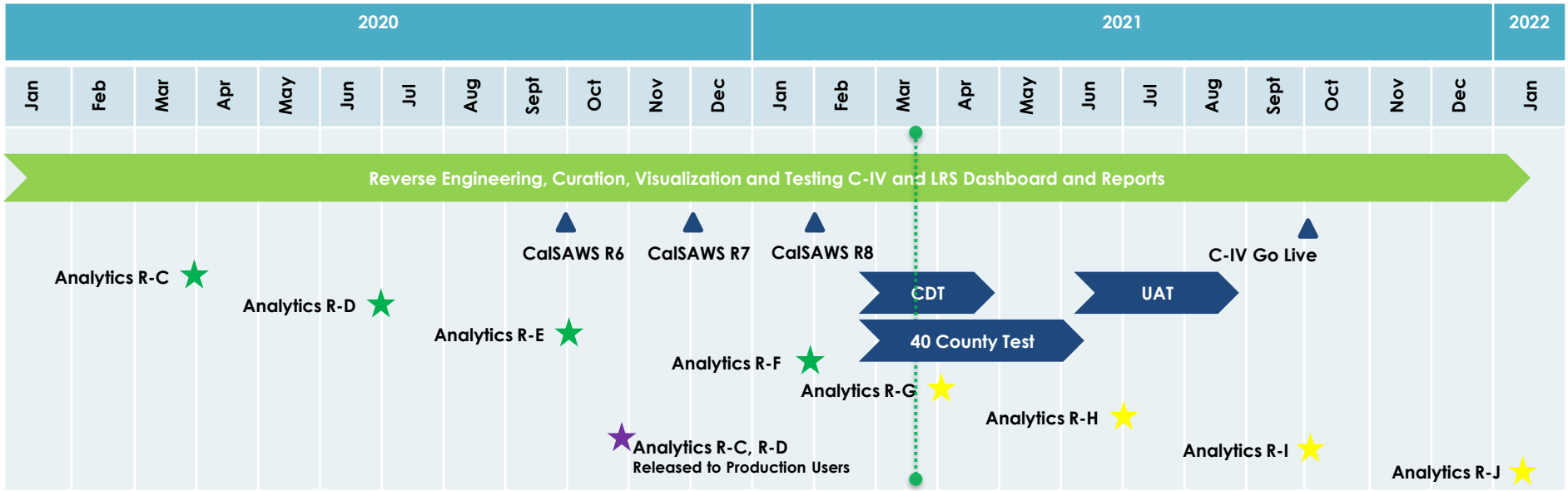
Migrating C-IV and LRS Dashboards, State, & Mgmt. Reports

Milestones Achieved

- Release E has Deployed to Production in February
- Release F Soft Launch County Testing is In-Progress and On-Schedule (March 2021)
  - 3 Dashboards
  - 74 State & Mgmt. Reports
- Release G Development and Testing In-Progress and On-Schedule for Soft Launch (March 2021)
- 40% Complete Overall and On-Schedule with Downstream Analytics Releases
- Converted Data Testing (CDT) of State Reports – In-Progress and On-Schedule to Complete in April
- 40-County System Test – In-Progress and On-Schedule
- 40-County Performance Test planned post System Test
- User Acceptance Testing (UAT)
  - C-IV Scheduled between June and August 2021
  - CalWIN Scheduled between July and September 2022 and represents the Counties opportunity to view the reports with their converted data.

Analytics Reports Replatform

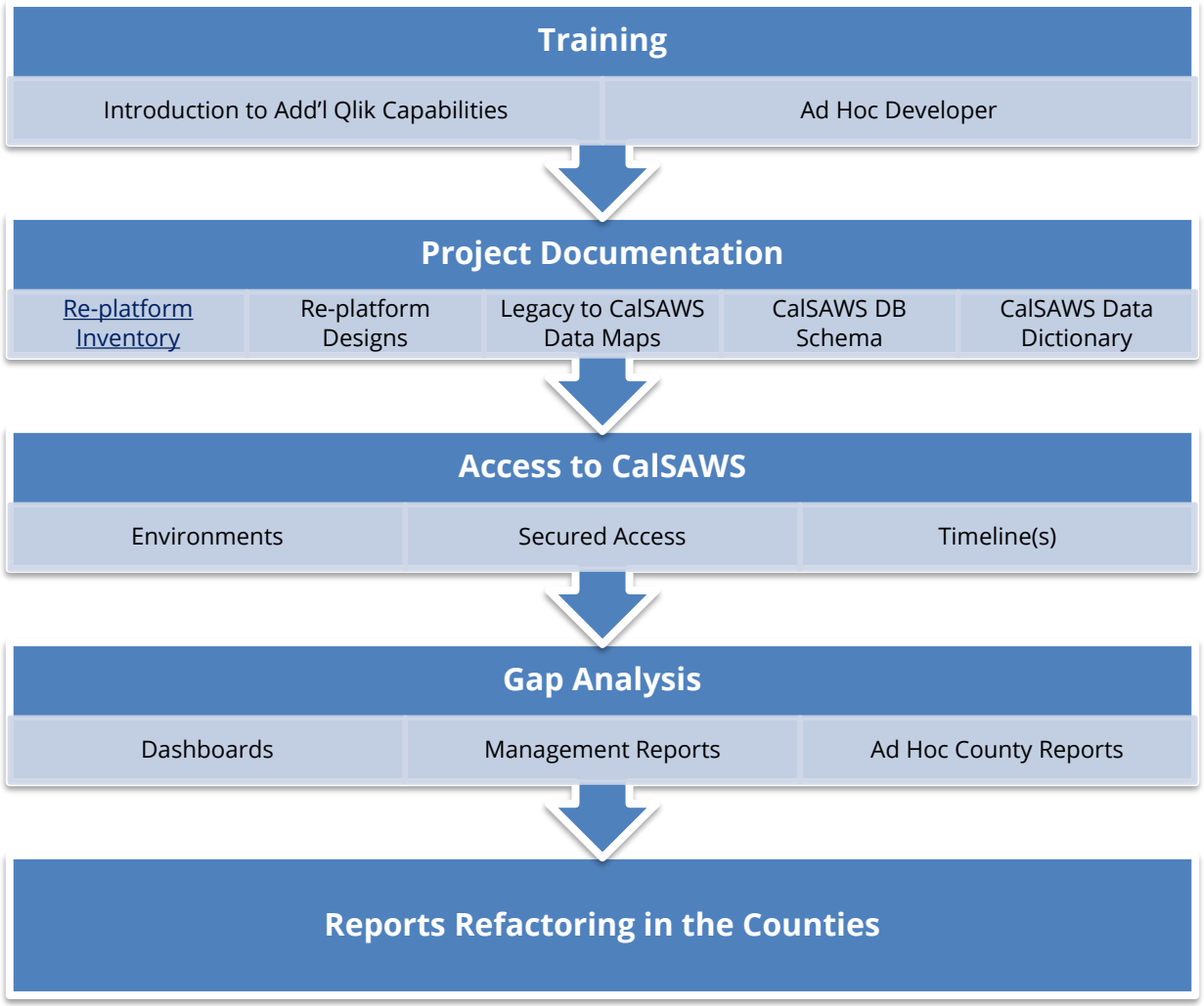
High Level Release Plan and Overall Status



Analytics Release	Status	Soft Launch Date	Dashboards	State & Mgmt. Reports	Total Reports	Notes
C	In Production	Deployed	2	0	**2**	C-IV State Reports Deployed prior to CalSAWS C-IV CDT
D		Deployed	5	33	**38**	
E	In Production	Deployed	8	60	**68**	
F	In Soft Launch	Deployed *(for County Testing)*	3	74	**77** *On-Schedule and 40% Complete*	
G	In Development *(On-Schedule)*	3/30/2021	4	47	**51**	
H	Future Development	6/30/2021	6	67	**73**	
I		9/30/2021	1	76	**77**	
J		1/15/2022	0	75	**75**	*All Mgmt. Reports
Total Reports			**29**	**432**	**461**	

Ad Hoc Reporting Readiness

Ad Hoc Reporting Curriculum, Documentation, and Environment Checklist Support



Training Planned for Mid May and Summer 2021 via WBT and Virtual

Documentation Currently being Delivered (as available)

C-IV → May 2021
CalWIN → TBD

Counties are requesting the Training, Documentation, and Access to Perform Analysis

Methodology (i.e., how to use the above) and Timelines need to Align with the Counties Migration to CalSAWS

Ad Hoc Reporting Readiness

County Reporting Training Curriculum

Qlik Platform Capabilities

- The purpose of this training is to provide staff with an overview of the Story Telling feature in Qlik Sense within the CalSAWS Qlik Enterprise Reporting solution.
- Web Based Training (WBT) accessed via Learning Management System (LMS)
- For Basic Reporting CalSAWS Users with basic Qlik knowledge
- Available in April 2021

CalSAWS Connect and Query

- The purpose of this training is to provide staff with an…
- Virtual (live) training session
- For Ad Hoc Developers
- Available in May 2021

Ad Hoc Reporting Readiness

CalSAWS Documentation

Inventory	• Lists the Inventory of C-IV and LRS Reports being replatformed by the from existing platforms to Qlik
Designs	• Represents the Purpose-Built Data Set documentation used by the Analytics team to replatform the Inventory of C-IV and LRS Reports to the Data Lake
Data Maps	• Provides the CalWIN to CalSAWS Table and Column Differences from Conversion Data Mapping tool and includes high level business rules with regards to the transformations
Data Dictionary	• Includes the Table and Column definitions in the CalSAWS Data Model

Ad Hoc Reporting Readiness

Access to CalSAWS

Access	Environment(s)	Timeline(s)
• Access to Ad Hoc Staging DB • Via a Private DB Link	• DB Link to connect to a CalSAWS Environment with converted 40 County Data	• May 2021 for C-IV • TBD for CalWIN

Ad Hoc Reporting Readiness

CalWIN Management Report Gap Analysis

DDID 2173 Requirement

- Perform Non-State Reports Gap Analysis which may impact CalWIN counties
- Gaps to be reviewed and prioritized by Consortium for approval through the CalSAWS Change Control Board process

Mgmt. Report Gap Analysis

- Top 100 CalWIN Non-State reports selected for analysis:
- Management Reports (MR) that do not support State Reports
- MR's not retired
- MR's without corresponding Reports

Gap Assessment Results

90% Match:

- Functional differences
- Exists and some non-critical data elements

10% with No Direct Match :

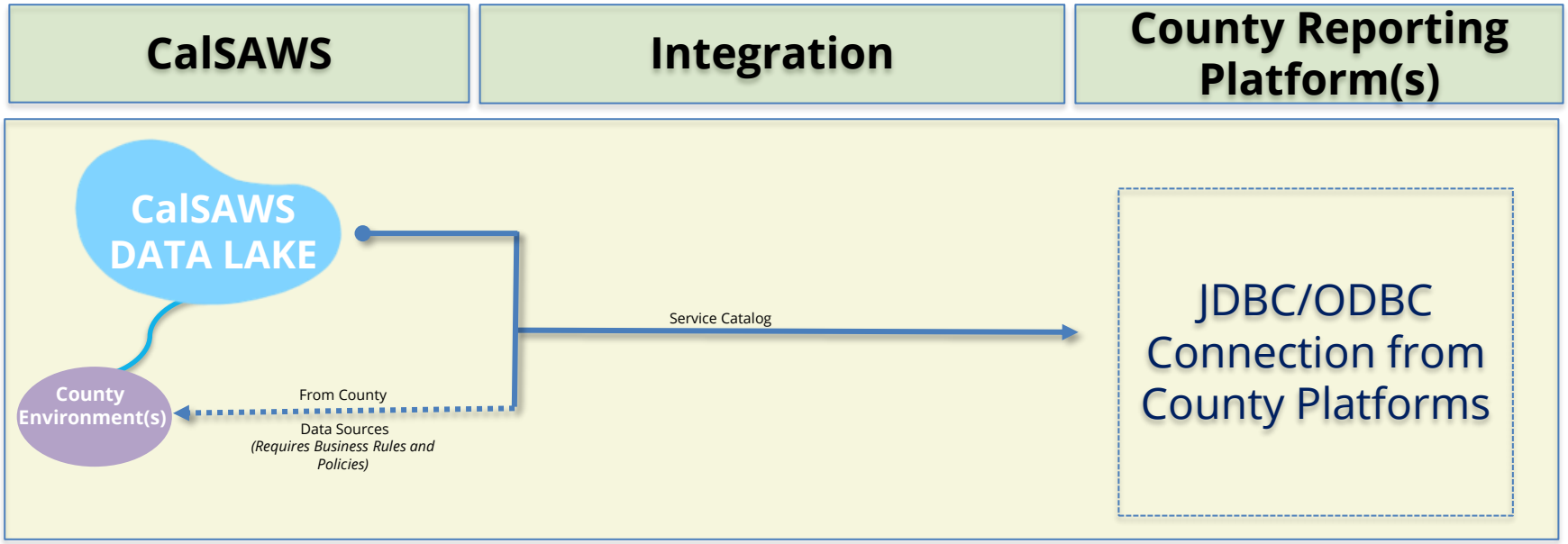
- Functionality Not Needed (or No Longer Applicable)
- Functionality Not Supported in CalSAWS

Recommendations

- No gaps identified resulting in new requirements for Consortium review
- CalWIN counties will be able to leverage existing CalSAWS reports

Ad Hoc Reporting Readiness

CalSAWS Data Lake – County Ad Hoc Environments



CalSAWS Service Catalog

- **Platinum :** Project provides the County Ad Hoc Environment and provisions CalSAWS Qlik enterprise development tools and technical support. County develops and tests their own reports;
- **Gold:** Project provides the County Ad Hoc Environment only. County uses their own reporting tools to develop and test their own reports

County Ad Hoc Environments and Qlik Development Components:

- S3 Buckets;
- EMR;
- Aurora RDS;
- Qlik Sense;
- Nprinting.

Ad Hoc Reporting Readiness

CalSAWS Data Lake – County Ad Hoc Environments

Service Level Catalog

COST PER MONTH PER INSTANCE
(Top Down)

Counties to leverage the CalSAWS Data Lake data (S3) and/or RDS Purpose Built Data Sets for their own County Reports, Analysis, and Development. See visual below.

	Platinum			Gold		
County Data Lake Development Environment						
AWS S3 Bucket Sources and Storage Capacity	**Small** (< X TB)	**Medium** (> X TB and < X TB)	**Large** (> X TB and < X TB)	**Small** (< X TB)	**Medium** (> X TB and < X TB)	**Large** (> X TB and < X TB)
	$	$$	$$$	$	$$	$$$
Elastic Map Reduce (EMR)	$$			$		
Aurora RDS	**Small**	**Medium**	**Large**	**Small**	**Medium**	**Large**
	$	$$	$$$	$	$$	$$$
Qlik Sense (Visualization)	$$			n/a		
Nprinting	$$			n/a		
Technical Support						
Full Time Equivalent (FTE)	n/a			n/a		
Support As-Needed	T&M ($/hour x Need) Sr. Developer *(min. 8 hrs. and max. 160 hrs.)*			n/a		

Procurement Update

CalSAWS Procurements

2021

- Central Print Services Appeal
  - Xerox filed a formal appeal
  - Appeal Review Panel Hearing was conducted on March 3, 2021
- Begin CalSAWS M&O Procurement
  - Develop procurement strategy and schedule options: January - March
  - Prepare and release Request for Information (RFI): March – April
  - Analyze RFI responses: May
  - Develop requirements: June - July
  - Prepare Draft RFP: August – November
- SOC 2 Procurement
  - RFP planned for release on March 19, 2021 via San Bernardino County

State Partners Updates

- OSI
- CDSS
- DHCS

Regional Updates

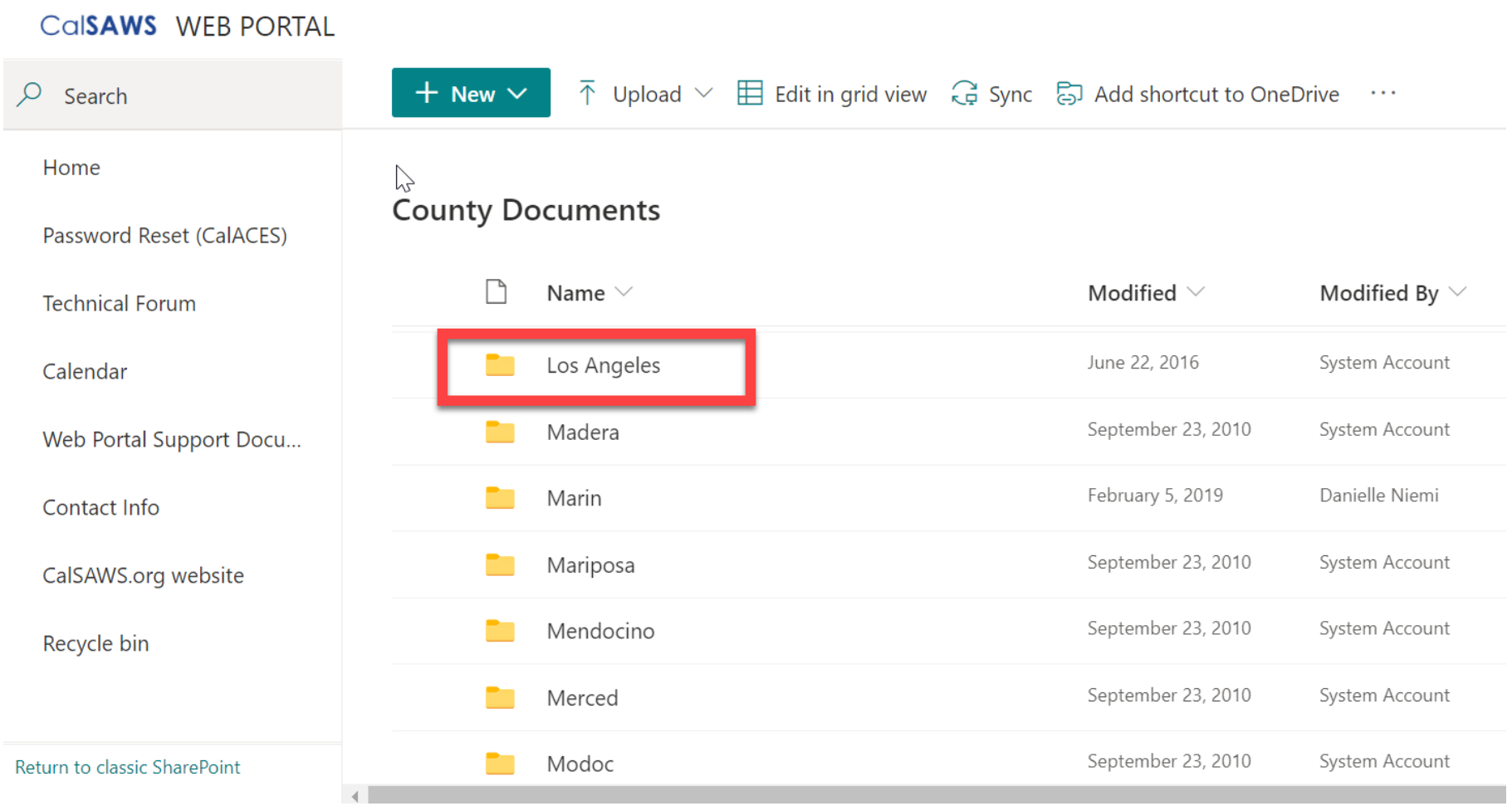
JPA Board March Meeting Overview

Adjourn Meeting

PSC Appendix Material
Cross County Sharing - How-To

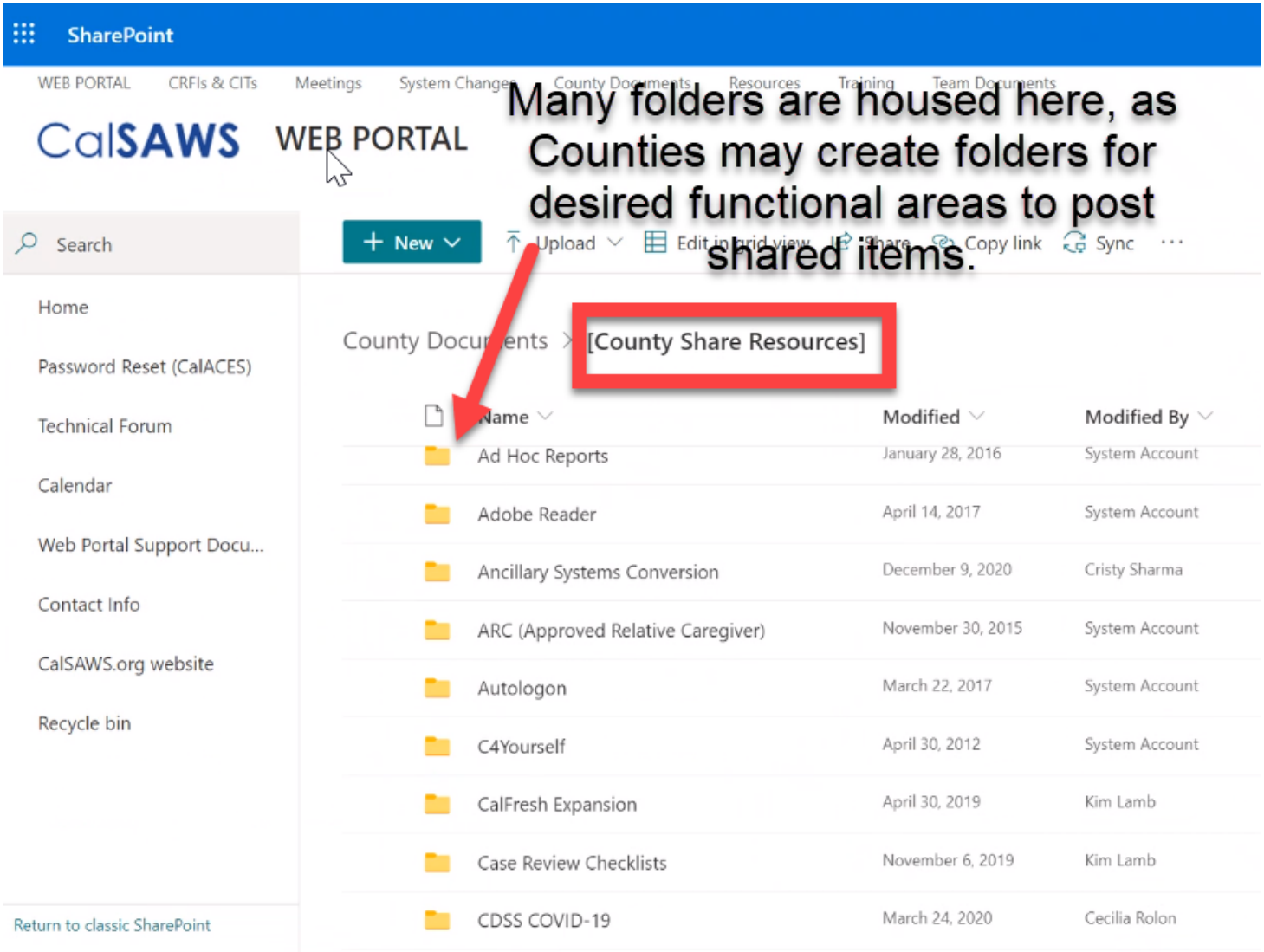
Cross County Sharing – How To

County-Specific Folders- Example Los Angeles- Viewable only by LA staff



Cross County Sharing – How To

County Share Resources Folder- Viewable by 58-County Staff with Web Portal Access

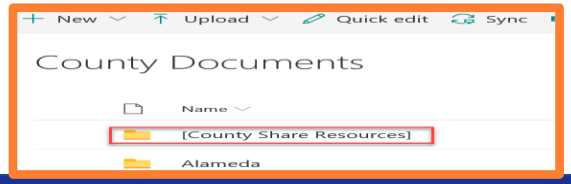


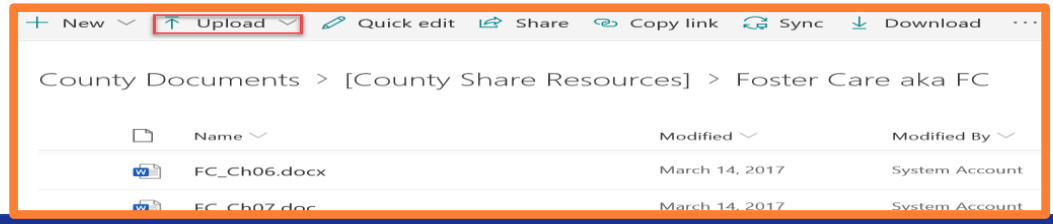
Cross County Sharing – How To

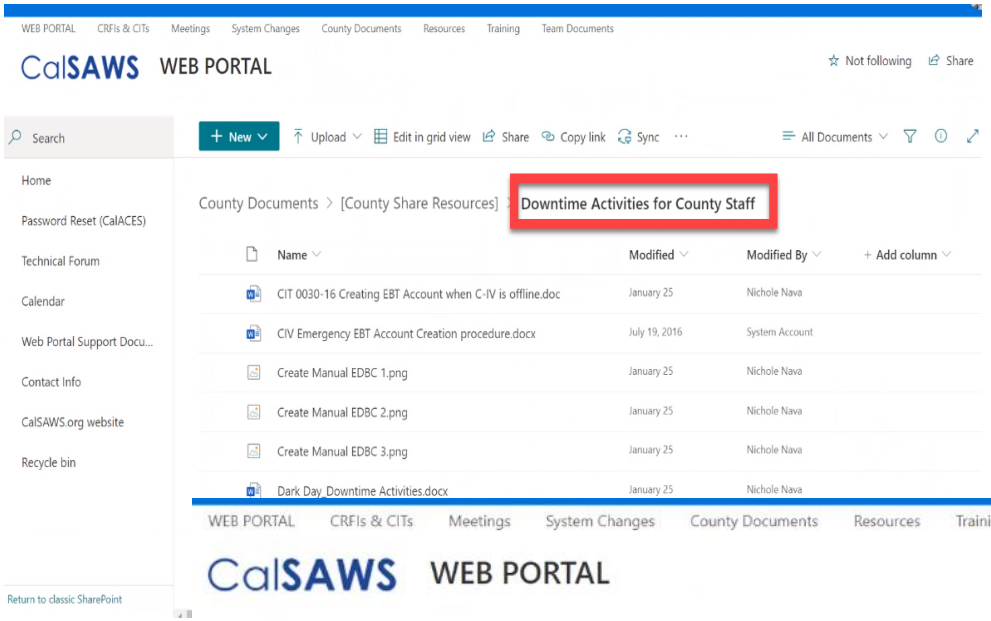
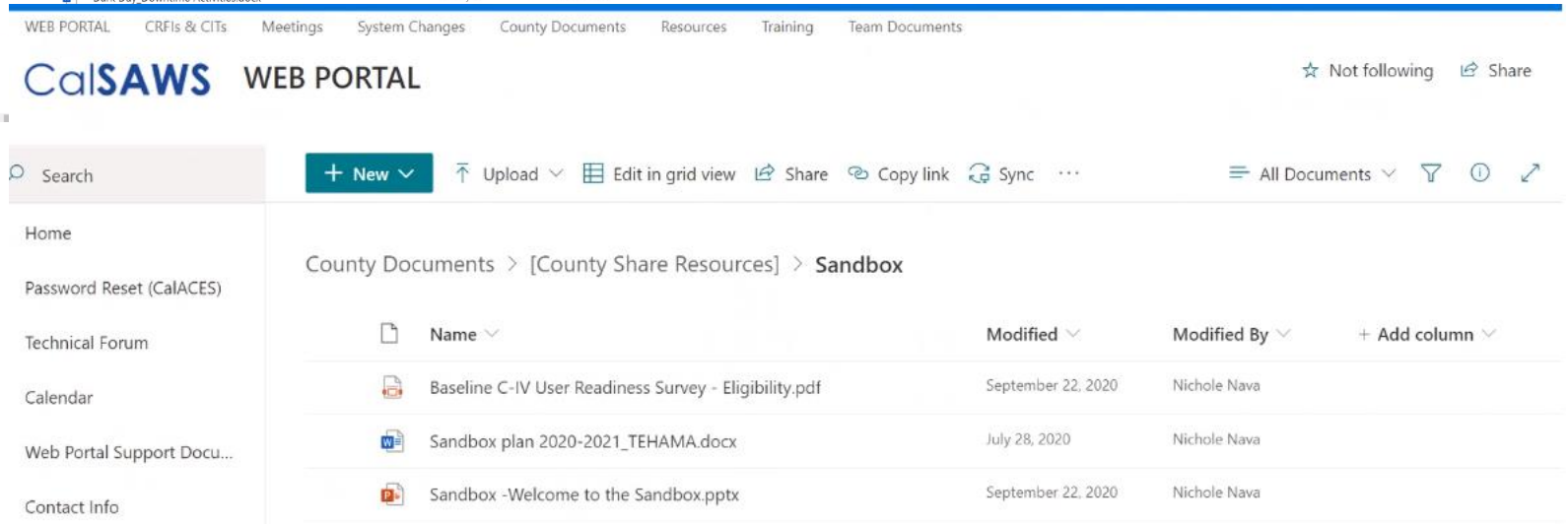
Upload your County - Business Processes & Policies & Procedures

- **How to <u>share</u> <u>County created Business Process/Resources with CalSAWS & Counties:</u>**
  Path: CalSAWS Web Portal Home > County Documents > [County Share Resources]**> Choose Folder!**
  - Click on 'County Documents' tab.
  - Click on '[County Share Resources]' folder.
  - Find an existing functional area folder to open and upload your County's Resource. *When naming your document, please <u>include your County Name</u>.* **OR**…<u>If no area matches</u>…
  - On menu, click on 'New' and click on 'New Folder'. Type a Name for the new folder that relates to materials being shared. Click 'Create.'

- **<u>To Upload Document(s)</u>:**
  - Drag document(s) from your home 'My Docs' or 'Shared Drive' folder into an existing folder or folder you just created on the Web Portal. **OR…**
  - Start in the desired folder location on Web Portal.
  - Click on 'Upload'. Click on 'File'.
  - Browse your home 'My Docs' or 'Shared Drive' folder, click on desired file(s), click 'Open'.
  - By sharing your County developed materials for other counties, you save them production effort, which will likely be reciprocated!
  - ***Reminder:*** Not all staff have access to the Web Portal, if you see something useful or staff need help, check 'County Share Resources' and Save items down to a County Shared Drive!





Cross County Sharing – How To

County Share Resources- Recent Example of Sharing - Downtime Activities for County Staff & Sandbox Support