



CalSAWS DD&I Weekly Status Report

**Reporting Period: August 16, 2021 to August 22,
2021**

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1.0 Project Management

1.1 Project Deliverables Summary

Table 1.1-1 – Overall Summary of Deliverable Status for Current Reporting Period

| DEL # | DELIVERABLE NAME | TEAM | STATUS [1] | STATUS |
|-------|----------------------------------------|------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| 60 | CalSAWS Migration Work Plan Update #28 | PMO |  | Received approval for the Final Deliverable (FDEL) on August 20, 2021 |

[1] Status: **Green:** On schedule, performing as planned; **Amber:** Potential delay/monitor with no material schedule impact; **Red:** Behind schedule and requires escalation

1.2 Highlights of the Reporting Period

1.2.1 Project Management

- ▶ Continued CalSAWS DD&I Facility Management activities, including:
 - Key initiatives related to facilities at the Rancho Cordova Project Office are provided in Table 1.2.1-1 (Key Facility Initiatives/Projects) below

Table 1.2.1-1 – Key Facility Initiatives/Projects

| ITEM # | INITIATIVES/PROJECTS | LOCATION | TARGET DATE | NOTES/STATUS |
|--------|----------------------|--------------------------------------------|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Large Space Needs | Rancho Cordova and Norwalk Project Offices | June – August 2021 | <ul style="list-style-type: none"> • Continued planning facility capacity and equipment needs for CalSAWS DD&I C-IV UAT command center/war rooms, CalSAWS Train-the-Trainer sessions, and Imaging Training |
| 2 | Return to Office | Rancho Cordova and Norwalk Project Offices | Spring/ Summer 2021 | <ul style="list-style-type: none"> • Continued reviewing and processing Return to Office (RTO) Approval Request forms submitted by CalSAWS Project staff, which are required to access the CalSAWS Rancho Cordova or Norwalk Project offices |

- ▶ Facilitated the CalSAWS Weekly Status Meeting that was held on August 18, 2021
- ▶ Began preparations for the Section Directors meeting that is scheduled for August 24, 2021
- ▶ Continued CalSAWS Risk Management activities, including:
 - Continued to work with risk owners to develop and update mitigation plans for the accepted CalSAWS DD&I Project risks
- ▶ Continued supporting engagement of project staff working remotely, including:
 - Continued preparations for the next monthly virtual CalSAWS Project All Staff Meeting that will be held on September 22, 2021

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- o Continued development of the next monthly issue of the CalSAWS Connect newsletter that will be sent to the CalSAWS Project Team on September 16, 2021
- ▶ Continued discussions with the Consortium regarding the development of high-level Gantt charts for the CalSAWS Project and continued reviewing potential tools that may be used to create the CalSAWS Integrated Gantt charts
- ▶ Continued performing Contract Management activities for the CalSAWS DD&I Project
 - o Continued development of the documents for LRS Amendment No. 28, which is planned to include the following:
 - Updates to Exhibit U, the Statement of Work for the CalSAWS DD&I Project, for an annual update to the CalSAWS DD&I Statement of Requirements and also reflect the current approved deployment schedule for Non-State Forms
 - Updates to Exhibit W, the Statement of Work for the CalSAWS Cloud Enablement Project, to reflect the current approved schedule for the last Analytics soft launch
 - Updates to Exhibit Z, the Statement of Work for the CalSAWS Imaging Project, to reflect the current go-live schedule for the CalWIN waves
 - Updates to Exhibit AC, the Statement of Work for the CalSAWS Customer Service Center Project, to reflect the revised schedule for design activities
 - o LRS Amendment No. 28 is planned to be submitted to the CalSAWS JPA Board of Directors for approval on September 10, 2021
 - o Continued planning the implementation of requirements from the DHCS and CDSS Privacy and Security Agreements (PSAs) that were approved by the JPA Board of Directors on April 16, 2021
- ▶ Continued performing Deliverable Management activities for the CalSAWS DD&I Project
- ▶ Completed preparations for the next CalSAWS Project orientation session for new project staff that is scheduled for August 23, 2021

Deliverable Management

Table 1.2.1-2 – Deliverable Status for Current Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 60 | CalSAWS Migration Work Plan Update #28 | <ul style="list-style-type: none">• Facilitated a touchpoint meeting with Deliverable reviewers on August 18, 2021 to address comments and questions, as needed• Received approval for the FDEL on August 20, 2021 |

1.2.2 Communications Management

- ▶ CalSAWS Communications Management activities including:
 - o Continued to gather key communication milestones from the Project teams
- ▶ CalSAWS Enhanced Communications Strategy:
 - o Continued oversight and management of Power of 58 materials
- ▶ CalSAWS External Website (www.calsaws.org):
 - o Continued the administration and support of the CalSAWS external website
 - See Table 1.2.2-1 for details on website support activities

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- ▶ CalSAWS Migration DD&I Release 21.11 Communications:
 - See table 1.2.2-4 for details

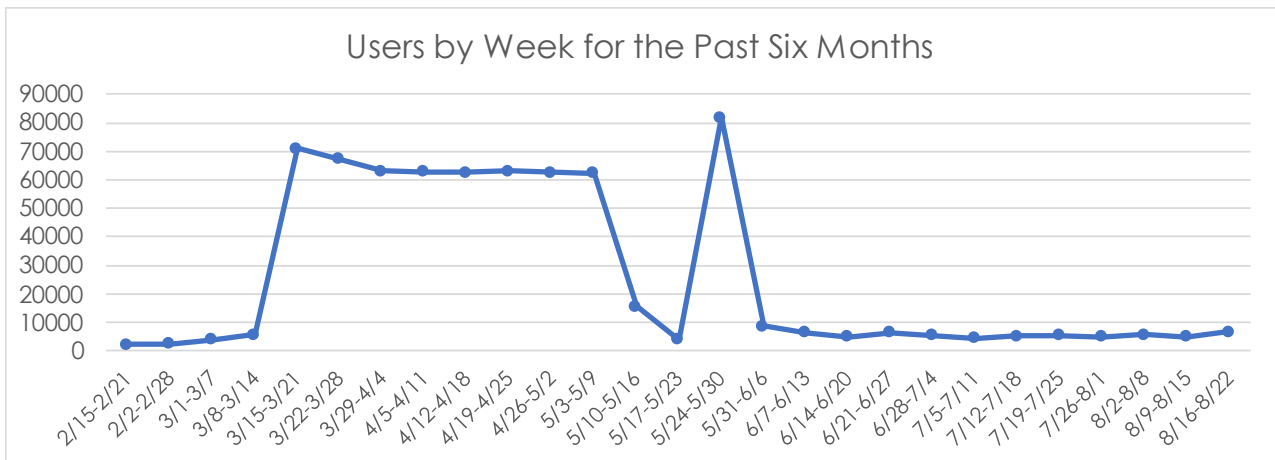
Table 1.2.2-1 – Website Support Activities

| TASK | DATE(S) | TASK TYPE |
|-------------------------------|---------|-----------|
| None for the reporting period | | |

Table 1.2.2-2 – CalSAWS.org Usage Statistics

| CATEGORY | DURING REPORTING PERIOD | SINCE LAUNCH |
|---------------------------------------------------|-------------------------|--------------|
| Total Number of Subscribers | 6 | 982 |
| Total Number of Unique Users | 6,783 | 974,380 |
| Total Number of New Users | 5,551 | 974,380 |
| Total Number of Sessions (Individual Site Visits) | 8,906 | 1,207,609 |
| Average Number of Sessions per User | 1.31 | 1.24 |
| Average Number of Page Views per Session | 1.40 | 1.25 |
| Average Session Duration | 1:07 | 0:54 |
| AskCalSAWS Inquiries – Received/Resolved | 5/8 | 351/346 |

Figure 1.2.2-1 – Overall CalSAWS.org Usage Trend*



Note:

* Increase in usage from March 15, 2021 to May 16, 2021 was investigated to be from cities in the United States

Table 1.2.2-3 – CalSAWS.org Subscription Service Statistics

| WEBPAGE | PERCENT OF SUBSCRIBERS |
|----------------------------------------|------------------------|
| Latest News – CalSAWS Buzz Newsletter | 48% |
| Latest News – News | 37% |
| Meetings – Project Steering Committee | 31% |
| Other Updates – Careers | 30% |
| CalSAWS Committees – CalWORKs/CalFresh | 28% |

Table 1.2.2-4 – CalSAWS Migration DD&I Release 21.11 Communication Activities

| TASK | DATE(S) | OWNER |
|---------------------------------------------------------------------|---------|-------|
| 21.11 Communications activities will be added as planning commences | | |

1.2.3 Cultural Transformation

► Phase 1 activities:

○ Overall:

- Continued engaging with Cultural Ambassadors to coach and help them adjust their action plans based on feedback received from the CalSAWS Leadership team
- Continued engaging with the CalSAWS Inclusion, Diversity, and Equity Advancement (IDEA) team to coordinate cross-Project coaching program and employee resource groups
- Continued management of Power of 58 assets on the CalSAWS Project SharePoint site
- Continued to support development of the monthly CalSAWS Connect Newsletter
- Continued alignment with the CalSAWS Innovation team on areas for partnership in second round of Cultural Ambassadors
- Continued development of expanded scope of Cultural Transformation second round initiatives based on feedback received from the Consortium Section Directors
- Continued recruitment activities for 2021 Cultural Ambassadors
- Continued coordination across IDEA, Great Place to Work (GPTW), and Soft Skills Training to create a CalSAWS Cultural Framework and on boarding training
- Continued the development of a CalSAWS Culture-focused orientation for new joiners

1.2.4 Inclusion, Diversity and Equity Advancement (IDEA)

► Co-Create Phase

○ IDEA Initiatives

- Workshops
 - Supported Project 986 Consulting's diversity, equity, and inclusion focused workshop for all staff
 - Continued to prepare the overview deck and rewards for the conclusion of the session
- Leadership Session
 - Continued preparation for the leadership overview deck and session
- We Are One
 - Continued to update the CalSAWS IDEA calendar with most recent events

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- Pulse Survey
 - Conducted analysis that compared previous pulse survey results to this round's results
- ▶ Buddy Program
 - Began preparation for the next Buddy Program round
- ▶ Employee Resource Groups (ERGs)
 - Assisted the ERGs to plan the "How to Prioritize Your Mental Health" event with guest speaker Kiaundra Jackson that is scheduled for August 23, 2021
- o IDEA General
 - Sent the output deck of "Being The Change" to the group of participants
 - Continued to collaborate with Great Place to Work (GPTW), Soft Skills, and Cultural Transformation to discuss the image of consolidated offerings to the CalSAWS Project team
 - Continued to work with the CalSAWS Connect team to provide content for diversity, equity and inclusion-related topics and an IDEA overview
 - Completed the "Journey to Success" visual for IDEA, outlining what the plans are in the next coming years
 - Began working on a visual that shows where we have come over the course of a year with the inclusion, diversity, and equity advancement efforts

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1.3 CRFI/CIT Communications Information

- ▶ The following table outlines CalSAWS Information Transmittals (CITs) sent for the reporting period ending August 22, 2021

Table 1.3-1 – CITs

| CIT ID | SUBJECT | CATEGORY | DISTRIBUTION DATE | PRIMARY CalSAWS CONTACT | BACKUP CalSAWS CONTACT |
|---------|---------------------------------------------------------------------------|---------------|-------------------|-------------------------|------------------------|
| 0213-21 | C-IV County Prep Phase Packet and Security Matrix Updates | Informational | August 16, 2021 | Raul Gonzalez | Bonnie Sleeper |
| 0214-21 | CalSAWS Administrative Budget Year End Statement FY20/21 | Informational | August 17, 2021 | Stephanie Aragon | Chia Thao |
| 0215-21 | FY21/22 Administrative Invoices for the CalSAWS JPA Administrative Budget | Informational | August 17, 2021 | Stephanie Aragon | Chia Thao |
| 0216-21 | Registration Report for General Training | Informational | August 17, 2021 | Ashley Arnold | Shivani Smith |
| 0217-21 | LMS Access Guide for General Training | Informational | August 17, 2021 | Ashley Arnold | Shivani Smith |
| 0218-21 | C-IV User Change Readiness Assessment Survey | Informational | August 17, 2021 | Helen Cruz | Araceli Gallardo |
| 0220-21 | BenefitsCal Compatible Browsers | Informational | August 19, 2021 | Anna Chia | Matthew Spurrier |
| 0222-21 | CalSAWS BenefitsCal Online Store | Informational | August 20, 2021 | Matthew Spurrier | N/A |

- ▶ The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period ending August 22, 2021

Table 1.3-2 – CRFIs

| CRFI ID | SUBJECT | DISTRIBUTION DATE | STATUS | RESPONSE DUE DATE | CalSAWS CONTACT |
|---------|-----------------------------------------------------------------------|-------------------|--------|-------------------|-----------------|
| 21-049 | Request for Imaging Train-the-SME (ITTSME) Participants for LA County | August 11, 2021 | Open | August 27, 2021 | Ashley Arnold |

Table 1.3-3 – Overdue CRFIs

| CRFI ID | Subject | Region 1 | Region 2 | Region 3 | Region 4 | Region 5 | Region 6 |
|---------|---------|----------|----------|----------|----------|----------|----------|
| None | | | | | | | |

- ▶ No Overdue CRFIs for the reporting period ending August 22, 2021

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1.4 Activities for the Next Reporting Period

1.4.1 Project Management

- ▶ Continue CalSAWS DD&I Facility Management activities, including:
 - Continue key initiatives related to facilities at the Rancho Cordova Project Office, which are provided in Table 1.2.1-1 (Key Facility Initiatives/Projects) above
- ▶ Continue CalSAWS Risk Management activities, including:
 - Continue to work with risk owners to monitor risks and update risk mitigation plans
- ▶ Facilitate the CalSAWS Weekly Status Meeting scheduled for August 25, 2021
- ▶ Complete preparations and participate in the Section Directors Meeting that is scheduled for August 24, 2021
- ▶ Continue activities to support Project staff working remotely
 - Continue planning and preparations for the next monthly virtual CalSAWS Project All Staff Meeting that is scheduled for September 22, 2021
 - Continue development of the next issue of the CalSAWS Connect newsletter that will be distributed to the CalSAWS Project Team on September 16, 2021
 - Continue developing Project communications, as needed
- ▶ Continue to plan and prepare for CalSAWS Project staff to return to the Project offices once the State and Local Government Shelter At Home ordinances have been lifted
- ▶ Continue process of reviewing tool capabilities for the high-level CalSAWS Integrated Gantt chart
- ▶ Continue performing Contract Management activities for the CalSAWS DD&I Project
- ▶ Continue performing Deliverable Management activities for the CalSAWS DD&I Project
- ▶ Facilitate the CalSAWS Project orientation session for new project staff that is scheduled for August 23, 2021

Deliverable Management

Table 1.4.1-1 – Deliverable Status for Next Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

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1.4.2 Communications Management

- ▶ Continue to monitor usage and update materials as requested
 - See table 1.4.2-1 for planned website support activities
- ▶ CalSAWS Communications Management activities including:
 - Continue to gather key communication milestones from the Project teams
- ▶ CalSAWS Enhanced Communications Strategy:
 - Continue oversight and management of Power of 58 roll out

Table 1.4.2-1 – Website Support Activities

| TASK | DATE(S) | TASK TYPE |
|------------------------------------------------------------------------------------|--------------------|------------------------|
| Update C4Yourself link on Resource page to direct to new BenefitsCal portal | September 25, 2021 | Website Content Update |
| Update 'YourBenefitsNow' link on Resource page to direct to new BenefitsCal portal | TBD | Website Content Update |

1.4.3 Cultural Transformation

- ▶ Continue to provide tips via email, Microsoft Teams, and coaching to help the CalSAWS Project Team continue working virtually 100% through the COVID-19 Work from Home ordinances
- ▶ Anticipate and plan for cultural impacts pertaining to current climate and returning to the office
- ▶ Plan and execute cross-Project initiatives to increase employee engagement
- ▶ Plan and execute cross-Project initiatives to increase feedback
- ▶ Plan and execute cross-Project initiatives to increase employee wellness
- ▶ Plan and execute cross-Project initiatives to increase employee-driven innovation and entrepreneurship across the CalSAWS Project
- ▶ Continue recruiting Culture Ambassadors for second round of ambassador initiatives
- ▶ Finalize CalSAWS Culture initiatives onboarding session materials

1.4.4 Inclusion, Diversity & Equity Advancement (IDEA)

- ▶ Plan for the Buddy Program's Round II participants
- ▶ Continue to prepare for upcoming guest appearance for the Employee Resource Groups (ERGs)
- ▶ Continue to collaborate on the image for alignment with Great Place to Work (GPTW), Culture Transformation and Training teams
- ▶ Continue to work with CalSAWS Connect team to provide content for the monthly newsletter
- ▶ Review and prepare analysis of pulse survey with leads

1.5 Deviations from Plan/Adjustments

- ▶ None for the reporting period

2.0 Technical Infrastructure and Cloud Enablement

2.1 Highlights of the Reporting Period

- ▶ Continued development and integration workshops with BenefitsCal
 - 1 new medium severity status defect was opened
 - 5 defects deployed to the development environment
 - 4 defects are in progress
 - 27 defects closed overall
 - Continued to triage existing Partner Integration Testing defects and address new UAT defects as they arise
- ▶ ForgeRock Identity Manager (IDM) Migration to Shared Repository deployed to Development environment
- ▶ Continued participation in CalSAWS Disaster Recovery Testing
 - Disaster Recovery test using inaugural Hot-Hot approach was successful, services brought up within time as expected
- ▶ Executed C-IV/CalSAWS/LMS Conversion Production Bulk Upload

Table 2.1-1 – ForgeRock Milestones

| MILESTONES | DUE DATE | STATUS |
|----------------------------------------------|----------|-------------|
| Deploy BenefitsCal Production Application | 21.09.03 | In progress |
| ForgeRock IDM Migration to Shared Repository | 21.09.10 | In progress |
| ForgeRock 21.09 Production Deployment | 21.09.10 | Not started |
| Los Angeles County Federated Authentication | 21.10.29 | In progress |

- ▶ Change Enablement
 - Partnered with the Change Management team to complete the CalSAWS login Cheat Sheet and distributed to C-IV County Implementation Point of Contacts (IPOCs) and Primary Point of Contacts (PPOCs)
- ▶ Continued Innovation Lab activities
 - Deployed Operational Decision Making (ODM) Rules (*Describe Phase*)
 - Continued progress on analysis of CalSAWS monolithic application
 - Streamlined CalSAWS Lobby Application (*Describe Phase*)
 - Continued assessment to understand level of effort to complete enhancements
 - System Status for End Users (*Co-Create Phase*)
 - Continued prototype project management timeline and activities
 - CalSAWS Production Calendar (*Discovery Phase*)
 - Continued prototype project management timeline and activities
 - Cybersecurity Awareness Program (*Discovery Phase*)
 - Completed level of effort to support phishing awareness program

Deliverable Management

Table 2.1-2 – Technical Infrastructure and Cloud Enablement Deliverable Status for Current Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

2.2 Activities for the Next Reporting Period

- ▶ Continue to support BenefitsCal UAT
 - Triage existing Partner Integration Testing defects and address new UAT defects as they arise
- ▶ Continue development work on deploying BenefitsCal Production application credentials
- ▶ Submit Change Request for 21.09.10 Production Release
- ▶ Innovation Lab
 - Deploy Operational Decision Making (ODM) Rules (*Describe Phase*)
 - Continue development of requirements from monolithic application analysis
 - Streamline CalSAWS Lobby Application (*Describe Phase*)
 - Continue assessment of level of effort
 - System Status for End Users (*Co-Create Phase*)
 - Continue to update project timeline for prototype
 - CalSAWS Production Calendar (*Describe Phase*)
 - Continue to update project timeline for prototype
 - Cybersecurity Awareness Program (*Discovery Phase*)
 - Set up discussion with Innovation and Security leadership to discuss next steps

Deliverable Management

| DEL # | DELIVERABLE NAME | STATUS |
|-------|------------------------------------|--------|
| | None for the next reporting period | |

2.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

3.0 Imaging

3.1 Highlights of the Reporting Period

- ▶ Updated Amazon Web Service (AWS) Snowball process for C-IV imaging migration
 - Continued validating contents of AWS Snowball 8 and Snowball 9
- ▶ Continued to monitor database migration process
- ▶ Continued validation of Los Angeles County's AWS Snowball transfer with Hyland
- ▶ Continued Los Angeles County's Imaging User Acceptance Testing (UAT)
 - Completed first two weeks of scenarios:
 - 52 scenarios passed
 - 6 scenarios failed
 - 1 scenario in progress
- ▶ Conducted the final C-IV UAT Testing
 - Last outstanding scenario passed on August 19, 2021
- ▶ Conducted San Diego County Document Migration Discovery Session Check-in for August 17, 2021
- ▶ Conducted Placer County Document Migration Discovery Session Check-in for August 17, 2021
- ▶ Conducted Fresno County Document Migration Discovery Session Check-in for August 18, 2021
- ▶ Conducted Orange County Document Migration Discovery Session Check-in for August 19, 2021
- ▶ Conducted San Francisco County Document Migration Discovery Session for August 19, 2021
- ▶ Scheduled San Luis Obispo County Document Migration Discovery Session for August 24, 2021
- ▶ Scheduled Placer County Document Migration Discovery Session Check-in for August 24, 2021
- ▶ Scheduled Santa Clara County Document Migration Discovery Session Check-in for August 25, 2021
- ▶ Scheduled Orange County Document Migration Discovery Session Check-in for August 26, 2021
- ▶ Scheduled Ventura County Document Migration Discovery Session Check-in for August 26, 2021
- ▶ Scheduled Los Angeles County Document Migration Discovery Session Check-in for August 26, 2021

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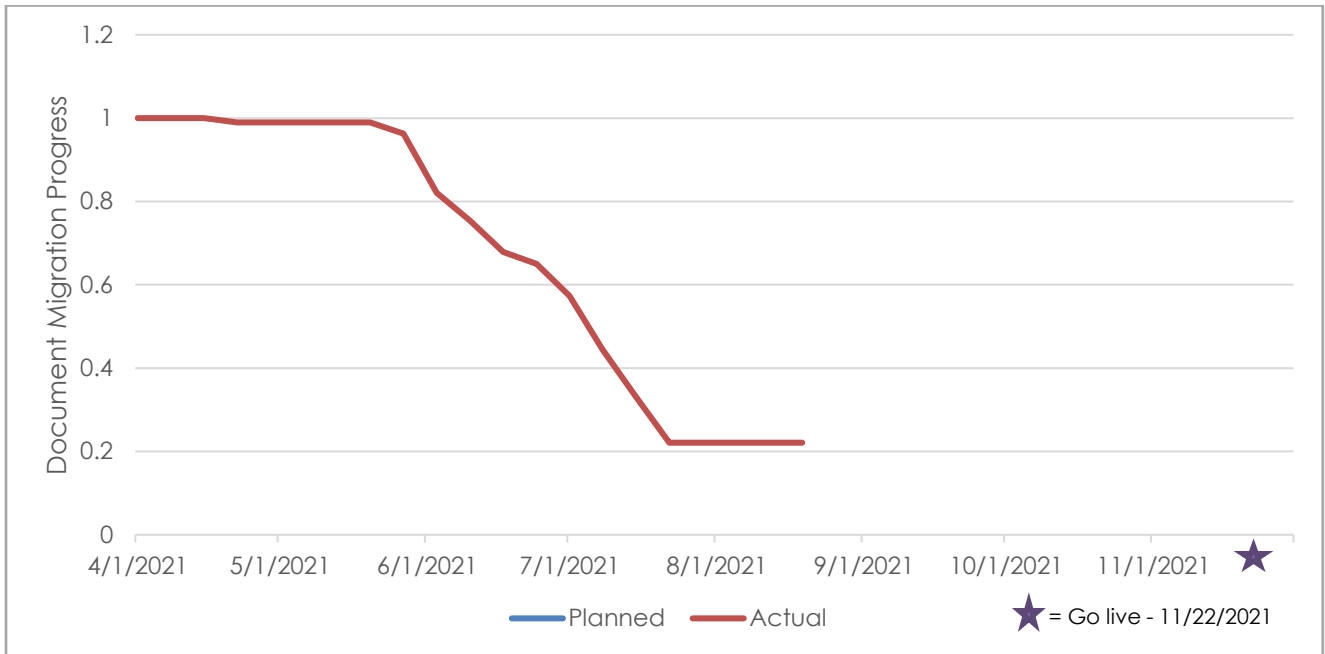
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Table 3.1-1 – CalSAWS Imaging Project Milestones

| MILESTONES | SUBMISSION DUE DATE | STATUS |
|------------------------------------------------------------------------------|---------------------|-------------|
| Application Build Activities | March 25, 2021 | Completed |
| Release 21.01 | November 25, 2020 | Completed |
| Release 21.03 | January 28, 2021 | Completed |
| Release 21.05 | March 25, 2021 | Completed |
| User Acceptance Testing Environment Build-out | April 23, 2021 | Completed |
| C-IV UAT Imaging Admin week | July 2, 2021 | Completed |
| C-IV UAT Imaging Admin Retest week | July 19, 2021 | Completed |
| Los Angeles UAT Imaging Admin week | August 9, 2021 | Completed |
| Migration Activities | October 1, 2021 | In progress |
| Conduct San Diego County Document Migration Discovery Session Check-in | August 17, 2021 | Completed |
| Conduct Placer County Document Migration Discovery Session Check-in | August 17, 2021 | Completed |
| Conduct Fresno County Document Migration Discovery Session Check-in | August 18, 2021 | Completed |
| Conduct Orange County Document Migration Discovery Session Check-in | August 19, 2021 | Completed |
| Conduct San Francisco County Document Migration Discovery Session | August 19, 2021 | Completed |
| Conduct Placer County Document Migration Discovery Session Check-in | August 24, 2021 | Scheduled |
| Conduct San Luis Obispo County Document Migration Discovery Session Check-in | August 24, 2021 | Scheduled |
| Conduct Santa Clara County Document Migration Discovery Session Check-in | August 25, 2021 | Scheduled |
| Conduct Orange County Document Migration Discovery Session Check-in | August 26, 2021 | Scheduled |
| Conduct Ventura County Document Migration Discovery Session Check-in | August 26, 2021 | Scheduled |
| Conduct Los Angeles County Document Migration Discovery Session Check-in | August 26, 2021 | Scheduled |

Figure 3.1-1 – Los Angeles (Nexlogica)*



Note:

* Please see CalSAWS Project Risk #234

Figure 3.1-2 – C-IV UAT Imaging Burnup

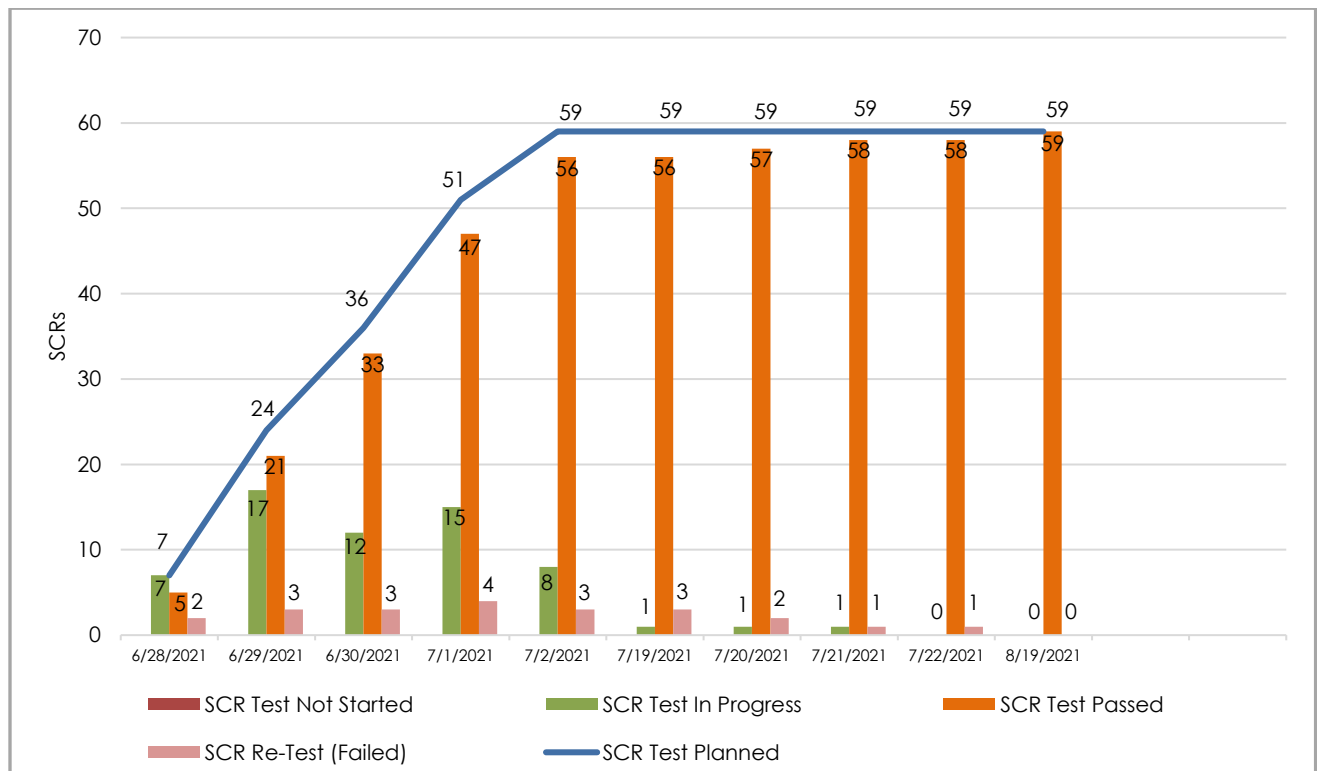


Figure 3.1-3 – Los Angeles UAT Imaging Burnup

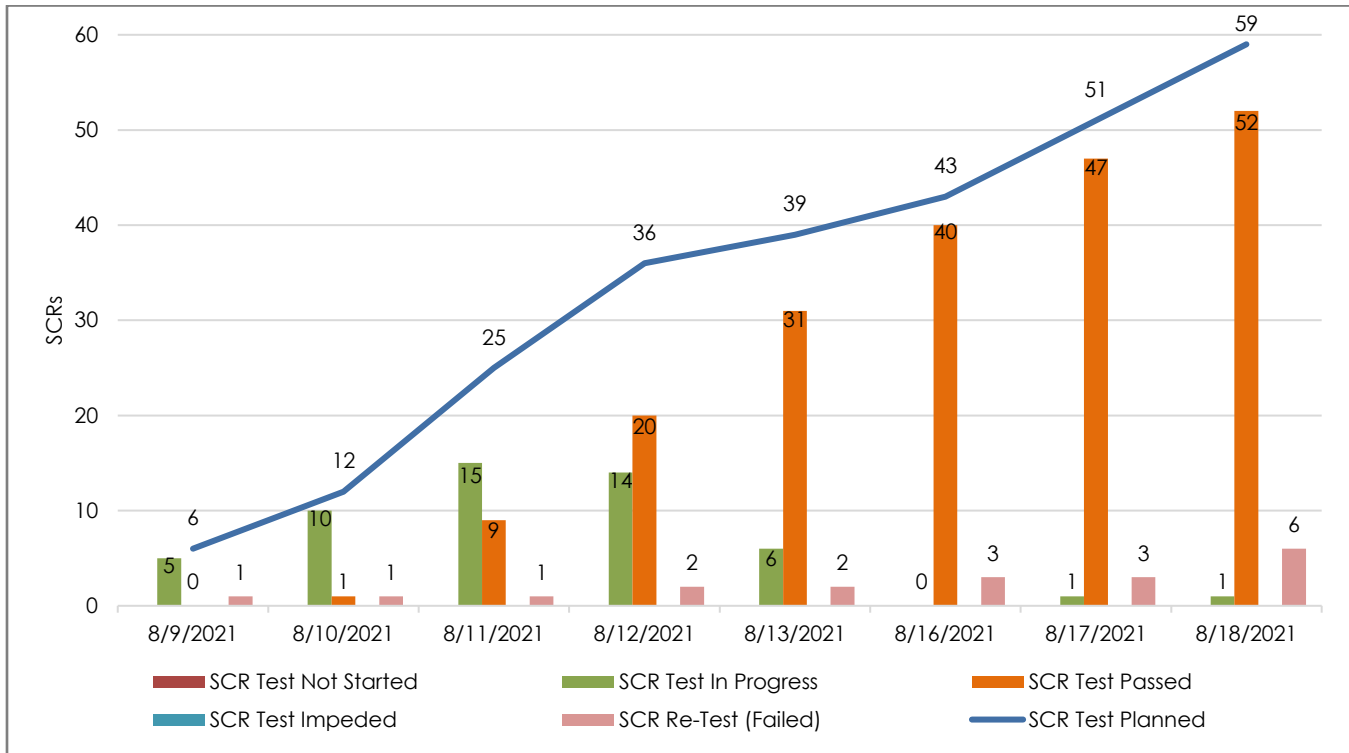


Table 3.1-2 – Los Angeles UAT Imaging Execution

| CalSAWS UAT | TOTAL SCENARIOS | NOT EXECUTED | PASSED | FAILED | BLOCKED | NOTES |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|--------------|--------|--------|---------|-------|
| COMPLETED | | | | | | |
| Imaging Admins | 59 | 1 | 52 | 6 | 0 | |
| Failed Test Case Reasons: | | | | | | |
| <ul style="list-style-type: none"> • UAT-T3: Images Buttons Defect CA-232210 • UAT-T7: Imaging Reports - Documents Captured Defect CA-232439 • UAT-T8: Imaging Reports - Initial QA Defect CA-232439 • UAT-T9: Imaging Reports - Exception Queues Aging Defect CA-232439 • UAT-T31: Specialty Flags: Program selection Defect CA-232544 • UAT-T59: R - Images from a kiosk Defect CA-232145 | | | | | | |
| Not Executed Case: | | | | | | |
| <ul style="list-style-type: none"> • UAT-T58: Confidential Cases: Barcode Verification Confidential Queue | | | | | | |

Figure 3.1-4 – C-IV UAT Imaging Defects

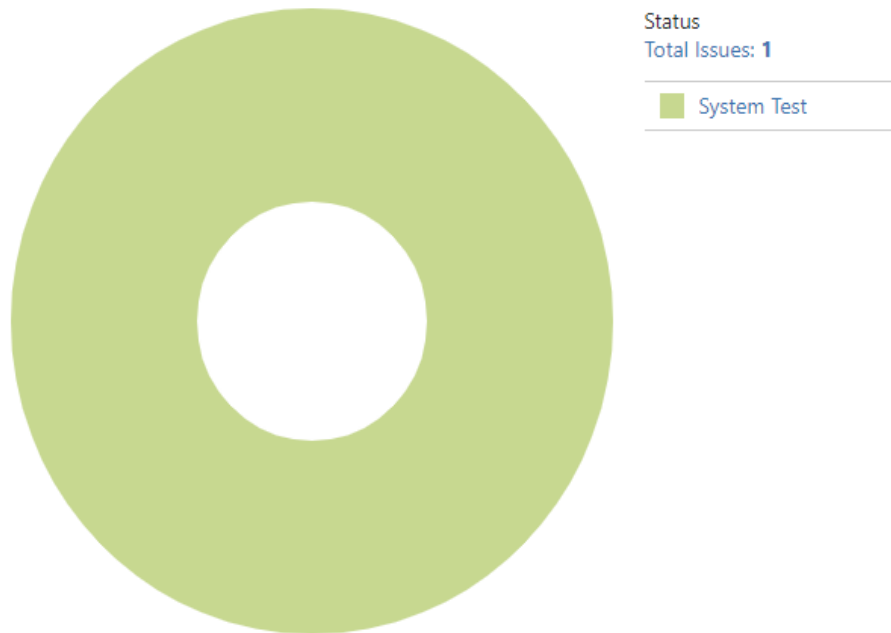


Table 3.1-3 – C-IV UAT Imaging Defects

| STATUS | 2-NORMAL/MEDIUM | 3-NORMAL/LOW | 4-COSMETIC | TOTAL |
|--------------|-----------------|--------------|------------|-------|
| System Test | 0 | 1 | 0 | 1 |
| Total Issues | 0 | 1 | 0 | 1 |

Figure 3.1-5 – C-IV UAT Imaging Defects

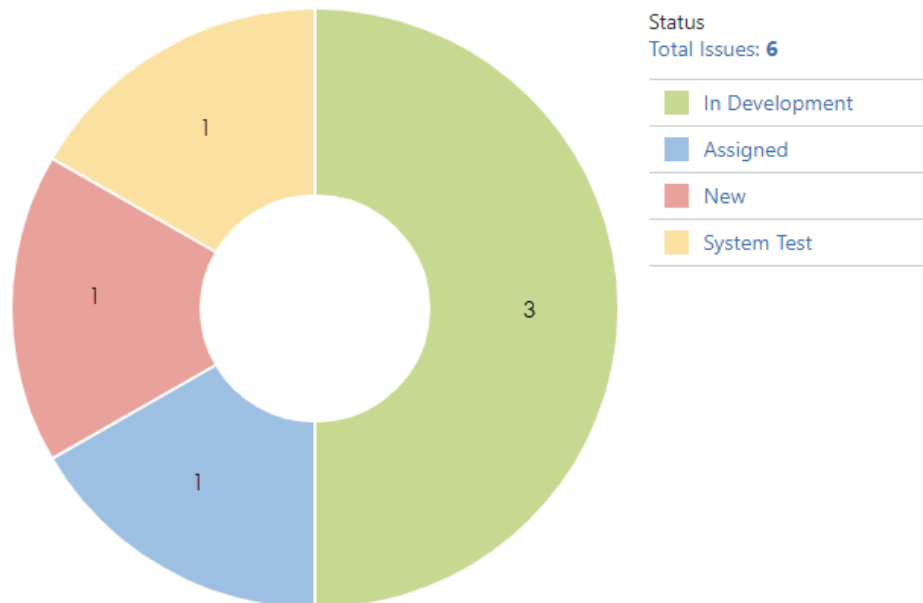


Table 3.1-4 – Los Angeles UAT Imaging Defects

| STATUS | 2-NORMAL/MEDIUM | 3-NORMAL/LOW | 4-COSMETIC | TOTAL |
|---------------------|-----------------|--------------|------------|----------|
| New | 0 | 1 | 0 | 1 |
| Assigned | 1 | 0 | 0 | 1 |
| In Development | 2 | 0 | 1 | 3 |
| System Test | 1 | 0 | 0 | 1 |
| Total Issues | 4 | 1 | 1 | 6 |

3.2 Activities for the Next Reporting Period

- ▶ Update Amazon Web Service (AWS) Snowball Process for C-IV imaging migration
 - Finalize validating contents of AWS Snowball 8 and Snowball 9
- ▶ Continue to monitor database migration process
- ▶ Continue validation of Los Angeles County's AWS Snowball transfer with Hyland
- ▶ Schedule Los Angeles County's Imaging UAT Retest for week of August 30, 2021
- ▶ Conduct San Luis Obispo County Document Migration Discovery Session for August 24, 2021
- ▶ Conduct Placer County Document Migration Discovery Session Check-in for August 24, 2021
- ▶ Conduct Santa Clara County Document Migration Discovery Session Check-in for August 25, 2021
- ▶ Conduct Orange County Document Migration Discovery Session Check-in for August 26, 2021
- ▶ Conduct Ventura County Document Migration Discovery Session Check-in for August 26, 2021
- ▶ Conduct Los Angeles County Document Migration Discovery Session Check-in for August 26, 2021
- ▶ Schedule Santa Barbara County Document Migration Discovery Session Check-in for August 30, 2021
- ▶ Schedule Placer County Document Migration Discovery Session Check-in for August 31, 2021
- ▶ Schedule Santa Clara County Document Migration Discovery Session Check-in for August 25, 2021
- ▶ Schedule Orange County Document Migration Discovery Session Check-in for September 2, 2021
- ▶ Schedule Ventura County Document Migration Discovery Session Check-in for September 2, 2021
- ▶ Schedule Los Angeles County Document Migration Discovery Session Check-in for September 2, 2021

3.3 Deviations from Plan/Adjustments

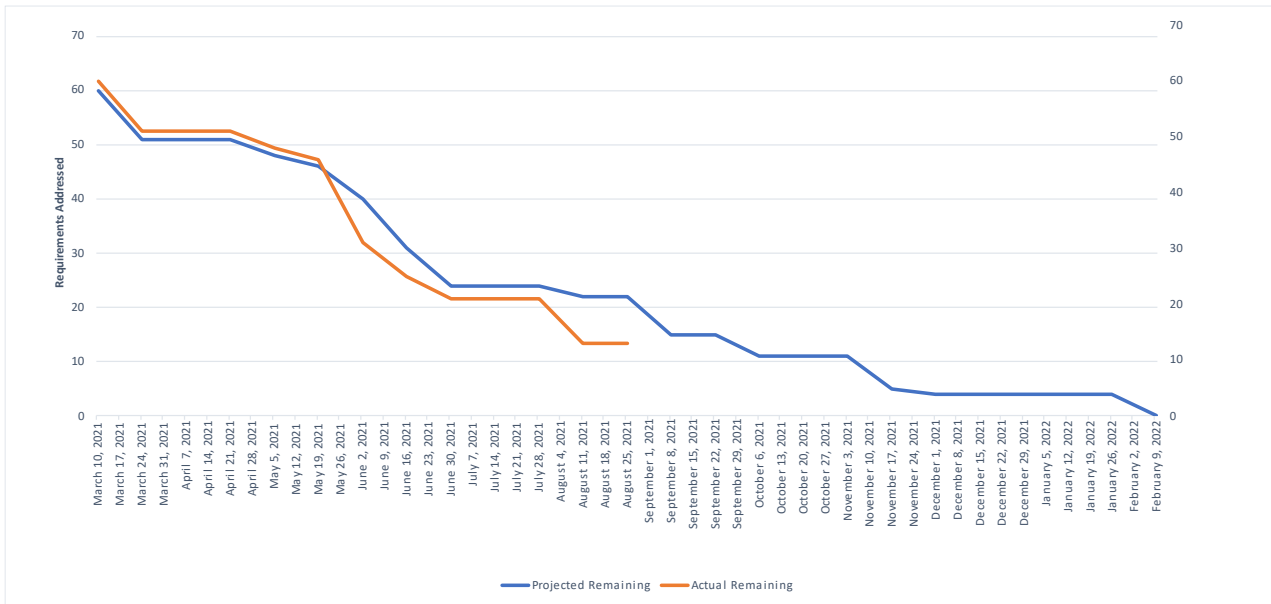
- ▶ None for the reporting period

4.0 Customer Service Center (CSC)

4.1 Highlights of the Reporting Period

- ▶ Submitted task for cancelling an appointment in Outbound IVR Design for approval
- ▶ Continued progress of Telephonic Signature with Application Development team
- ▶ Submitted request to AWS (Amazon Web Services) for Call Control Panel (CCP) implementation strategies with Telephonic Signature design
- ▶ Continued to plan and prepare for build phase

Figure 4.1-1 – CalSAWS Customer Service Center – Requirements Burndown



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Table 4.1-2 – Customer Service Center Milestones

| MILESTONES | DESIGN DUE DATE | STATUS | TENTATIVE RELEASE DATES |
|----------------------------------------------------------------------|-------------------|-------------------|-------------------------|
| Outbound IVR - Core Tech Design (CA-226207) | March 24, 2021 | Approved | 21.11 |
| WFM/QA/QM Reporting (CA-226209) | March 24, 2021 | Approved | 22.01 |
| Post-Call Survey (CA-228023) | April 28, 2021 | Approved | 22.05 |
| WebChat/Click-to-Call (CA-227063) | April 28, 2021 | Approved | 22.05 |
| Voice Authentication: All Languages - Core Tech Design (CA-226843) | April 28, 2021 | Approved | 22.03 |
| Enhanced CCP (CA-226844) | May 12, 2021 | Approved | 22.03 |
| Work-from-home Modifications (CA-227064) | May 12, 2021 | Approved | 22.03 |
| Admin Page - Core Tech Design (CA-226672) | May 26, 2021 | Approved | 22.05 |
| Inbound IVR (CA-226837) | June 9, 2021 | Approved | 22.05 |
| Scheduled Callback (CA-229573) | July 7, 2021 | Approved | 22.05 |
| Outbound IVR – Batch (CA-228699) | July 28, 2021 | Approved | 21.11 |
| Outbound IVR - App Dev (CA-228699) | August 18, 2021 | Submitted | 22.01 |
| Environments (CA-227045) | August 18, 2021 | Draft in progress | 21.11 |
| External Party Access IVR - Core Tech and App Dev Design (CA-226839) | September 8, 2021 | Draft in progress | 22.01 |
| Telephonic Signature - Core Tech and App Dev Design (CA-226838) | October 27, 2021 | Draft in progress | 22.01 |
| Voice Authentication: All Languages - App Dev (CA-TBD) | November 24, 2021 | Not started | 22.03 |
| Admin Page – App Dev (CA-TBD) | January 26, 2022 | Draft in progress | 22.05 |

4.2 Activities for the Next Reporting Period

- ▶ Continue integrated designs of External Party Access IVR
- ▶ Continue Contact Center Environments Design reviews with Security team
- ▶ Conduct requirements session with Consortium Team for Telephonic Signature Design
- ▶ Continue to work with Amazon Web Services (AWS) to establish execution of Call Control Panel (CCP) for Telephonic Signature Design

4.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

5.0 Analytics

5.1 Highlights of the Reporting Period

5.1.1 Analytics Summary

Table 5.1.1-1 – CalSAWS Analytics Summary

| ANALYTICS RELEASE | STATUS | SOFT LAUNCH DATE | HARD LAUNCH DATE | DASHBOARDS | STATE & MGMT. REPORTS | TOTAL | % OF TOTAL |
|----------------------|--------------------|---------------------|---------------------------|------------|-----------------------|------------|------------|
| C | In Production | Deployed | Deployed | 2 | 0 | 2 | 0% |
| D | In Production | Deployed | Deployed | 4 | 33 | 37 | 9% |
| E | In Production | Deployed | Deployed | 7 | 60 | 67 | 23% |
| F | In Soft Launch | Deployed | Deployed | 3 | 74 | 77 | 40% |
| G | In Soft Launch | Deployed | Deployed | 4* | 45 | 49 | 51% |
| H | In Soft Launch | Deployed | Planned September 2021 | 6 | 65 | 71 | 67% |
| I | In Development | October 29, 2021 | January 28, 2022 | 1 | 75 | 76 | |
| J | Future Development | January 15, 2022 | TBD | 0 | 75 | 75 | |
| TOTAL REPORTS | | | | 27 | 427 | 454 | |

Note: * The 3 C-IV Dashboards in Release G will be hard launched on September 8, 2021

5.1.2 Soft Launch

- ▶ Continued County Validation testing on Release H dashboards and reports
- ▶ Continued processing SCR CA-231454 to track the soft launch deployment of the three (3) C-IV dashboards
 - Successfully soft launched two as planned:
 - Call log
 - Semi-annual reporting
 - Prepared to soft launch the third as planned this week:
 - Workload Productivity Report (WPR) and Engagement

5.1.3 Production (Hard Launch)

- ▶ No updates for the reporting period

5.1.4 Performance and Scalability

- ▶ Completed all soft and hard launch deployed dashboards and reports (Los Angeles data only) within the batch window
- ▶ Continued 40 County Analytics Isolation Performance testing on release H code base now on Golden Date Set (GDS) 6
 - Identified potential performance issue with Data Lake to Relational Database Service (RDS) dashboard jobs. DBA team recommendation is to increase to next instance size to avoid jobs being CPU bound on writer instance. Reviewed results and recommend to 8x instance, submitted request via the CalSAWS Project's

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FinOps process; that request is currently pending approval

- ▶ Batch End-to-End Performance Testing (with 40 County Data) – Analytics
 - Reviewed additional results from End-to-End run last week for consistency
 - Identified potential contention on Qlik jobs. Re-testing in isolation performance test
- ▶ Continued work on automated dashboard that could dynamically show visual results comparatively
- ▶ Monitored results of GDS 7 1B conversion (second test for post replica recovery timing) for re-factoring into estimate of post-cutover timings

5.1.5 40 County System Test

- ▶ Completed 40 County System Test of dashboards and reports that have been soft launched and are in production. Report testing is 100% completed and dashboards is 100% completed

5.1.6 User Acceptance Testing (UAT)

- ▶ Continued to provide Analytics team support for UAT
- ▶ Dashboard and Reports Open Items:
 - Deployed Call Log and SAR dashboards; however, there was no identified front-page tab to add the link. The team has sent proposed front-end design to the Consortium Technical (CT) team, which is pending approval by the Consortium Technical team. UAT testers can access through a provided, direct link to the dashboard that is not available from front page. Testing this link in SYS6 before pushing to UAT and production
 - Deployed Workload Productivity Report (WPR) being on August 18, 2021

5.1.7 Development and Testing

- ▶ Release H
 - Created SCR CA-230429 to track the progress on the remaining 3 C-IV reports rescheduled from Release H. Proposed solution is approved by Consortium for below reports. These reports are planned for deployment prior to the C-IV Counties' cutover to the CalSAWS System; the current deployment is estimated for August 27, 2021
 - Longitudinal Analysis Report
 - Engagement Analysis Report
 - Caseload Inventory Report
- ▶ Release I
 - Dashboards
 - Continued curation build, dashboards build, and testing. The soft launch scheduled for October 27, 2021 remains on schedule

Figure 5.1.7-1 – CalSAWS Analytics – Release I Burndown (OBIEE)

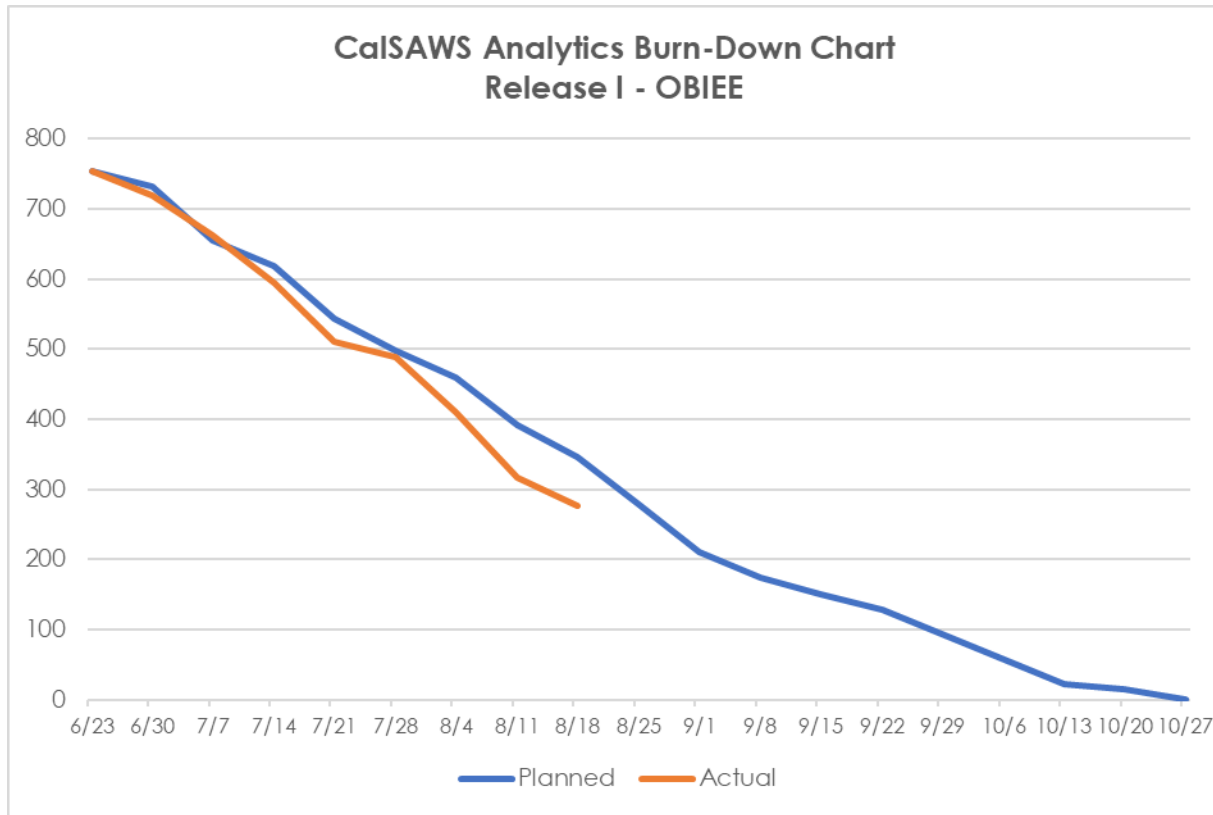


Figure 5.1.7-2 – CalSAWS Analytics – Release I Status Matrix (OBIEE)

| Dashboard | Subject Area | Category | Curation Build | Curation Test | CT Curation Validation | Dashboard Build | Dashboard Test | CT Dashboard Validation | Performance Testing | Hard Launch |
|----------------------|------------------------|--------------------------|----------------|---------------|------------------------|-----------------|----------------|-------------------------|---------------------|-----------------|
| Soft Launch (10/30) | | | | | | | | | | |
| Statistical Reports | Pending Applications | Pending Applications | | | | 8/31 | 9/24 | 10/27 | 10/27 | HL #5 (1/28/22) |
| | Application Processing | Application Processing | | | | 8/31 | 9/24 | 10/27 | 10/27 | HL #5 (1/28/22) |
| | GEO Coding | Caseload Characteristics | | | | 10/8 | 10/15 | 10/27 | 10/27 | HL #5 (1/28/22) |
| | Ehit | Medi-Cal Renewal | 9/1 | 9/24 | 10/27 | 9/24 | 10/1 | 10/27 | 10/27 | HL #5 (1/28/22) |
| | Caseload | Active Caseload | 9/8 | 10/1 | 10/27 | 10/1 | 10/8 | 10/27 | 10/27 | HL #5 (1/28/22) |
| | | Terminations | 9/8 | 10/1 | 10/27 | 10/1 | 10/8 | 10/27 | 10/27 | HL #5 (1/28/22) |
| | | Graphs | 9/8 | 10/1 | 10/27 | 10/1 | 10/8 | 10/27 | 10/27 | HL #5 (1/28/22) |
| Performance Measures | Performance Measures | 9/15 | 10/8 | 10/27 | 10/8 | 10/15 | 10/27 | 10/27 | HL #5 (1/28/22) | |

| |
|--------------------------|
| Legend: |
| Complete |
| Complete as of this week |
| In Progress |

- o Reports
 - Curation and Visualization Build are in progress and on schedule for the October 29, 2021 soft-launch

Figure 5.1.7-3 – CalSAWS Analytics – Release I Burndown (State & Management)

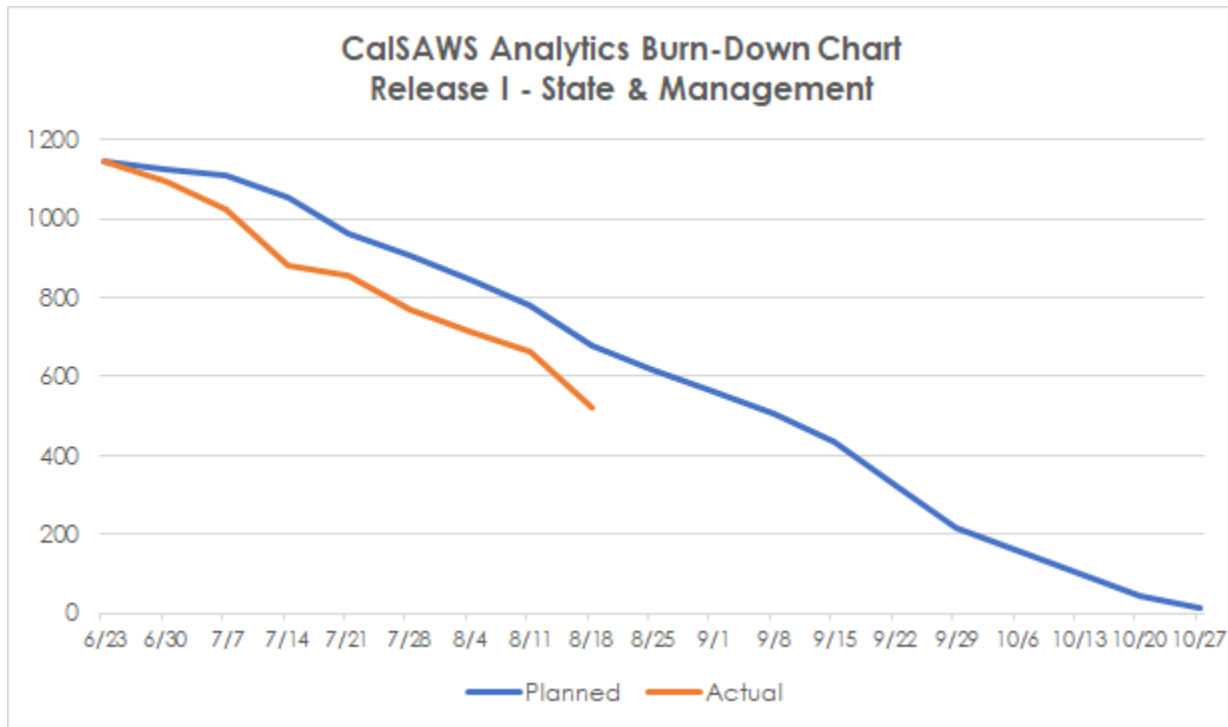


Figure 5.1.7-4 – CalSAWS Analytics – Release I Status Matrix (State & Management)

| Type | Functional Area | Number of Reports | Reverse Engineering | | Curation Build | | Curation Test | | Consortium Curation Test | | Visualization Build | | Visualization Test | | Consortium Viz Validation | |
|-------|---------------------|-------------------|---------------------|--------|-----------------|--------|-----------------|--------|--------------------------|--------|---------------------|--------|--------------------|--------|---------------------------|--------|
| | | | Due Date | % Comp | Due Date | % Comp | Due Date | % Comp | Due Date | % Comp | Due Date | % Comp | Due Date | % Comp | Due Date | % Comp |
| Mgmt | Administration | 12 | 7/15 | 100% | 8/20 | 25% | 9/10 | 25% | 10/27 | 0% | 9/30 | 25% | 10/15 | 17% | 10/27 | 0% |
| | Case Activity | 23 | 7/15 | 100% | 8/20 | 39% | 9/10 | 39% | 10/27 | 0% | 9/30 | 52% | 10/15 | 48% | 10/27 | 0% |
| | Employment Services | 3 | 7/15 | 100% | 8/20 | 0% | 9/10 | 0% | 10/27 | 0% | 9/30 | 0% | 10/15 | 0% | 10/27 | 0% |
| | Fiscal | 33 | 7/15 | 100% | 8/20 | 45% | 9/10 | 45% | 10/27 | 0% | 9/30 | 58% | 10/15 | 58% | 10/27 | 0% |
| | Special Units | 2 | 7/15 | 100% | 8/20 | 0% | 9/10 | 0% | 10/27 | 0% | 9/30 | 50% | 10/15 | 0% | 10/27 | 0% |
| | State | 2 | 7/15 | 100% | 8/20 | 0% | 9/10 | 0% | 10/27 | 0% | 9/30 | 0% | 10/15 | 0% | 10/27 | 0% |
| TOTAL | | 75 | 75 of 75 100% | | 27 of 64 42% | | 27 of 64 42% | | 0 of 64 42% | | 35 of 75 47% | | 32 of 75 43% | | 0 of 75 0% | |

| |
|--------------------------|
| Legend: |
| Complete |
| Complete as of this week |
| In Progress |

5.1.8 Change Enablement

- o Completed all current change enablement scope

5.2 Re-Platform Migration Schedule

Table 5.2-1 – Analytics Reports Re-Platform Release Migration Schedule

| Release C (Migration Window: November 2020 – March 2021): In Production | | | |
|--------------------------------------------------------------------------------|-----------------------|-----------------------------|------------------------------|
| Dashboards | | | |
| LRS | • CalWORKs | Daily | 18 Sheets |
| | • QA | Daily | 10 Sheets |
| Release D (Migration Window: February 2020 – June 2020): In Production | | | |
| Dashboards | | | |
| LRS | • CalFresh | Daily | 30 Sheets |
| | • CalFresh Meals | Monthly | 2 Sheets |
| | • Managed Personnel | Daily | 1 Sheet |
| | • SSI/SSP | Daily | 2 Sheets |
| State & Management | | | |
| | Category | Number of Scheduled Reports | Number of On Request Reports |
| LRS and C-IV | • Administrative | 4 | 0 |
| | • Case Activity | 7 | 0 |
| | • Fiscal | 15 | 0 |
| | • State | 6 | 0 |
| Release E (Migration Window: May 2020 – September 2020): In Production | | | |
| Dashboards | | | |
| LRS | • Med-Cal | Daily | 30 Sheets |
| | • General Relief | Daily and Monthly | 32 Sheets |
| | • Program Assignment | Monthly | 1 Sheet |
| | • DPSSTATS Scorecard | Daily | 1 Sheet |
| | • AAP (CWS) | Daily | 21 Sheets |
| | • Foster Care (CWS) | Daily | 21 Sheets |
| | • Kin-Gap (CWS) | Daily | 21 Sheets |
| State & Management | | | |
| | Category | Number of Scheduled Reports | Number of On Request Reports |
| LRS and C-IV | • Administrative | 7 | 0 |
| | • Case Activity | 4 | 0 |
| | • Employment Services | 0 | 0 |
| | • Fiscal | 34 | 0 |
| | • State | 13 | 0 |
| | • Special Units | 1 | 0 |
| | • Resource Data Bank | 1 | 0 |

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| Release F (Migration Window: August 2020 – December 2020) In Production | | | |
|--------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|
| Dashboards | | | |
| LRS | <ul style="list-style-type: none"> Operational Reports | Monthly | 30 Sheets |
| | <ul style="list-style-type: none"> Task Management | Daily | 19 Sheets |
| | <ul style="list-style-type: none"> Welfare Fraud Prevention & Investigation | Monthly | 4 Sheets |
| State & Management | | | |
| | Category | Number of Scheduled Reports | Number of On Request Reports |
| LRS and C-IV | <ul style="list-style-type: none"> Administrative | 2 | 2 |
| | <ul style="list-style-type: none"> Case Activity | 3 | 5 |
| | <ul style="list-style-type: none"> Employment Services | 0 | 1 |
| | <ul style="list-style-type: none"> Fiscal | 28 | 2 |
| | <ul style="list-style-type: none"> Resource Data Bank | 0 | 0 |
| | <ul style="list-style-type: none"> State | 26 | 0 |
| | <ul style="list-style-type: none"> Special Units | 0 | 5 |
| Release G (Migration Window: November 2020 – March 2021) In Production | | | |
| Dashboards | | | |
| C-IV | <ul style="list-style-type: none"> Call Log (In UAT) | Daily | 19 Sheets |
| | <ul style="list-style-type: none"> Semi Annual Reporting (In UAT) | Daily | 11 Sheets |
| | <ul style="list-style-type: none"> WPR and Engagement (In UAT) | Daily | 46 Sheets |
| LRS / C-IV | <ul style="list-style-type: none"> Reception Log (In Production) | Daily | 10 Sheets |
| State & Management | | | |
| | Category | Number of Scheduled Reports | Number of On Request Reports |
| LRS and C-IV | <ul style="list-style-type: none"> Administrative | 3 | 0 |
| | <ul style="list-style-type: none"> Case Activity | 4 | 3 |
| | <ul style="list-style-type: none"> Employment Services | 0 | 1 |
| | <ul style="list-style-type: none"> Fiscal | 33 | 1 |
| | <ul style="list-style-type: none"> State | 0 | 0 |
| | <ul style="list-style-type: none"> Special Units | 0 | 0 |
| | <ul style="list-style-type: none"> Resource Data Bank | 0 | 0 |
| | <ul style="list-style-type: none"> New Reports | 0 | 0 |
| Release H (Migration Window: February 2021 – June 2021) In Soft Launch | | | |
| Dashboards | | | |
| LRS | <ul style="list-style-type: none"> Caseload History | Monthly | 9 Sheets |
| | <ul style="list-style-type: none"> Alerts | Daily | 5 Sheets |
| | <ul style="list-style-type: none"> Alerts (CWS) | Daily | 3 Sheets |
| | <ul style="list-style-type: none"> Placement Vendor Exception Report (CWS) | Daily | 3 Sheets |
| | <ul style="list-style-type: none"> Work Order (CWS) | Daily | 6 Sheets |
| | <ul style="list-style-type: none"> Welfare to Work | Daily | 7 Sheets |

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| State & Management | | | |
|-----------------------------------------------------------------------------------|-----------------------|-----------------------------|------------------------------|
| | Category | Number of Scheduled Reports | Number of On Request Reports |
| LRS and C-IV | • Administrative | 0 | 14 |
| | • Case Activity | 0 | 8 |
| | • Employment Services | 0 | 11 |
| | • Fiscal | 2 | 20 |
| | • State | 5 | 0 |
| | • Special Units | 0 | 6 |
| | • Resource Data Bank | 0 | 2 |
| Release I (Migration Window: May 2021 – September 2021) In Design and Development | | | |
| Dashboards | | | |
| LRS | • Statistical Reports | Monthly | 79 Sheets |
| State & Management | | | |
| | Category | Number of Scheduled Reports | Number of On Request Reports |
| LRS | • Administrative | 11 | 1 |
| | • Case Activity | 19 | 5 |
| | • Employment Services | 3 | 0 |
| | • Fiscal | 28 | 5 |
| | • State | 2 | 0 |
| | • Special Units | 1 | 1 |
| Release J (Migration Window: September 2021 – January 2022) | | | |
| State & Management | | | |
| | Category | Number of Scheduled Reports | Number of On Request Reports |
| LRS | • Administrative | 4 | 3 |
| | • Case Activity | 14 | 1 |
| | • Employment Services | 7 | 0 |
| | • Fiscal | 36 | 1 |
| | • Resource Data Bank | 1 | 0 |
| | • Special Units | 5 | 3 |

Note:

- State & Management number of reports might change as per analysis with Application Development and other dependencies

5.3 Activities for the Next Reporting Period

- ▶ Cloud Analytics
 - Continue executing 40 County system test and end-to-end performance testing (review performance on the Elastic MapReduce (EMR) cluster as the team will have more defined overlap of reports and dashboards) on Golden Data Set (GDS) 6
 - Continue to support User Acceptance Test (UAT)
 - Continue identifying options for post cutover plan steps and review with Consortium
 - Release G
 - Complete testing of last C-IV dashboard - Workload Productivity Report (WPR) – in stage 2 (40 County data)
 - Release H
 - Support County validation testing
 - Release I
 - Continue development of release I reports and dashboards
 - Continue Glue POC post C-IV cutover

5.4 Deviations from Plan/Adjustments

- ▶ None for the reporting period

6.0 Application Development and Test

6.1 Highlights of the Reporting Period

6.1.1 Application Development Summary

Table 6.1.1-1 – CalSAWS Application Development Summary

| | Status | 21.11 | 22.01 | 22.02 | 22.03 | 22.05 | 22.06 | 22.07 | 22.09 | 22.11 | 23.01 |
|--------|----------------------|-----------|-----------|----------|-----------|-----------|----------|----------|----------|----------|----------|
| Design | New | 0 | 9 | 0 | 26 | 13 | 0 | 1 | 4 | 0 | 3 |
| | Design in Progress | 0 | 16 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Ready for Committee | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Committee Review | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Pending Approval | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Build | Approved | 0 | 1 | 0 | 1 | 2 | 1 | 1 | 1 | 1 | 1 |
| | In Development | 13 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Development Complete | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | In Assembly Test | 15 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Test | System Test | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Test Complete | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | In Production | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Grand Total | 30 | 29 | 0 | 32 | 15 | 1 | 2 | 5 | 1 | 4 |

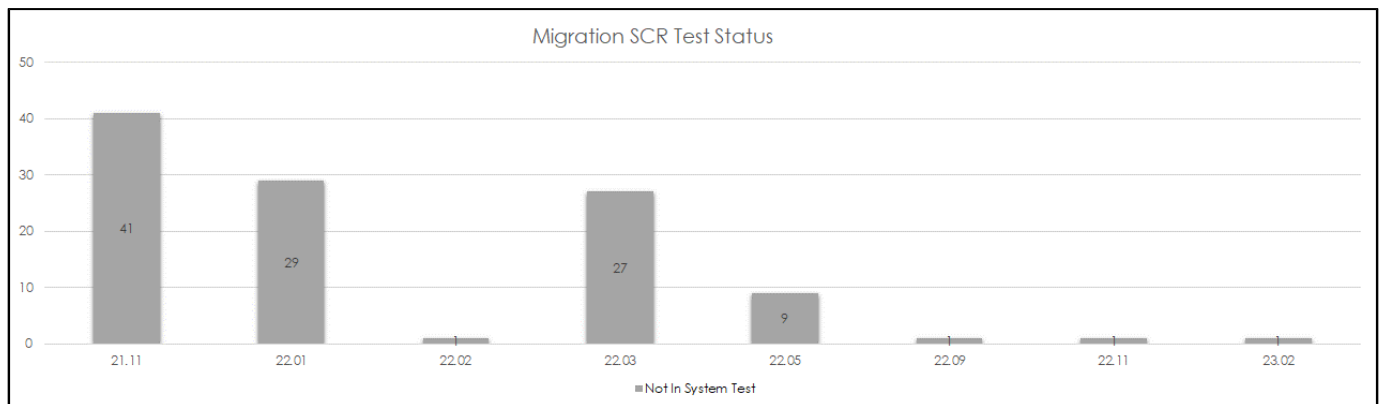
| | |
|-----------------------|-----|
| SCRs in Production | 738 |
| SCRs with Release TBD | 1 |

Notes:

- This table includes Application Development SCRs with migration impact. SCRs in Production represents a count of any SCR that have a project phase of migration and have been deployed to production. SCRs with Release to be determined includes any migration impact SCR where the fix version is "TBD"

6.1.2 DDID System Test Status

Figure 6.1.2-1 – DDID System Test Status



Notes:

- Includes all SCRs that have a Funding Source of CalSAWS DD&I that are not in Rejected or Pending Rejection status and are targeted for a baseline release. This includes SCRs associated to DDID 1967 for the unforeseen allowance and DDID 1631 for the reports allowance. In Production includes In Production statuses; Test Complete includes Test Complete; System Test includes System Test status; Not in System Test includes all SCR statuses prior to System Test delivery
- Counts are higher in this chart (as compared with Design and Build Status) due to the inclusion of all CalSAWS DD&I SCRs targeted for the release, such as DD&I Training and Technical SCRs

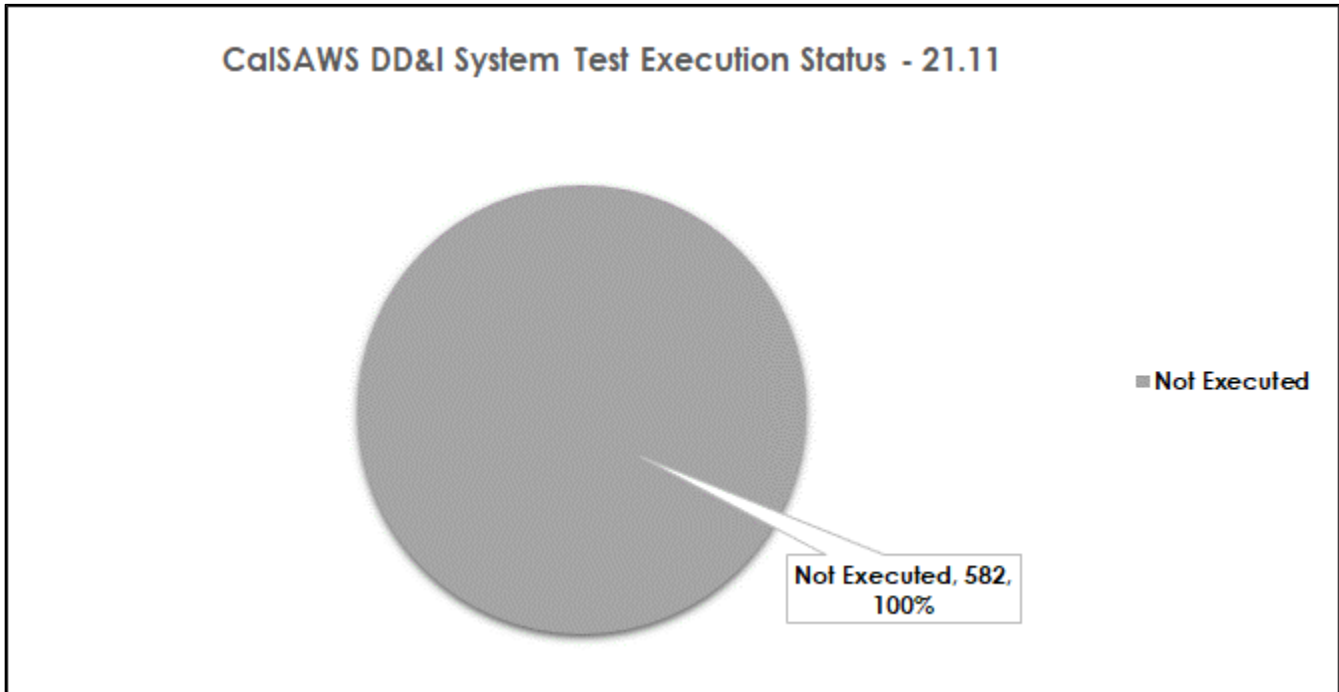
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Table 6.1.2-1 – DDID System Test Status

| | |
|----------------------------------------------|-----------|
| Pass Rate Target as of August 20, 2021 | 0% |
| Pass Rate Actual as of August 20, 2021 | 0% |
| System Test Complete Date: November 19, 2021 | |



Note:

- Test Script counts are subject to change as test scripts are added or removed throughout the execution phase. Includes testing execution for all CalSAWS DD&I Test Scripts in the release

- ▶ Continued drafting designs and development activities for DDIDs. Status is provided in Figure 6.1.1-1 (CalSAWS DDID Design Status) above
- ▶ Continued test preparation for Release 21.11. Status is provided in Figure 6.1.2-1 (CalSAWS DDID System Test Execution Status) above

6.1.3 Non-State Forms (NSF):

- ▶ State form translations
 - The following table shows status of State form translation SCRs
 - CA-215171 – GEN 202: In System Test
 - CA-215077 – CW 105: Waiting for State translations

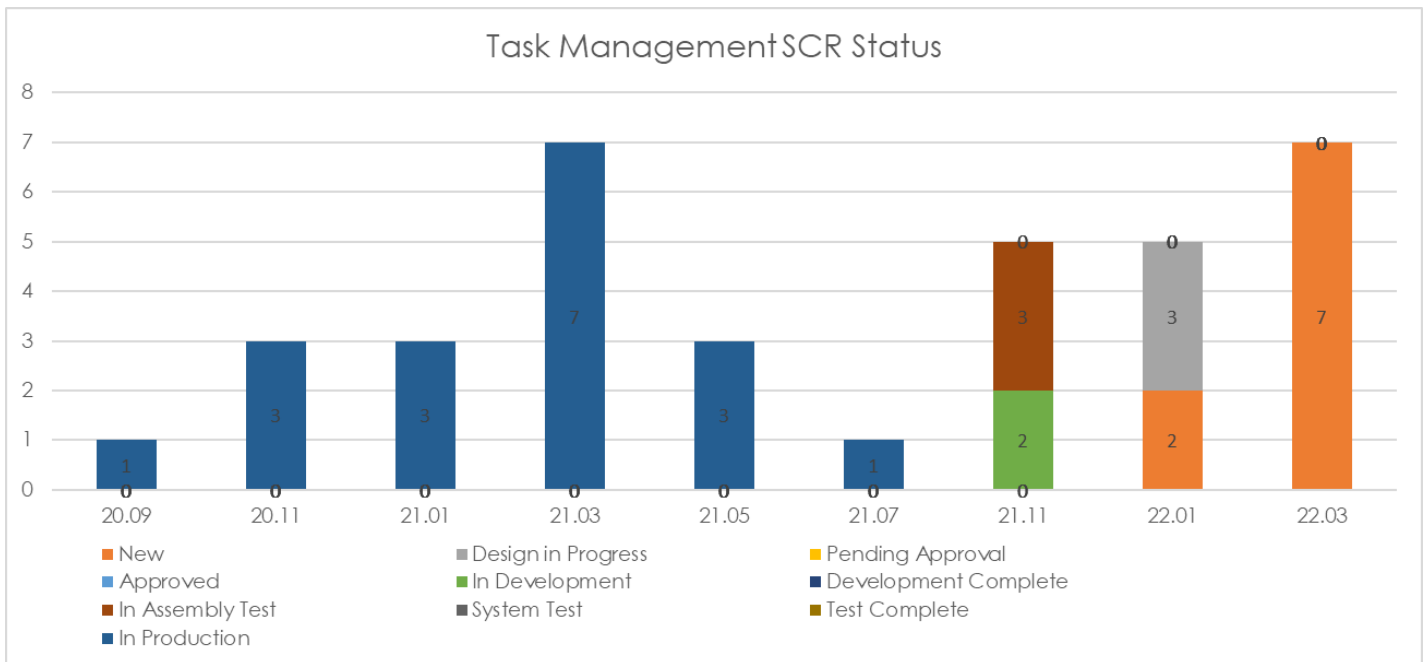
Table 6.1.3-1 – State form translation SCRs

| STATE FORMS – TRANSLATION SCRs | FORM COUNT |
|--------------------------------|------------|
| In Design | 1 |
| In Development | 0 |
| In Test | 1 |
| Test Complete | 0 |
| In Production | 33 |
| Grand Total | 35 |

6.1.4 Task Management

- ▶ Continued to meet with Consortium Business Analysts and Quality Assurance team (QA) to develop designs for the 22.01 release
 - CA-214912 DDID 2246, 2240
 - CA-214916 DDID 2252
 - CA-214905 DDID 2230

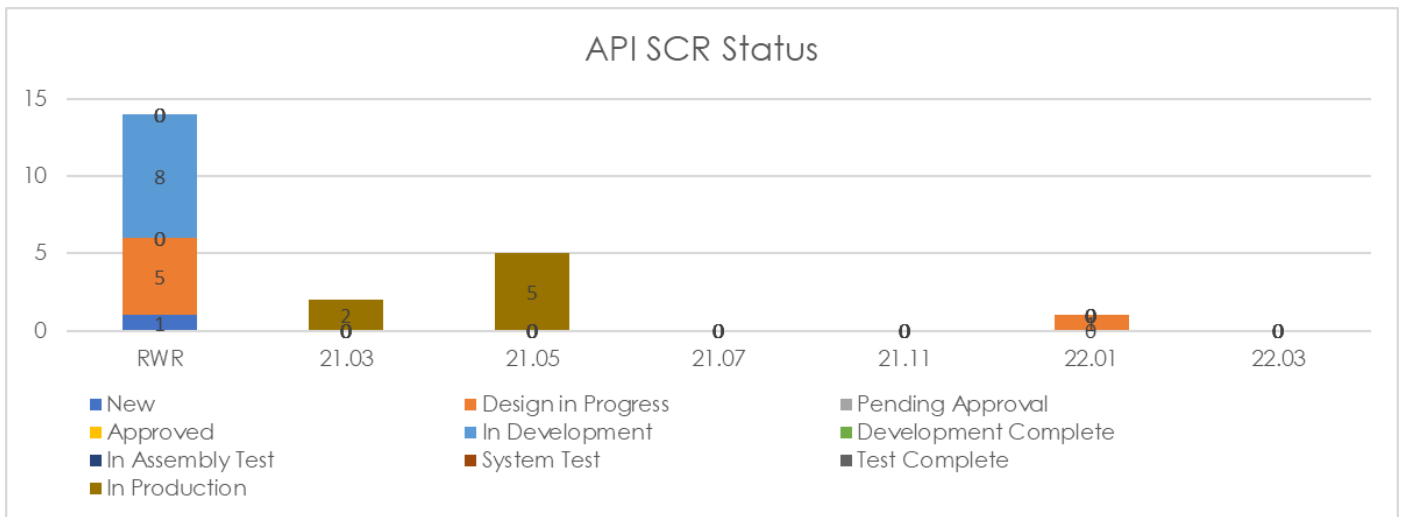
Figure 6.1.4-1 – Task Management DDID Status



6.1.5 Application Programming Interface (API)

- ▶ Continued meeting with Consortium Business Analysts and the Quality Assurance (QA) team to develop designs
 - CA-214758 DDID 2355
 - CA-214756 DDID 2353
 - CA-214754 DDID 2351
 - CA-214747 DDID 2344

Figure 6.1.5-1 – API DDID Status



6.1.6 GA/GR

► General:

- o Provided the weekly status update to Consortium on August 17, 2021
- o Discussed the GA GR Correspondence deliverables and design clarifications on August 17, 2021, and August 19, 2021
- o Discussed the GA GR Correspondence web service design clarifications on August 18, 2021, and August 20, 2021
- o Reviewed with BAs on Thursday 8/19/2021 the following
 - Initial draft Design of SCR CA-215671 DDID 2319 FDS: GA GR - Group 3 Forms
 - Content Revision of CA-215916 - Batch 2 Income Rules, NOA Reasons
 - Content Revision of CA-229418 - Group 2 Forms
- o Continued with development of 21.11 SCRs
 - CA-225943 – DDID 2319 FDS: GA GR - API Correspondence Service
 - CA-215914 – DDID 2313 FDS: GA GR Employment Services – Phase 2
 - CA-215688 – DDID 2686 FDS: Phase 4 - GA GR - API – Emulator
 - CA-224578 – DDID 2686/2314 FDS: GA GR Phase 2 Batch 3 (3 Rules) - Income Rules and Corresponding NOA Reasons
 - CA-226400 – Phase 2 Non-Financial, Income Additional Changes - Correspondence from EDBC
 - CA-229071 – Phase 2 Non-Financial, Income EDBC Additional Changes - EDBC Display Reason
- o Began assembly testing activities for the following SCRs:
 - CA-215670 – Group 1 Forms
 - CA-228982 – Phase 1 Batch 2 (9 Rules) SFU Rules, NOA Reasons
 - CA-215926 - Phase 1 Batch 3 (11 Rules) Non-Financial Rules, NOA Reasons
 - CA-215916 - Phase 2 Batch 1 Income Rules, NOA Reasons
 - CA-215672 - Phase 2 Batch 2 Income Rules, NOA Reasons
 - CA-215920 – DDID 2314/2319 FDS: GA GR NOA/Form Generations from EDBC Phase 1
 - CA-215927 – DDID 2314b, DDID 2321 FDS: GA GR Fiscal Changes

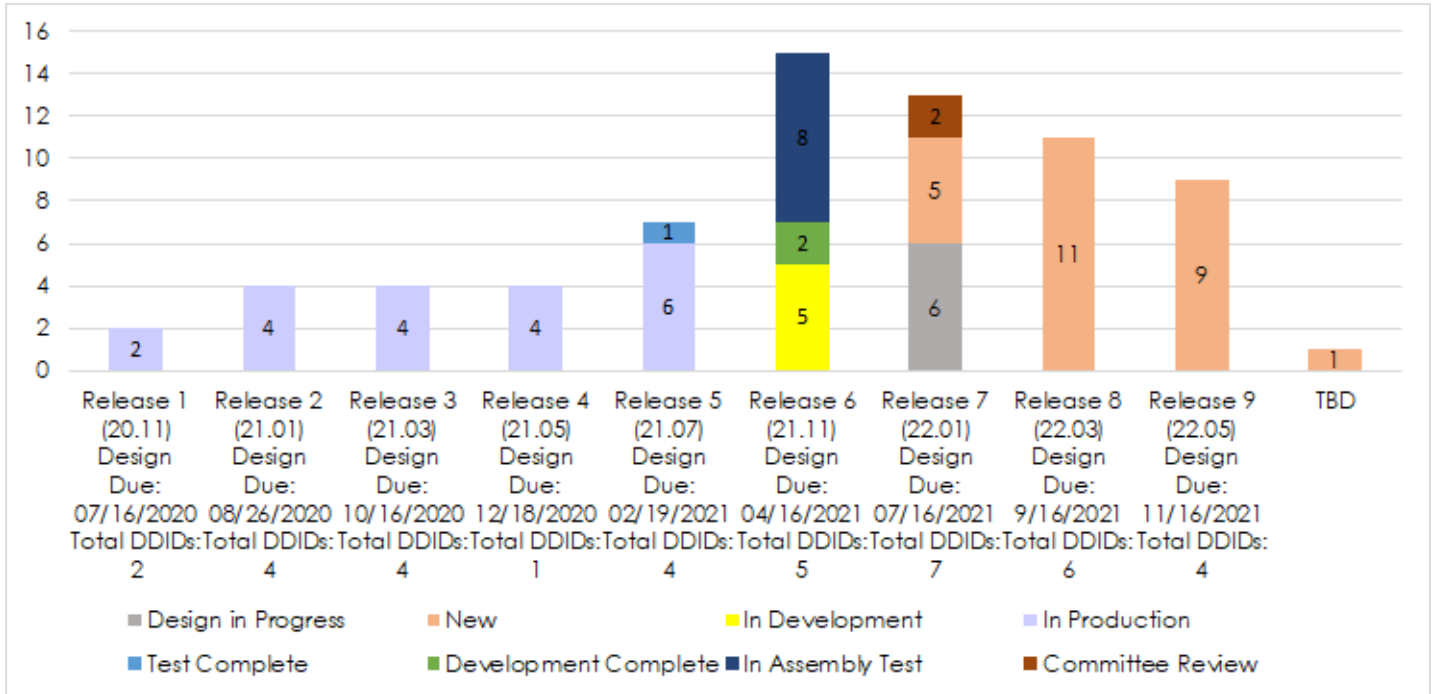
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- o Continued Automated System test scripting of phase 1 batch 2 SCR CA-228982 and phase 1 - Batch 3 CA-215926
- o Began 22.01 designs
 - CA-215678 - DDID 2375 FDS: GA GR Splitting grant into Multiple Warrants
 - CA-215673 – DDID 2323 FDS: GA GR - GR recoverable offset batch
 - CA-215917 – DDID 2314 FDS: GA GR Rules Phase 3 - Resource, Reporting Rules and corresponding NOA Reasons, MU triggers

Figure 6.1.6-1 – GA/GR DDID Status



► CalWIN Correspondence Track:

Figure 6.1.6-2 – GA/GR Correspondence

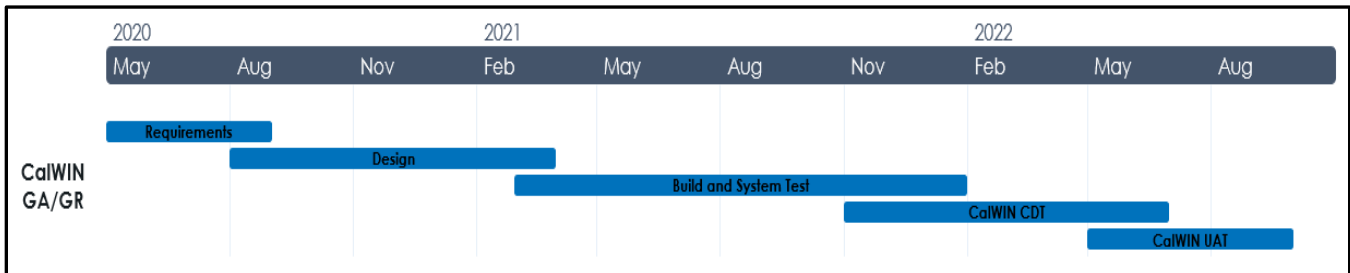
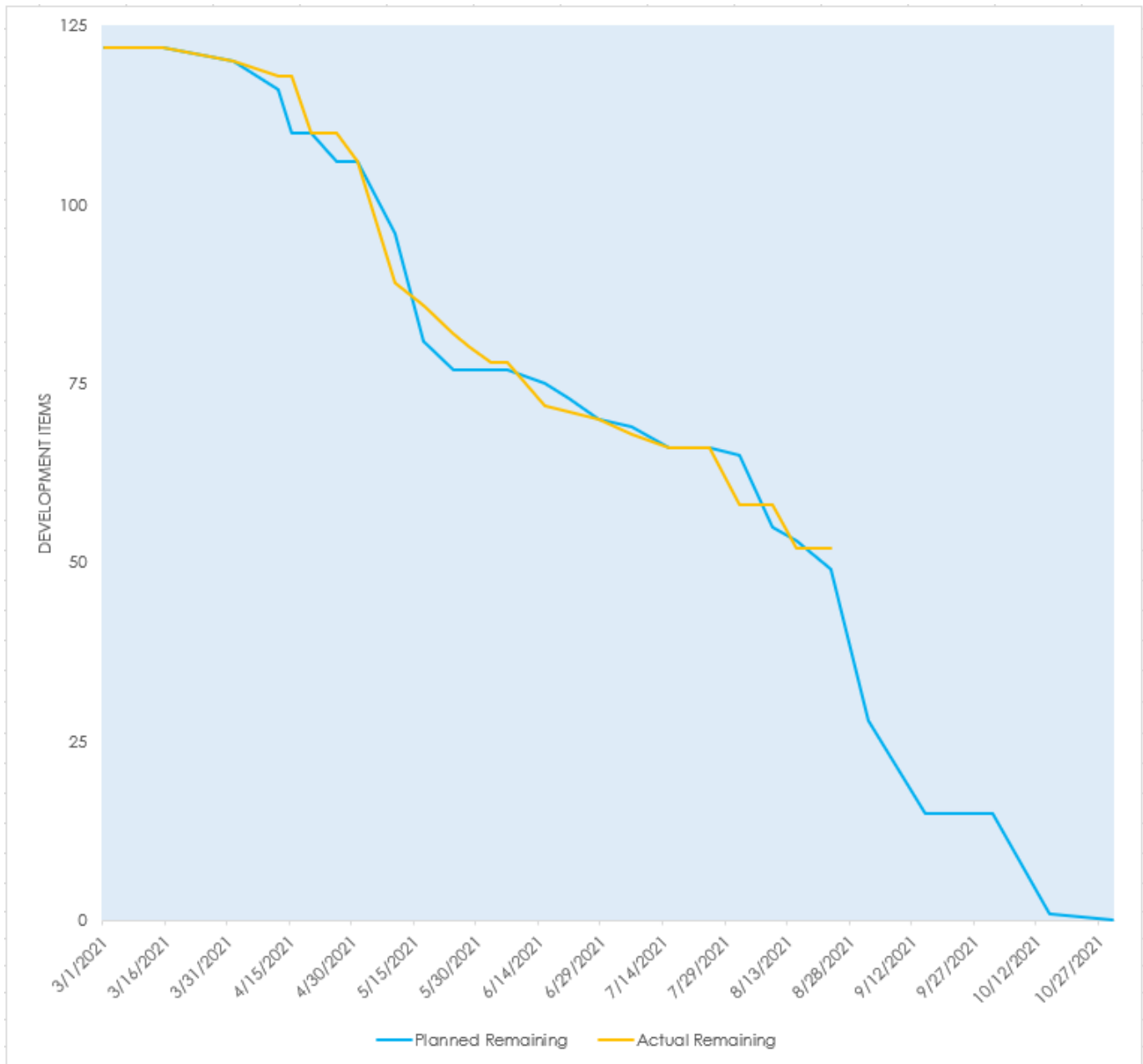


Figure 6.1.6-3 – CalWIN GA/GR Correspondence Development



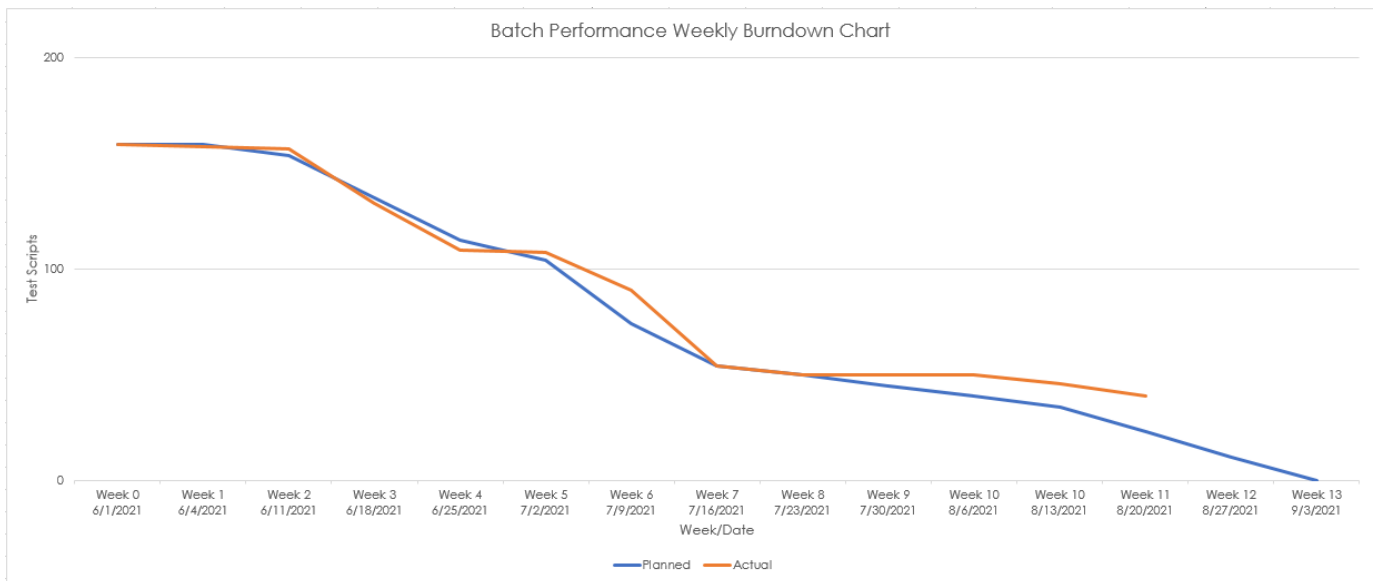
6.1.7 CalSAWS Portal Integration

- ▶ Continued supporting BenefitsCal System Integration Test (SIT) activities and User Acceptance Testing (UAT) activities
 - Continued reviewing findings and resolving defects
- ▶ Participated in weekly calls with Code for America to discuss API integration

6.1.8 Batch Performance Test

- ▶ Opened Performance defects to track batch processes that have been identified for performance analysis. Of the 26 remaining open defects, 3 are in development, 18 are in the testing phase, and the remainder are still being researched
- ▶ Executed Performance tests
 - Executed first business day batch cycle
 - Executed high volume forms batch cycle
- ▶ Upcoming Performance test plan for the week of August 23, 2021
 - Execute 10-Day Eligibility Determination Benefit Calculation (EDBC) batch cycle
 - Execute main payroll batch cycle

Figure 6.1.8-1 – Batch Performance Burndown Chart



6.1.9 Central Print

- ▶ Reviewed the central print cutover checklist and provided feedback to the Gainwell team
- ▶ The following SCRs are targeted for deployment on August 27, 2021:
 - CA-218205 - Turn on GEN 1365 indicator – In System Test
 - CA-226573 - Cutover Activities for new Central Print vendor – In System Test

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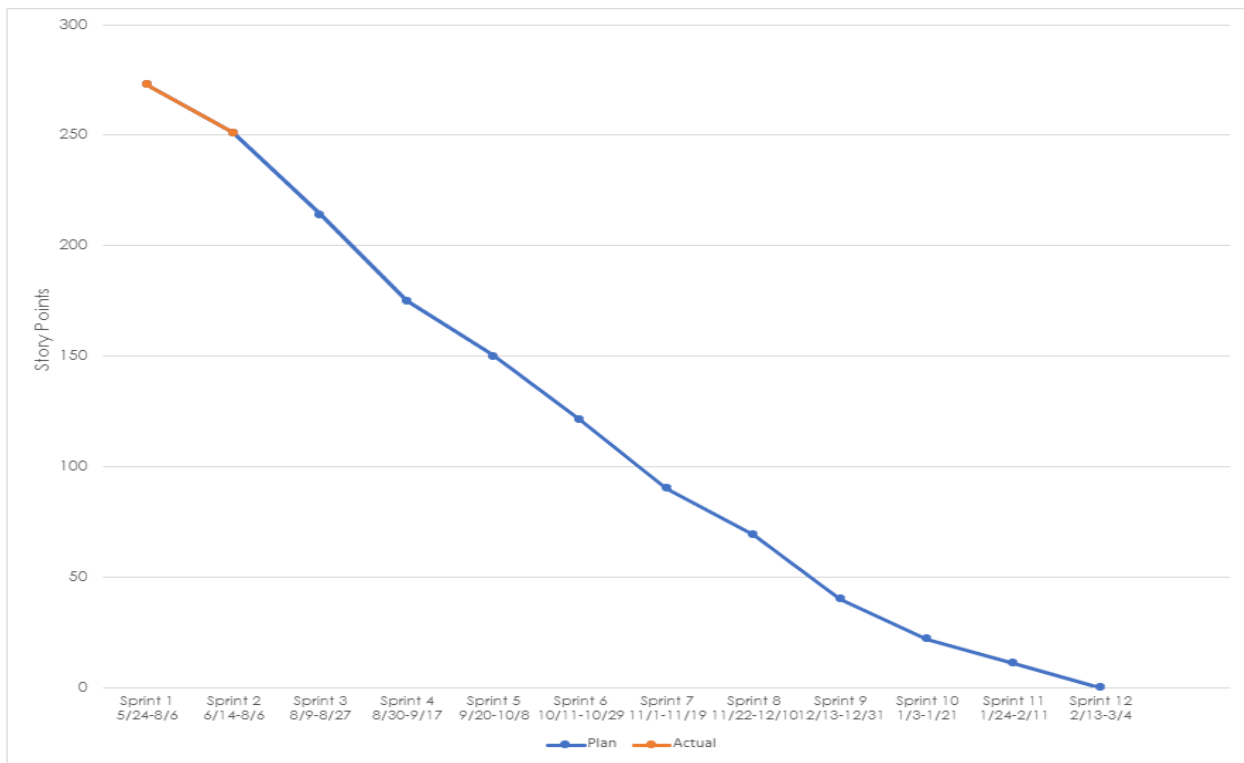
Weekly Status Report Period: August 16, 2021 to August 22, 2021

6.1.10 Case Purge

In July 2020, a team was formed to design, build, test, and deploy a Case Purge solution for the C-IV and LRS/CalSAWS Systems. This Purge functionality is based on the records retention policy approved by the CalSAWS Project Steering Committee in September 2019. The Purge team is using the Agile methodology for this effort and will be deploying functionality to Production at the conclusion of each Sprint. This team is operating independently of the existing Design, Application Development, Training, and Test teams

- ▶ Continued Sprint 3 of CalSAWS Porting Epic, which includes the following:
 - Refactored Batch logging and Deletion Model
 - Added new EDBC/Recovery Account Rule to Sweep Jobs
 - Created new status for LDS Cases loaded into Case Purge table

Figure 6.1.10-1 – CalSAWS Case Purge Burndown Chart



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Table 6.1.10-1 – Planned Purge Sprints

| | |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sprint 1 | Case Identification, Case Purge Table updates, Data Removal Detail page PDFs, S3 Storage, Translate LDS Flat File into Oracle Database |
| Sprint 2 | Case Exception logging, Case Deletion Batch, Deletion Tables, Complete Data Mapping for LDS |
| Sprint 3 | Refactor Batch logging, Refactor Deletion Model, add new EDBC/RA Rule to Sweep Jobs, Load County-level Flat file into Oracle, create new Status for LDS Cases loaded into Case Purge table |
| Sprint 4 | Case Deletion logging, Purge Status, Deletion Table Names, Image Removal, Re-Verification Batch, Create LDS Issuance/Journal History PDFs, Transform LDS Data from Temp to Destination Tables Group 1 |
| Sprint 5 | Deletion Batch process for PGM_DETL and Child Tables, add new CalHEER's related tables, Migrate Transformed LDS Data from Temp to Destination Tables Group 2 |
| Sprint 6 | Case Data Removal Identification/Override Reports, Document Removal Process to S3, County Test for LDS Case Data Load |
| Sprint 7 | Image Removal process, Re-Verification logic, YBN e-app logic to block transfers, History PDF |
| Sprint 8 | Time Limit Aid Summary and Detail page, Data Removal Completion Report |
| Sprint 9 | Research Case Lock, Update PDF Parsing logic |
| Sprint 10 | Disaster Recovery Document Deletion, OBIEE/EDR Cleanup for Delete Track, Create Case Lock, VLP |
| Sprint 11 | Performance Environment Preparation & Execution |
| Sprint 12 | Batch Scheduling, Case Purge Transition |

6.1.11 Deliverable Management

Table 6.1.11-1 – Deliverable Status for Current Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

6.2 Activities for the Next Reporting Period

- ▶ Continue drafting designs for Migration Impact SCRs
- ▶ Continue test preparation for CalSAWS 21.11 Release

Deliverable Management

Table 6.2-1 – Deliverable Status for Next Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

6.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

7.0 Conversion

7.1 Highlights of the Reporting Period

7.1.1 C-IV Conversion

- ▶ Golden Data Set (GDS) 7 Conversion Run:
 - Completed triage of Conversion automated test suite outcomes
 - Completed execution of manual test scenarios
- ▶ Continued User Acceptance Testing (UAT) execution support
- ▶ Continued development of post conversion transformation scripts

7.1.2 CalWIN Conversion:

- ▶ Data Model (DM) 21.07 Epic
 - Began Sprint 2 with focus on defect resolution and backlog re-baseline
- ▶ CalWIN Conversion Golden Data Set (CW GDS)
 - Completed set up of Con15 and Con3 environments (baseline target C-IV GDS#7 21.07 release and Source R65)
 - Began Wave 1 execution

Table 7.1.2-1 – CalWIN Conversion Statistics 21.07 (July 2021 - August 2021)

| 21.07 | | | | | | | | | | | | |
|---------------------|------------------------|-----------------|-----------|---------------------------------------------|--------------------------------|-----------------------------|-------------------|--------------|---------|---------------------|------|----------|
| Sprint | Total - Deferred Items | Sprint Duration | | Item Status | | | | | | | | |
| | | | | 0% | 25% | 30% | 50% | 75% | 5% | 100% | 100% | 0% |
| | | | | Not Started | Analysis & Mapping in Progress | Ready for Consortium Review | Build In Progress | Ready for AT | On Hold | Completed (Tested)* | CNR | Deferred |
| Overall | 149 | 7/26/2021 | 8/13/2021 | 58 | 5 | 0 | 3 | 3 | 0 | 80 | 0 | 0 |
| Planning | | 7/19/2021 | 7/23/2021 | Identified Database changes for 21.07 GDS#1 | | | | | | | | |
| Data Model Sprint 1 | 56 | 7/26/2021 | 8/13/2021 | 0 | 0 | 0 | 0 | 0 | 0 | 56 | 0 | 0 |
| EDBC Match Sprint 5 | 23 | 7/26/2021 | 8/13/2021 | 0 | 0 | 0 | 0 | 0 | 0 | 23 | 0 | 0 |
| Data Model Sprint 2 | 17 | 8/16/2021 | 9/3/2021 | 14 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| EDBC Match Sprint 6 | 53 | 8/16/2021 | 9/3/2021 | 44 | 2 | 0 | 3 | 3 | 0 | 1 | 0 | 0 |

- ▶ Continued CalWIN Conversion System Test Development (Epic) which is approximately 68% complete and on schedule to complete development by the end of October 2021
 - Completed development of the Eligibility Determination Benefit Calculation (EDBC) Functional Area scenarios
 - Continued development of the Special Units Functional Area scenarios
 - Continued development of the Fiscal Functional Area scenarios

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Table 7.1.2-2 – CalWIN System Test Development Status

| Functional Area | System Test | Total | Start | Finish | Not Started | In Progress | On Hold | Completed | % Completed | Planned Completed |
|------------------|----------------|------------|------------------|-------------------|-------------|-------------|----------|------------|-------------|-------------------|
| Overall | Overall | 302 | 3/22/2021 | 10/29/2021 | 90 | 1 | 5 | 204 | 68% | 66% |
| Online | Queries | 46 | 3/22/2021 | 4/23/2021 | 0 | 0 | 0 | 46 | 100% | 100% |
| Online | Scenarios | 46 | 3/29/2021 | 4/30/2021 | 0 | 0 | 3 | 43 | 93% | 100% |
| EDBC | Queries | 20 | 5/3/2021 | 6/4/2021 | 0 | 0 | 0 | 20 | 100% | 100% |
| EDBC | Scenarios | 20 | 5/3/2021 | 6/4/2021 | 0 | 0 | 0 | 20 | 90% | 100% |
| Special Units | Queries | 25 | 6/7/2021 | 7/9/2021 | 0 | 0 | 0 | 25 | 100% | 100% |
| Special Units | Scenario | 25 | 6/7/2021 | 7/9/2021 | 0 | 0 | 2 | 23 | 100% | 100% |
| Fiscal | Queries | 21 | 7/12/2021 | 8/13/2021 | 0 | 1 | 0 | 20 | 95% | 68% |
| Fiscal | Scenario | 21 | 7/12/2021 | 8/13/2021 | 14 | 0 | 0 | 7 | 33% | 68% |
| Batch/Interfaces | Queries | 38 | 8/16/2021 | 9/30/2021 | 38 | 0 | 0 | 0 | 0% | 0% |
| Batch/Interfaces | Scenario | 38 | 8/16/2021 | 9/30/2021 | 38 | 0 | 0 | 0 | 0% | 0% |

7.1.3 Gainwell Technologies

- ▶ CalWIN Data Migration (Gainwell Technologies)
 - Continued working with the Conversion teams to plan future data delivery milestones
 - Continued to meet with the document migration team and assess document migration processes and needs for Converted Data Testing (CDT)
 - Continued discussions on additional data points to be included for shell cases to align with the C-IV shell cases
- ▶ CalWIN Data Retention M&O (Gainwell Technologies)
 - Data Retention limited process run successfully for all 18 Counties on August 22, 2021
 - Process updates records in the back end based on County activity of reopening cases previously not retained
 - Continued planning for future data retention to begin November 2021

7.1.4 Ancillary Systems Conversion:

- ▶ Continued to make data mapping and transformation progress
- ▶ Continued to make progress addressing issues found in Production Dataset Size files. These files are necessary for CalWIN Core Conversion orchestration and integrations
- ▶ Received all Counties' files for Golden Data Set (GDS) 1
 - Followed up with Counties to address issues found within the files

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Table 7.1.4-1 – Ancillary Status by Functional Area

| PHASE | COLLECTIONS | FRAUD | TASK MANAGEMENT |
|-----------------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Data Mapping | 12 Counties Data Mapping completed and 2 In-progress (as they iterate through Mapping and Transformation) | 4 Counties Data Mapping Completed, 1 is In-progress (as the County iterates through Mapping and Transformation) | All 8 Counties Data Mapping Completed |
| Transformation | 4 Counties Data build and 4 In-progress. All Counties have successfully submitted production sized files for GDS1 | 4 Counties Data Mapping Completed, 1 is In-progress. All Counties have successfully submitted production sized files for GDS1 | All 8 County is build completed. All Counties have successfully submitted production sized files for GDS1 |
| Risk or Issues | None | | |

Table 7.1.4-2 – County Status by Ancillary System

| COUNTY | COLLECTIONS | FRAUD | TASK MANAGEMENT |
|---------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------|----------------------------------------------------------------------|
| Contra Costa | Design completed and build in-progress Received production sized files | N/A | N/A |
| Placer | Design and build completed Received production sized files | Design and build completed Received production sized files | Design and build completed Received production sized files |
| Yolo | Design and build completed Received production sized files | N/A | N/A |
| Santa Clara | N/A | N/A | Design and build completed Received Production Sized Files |
| Tulare | Design and build completed Received production sized files | N/A | N/A |
| Orange | Design and build completed Received production sized files | Design and build completed Received production sized files | Design and build completed Received production sized files |
| Santa Barbara | N/A | N/A | Design and build completed Received production sized files |

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| COUNTY | COLLECTIONS | FRAUD | TASK MANAGEMENT |
|-----------------|----------------------------------------------------------------------------------|------------------------------------------------------------------------|------------------------------------------------------------------------|
| Ventura | Design and build completed Received production sized files | N/A | N/A |
| San Mateo | Design and build completed Received production sized files | N/A | Design and build completed Received production sized files |
| Santa Cruz | Design and build completed Received production sized files | N/A | Design and build in-progress Received production sized files |
| Solano | Design and build completed Received production sized files | N/A | N/A |
| Alameda | Design and build in-progress Received production sized files | Design and build in-progress Received production sized files | N/A |
| Fresno | Design completed and build in-progress Received production sized files | N/A | N/A |
| Sonoma | Design and build completed Received production sized files | N/A | Design and build completed Received production sized files |
| Sacramento | N/A | Design and build completed Received production sized files | Design and build completed Received production sized files |
| San Francisco | Design and build completed Received production sized files | N/A | N/A |
| San Luis Obispo | Design and build completed Received production sized files | Design and build completed Received production sized files | N/A |

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Figure 7.1.4-3– Ancillary Systems Conversion Gantt Chart

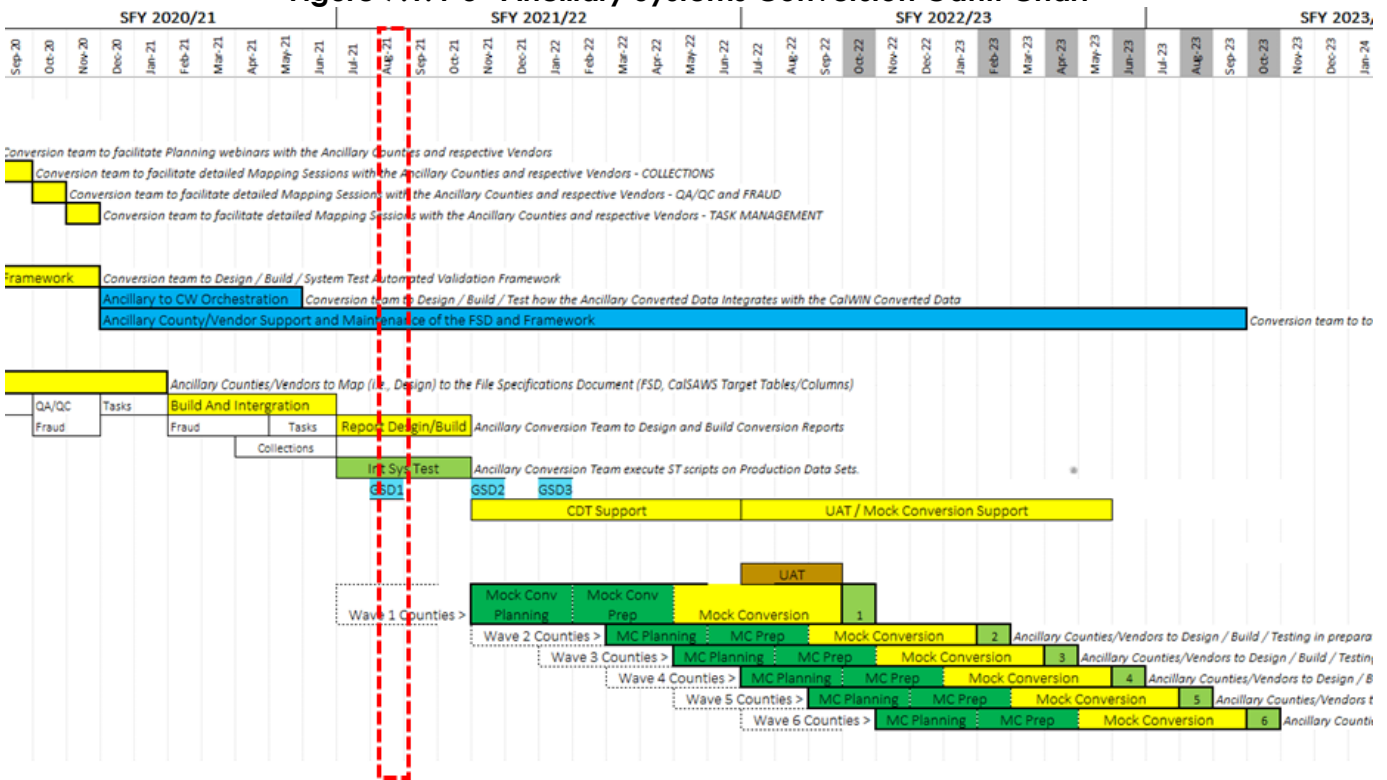


Table 7.1.4-4 – Ancillary Systems Conversion Milestones

| FINISH | MILESTONE | MILESTONE DESCRIPTION | STATUS |
|---------------|-------------------------------------|---------------------------------------------------------------------------------------------------------|-------------|
| July 2020 | Project Kick-Off/Discovery Sessions | Team introductions and Project overview | Completed |
| August 2020 | File Specification Document (FSD) | CalSAWS DB (structures) as Conversion Target | Completed |
| August 2020 | Project Planning | Detailed walkthrough of the Project schedule and File Specification Document (FSD) | Completed |
| December 2020 | Automation Framework Complete | Exception handling for Ancillary provided Data is ready for the Counties | Completed |
| February 2021 | Design/Mapping Complete | All CalSAWS DB Targets (defined in FSD) have Source Mappings from Ancillary | Completed |
| July 2021 | Build Complete | Development activities dependent Design Mapping are ready to Start (or are Complete) | Completed |
| January 2022 | System Test Complete | System Test execution dependent on test scripts and Build Complete are ready to Start (or are Complete) | Not started |

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| FINISH | MILESTONE | MILESTONE DESCRIPTION | STATUS |
|--------------|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-------------|
| April 2022 | Integration Test Complete | End-to-End Test execution dependent on test scripts and System Test Complete are ready to Start (or are Complete) | Not started |
| August 2023 | Mock Conversion Ancillary System Data Delivered | Counties to delivery Ancillary System Data to the CalSAWS Conversion team as a Pre-Requisite to begin Mock Conversions | Not started |
| August 2023 | Wave 1 – 6 Mock Conversions | Simulated Cutover Activities dependent on Integration Test Complete are ready to Start (or are Complete) | Not started |
| August 2023 | Wave 1 – 6 Mock Conversions Data Validation | Validation of Data (from Mock Conversion) are ready to Start (or are Complete) | Not started |
| October 2023 | Wave 1 – 6 Conversion Cutovers | Execution of (live) Cutover Activities are ready to Start (or are Complete) | Not started |

Deliverable Management

Table 7.1.4-5 – Conversion Deliverable Status for Current Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

7.2 Activities for the Next Reporting Period

7.2.1 C-IV Conversion:

- ▶ Continue development of post conversion transformation scripts
- ▶ Continue to User Acceptance Testing (UAT)
- ▶ Prepare and execute C-IV CalSAWS Conversion Part 1A County preparation

7.2.2 CalWIN Conversion:

- ▶ Continue CalWIN Golden Data Set (GDS) 1
 - Complete wave 1
 - Begin wave 2
 - Anticipate completion October 15, 2021
- ▶ Continue EDBC match defect resolutions Sprint 6
 - Continue to review results from the Eligibility Determination Benefit Calculation (EDBC) Match Batch execution
- ▶ Continue Data Model epic 21.07 Sprint 2
 - Sprint will focus on backlog re-baselining and prioritization for GDS 2
- ▶ Continue system test scenario development
- ▶ Continue converted data delivery planning activities

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7.2.3 Gainwell Technologies

- ▶ CalWIN Data Migration (Gainwell Technologies)
 - Continue documentation with CalSAWS on extraction plans around shell cases
 - Continue planning for future CalWIN extractions
- ▶ CalWIN Data Retention M&O (Gainwell Technologies)
 - Continue planning for future data retention runs

7.2.4 Ancillary Systems Conversion:

- ▶ Continue ongoing support for mapping and data extract activities on Ancillary Collections, Fraud and Task Management
- ▶ Continue to update the Ancillary Systems file specifications documents (as needed)
- ▶ Continue to update the Ancillary Systems Conversion Plan work product (as needed)

7.2.5 Deliverable Management

Table 7.2.5-1 – Conversion Deliverable Status for Next Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

7.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

8.0 Training

8.1 Highlights of the Reporting Period

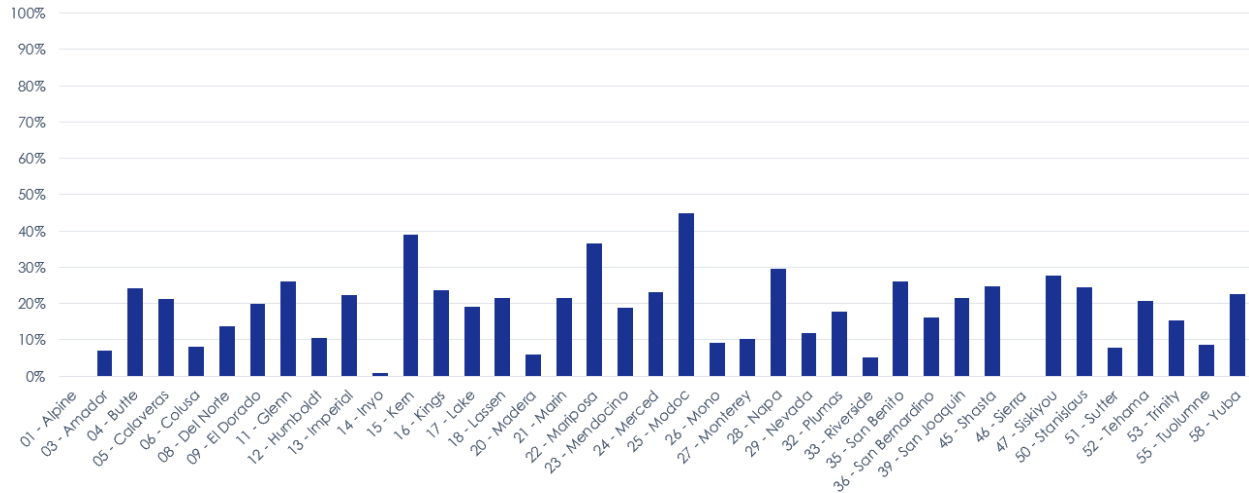
- ▶ Hosted weekly Training Touchpoint meeting on August 16, 2021
- ▶ Completed final bulk user load to ForgeRock Production of remaining active C-IV users per Change Request #CHG0031235
- ▶ Completed design of Learning Management System (LMS) automated/scheduled daily reports and weekly County Training Summary/Executive view Reports
- ▶ Delivered monthly Training slide deck for monthly training status updates
- ▶ Finalized the County Training Coordinator Guide
- ▶ Training Environments
 - Continued to work cross-team to troubleshoot CalSAWS Training Staging Tickets
- ▶ Supported the Consortium Training team with Early Training Sessions during the week of August 16-20, 2021
- ▶ Learning Management System (LMS)
 - Distributed CalSAWS Informational Transmittal (CIT) for LMS access guide version 4 for General Training
 - Delivered CIT for the distribution of the LMS Registration Report
 - Distributed LMS Registration Report to each County Training Coordinator, PPOC, IPOCs and Regional Managers
 - Provided Consortium Help Desk and Consortium Training Incident Resolution Guide
- ▶ Continue to assist the BenefitsCal training team on LMS admin functions/configuration
- ▶ Imaging
 - Hosted Imaging Train-the-SME (ITTSME) for C-IV Counties on August 16, 2021, August 17, 2021, August 18, 2021, and August 19, 2021
 - Attended Early Training Open Session on August 20, 2021
 - Completed case set-up in Training Production environment for August 23-26, 2021 ITTSME sessions
 - Sent ITTSME materials to Week 3 participants
 - Generated ITTSME reports for Week 2 and sent to C-IV County Regional Managers

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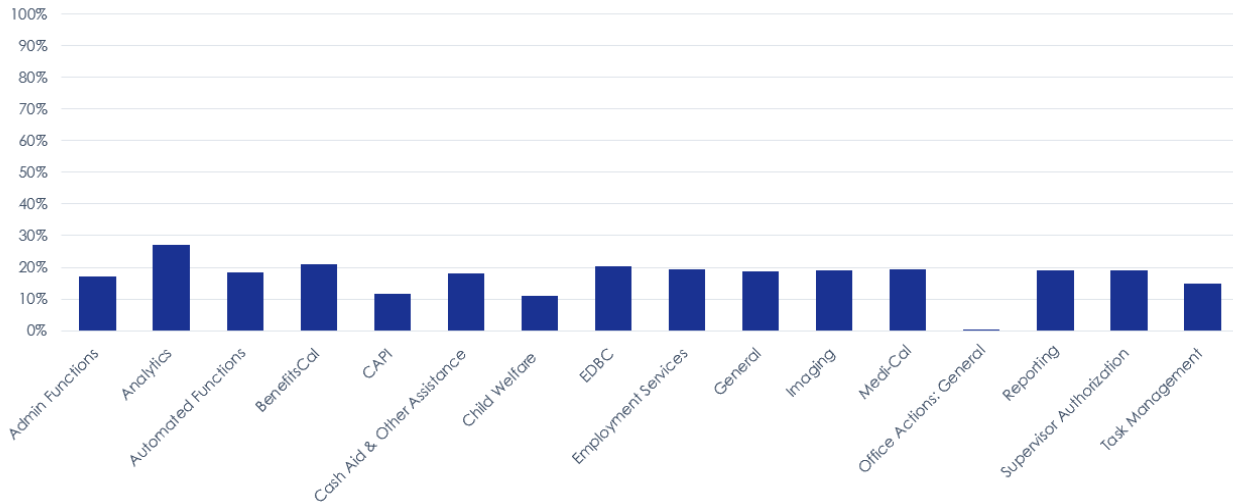
Table 8.1-1 Training Completion Rate by County



Notes:

- Some Counties opted out of participating in Early Training
- % Completion represents completion of required training by staff within a specific County

Table 8.1-2 Training Completion Rate by Curriculum



Notes:

- % Completion represents completion of required training by curriculum by staff across all Counties

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Table 8.1-3 Early Training ServiceNow Tickets by Incident Type and Status

| INCIDENT TYPES BY STATUS | STATUS | | | |
|-------------------------------------|--------------------------------------|-------------------------------------------|------------|-----------------|
| | IN PROGRESS – PENDING PROJECT REVIEW | IN PROGRESS – PENDING COUNTY CONFIRMATION | RESOLVED | TOTAL INCIDENTS |
| County Training Coordinator Support | 3 | 0 | 0 | 3 |
| ForgeRock Inactive Account | 1 | 0 | 47 | 48 |
| ForgeRock Locked Account | 0 | 0 | 5 | 5 |
| ForgeRock Merge Issue | 0 | 0 | 1 | 1 |
| ForgeRock Password Reset | 0 | 0 | 37 | 37 |
| ForgeRock Server Error | 0 | 0 | 12 | 12 |
| LMS WBT Issue | 4 | 2 | 61 | 67 |
| Login Issues | 1 | 1 | 317 | 319 |
| New Employee Access Request | 2 | 0 | 0 | 2 |
| Questions | 0 | 2 | 3 | 5 |
| Sandbox Issue | 0 | 0 | 6 | 6 |
| Total Incidents * | 11 | 5 | 489 | 505 |

Note:

* Total Incidents show incidents as of July 16, 2021

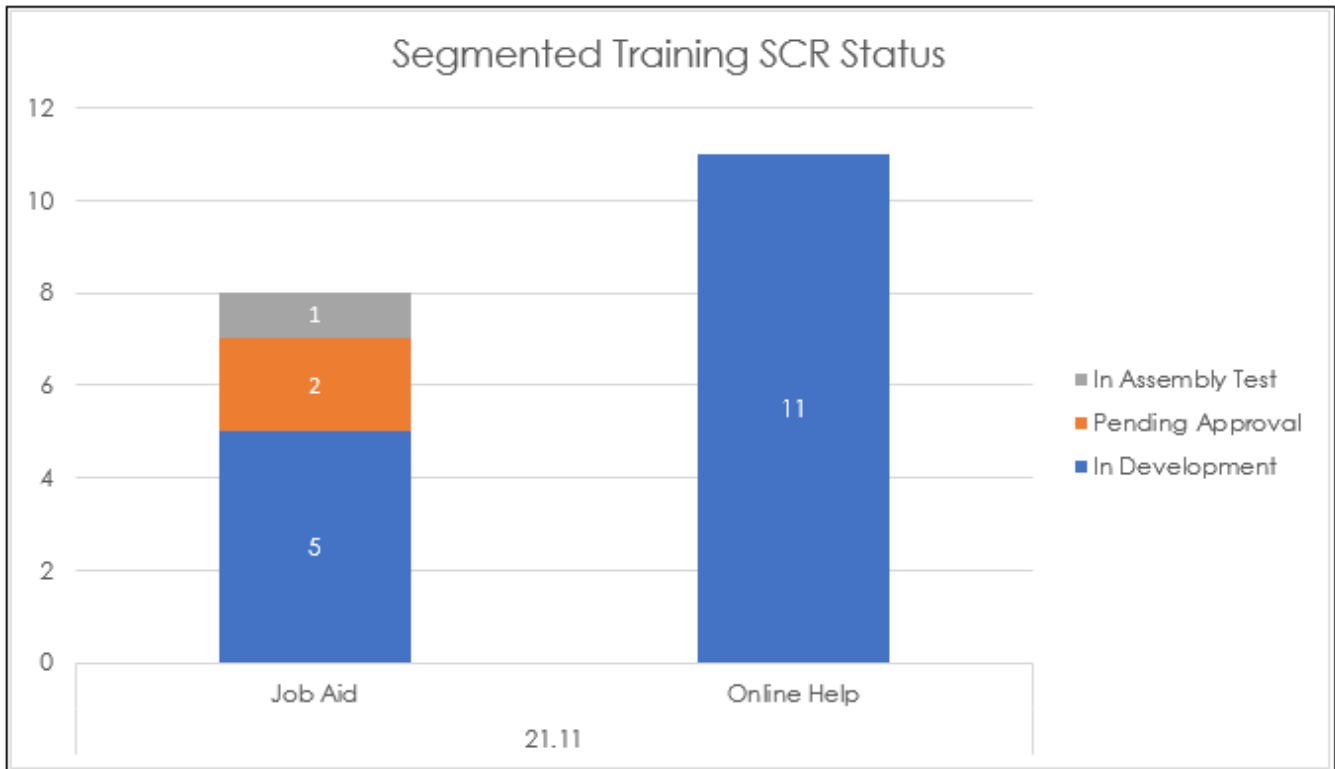
Table 8.1-4 Learning Management System (LMS) Access

| PARTICIPANT TYPE | TOTAL |
|------------------------------------|--------------|
| Early Training Participants | 320 |
| ITTSME Participants | 248 |
| County Training Coordinators | 65 |
| Additional LMS Access Participants | 1,028 |
| Total | 1,661 |
| Total using LMS | 1,560 (94%) |

Note:

- Remaining participants have either not attempted to log in or are being resolved as reported through the Help Desk tickets

Figure 8.1-5 Training SCR Status



Note: The above bar chart shows the number of SCRs, not individual Job Aid/Online Help updates

Deliverable Management

Table 8.1-5 – Training Deliverable Status for Current Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

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8.2 Activities for the Next Reporting Period

- ▶ Host weekly Training Touchpoint meeting on August 30, 2021
- ▶ Distribute the updated County Training Coordinator Guide
- ▶ Continue supporting Early Training sessions
- ▶ Continue Impact Analysis and SCR creation for 21.11 Training SCRs
- ▶ Continue to monitor progress for Training Staging and Training Production Environment Incidents
- ▶ Continue to provide support to the Consortium Training Team and Production Operations team on the new Release Notes process
- ▶ Continue to review/complete the County-level Implementation Readiness Checklist to confirm Training tasks for the 39 C-IV Counties
- ▶ Imaging
 - Host Imaging Train-the-SME (ITTSME) for C-IV Counties on August 23 - 26, 2021
 - Attend Early Training Open Session on August 27, 2021
 - Schedule ITTSME Hands-On Practice Make-Up Sessions and communication session assignments to PPOCs and participants
 - Generate ITTSME reports for Week 3 and send to C-IV County Regional Managers
 - Draft CalSAWS Informational Transmittal (CIT) for Los Angeles County Imaging Training

Deliverable Management

Table 8.2-1 – Training Deliverable Status for Next Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

8.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

9.0 Deployment

9.1 Highlights of the Reporting Period

9.1.1 Implementation

- ▶ Hosted the Implementation Readiness Checkpoint Meeting with the C-IV Counties on August 18, 2021, during which the following topics covered included Downtime for County Preparation Phase Cutover, Analytics Crystal Reports, County Preparation Phase Packet Revisions, County Preparation Phase Support Model, Change Management, Training, Imaging, and Upcoming County Implementation Readiness Tasks
 - Began creating an e-application conversion Q&A document based on questions from Implementation Points of Contacts (IPOCs)
- ▶ Hosted the Implementation Readiness Checkpoint pre-meet with the Regional Managers on August 19, 2021, in which the following topics covered included County Preparation Phase Metrics, T-3 Week County Director Checkpoints, Go-Live Packet
- ▶ Hosted the weekly CalSAWS Green Light Status meeting on August 18, 2021, in which the most current readiness data was presented to the Section Directors and Regional Managers
 - Continued coordination with the BenefitsCal and Central Print Implementation teams on an integrated readiness and greenlight reporting approach
- ▶ Presented the Green Light Status at the following venues:
 - Follow-up to Deep Dive of C-IV Go-Live for State Executives on August 18, 2021
 - Project Steering Committee (PSC) Meeting on August 19, 2021
- ▶ Continued preparing the Command Center staff to provide additional support during the County Preparation Phase
- ▶ Continued to finalize internal County office visit logistics trackers by region and coordinate with IPOCs and Office Points of Contact on creating final schedule
- ▶ Continued preparing for Post-Deployment Stakeholder Calls with the C-IV Counties
- ▶ Continued preparing nine post-conversion case review guides for the known data discrepancies between C-IV and CalSAWS, which will be included in the go-live packet, along with impacted case listings
- ▶ Continued collecting responses to CRFI 21-048 to identify office-level support individuals in the Counties during the post-deployment support period
 - Continued planning for the Office-level support orientation, to be hosted on September 7, 2021 to inform identified individuals of their role responsibilities and the post-deployment support model available to them
- ▶ Hosted Implementation Regional Touchpoint #4 for Regions 1, 3, 4, and 5
- ▶ Continued coordination with the User Acceptance Test (UAT) team on testing outcomes and their impact on the Implementation team, as appropriate
- ▶ Continued to maintain a master FAQ document of all Implementation-related questions asked across various meetings, emails, and other feedback mechanisms (posted monthly to the Web Portal)
- ▶ Continued the maintenance of the County and Project Readiness Checklists in JIRA across the below readiness areas as a tracking mechanism across multiple Project teams, which serves as a comprehensive dashboard reporting tool on Implementation Readiness: Application Readiness, Conversion Readiness, Technical Readiness, Change Readiness, Training Readiness, Implementation

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Support Readiness, and Integration Readiness

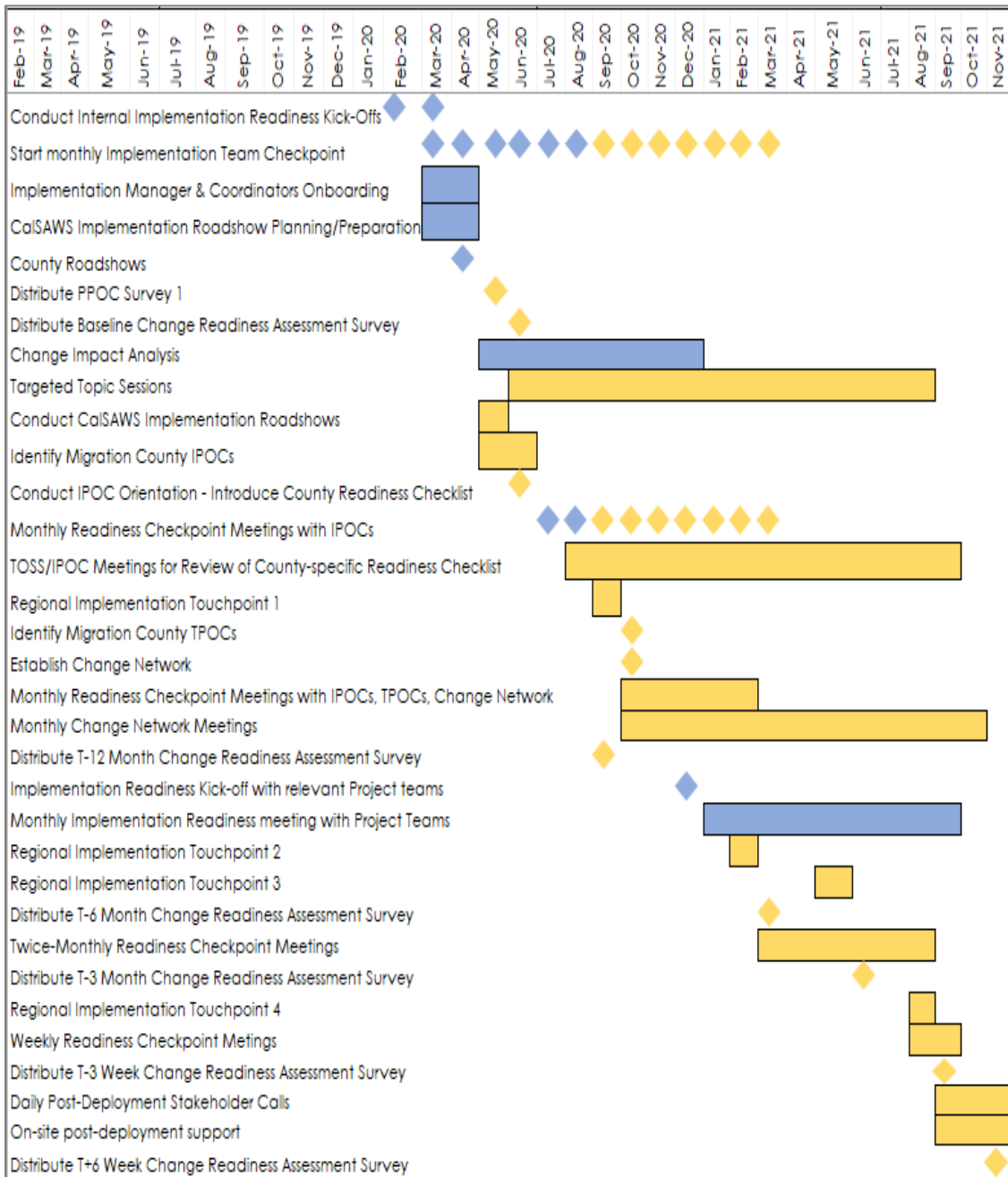
- ▶ Continued coordination with the Implementation Points of Contact (IPOCs) on tracking their County's readiness
 - Regional TOSS teams continued August occurrences of the monthly TOSS/IPOC touchpoints, in which checklist task statuses are discussed
 - Continued tracking actual completion dates for each County, as tasks are coming due
 - Continued providing guidance and clarification to IPOCs on readiness activities and the ongoing progress of the Readiness Checklist
 - Continued to assess potential additional readiness activities that originate from Project teams, as well as the Counties, and include in checklist(s) as appropriate
- ▶ Maintained schedule of Implementation meetings (see Table 9.1.1-2)
- ▶ Imaging
 - Continued to maintain Imaging tasks on Project and County readiness checklists for both C-IV and Los Angeles County
 - Continued supporting Implementation team in answering County Imaging questions
 - Continued planning for Los Angeles County Imaging Implementation Support

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Figure 9.1.1-1 – Implementation Gantt Chart



Note:

- Activities in yellow indicate direct interaction with the C-IV Counties

Table 9.1.1-2 – C-IV Migration Implementation Readiness Meetings with Key Stakeholders

| DAY | BEGIN DATE | FREQUENCY | PARTICIPANTS |
|----------------------------------------------------------------------|-------------------------------|-----------------------------------|----------------------------------------------------------------------------------------|
| Pre-Implementation | | | |
| Monthly Implementation Readiness Checkpoint | T-18 Months March 2020 | Monthly | Implementation team/Training, Regional Managers |
| Monthly Project pre-meets to Implementation Readiness Checkpoints | T-15 Months June 2020 | Monthly | Implementation team/Training, Regional Managers |
| Monthly Implementation Readiness Checkpoint – added participants | T-14 Months July 2020 | Monthly | Implementation team/Training, Regional Managers, IPOCs |
| TOSS/IPOC Meetings for Review of County-specific Readiness Checklist | T-13 Months August 2020 | As established by IPOC preference | TOSS, IPOCs, Regional Managers |
| Regional Implementation Touchpoints | T-12 Months September 2020 | Quarterly | TOSS, Regional Managers, IPOCs (regional), Regional Stakeholders |
| Monthly Implementation Readiness Checkpoint – added participants | T-9 Months December 2020 | Monthly | Implementation team/Training, Regional Managers, IPOCs, TPOCs |
| Bi-Monthly Implementation Readiness Checkpoint | T-5 Months April 2021 | Bi-monthly | Implementation team/Training, Regional Managers, IPOCs, TPOCs |
| Weekly Implementation Readiness Checkpoint | T-1 Month August 2021 | Weekly | Implementation team/Training, Regional Managers, IPOCs, TPOCs, CNCs |
| Post-Implementation | | | |
| Daily Post-Deployment Support Meeting | September 2021 | Daily (30 Business Days) | Implementation team (including onsite support team members) |
| Daily Post Deployment Stakeholder Call | September 2021 | Daily (30 Business Days) | Implementation team/Training, Regional Managers, IPOCs, TPOCs, and County Stakeholders |

Deliverable Management

Table 9.1.1-3 – Deployment Deliverable Status for Current Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

9.1.2 Change Management

- ▶ Continued to maintain the CalSAWS Deliverable #41 Operational Working Document (OWD), which captures change readiness tasks, target start and execution dates, and associated owners until go-live
- ▶ Continued to add and track communications events on the Change Management Communications Roadmap, including the creation of infographics, videos, and other change communications
- ▶ Change Network
 - Continued to monitor input from the Change Network Champion (CNC) Feedback Form and provide responses in a timely manner
 - Distributed the final materials from the August CNC meeting
 - Began to prepare for the September and final CNC meeting on September 9, 2021
- ▶ Targeted topics/Just-in-Time (JIT) demonstrations
 - Supervisor authorization
 - Continued to prepare the final materials from the three Supervisor Authorization JIT demonstrations: Admin, Eligibility, and Fiscal
- ▶ Communication
 - Go-Live Packet
 - Continued editing one component of the Go-Live Packet, the Informational Migration Packet, for distribution in September 2021
 - Continued compiling all components of the Go-Live Packet in a single, master packet, as well as a separate folder containing all inputs
 - User Readiness Assessment Survey
 - Finalized the T-3 Week User Readiness Assessment Survey questions
 - Distributed the T-3 Week User Readiness Assessment Survey CalSAWS Informational Transmittal (CIT) on August 17, 2021
 - Thank-You Video on Commitment
 - Continued developing a Thank-You video to distribute to Counties, thanking Counties for efforts the past 10-12 months
 - Infographic
 - Began developing the Downtime Infographic for distribution in September 2021
- ▶ Continued the Drive Change Team Efforts phase of the Change Impact Analysis (CIA)
 - Reviewed 1,143 designs/design differences
 - 782 have been identified as having some level of impact
 - 23 have been identified as having a high level of impact
 - 146 have been identified as having a medium level of impact
 - 611 have been identified as having a low level of impact
 - 369 have been identified as having no impact to C-IV users (i.e., migrated from C-IV or only impacting Los Angeles County)
 - Change Management is collaborating closely with Training to align on potential Project actions for each identified change, such as Web Based Trainings (WBTs), Job Aids, Training Templates (Quick Guides, Reference Guides), Targeted Topic Sessions, Short Videos, etc.
- ▶ Continued coordination and collaboration with Conversion team on Change Management's role in communicating and tracking manual case reviews, as well as downstream application/batch impacts based on unreconcilable data

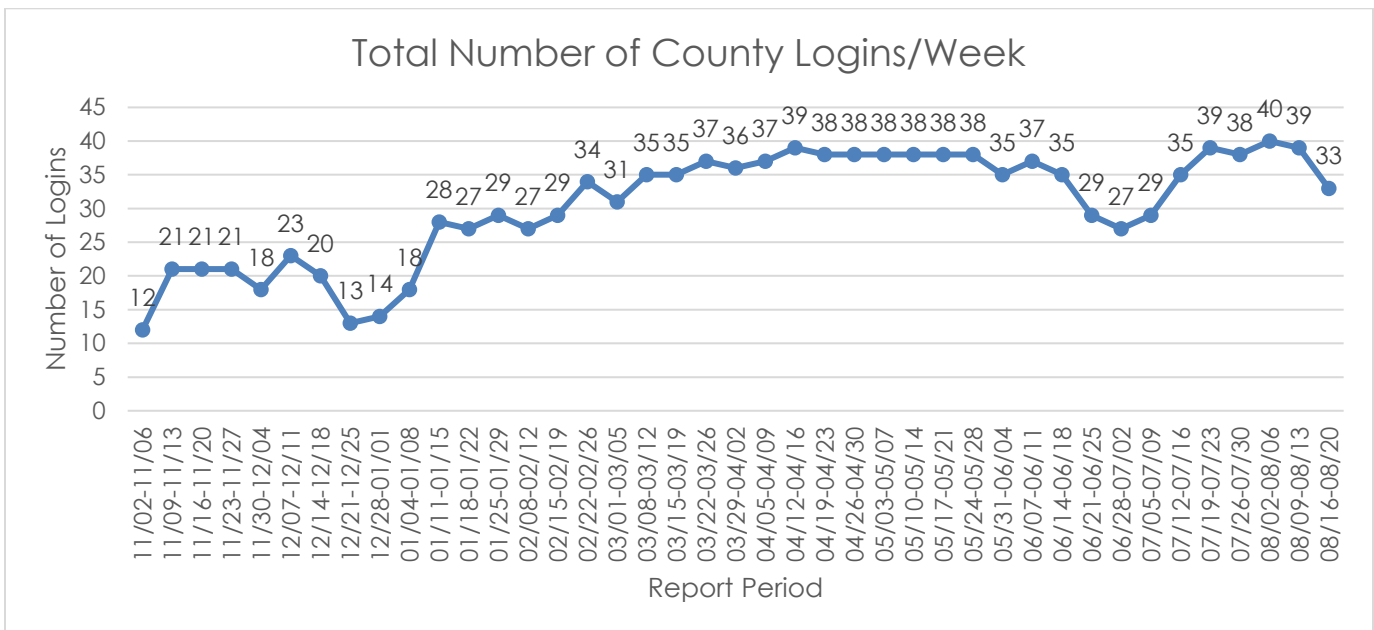
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- ▶ Continued to monitor Sandbox performance and follow up on the status of open environment defects
- ▶ Imaging
 - Continued coordination and collaboration of 'C-IV Migration to CalSAWS Organizational Change Management (OCM)' and 'Imaging OCM' Teams
 - Los Angeles County Imaging Change Management
 - Distributed Los Angeles County T-3 Month Imaging Change Readiness Assessment
 - Continued planning for Los Angeles County Imaging Change Network August monthly meeting
- ▶ Task Management
 - Continued coordination with Task Management Application Development teams for overview of the solution and change
 - Continued review and development of Task Management training and change management materials, including migration WBTs, infographics, and targeted topic session materials

Figure 9.1.2-1 – LRS Sandbox Environment: Total Number of Counties that Logged in per Week (Excluding 02/01/2021-02/09/2021)



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Figure 9.1.2-2 – LRS Sandbox Environment: Average Time Users Spent in the Sandbox per Week (Excluding 02/01/2021-02/09/2021)

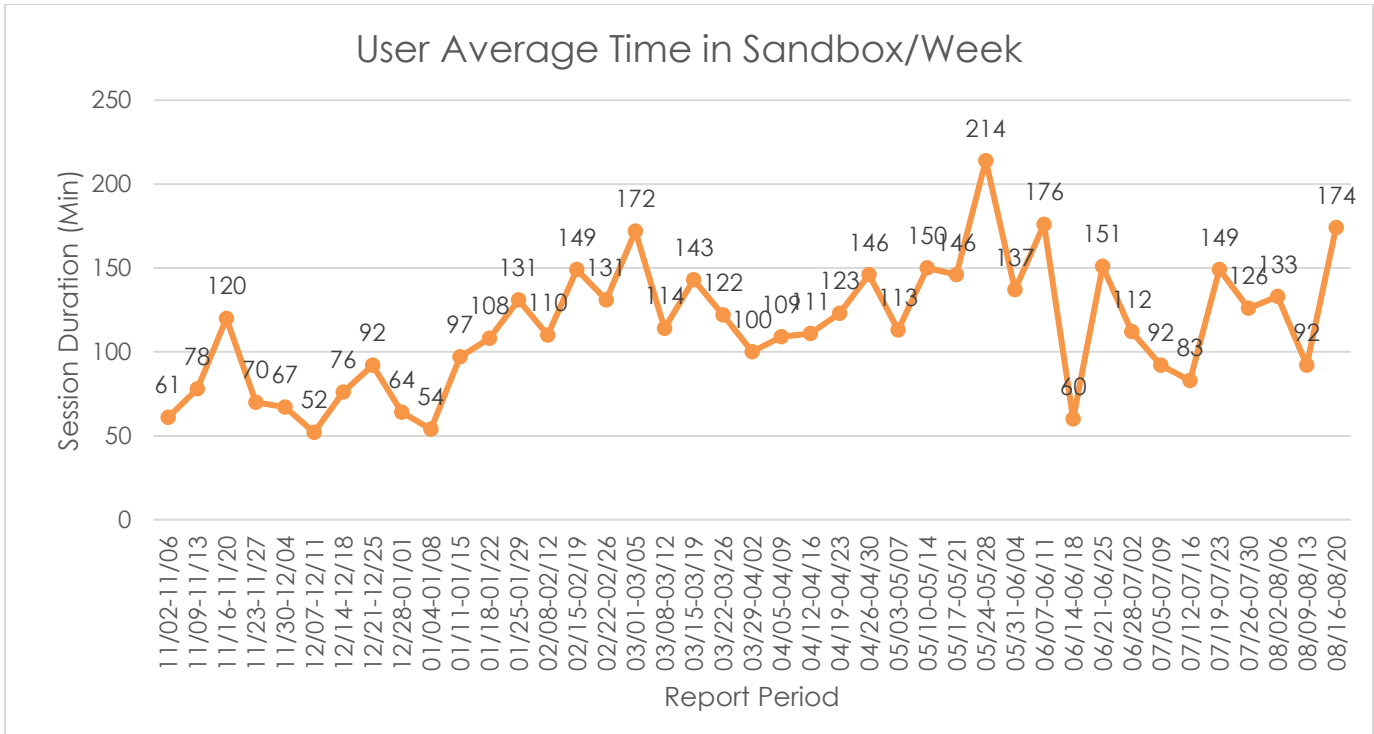


Table 9.1.2-1 – Login Counts & Total Logged Time by County During Reporting Period

| COUNTY | USER | LOGIN COUNT | TOTAL LOGGED TIME |
|--------------|----------------------------|-------------|-------------------|
| Butte | c04.Users 1, 6 | 8 | 04:13:54 |
| Contra Costa | c07.Users 1, 2, 3, 5 | 44 | 05:11:17 |
| Del Norte | c08.Users 1, 3, 5 | 3 | 03:25:54 |
| Humboldt | c12.Users 1, 2, 3, 4, 5, 6 | 2 | 08:12:14 |
| Imperial | c13.User 3 | 1 | 00:37:14 |
| Kern | c15.Users 2, 3, 6 | 2 | 03:25:54 |
| Lake | c17.User 2 | 2 | 00:20:15 |
| Los Angeles | c19.User 6 | 4 | 01:30:35 |
| Marin | c21.Users 1, 2, 3, 4, 5, 6 | 1 | 08:12:14 |
| Mariposa | c22.User 1 | 1 | 00:42:31 |
| Merced | c24.Users 1, 3, 5, 6 | 31 | 03:53:44 |
| Monterey | c27.Users 1, 5, 6 | 11 | 03:25:54 |
| Napa | c28.User 4 | 1 | 00:01:09 |
| Nevada | c29.Users 1, 5, 6 | 2 | 03:25:54 |
| Orange | c30.Users 1, 2, 3, 4 | 9 | 03:53:44 |
| Placer | c31.Users 1, 3 | 5 | 03:10:40 |
| Riverside | c33.Users 1, 3, 4, 5, 6 | 7 | 07:58:40 |
| Sacramento | c34.Users 1, 5 | 6 | 03:10:40 |
| San Benito | c35.Users 1, 2, 3, 4, 5 | 5 | |

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| COUNTY | USER | LOGIN COUNT | TOTAL LOGGED TIME |
|-----------------|----------------------------|-------------|-------------------|
| San Bernardino | c36.Users 1, 3, 4, 5, 6 | 19 | |
| San Diego | c37.Users 1, 2, 3, 4, 5, 6 | 40 | |
| San Francisco | c38.Users 1, 2, 3, 4, 5 | 7 | |
| San Joaquin | c39.Users 4, 5, 6 | 3 | |
| San Luis Obispo | c40.Users 1, 6 | 2 | |
| San Mateo | c41.Users 1, 6 | 4 | |
| Santa Barbara | c42.Users 1, 2, 3, 6 | 10 | |
| Santa Clara | c43.Users 1, 2, 4, 5, 6 | 12 | |
| Santa Cruz | c44.Users 1, 2, 3 | 2 | |
| Shasta | c45.Users 1, 3, 5, 6 | 4 | |
| Solano | c48.User 1 | 3 | 00:33:12 |
| Stanislaus | c50.Users 1, 2, 4 | 1 | |
| Sutter | c51.Users 2, 4, 5, 6 | 4 | |
| Ventura | c56.Users 1, 3, 5 | 5 | |

9.2 Activities for the Next Reporting Period

9.2.1 Implementation

- ▶ Host the County Preparation Phase Green Light meeting on August 25, 2021, in which a go/no-go decision will be made for the County Preparation Phase Cutover
- ▶ Host the Weekly Implementation Readiness Checkpoint Meeting with the C-IV Counties on August 25, 2021, during which the following topics will be covered: e-application Q&A, County Preparation Phase Click-through, County Preparation Phase Metrics, Change Management, Training, Imaging, Upcoming Readiness Tasks
- ▶ Host the weekly CalSAWS Green Light Status meeting on August 25, 2021, in which the most current readiness data will be presented to the Section Directors and Regional Managers
- ▶ Host the County Preparation Phase Click-through Kick-off meeting on August 24, 2021
- ▶ Continue to finalize internal County office visit logistics trackers by region and coordinate with IPOCs and Office Points of Contact on creating final schedule
- ▶ Host the final Implementation Regional Touchpoint #4 for Region 2 on August 23, 2021
- ▶ Continue coordination with the User Acceptance Test (UAT) team on UAT outcomes relevant to the Implementation, Change, and Training teams
 - Continue including Implementation team as representation at the UAT Weekly Kick off, daily triage, and daily stand-up calls
- ▶ Continue preparing the Command Center staff to provide additional support during the County Preparation Phase
- ▶ Continue to maintain Project-level and County-level Readiness checklists with known Implementation milestones and tasks in the areas of Application Readiness, Conversion Readiness, Technical Readiness, Change Readiness, Training Readiness, Implementation Support Readiness, and Integration Readiness
 - Continue to update County-specific checklists based on feedback from Implementation Point of Contacts (IPOCs)
 - Continue to track upcoming task due dates and actual completion dates

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- Continue tracking County Profiles attributes, which will feed into County-specific readiness criteria
- ▶ Continue ongoing engagement with County IPOCs, documenting questions asked in the Master FAQ tracker, and researching and providing the associated resolution in support of readiness activities
- ▶ Imaging
 - Host Los Angeles County August Imaging Implementation Readiness Checkpoint on August 23, 2021
 - Continue supporting Implementation team in answering County Imaging questions
 - Continue monitoring Project Implementation Readiness tasks for C-IV Imaging implementation
 - Continue monitoring Project and County Imaging Readiness tasks for Los Angeles County Imaging implementation
 - Continue planning Los Angeles County Imaging Implementation support

Deliverable Management

Table 9.2.1-1 – Deployment Deliverable Status for Next Reporting Period

| DEL # | DELIVERABLE NAME | STATUS |
|-------|-------------------------------|--------|
| | None for the reporting period | |

9.2.2 Change Management

- ▶ Continue to maintain Deliverable #41 Ongoing Working Document (OWD)
- ▶ Continue to add Communications Events and expected completion dates to the Change Management Communications Roadmap for Change Management activities and County engagement points
 - Based on Change Readiness Assessment Surveys results, Change Network feedback, and Change Impact Analysis outcomes, continue to determine topics and create content for change communications, such as infographics, videos, and the CalSAWS Newsletter
 - Continue content for Change Communications (infographics, news blasts, videos etc.)
- ▶ Change Network
 - Continue to monitor input from the Change Network Champions (CNC) Feedback Form and provide responses in a timely manner
 - Continue developing the September and Final CNC meeting presentation deck for September 9, 2021
- ▶ Targeted topics / Just-in-Time (JIT) demonstrations
 - Supervisor Authorization
 - Continue to prepare the three Supervisor Authorization Just-in-Time demonstration follow-up materials
- ▶ Communication
 - Go-Live Packet
 - Continue editing one component of the Go-Live Packet, the Informational Migration Packet, for distribution in September 2021
 - Continue compiling the Go-Live Packet components into one Master Packet, as well as a collection of different inputs

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- Infographic
 - Continue to develop the structure for the infographic on downtime, set to be distributed in September
- Thank-You Video
 - Continue developing a Thank-You video to distribute to Counties, thanking the Counties for work during the past 10-12 months
- User Readiness Assessment Survey
 - Prepare to distribute the T-3 Week User Readiness Assessment Survey on August 31, 2021
- ▶ Continue to drive change team efforts phase of the C-IV to CalSAWS Change Impact Analysis
 - Continue coordination with Training Team on Organizational Change Management (OCM) recommendations based on Change Impact Analysis (CIA) outcomes
- ▶ Continue coordination with Conversion on case review tracking, Application Development Team input, and necessary County outreach
 - Continue to review Conversion impacts from JIRA extract
- ▶ Continue to monitor Sandbox environment performance and escalate issues as necessary
- ▶ Imaging
 - Host Los Angeles County Imaging Change Network August monthly meeting on August 26, 2021
 - Begin planning content for Los Angeles County Imaging Newsletter #4
 - Monitor responses to Los Angeles County T-3 Monthly Imaging Change Readiness Assessment
- ▶ Task Management
 - Continue coordination with Task Management Application Development teams for overview of the solution and change
 - Continue review and development of in progress training and change management materials; continue planning and development of Task Management CFPs

9.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

10.0 Appendices

Appendix A – CalSAWS Deliverable Summary

Appendix B – CalSAWS Migration Work Plan Summary

Appendix C – CalSAWS DD&I Project Gantt Chart

Appendix D – CalSAWS Project Risks and Issues

Appendix E – OBIEE and State & Management Master Inventory

