



# CalSAWS DD&I Weekly Status Report

**Reporting Period: December 6, 2021 to December  
12, 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
58	CalSAWS (CalWIN) UAT Readiness Report/Milestone	Application Development		Draft Deliverable Expectation Document (DDED) is in progress. Submission of the DDED is due on January 27, 2022
65	CalSAWS Migration Work Plan Update #32	PMO		Final Deliverable (FDEL) is in progress. Submission of the FDEL is due on December 13, 2021
66	CalSAWS Deployment Complete Milestone/Report – C-IV	Implementation		Received approval of the FDEL on December 8, 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	September - December 2021	<ul style="list-style-type: none"> <li>• Completed planning facility capacity and equipment needs for CalSAWS DD&amp;I Post-Implementation Support command center rooms and CalSAWS Project staff. Currently, the team is working remotely and will inform the PMO Facility team if the onsite work is required</li> </ul>
2	Return to Office	Rancho Cordova and Norwalk Project	Spring - Winter 2021	<ul style="list-style-type: none"> <li>• 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</li> </ul>

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ITEM #	INITIATIVES/ PROJECTS	LOCATION	TARGET DATE	NOTES/STATUS
		Offices		or Norwalk Project offices <ul style="list-style-type: none"> <li>• Continued to monitor and review requests from CalSAWS Project staff who are interested in returning to the CalSAWS Rancho Cordova and Norwalk Project offices on a hybrid schedule</li> </ul>

- ▶ Facilitated the CalSAWS Weekly Status Meeting that occurred on December 8, 2021
- ▶ Began preparations for the Section Directors meeting scheduled for December 14, 2021
- ▶ Continued CalSAWS Risk Management activities, including:
  - Continued to work with risk and issue owners to develop and update mitigation plans for the accepted CalSAWS DD&I Project risks and issues
- ▶ Continued supporting engagement of project staff working remotely, including:
  - Finalized and distributed the monthly issue of the CalSAWS Connect newsletter to the CalSAWS Project Team on December 9, 2021
  - Continued preparations for the next monthly virtual CalSAWS Project All Staff meeting that is scheduled for December 15, 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
  - Updated and finalized the documents for contract Change Notice No. 13, which addressed comments from the Consortium's review. Change Notice No. 13 will be submitted to the CalSAWS JPA Board of Directors for approval on December 17, 2021 and include the following:
    - Use of the contract's R&A Change Budget Services allocation for CDSS reports support, enhancements related to CalSAWS correspondence, and additional CalSAWS Modifications and Enhancements (M&E) hours for State Fiscal Year 2021/22
    - Technical updates to Schedule 2 to Exhibit X, the Statement of Work for the CalSAWS DD&I Project, to reflect the final approved deployment schedule for Non-State Forms
    - Technical updates to Schedule 15 to Exhibit X, the Statement of Work for the CalSAWS Customer Service Center Project, to reflect the current approved schedule for design activities
  - 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
- ▶ Facilitated the CalSAWS orientation session for new CalSAWS Project staff on December 6, 2021
- ▶ Completed development of the monthly CalSAWS IT Project Status Report for November 2021 and participated in the monthly CalSAWS IT Report Meeting with OSI (Office of Systems Integration), CMS (Centers for Medicare and Medicaid Services), and FNS (Food and Nutrition Service) that was held on December 8, 2021

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- ▶ Continued performing Deliverable Management activities for the CalSAWS DD&I Project

**Deliverable Management**

**Table 1.2.1-2 – Deliverable Status for Current Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
65	CalSAWS Migration Work Plan Update #32	<ul style="list-style-type: none"> <li>• Continued developing the FDEL</li> <li>• Submission of the FDEL is due on December 13, 2021</li> <li>• Scheduled a touchpoint meeting with Deliverable reviewers for December 15, 2021, to address questions and comments for the FDEL, as needed</li> </ul>

**1.2.2 Communications Management**

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

**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**

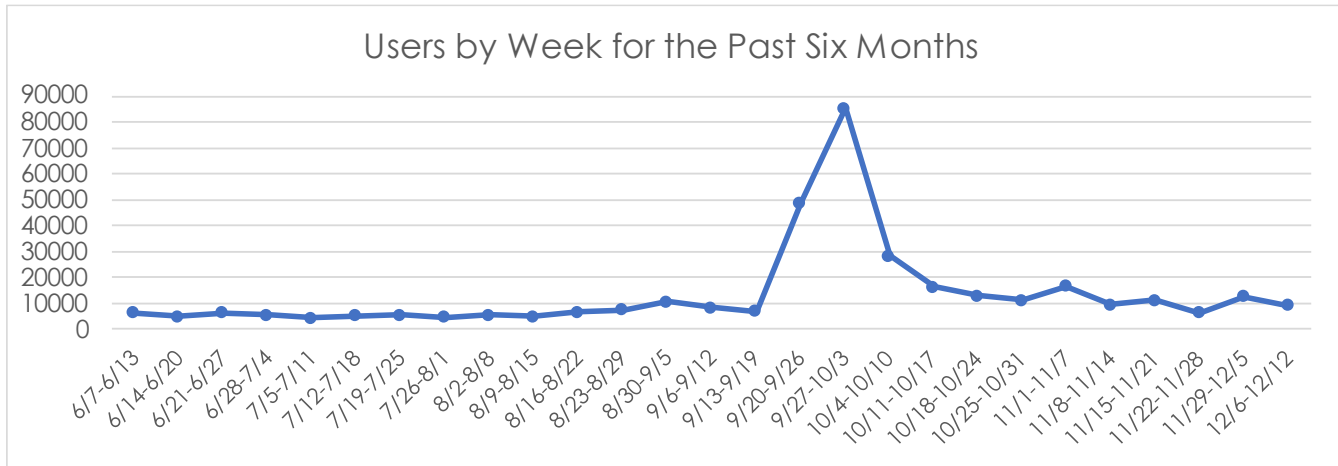
CATEGORY	DURING REPORTING PERIOD	SINCE LAUNCH
Total Number of Subscribers	16	1,505
Total Number of Unique Users	9,164	1,219,784
Total Number of New Users	6,462	1,219,784
Total Number of Sessions (Individual Site Visits)	12,345	1,626,889
Average Number of Sessions per User	1.35	1.33
Average Number of Page Views per Session	1.38	1.30
Average Session Duration	1:38	0:58
AskCalSAWS Inquiries – Received/Resolved	6/7	524/520

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



**Table 1.2.2-3 – CalSAWS.org Subscription Service Statistics**

WEBPAGE	PERCENT OF SUBSCRIBERS
Latest News – CalSAWS Buzz Newsletter	37%
Latest News – News	29%
Other Updates – Careers	24%
CalSAWS Committees – CalWORKs/CalFresh	23%
Meetings – Project Steering Committee	23%

**1.2.3 Cultural Transformation**

- ▶ Delivered Research and Development Ambassador Group Design Thinking sessions on December 7, 2021 and December 9, 2021
- ▶ Round 2 activities:
  - Overall:
    - Continued to collaborate with Innovation Team to develop design thinking activities for Technology and Communications Ambassador groups
    - Scheduled additional 30-minute ideation sessions for Technology and Communication Ambassador groups to compete each initiative's
    - concept poster
    - Drafted the January – March Cultural Transformation engagement activities timeline, including tentative meeting dates for Culture Ambassadors and Culture Advisors
    - Introduced the 2022 Culture Transformation efforts during the CalSAWS Project Orientation meeting on December 6, 2021



#### 1.2.4 Inclusion, Diversity and Equity Advancement (IDEA)

- ▶ Co-Create Phase
  - IDEA Initiatives
    - Workshops
      - Conducted the first session of the final December workshop series and planned for the last workshop session to take place December 16, 2021
    - Leadership Session
      - Completed and sent out workshop certificates and confirmed round two potential vendor
    - We Are One
      - Continued to update the IDEA overall calendar and overview deck with new initiatives included
    - Pulse Survey
      - Prepared analysis to present the pulse survey results for the January JPA meeting
    - CalSAWS Table Talks
      - Connected with potential guests for next table talks session in January
      - Began to brainstorm on next few months of Table Talks topics
    - Employee Resource Groups (ERGs)
      - Connected with presenter to come and share best practices for maintaining a strong ERG
      - Began to plan with the Black Employee Resource Group (BERG) for the Black History Month event in February
    - Counties Connected
      - Discussed further plans to engage with Counties
    - Communities Connected
      - Configured list of organizations to partner with for community outreach opportunities
    - Small Team Building
      - Prepared for the pilot session for December 17, 2021
  - IDEA General
    - Continued to collaborate with Cultural Transformation team
    - Continued to update the IDEA overall calendar on the “We Are One” website
    - Continued to collaborate with Great Place to Work (GPTW)
    - Continued to contribute to the CalSAWS Connect team

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### 1.3 CRFI/CIT Communications Information

- ▶ The following table outlines CalSAWS Information Transmittals (CITs) sent for the reporting period ending December 12, 2021

**Table 1.3-1 – CITs**

CIT ID	SUBJECT	CATEGORY	DISTRIBUTION DATE	PRIMARY CalSAWS CONTACT	BACKUP CalSAWS CONTACT
0358-21	CalSAWS Migration User Acceptance Test Areas	Informational	December 8, 2021	Peggy Macias	Rachel Hernandez

- ▶ The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period ending December 12, 2021

**Table 1.3-2 – CRFIs**

CRFI ID	SUBJECT	DISTRIBUTION DATE	STATUS	RESPONSE DUE DATE	CalSAWS CONTACT
21-066	Updating CalSAWS County Fiscal Contact Information	November 17, 2021	Closed	December 8, 2021	Chia Thao

**Table 1.3-3 – Overdue CRFIs**

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

- ▶ No Overdue CalSAWS Requests for Information (CRFIs) for the reporting period ending December 12, 2021

### 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 and owners to monitor risks and update risk mitigation plans
- ▶ Facilitate the CalSAWS Weekly Status Meeting scheduled for December 15, 2021
- ▶ Complete preparations and participate in the Section Directors Meeting that is scheduled for December 14, 2021
- ▶ Continue activities to support Project staff working remotely
  - Continue preparations and planning for the monthly virtual CalSAWS Project All Staff Meeting that is scheduled for December 15, 2021
  - Begin development of the next issue of the CalSAWS Connect newsletter that will

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be distributed to the CalSAWS Project Team on January 13, 2022

- o Continue developing Project communications, as needed
- ▶ Continue to support Return to Office (RTO) requests for CalSAWS Project staff to visit the CalSAWS Rancho Cordova and Norwalk Project offices, and support CalSAWS Project staff who have returned to work at the project offices (either full time or as part of the 50/50 model)
- ▶ 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

### Deliverable Management

**Table 1.4.1-1 – Deliverable Status for Next Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
65	CalSAWS Migration Work Plan Update #32	<ul style="list-style-type: none"><li>• Finalize and submit the FDEL to the Consortium for review and feedback on December 13, 2021</li><li>• Facilitate a touchpoint meeting with Deliverable reviewers on December 15, 2021 to address questions and comments for the FDEL, as needed</li></ul>

### 1.4.2 Communications Management

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

**Table 1.4.2-1 – Website Support Activities**

TASK	DATE(S)	TASK TYPE
Update 'YourBenefitsNow' link on Resource page to direct to new BenefitsCal portal	TBD	Website Content Update

### 1.4.3 Cultural Transformation

- ▶ Deliver 4 Design Thinking workshops for the Technology and Communications Ambassador groups from December 14 -17, 2021
- ▶ Continue to collaborate with the Innovation team to facilitate all remaining 2021 Design Thinking sessions
- ▶ Draft communications to Culture Advisors to begin engaging them in support of the 2022 Culture Ambassador initiatives

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- ▶ Share recap of ideation sessions and next steps with Research and Development Ambassador group

### 1.4.4 Inclusion, Diversity & Equity Advancement (IDEA)

- ▶ Conduct the final session of workshops for all staff December 16, 2021
- ▶ Completed confirmation and finalizing round 2 workshop and leadership coaching vendor
- ▶ Continue to plan with Black Employee Resource Group (BERG) for the Black History Month event
- ▶ Conduct the first session for small team building with our pilot team on December 17, 2021
- ▶ Meet again with potential guest for CalSAWS Table Talks session in January
- ▶ Continue to work towards finalizing community engagement list for communities connected initiative
- ▶ Complete preparation for presentation of demographic analysis and community connected initiative for next JPA meeting
- ▶ Continue to collaborate on alignment with Great Place to Work (GPTW) and Cultural Transformation
- ▶ Continue to work with CalSAWS Connect team to provide content for the monthly newsletter

### 1.5 Deviations from Plan/Adjustments

- ▶ None for the reporting period

## 2.0 Imaging

### 2.1 Highlights of the Reporting Period

- ▶ Continued the enhanced performance testing work
- ▶ SCR CA-236864 - Configure Portal Summited Documents to Bypass OCR

**Table 2.1-1 – CalSAWS Imaging Project Milestones**

MILESTONES	SUBMISSION DUE DATE	STATUS
Migration Activities		In progress
Conduct Santa Barbara County Document Migration Discovery Session Check-in	December 6, 2021	Canceled
Conduct Placer County Document Migration Discovery Session Check-in	December 7, 2021	Completed
Conduct Santa Clara County Document Migration Discovery Session Check-in	December 8, 2021	Canceled

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MILESTONES	SUBMISSION DUE DATE	STATUS
Conduct Orange County Document Migration Discovery Session Check-in	December 9, 2021	Completed
Conduct Ventura County Document Migration Discovery Session Check-in	December 9, 2021	Canceled
Conduct Santa Barbara County Document Migration Discovery Session Check-in	December 13, 2021	Canceled
Conduct Placer County Document Migration Discovery Session Check-in	December 14, 2021	Scheduled
Conduct Santa Clara County Document Migration Discovery Session Check-in	December 15, 2021	Scheduled
Conduct Orange County Document Migration Discovery Session Check-in	December 16, 2021	Scheduled
Conduct Ventura County Document Migration Discovery Session Check-in	December 16, 2021	Scheduled

**Table 2.1-2 – CalWIN Counties’ Wave 1 Status Update**

Wave 1	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Contra Costa County	Start	7/16/2020	10/1/2020	8/6/2020	8/17/2020	1/3/2022	2/1/2022	6/1/2022	6/1/2022	10/3/2022	Go Live 10/24/22 12% Progress
	Finish	7/16/2020	9/27/2021	10/6/2020	12/30/2021	1/28/2022	5/31/2022	6/30/2022	10/2/2022	10/20/2022	
	Status	Completed	Completed	Completed	In progress	Awaiting	Awaiting	Awaiting	Awaiting	Awaiting	

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

**Amber Status:**

- ▶ There have been multiple errors identified in the document mapping work performed by the County. There is a possibility that if these errors are not corrected by the deadline, December 30, 2021, other milestones leading to go live may be delayed
- ▶ Contra Costa County is currently working on fixing its document mapping. The milestone will remain in Amber until all document mapping has been completed according to the deadline

Wave 1	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Placer County	Start	7/29/2020	10/1/2020	8/6/2020	8/31/2020	4/1/2021	1/3/2022	3/14/2022	3/14/22	10/3/2022	Go Live 10/24/22 30% Progress
	Finish	7/29/2020	10/1/2020	10/6/2020	3/26/2021	12/30/2021	3/11/2022	1/13/2022	10/2/2022	10/20/2022	
	Status	Completed	Completed	Completed	Completed	In progress	Awaiting	Awaiting	Awaiting	Awaiting	

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

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Wave 1	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Yolo County	Start	7/21/2020	10/1/2020	8/06/2020	8/25/2020	1/3/2022	2/1/2022	6/1/2022	6/1/2022	10/3/2022	Go Live 10/24/22
	Finish	7/21/2020	10/18/2021	10/06/2020	1/29/2021	1/28/2022	5/31/2022	6/30/2022	6/30/2022	10/20/2022	12% Progress
	Status	Completed	Completed	Completed	Completed	Awaiting	Awaiting	Awaiting	Awaiting	Awaiting	

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

**Table 2.1-3 – CalWIN Counties’ Wave 2 Status Update**

Wave 2	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Santa Clara County	Start	10/15/2020	12/1/2020	11/30/2020	11/10/2020	2/1/2022	3/16/2022	9/8/2022	9/1/2022	2/1/2023	Go Live 02/20/23
	Finish	10/15/2020	11/30/2021 1/20/2022	1/31/2021	8/27/2021	3/15/2022	8/31/2022	10/20/2022	1/31/2023	2/16/2023	10% Progress
	Status	Completed	In Progress	Completed	Completed	Awaiting	Awaiting	Awaiting	Awaiting	Awaiting	

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

**Green Status:**

- ▶ A revised deadline of January 20, 2022 has been established for the County to execute the contract with document migration vendor, Hyland. The new deadline is on schedule to be met

Wave 2	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Tulare County	Start	10/5/2020	12/1/2020	11/30/2020	12/2/2020	8/2/2021	1/3/2022	1/3/2022	4/16/2022	2/1/2023	Go Live 02/20/23
	Finish	10/5/2020	12/1/2020	1/31/2021	7/29/2021	12/30/2021	4/15/2022	4/15/2022	1/31/2023	2/16/2023	20% Progress
	Status	Completed	Completed	Completed	Completed	In progress	Awaiting	Awaiting	Awaiting	Awaiting	

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

**Table 2.1-4 – CalWIN Counties’ Wave 3 Status Update**

Wave 3	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Orange County	Start	1/7/21	3/1/21	3/1/21	2/2/21	4/30/21	1/3/22	8/1/22	8/1/22	4/1/23	Go Live 04/24/23
	Finish	1/7/21	3/1/21	4/30/21	4/22/21	12/30/21	8/1/22	1/31/23	1/31/23	4/20/23	30% Progress
	Status	Completed	Completed	Completed	Completed	In progress	Awaiting	Awaiting	Awaiting	Awaiting	

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

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Wave 3	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Santa Barbara County	Start	1/14/21	3/1/21	8/1/21	2/11/21	1/3/22	3/1/22	8/1/22	8/1/22	4/1/23	Go Live 04/24/23 12% Progress
	Finish	1/14/21	3/1/21	10/31/21	12/30/21	2/28/22	8/1/22	1/31/23	3/31/23	4/20/23	
	Status	Completed	Completed	Completed	Completed	Awaiting	Awaiting	Awaiting	Awaiting	Awaiting	

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

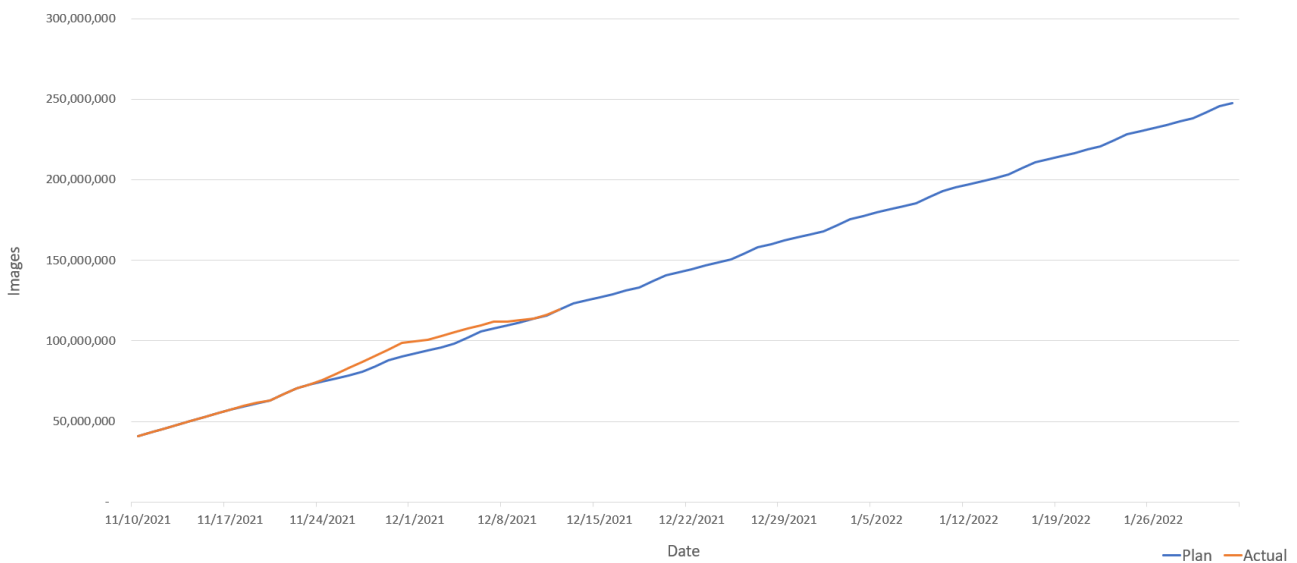
Wave 3	Target Dates	Kick Off	Identify Migration Method/ Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Progress
Ventura County	Start	1/19/21	03/1/21	3/1/21	2/18/21	6/30/21	1/3/22 2/1/22	1/3/22 2/1/22	8/1/22 9/16/22	4/1/23	Go Live 04/24/23 40% Progress
	Finish	1/19/21	3/1/21	4/30/21	5/31/21	12/30/21 01/30/22	8/1/22 8/31/22	7/15/22 9/15/22	3/31/23	4/20/23	
	Status	Completed	Completed	Completed	Completed	In progress	Awaiting	Awaiting	Awaiting	Awaiting	

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

### Green Status:

- ▶ The county has extended testing until January 30, 2022, to allow its migration vendor to conduct a final validation test. During this final test, County's vendor will recreate all document types and ensure that data is exported without errors
- ▶ The original export/import timelines have also been adjusted to account for the time needed to prepare/complete the initial export/import

**Table 2.1-5 – Los Angeles Image Hyland Import Burnup**



## 2.2 Activities for the Next Reporting Period

- ▶ Continue the enhanced performance testing work
  - Hyland to begin early-stage performance tests
  - Continue gathering usage statistics for Accenture end-to-end testing

## 2.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

## 3.0 Customer Service Center (CSC)

### 3.1 Highlights of the Reporting Period

- ▶ Updated Telephonic Signature Design and External Party Access designs in preparation for the December 15, 2021 committee meeting
- ▶ Continued build of both Enhanced Call Control Panel (CCP) and Outbound Interactive Voice Response (IVR)
- ▶ Continued build of Automated Testing platform for Outbound Interactive Voice Response (IVR) SCR
- ▶ Continued discussion with Los Angeles County and Wave 1 CalWIN Counties about their migration to CalSAWS contact center solution

**Figure 3.1-1 – CalSAWS Customer Service Center – Requirements Burndown**





## CalSAWS – California Statewide Automated Welfare System

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**Table 3.1-1 – Customer Service Center Milestones**

MILESTONES	DESIGN DUE DATE	STATUS	TENTATIVE RELEASE DATES
Outbound IVR - Core Tech Design (CA-226207)	March 24, 2021	Approved	22.01
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-231234)	August 18, 2021	Approved	22.01
External Party Access IVR - Core Tech and App Dev Design (CA-226839)	September 8, 2021	Committee review	22.05
Telephonic Signature - Core Tech and App Dev Design (CA-226838)	October 27, 2021	Committee review	22.05

### 3.2 Activities for the Next Reporting Period

- ▶ Continue discussions with Contra Costa, Los Angeles, Placer, and Yolo Counties about County Specific Interactive Voice Response (IVR) designs
- ▶ Continue build of System Change Request (SCR) CA-226207 for Outbound Interactive Voice Response (IVR)
- ▶ Continue build of System Change Request (SCR) CA-226844 for Enhanced Call Control Panel (CCP)
- ▶ Present updated Telephonic Signature and External Party Access Designs and request final approval from the Interactive Voice Response (IVR) Committee

### 3.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

## 4.0 Analytics

### 4.1 Highlights of the Reporting Period

#### 4.1.1 Analytics Summary

**Table 4.1.1-1 – 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	<b>2</b>	0%
D	In production	Deployed	Deployed	4	33	<b>37</b>	9%
E	In production	Deployed	Deployed	7	60	<b>67</b>	23%
F	In production	Deployed	Deployed	3	74	<b>77</b>	40%
G	In production	Deployed	Deployed	4	45	<b>49</b>	51%
H	In production	Deployed	Deployed	6	65	<b>71</b>	67%
I	In production	Deployed	February 3, 2022	1	84	<b>85</b>	83%
J	In development	January 27, 2022	TBD	0	75	<b>75</b>	
<b>TOTAL REPORTS</b>				<b>27</b>	<b>436</b>	<b>463</b>	

#### 4.1.2 Soft Launch

- ▶ Release I was successfully soft launched on November 10, 2021 and County Validation is in progress

#### 4.1.3 Production (Hard Launch)

- ▶ Daily and monthly reports and dashboards are current to date

#### 4.1.4 Performance and Scalability

- ▶ Continue to test the following changes:
  - Tuning update to Relational Database Service (RDS) database writer
  - RClone configuration change
- ▶ Begin testing:
  - Oracle 19c upgrade

#### 4.1.5 Development and Testing

- ▶ Release I
  - Reports and Dashboards
    - Soft Launch County Validation in progress (started on November 23, 2021)
    - Continuing to work on 40 County version of Geo-Coding Dashboard System Change Request (SCR) CA-232876

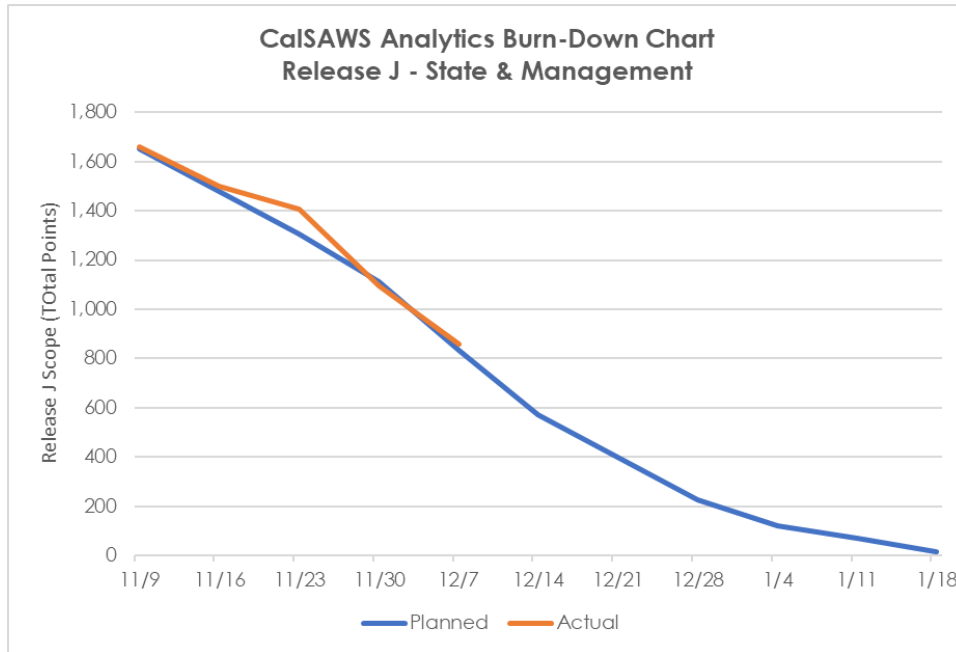
**CalSAWS – California Statewide Automated Welfare System**

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- ▶ Release J
  - Reports
    - Reverse Engineering nearing completion
    - Curation and Visualization Build is progressing

**Figure 4.1.5-1 – CalSAWS Analytics – Release J Burndown (State & Management)**



**Table 4.1.5-1 – CalSAWS Analytics – Release J 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	7	11/10	100%	12/3	29%	12/4	29%	1/21	0%	12/17	71%	1/14	43%	1/21	0%
	Case Activity	15	11/10	100%	12/3	67%	12/4	47%	1/21	0%	12/17	53%	1/14	33%	1/21	0%
	Employment Services	7	11/10	100%	12/3	70%	12/4	51%	1/21	0%	12/17	43%	1/14	35%	1/21	0%
	Fiscal	37	11/10	100%	12/3	71%	12/4	43%	1/21	0%	12/17	43%	1/14	29%	1/21	0%
	Resource Data Bank	1	11/10	100%	12/3	100%	12/4	100%	1/21	0%	12/17	100%	1/14	100%	1/21	0%
	Special Units	8	11/10	100%	12/3	63%	12/4	38%	1/21	38%	12/17	25%	1/14	0%	1/21	0%
<b>TOTAL</b>		<b>75</b>	75 of 75 100%		49 of 67 65%		35 of 67 47%		0 of 75 0%		36 of 75 48%		26 of 75 35%		0 of 75 0%	

<b>Legend:</b>
Complete
Complete as of this week
In Progress

**4.2 Re-Platform Migration Schedule**

**Table 4.2-1 – Analytics Reports Re-Platform Release Migration Schedule**

<b>Release C (Migration Window: November 2020 – March 2021): In Production</b>			
<b>Dashboards</b>			
LRS	• CalWORKs	Daily	18 Sheets
	• QA	Daily	10 Sheets
<b>Release D (Migration Window: February 2020 – June 2020): In Production</b>			
<b>Dashboards</b>			
LRS	• CalFresh	Daily	30 Sheets
	• CalFresh Meals	Monthly	2 Sheets
	• Managed Personnel	Daily	1 Sheet
	• SSI/SSP	Daily	2 Sheets
<b>State &amp; Management</b>			
	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
<b>Release E (Migration Window: May 2020 – September 2020): In Production</b>			
<b>Dashboards</b>			
LRS	• Medi-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
<b>State &amp; Management</b>			
	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
<b>Release F (Migration Window: August 2020 – December 2020) In Production</b>			

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

## CalSAWS – California Statewide Automated Welfare System

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### 4.3 Activities for the Next Reporting Period

- ▶ Analytics
  - Continue post-cutover report/dashboard support activities
  - Continue regular meetings with Consortium Regional Managers on reports/dashboard to discuss any critical concerns, work arounds, etc. regarding reports
  - Support Continued Performance tuning efforts and changes
  - Review usage of Workload Productivity Report (WPR) Dashboard with Consortium and determine next steps
  - Pursue SCR for Sunday Reports schedule change
  - Release I
    - Support County Validation
  - Release J
    - Continue development and test

### 4.4 Deviations from Plan/Adjustments

- ▶ Swapped Release I Hard-Launch and Release J Soft-Launch dates

## 5.0 Application Development and Test

### 5.1 Highlights of the Reporting Period

#### 5.1.1 Application Development Summary

**Table 5.1.1-1 – CalSAWS Application Development Summary**

	Status	22.01	22.02	22.03	22.05	22.06	22.07	22.09	22.11	23.01	23.02
Design	New	0	0	6	15	0	1	4	1	3	1
	Design in Progress	0	0	17	4	0	2	1	0	0	0
	Ready for Committee	0	0	0	0	0	0	0	0	0	0
	Committee Review	0	0	0	0	0	0	0	0	0	0
	Pending Approval	0	0	1	2	0	0	1	0	0	0
Build	Approved	0	0	4	3	0	1	1	1	0	0
	In Development	2	0	0	0	0	0	0	0	1	0
	Development Complete	0	0	0	0	0	0	0	0	0	0
	In Assembly Test	0	0	0	0	0	0	0	0	0	0
Test	System Test	20	3	1	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
	<b>Grand Total</b>	<b>22</b>	<b>3</b>	<b>29</b>	<b>24</b>	<b>0</b>	<b>4</b>	<b>7</b>	<b>2</b>	<b>4</b>	<b>1</b>

SCRs in Production	813
SCRs with Release TBD	2

**Notes:**

- This table includes Application Development System Change Requests (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 (TBD) includes any migration impact SCR where the fix version is "TBD"

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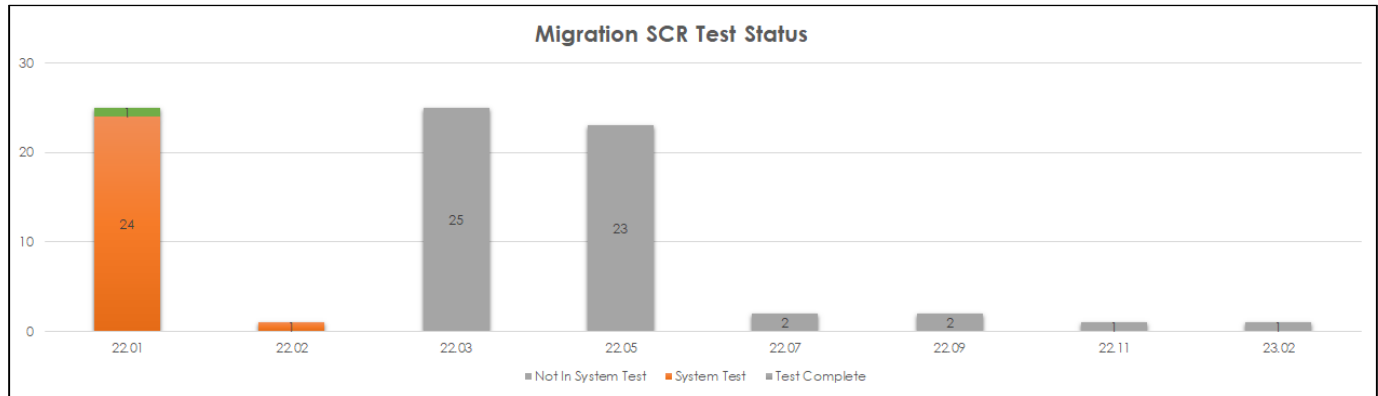
CalSAWS DD&I Project Phase

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- ▶ Continued drafting designs and development activities for Design Difference Identifiers (DDIDs). Status is provided in Figure 5.1.1-1 (CalSAWS DDID Design Status) above

**5.1.2 Design Difference Identifiers (DDID) System Test Status**

**Figure 5.1.2-1 – DDID System Test Status**

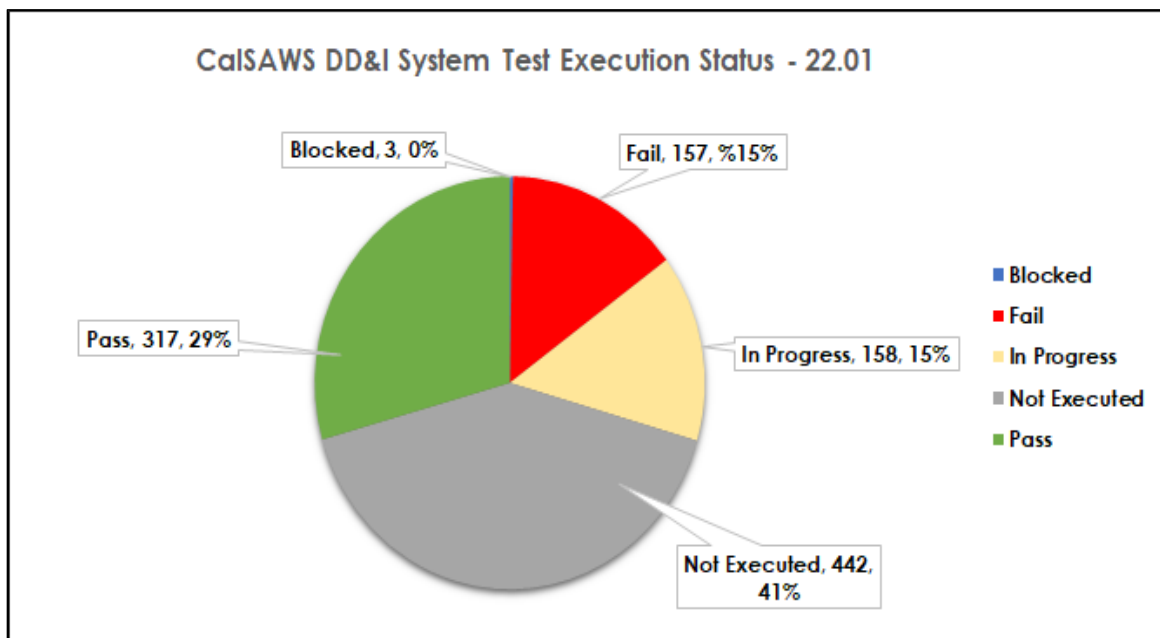


**Notes:**

- 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

**Table 5.1.2-1 – DDID System Test Execution Status – 22.01**

Pass Rate Target as of December 10, 2021	<b>25%</b>
Pass Rate Actual as of December 10, 2021	<b>29%</b>
System Test Complete Date: January 19, 2022	





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**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

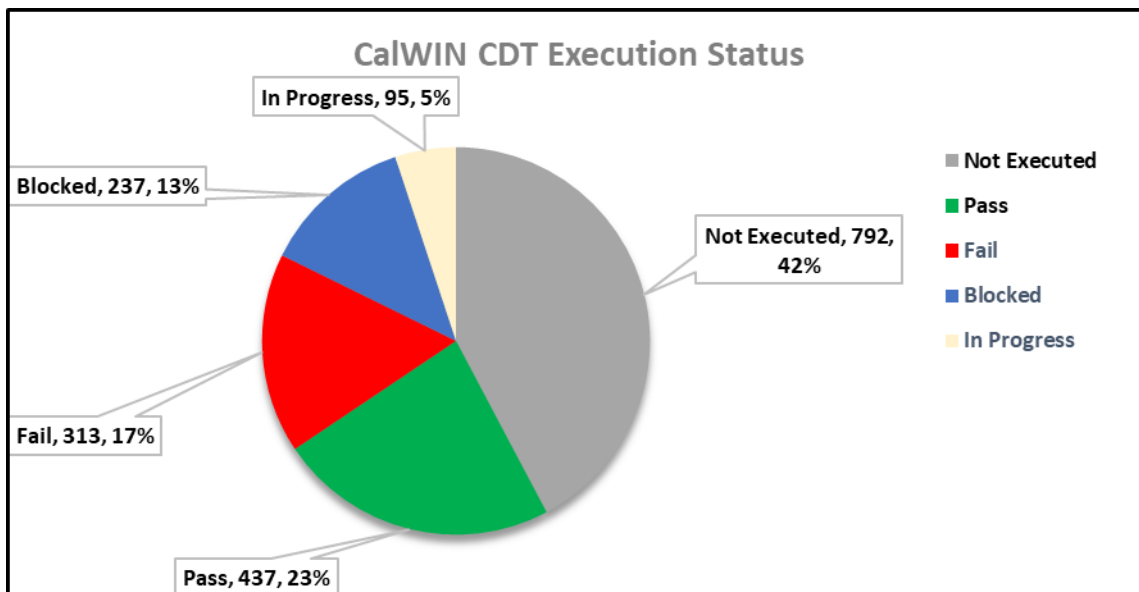
► Continue test execution for 22.01

**5.1.3 Converted Data Test (CDT):**

► Continue test execution of CalWIN Converted Data Test (CDT) phase

**Table 5.1.3-1 – CalWIN CDT Execution Status**

Pass Rate Target as of December 10, 2021	<b>19%</b>
Pass Rate Actual as of December 10, 2021	<b>23%</b>
System Test Complete Date: April 29, 2022	



**Note:**

- Test Script counts are subject to change as test scripts are added or removed throughout the execution phase

**Table 5.1.3-2 – CalWIN Converted Data Test (CDT) Execution Status by Functional Area**

CalWIN CDT Execution Status by Functional Area	Not Executed	In Progress	Pass	Fail	Blocked	Total
Ancillary	23	1	15	1	0	40
CalHEERS	52	6	13	5	2	78
Correspondence	40	13	34	61	16	164
Eligibility	92	48	72	80	75	367
Fiscal	162	1	78	29	44	314
GA/GR	234	0	0	1	0	235
Online	11	16	76	73	11	187
Reports	117	0	0	0	0	117
High-Volume Online Transactions	61	10	149	63	89	372
<b>Total</b>	<b>792</b>	<b>95</b>	<b>437</b>	<b>313</b>	<b>237</b>	<b>1874</b>

# CalSAWS – California Statewide Automated Welfare System

## CalSAWS DD&I Project Phase

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### Note:

- High-Transaction volume are the scripts that are executed via our Automated Regression scripts that are being manually executed against Converted data. Test script counts are subject to change as test scripts are added or removed throughout the execution phase
- Reports functional area is scheduled to see execution begin with load of Golden Data Set (GDS) 3 in the CDT environment (currently scheduled for week of December 13, 2021)
- GA/GR functional area is scheduled to see execution begin with load of Golden Data Set (GDS) 6 in the CDT environment (currently scheduled for week of March 21, 2022)

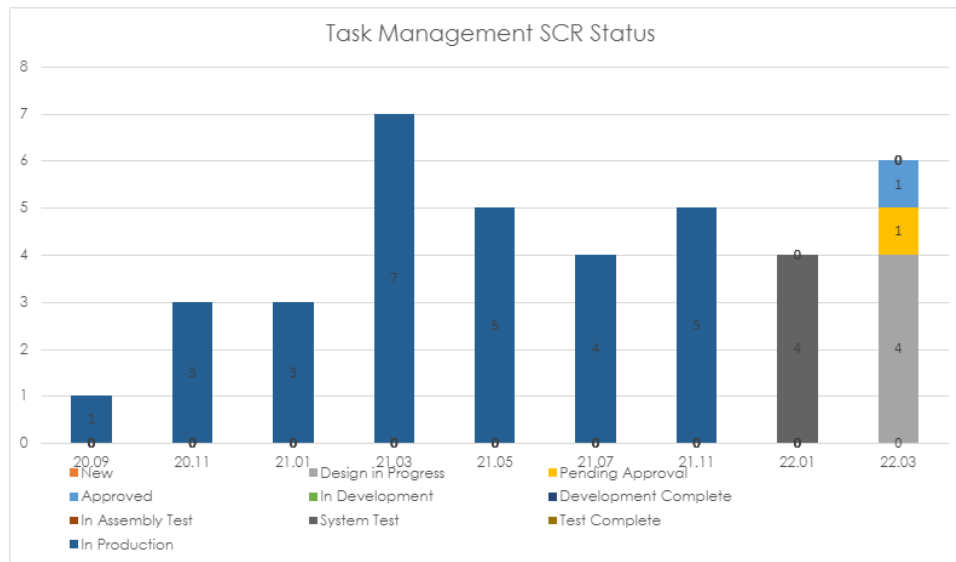
### 5.1.4 Non-State Forms (NSF):

- ▶ State form translations
  - CA-231858 – CW 105: Translations received. SCR is targeted for 22.07 and will be reflected in Table 5.1.1-1 in the next status report

### 5.1.5 Task Management

- ▶ Continued to meet with Consortium Business Analysts and Quality Assurance (QA) team to develop designs for the 22.03 release
  - CA-214922 DDID 2388 – Task Start Date
  - CA-214918 DDID 2275 – Bundle Case Tasks

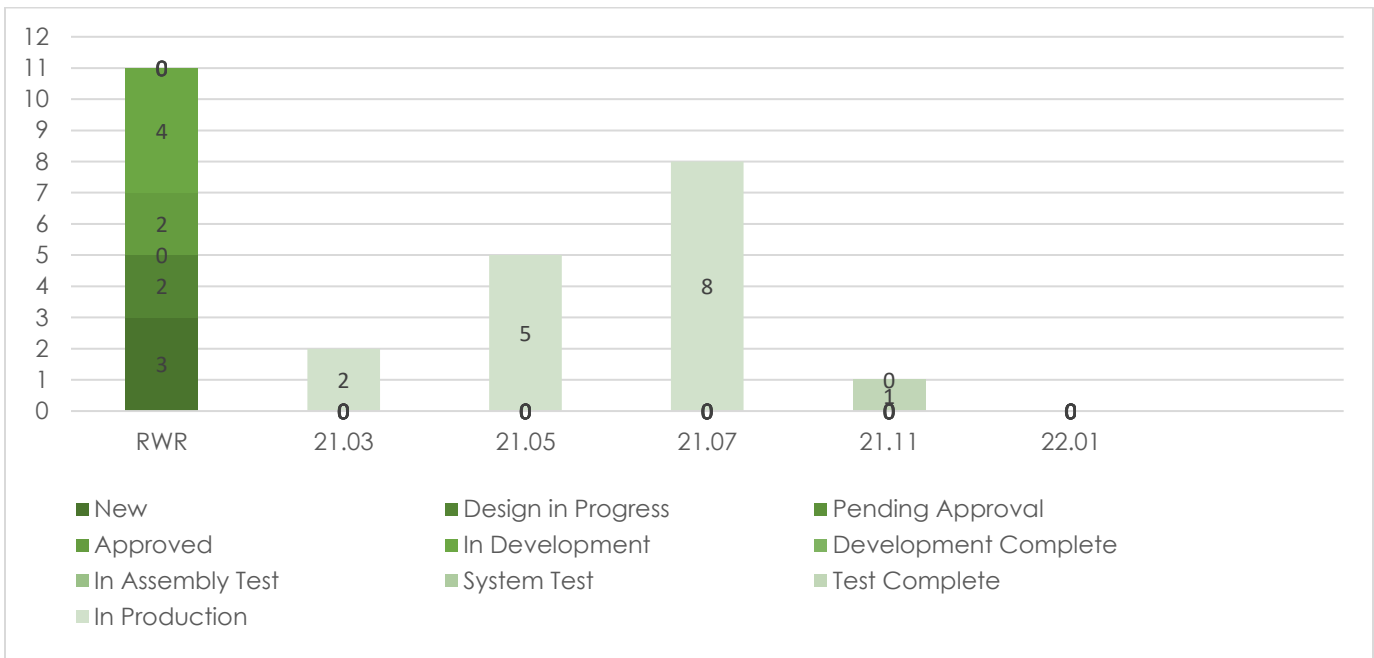
**Figure 5.1.5-1 – Task Management Design Difference Identifiers (DDID) Status**



### 5.1.6 Application Programming Interface (API)

- ▶ Continued meeting with Consortium Business Analysts and the Quality Assurance (QA) team to develop designs:
  - CA-214756 DDID 2353 – Time Limits API
  - CA-214754 DDID 2351 – Reception Log API
- ▶ Continued development on the following Application Programming Interfaces (APIs):
  - CA-214759 DDID 2356 FDS: API - Worker Info API
  - CA-214757 DDID 2354 FDS: API - Verifications API
  - CA-214752 DDID 2349 FDS: API - Person API
  - CA-214746 DDID 2343 FDS: API - Barriers API

Figure 5.1.6-1 – API DDID Status



### 5.1.7 GA/GR

► General:

- o Provided the weekly status update and GA/GR release plan changes to the Consortium on December 7, 2021
- o Discussed the GA GR Correspondence deliverables and design Clarifications on December 7, 2021 and December 9, 2021
- o Discussed the GA GR Correspondence web service design Clarifications on December 8, 2021 and December 10, 2021
- o Discussed the GA GR Eligibility Determination/Benefits Calculation (EDBC) design Clarifications on December 7 - 9, 2021
- o Reviewed the below 22.03 designs content revisions on December 9, 2021
  - CA-215922- GA GR Immediate Need
  - CA-236533 – Phase 4 Batch 1 EDBC Rules and NOA reasons
- o Continued with design of 22.03 SCRs
  - CA-229076 - DDID 2314 FDS: Mandatory Requirements Rule Additional Changes - EDBC Reasons and NOAs (Group 1)
  - CA-226399 - GA GR Forms Additional Changes - Online/Batch Tier 1 and Tier 2
  - CA-215921 - DDID 2315 FDS: GA GR Phase 2 - Employment Services Phase 3 Batch and EDBC changes
  - CA-224767 - DDID 2686/2314 FDS: GA GR - Batch Sweeps for CalWIN GA GR MU triggers - Phase 2
  - CA-215680 - DDID 2378 FDS: GA GR Time on aid changes
  - CA-215677 - DDID 2374 FDS: GA GR San Francisco Sub Programs
  - CA-215686 DDID 2384 FDS: GA GR Batch Appointments
  - CA-227328 - Sanction changes for CalWIN GA GR solution at program level

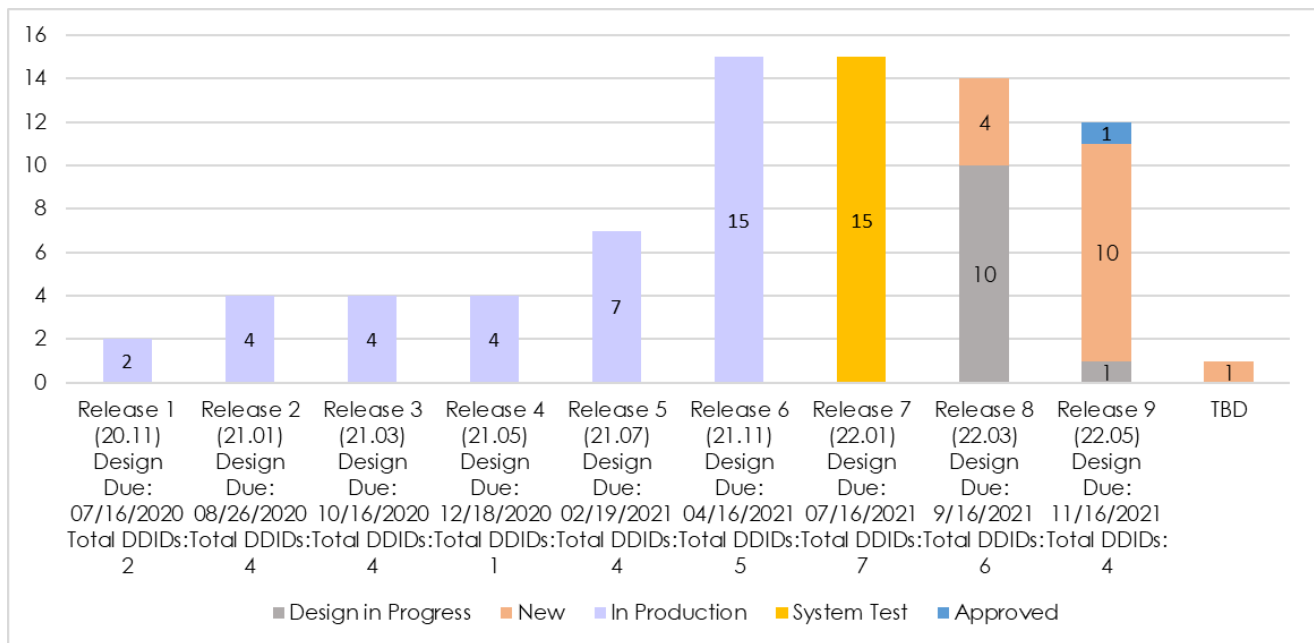
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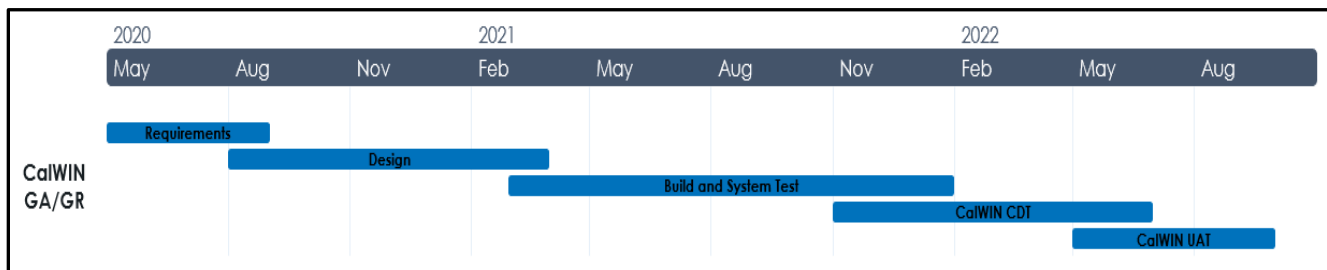
- o Continued with the Automated System test preparation/execution of
  - CA-229096 Phase 2 Batch 4 - Income Rules and corresponding NOA Reasons
  - CA-233488 Phase 2 Batch 5 - Income Rules and corresponding NOA Reasons
  - CA-215917 Phase 3 Batch 1 - Resource rules & NOA Reasons
  - CA-233489 Phase 3 Batch 2 - Resource rules & NOA Reasons
- o Continued with the Automated System test execution of
  - CA-215671- Group 3 form triggers
  - CA-233487 - Group 4 form triggers
  - CA-225258 - NOA Generation from EDBC - Phase 2

**Figure 5.1.7-1 – GA/GR DDID Status**



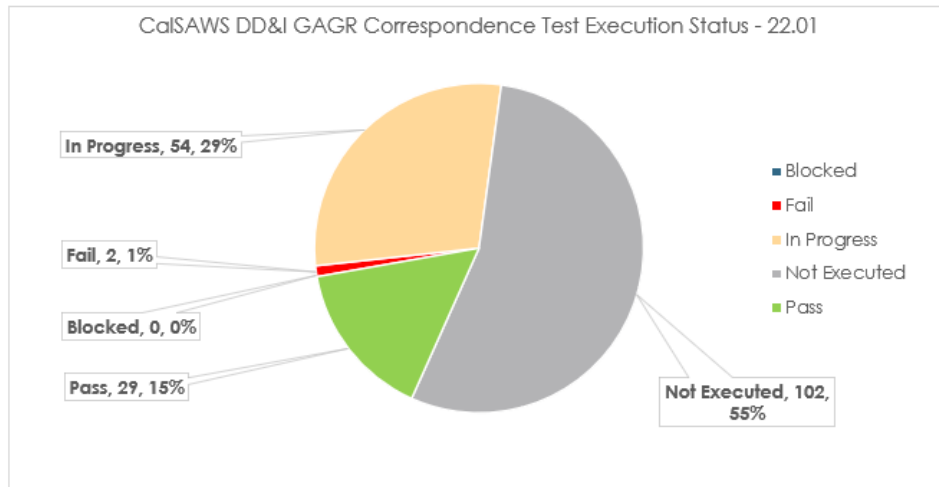
► CalWIN Correspondence Track:

**Figure 5.1.7-2 – GA/GR Correspondence**



**Figure 5.1.7-3 – CalWIN CalSAWS GA/GR Correspondence Testing**

Pass Rate Target as of December 12, 2021	<b>29%</b>
Pass Rate Actual as of December 12, 2021	<b>15%</b>
System Test Complete Date: January 19, 2022	



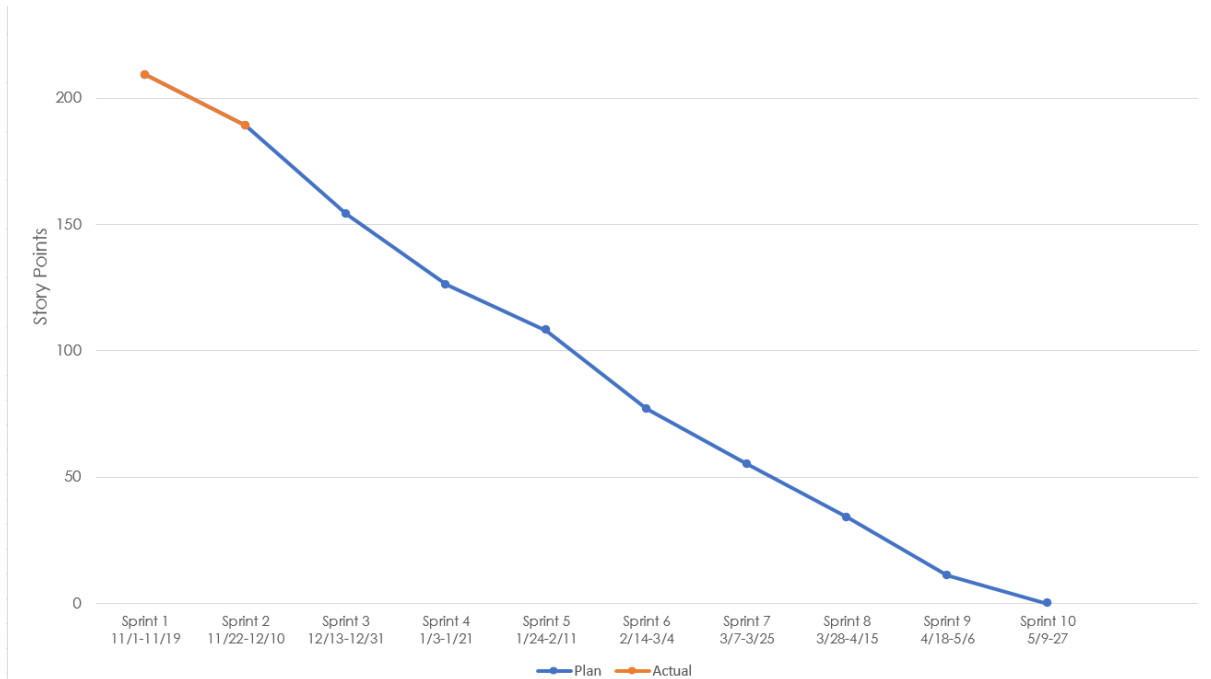
- ▶ GAGR Correspondence Service 22.01
  - 29 Scripts have passed to date, 45% of scripts have a begun or completed execution

### 5.1.8 Case Purge

In July 2020, a team was formed to design, build, test, and deploy a Case Purge solution for C-IV and CalSAWS. 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 is 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

- ▶ Completed design/build/test of Sprint 2 (SCR CA-229302). This Sprint includes the following items:
  - Case Locking (preventing workers from adding programs to purged cases)
  - Modification to make Images view only for purged cases (i.e. removal of ability to add images to purged cases)
  - Deployment of Sprint 2 to Production targeted for December 16, 2021

**Figure 5.1.8-1 – Case Purge Burndown Chart**



**Table 5.1.8-1 – Planned Purge Sprints**

<b>Sprint 1</b>	Porting Case Summary page updates, Case Data Removal page updates
<b>Sprint 2</b>	Add Case Locking, Image View only
<b>Sprint 3</b>	Porting the Identification sweep logic, Add new EDBC/RA Rules to Identification Sweeps, PDF Character Limit increase
<b>Sprint 4</b>	Porting for Deletion Batch process for PGM_DETL and Child Tables, Case Data Removal Identification Report, PDF Configuration to S3
<b>Sprint 5</b>	Porting Document Removal process, Re-Verification logic, YBN e-app logic to block transfers, History PDF Batch, Override Report
<b>Sprint 6</b>	Porting Image Removal Process, CalSAWS PDF Generation process
<b>Sprint 7</b>	Porting Time Limit Aid Summary page, Completion Report
<b>Sprint 8</b>	Porting for Disaster Recovery Document Deletion, OBIEE/EDR Cleanup for Delete Track, Verify Lawful Presence (VLP)
<b>Sprint 9</b>	Performance Environment Preparation and Execution
<b>Sprint 10</b>	Batch Scheduling, Case Purge Transition

**5.1.9 Deliverable Management**

**Table 5.1.9-1 – Deliverable Status for Current Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
58	None for the reporting period	<ul style="list-style-type: none"> <li>Began developing the DDED. Submission of the DDED is due on January 27, 2022</li> <li>Scheduled a walkthrough of the DDED with the Consortium on January 19, 2022</li> </ul>

**5.2 Activities for the Next Reporting Period**

- ▶ Continue drafting designs for Migration Impact System Change Requests (SCRs)
- ▶ Continue test execution for CalSAWS 22.01 Release

**Deliverable Management**

**Table 5.2-1 – Deliverable Status for Next Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
58	None for next reporting period	<ul style="list-style-type: none"> <li>Continue developing the DDED</li> <li>Submission of the DDED is due on January 27, 2022</li> </ul>

**5.3 Deviations from Plan/Adjustments**

- ▶ None for the reporting period

**6.0 Conversion**

**6.1 Highlights of the Reporting Period**

**6.1.1 C-IV Conversion**

- ▶ Continued post go-live support for former C-IV Counties

**6.1.2 CalWIN Conversion:**

- ▶ Continued Golden Data Set (GDS) 4 Epic
  - o Continuing to prioritize converted data testing (CDT) items based on CDT prioritization for GDS delivery. Items not completed in 21.11 Data Model Sprint 2 and Eligibility Determination/Benefits Calculation (EDBC) match 9 to be moved to GDS 4 Hardening. Items that cannot be delivered with GDS 5 will be moved to a future epic
- ▶ Continuing to triage converted data test (CDT) defects as they are created

**Table 6.1.2-1 – CalWIN Conversion Statistics Golden Data Set (GDS) 4 (December 2021)**

GDS#4												
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	85	11/22/2021	12/19/2021	9	7	0	6	17	0	46	0	0
Bugfix	15	11/22/2021	12/11/2021	0	0	0	0	0	0	15	0	0
21.11 Data Model Sprint 2	32	11/29/2021	12/11/2021	1	4	0	5	15	0	7	0	0
EDBC Match Sprint 9	38	11/29/2021	12/11/2021	8	3	0	1	2	0	24	0	0
GDS#4 Hardening Sprint (Conversion Run)	tbd	12/13/2021	12/19/2021	tbd	0	0	0	0	0	0	0	0

- ▶ Continued CalWIN Conversion System Test Development (Epic) which is approximately 98% completed

**Table 6.1.2-2 – CalWIN System Test Development Status**

Functional Area	System Test	Total	Start	Finish	Not Start	In Progre	On Hol	Comple	% Complet	Planned Complet	SPI
Overall	Overall	336	3/22/2021	10/29/2021	0	6	2	328	98%	100%	1.0
Online	Queries	57	3/22/2021	4/23/2021	0	0	0	57	100%	100%	1.0
Online	Scenarios	54	3/29/2021	4/30/2021	0	0	0	54	100%	100%	1.0
EDBC	Queries	19	5/3/2021	6/4/2021	0	0	0	19	100%	100%	1.0
EDBC	Scenarios	17	5/3/2021	6/4/2021	0	0	0	17	100%	100%	1.0
Special Units	Queries	15	6/7/2021	7/9/2021	0	0	0	15	100%	100%	1.0
Special Units	Scenarios	13	6/7/2021	7/9/2021	0	0	0	13	100%	100%	1.0
Fiscal	Queries	15	7/12/2021	9/3/2021	0	0	0	15	100%	100%	1.0
Fiscal	Scenarios	11	7/12/2021	9/3/2021	0	0	0	11	100%	100%	1.0
Interfaces	Queries	35	9/6/2021	10/29/2021	0	3	0	32	91%	100%	0.9
Interfaces	Scenarios	35	9/6/2021	10/29/2021	0	3	0	32	91%	100%	0.9
Ancillary	Queries	22	8/23/2021	10/1/2021	0	0	0	22	100%	100%	1.0
Ancillary	Scenarios	22	8/23/2021	10/1/2021	0	0	0	22	100%	100%	1.0
Ancillary Wave Dependent	Queries	9	10/1/2021	10/29/2021	0	0	0	9	100%	100%	1.0
Ancillary Wave Dependent	Scenarios	9	10/1/2021	10/29/2021	0	0	0	9	100%	100%	1.0
EDBC - CC-3271 - Missing hyperlink	Scenarios	1	9/7/2021	10/29/2021	0	0	1	0	0%	100%	0.0
EDBC - CC-2850 UIED	Scenarios	1	9/7/2021	10/29/2021	0	0	1	0	0%	100%	0.0
EDBC - CC-2849 UEID	Scenarios	1	9/7/2021	10/29/2021	0	0	0	1	100%	100%	1.0

**6.1.3 Gainwell Technologies**

- ▶ CalWIN Data Extraction
  - CalWIN extracted Wave 3 on December 12, 2021
- ▶ CalWIN Document Migration
  - Continued planning for delivery of all Client Correspondence
  - Continued delivery of Client Correspondence from CalWIN

**6.1.4 Ancillary Systems Conversion:**

- ▶ Continued to make progress addressing issues found in Production Dataset Size files. These files are necessary for CalWIN Core Conversion orchestration and integrations
- ▶ Facilitated Exception Reports review sessions with the Ancillary Counties to address questions and concerns
- ▶ Shell Cases
  - Completed data mapping and transformation build and test



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- o Continue to work with Counties to make certain County shell case data integrates with the CalWIN Core converted data

**Table 6.1.4-1 – County Status by Ancillary System**

<b>COUNTY</b>	<b>COLLECTIONS</b>	<b>FRAUD</b>	<b>TASK MANAGEMENT</b>
Contra Costa	<b>Design and build completed</b> Received production sized files	N/A	N/A
Placer	<b>Design and build completed</b> Received production sized files	<b>Design and build completed</b> Received production sized files	<b>Design and build completed</b> Received production sized files
Yolo	<b>Design and build completed</b> Received production sized files	N/A	N/A
Santa Clara	N/A	N/A	<b>Design and build completed</b> Received production sized files
Tulare	<b>Design and build completed</b> Received production sized files	N/A	N/A
Orange	<b>Design and build completed</b> Received production sized files	<b>Design and build completed</b> Received production sized files	<b>Design and build completed</b> Received production sized files
Santa Barbara	N/A	N/A	<b>Design and build completed</b> Received production sized files
Ventura	<b>Design and build completed</b> Received production sized files	N/A	N/A
San Mateo	<b>Design and build completed</b> Received production sized files	N/A	<b>Design and build completed</b> Received production sized files
Santa Cruz	<b>Design and build completed</b> Received production sized files	N/A	<b>Design and build in-progress</b> Received production sized files
Solano	<b>Design and build completed</b> Received production sized files	N/A	N/A
Alameda	<b>Design and build completed</b>	<b>Design and build completed</b>	N/A

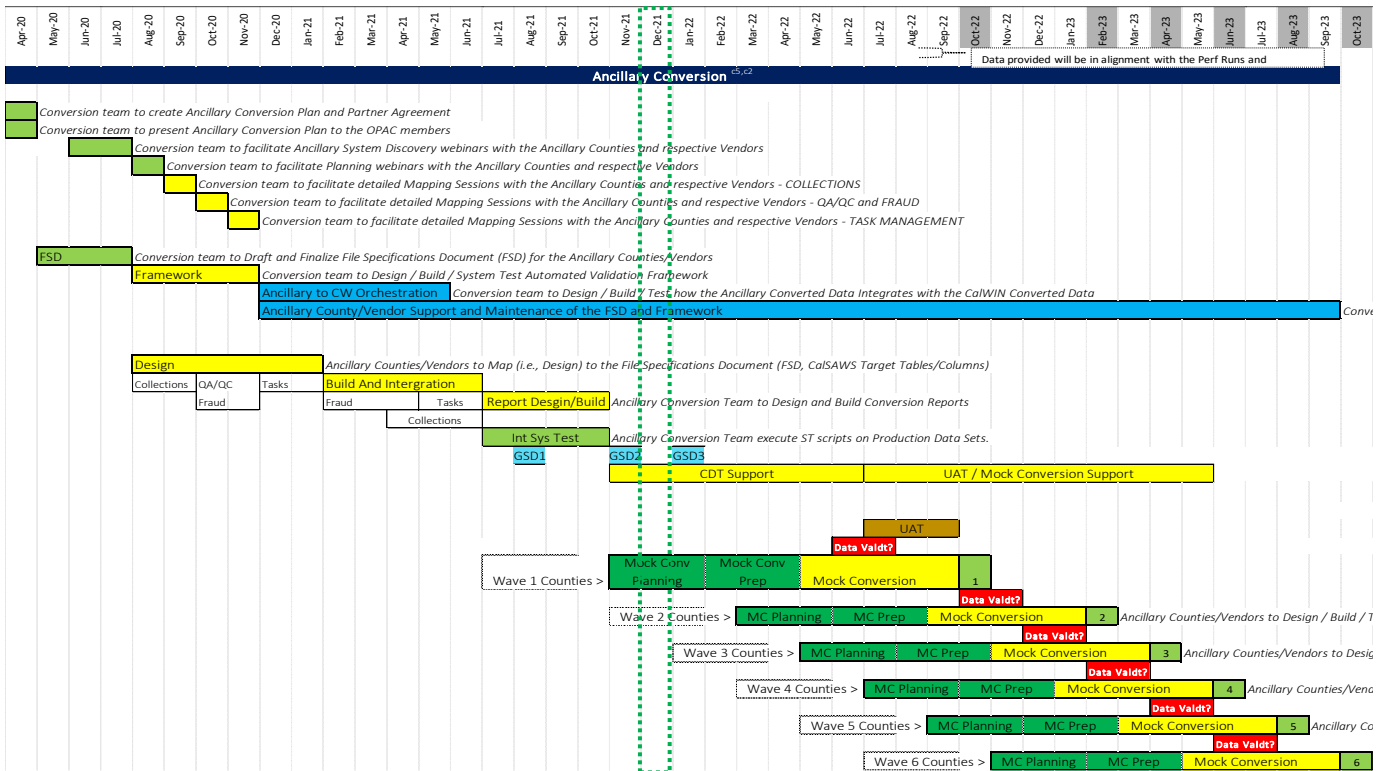
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COUNTY	COLLECTIONS	FRAUD	TASK MANAGEMENT
	Received production sized files	Received production sized files	
Fresno	<b>Design and build completed</b> Received production sized files	N/A	N/A
Sonoma	<b>Design and build completed</b> Received production sized files	N/A	<b>Design and build completed</b> Received production sized files
Sacramento	N/A	<b>Design and build completed</b> Received production sized files	<b>Design and build completed</b> Received production sized files
San Francisco	<b>Design and build completed</b> Received production sized files	N/A	N/A
San Luis Obispo	<b>Design and build completed</b> Received production sized files	<b>Design and build completed</b> Received production sized files	N/A

Figure 6.1.4-1– Ancillary Systems Conversion Gantt Chart



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**Table 6.1.4-2 – Ancillary Systems Conversion Milestones**

<b>FINISH</b>	<b>MILESTONE</b>	<b>MILESTONE DESCRIPTION</b>	<b>STATUS</b>
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)	In progress
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

**6.1.5 Deliverable Management**

**Table 6.1.5-1 – Conversion Deliverable Status for Current Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
	None for the reporting period	

**6.2 Activities for the Next Reporting Period**

**6.2.1 C-IV Conversion:**

- ▶ Continue post go-live support for former C-IV Counties

**6.2.2 CalWIN Conversion:**

- ▶ Complete Jira epics and issue aligned with Golden Data Set (GDS) Delivery schedule
- ▶ Continue Golden Data Set (GDS) 4 build activities
- ▶ Continue Converted Data Test (CDT) Support
- ▶ Continue Converted Data Delivery planning activities

**6.2.3 Gainwell Technologies**

- ▶ CalWIN Data Migration
  - Continue planning for future CalWIN extractions
- ▶ CalWIN Data Retention M&O
  - Continue planning for future data retention runs

**6.2.4 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)
- ▶ Continue system test scenario for automation development
- ▶ Prepare to receive Wave 3 Data Extracts

**6.2.5 Deliverable Management**

**Table 6.2.5-1 – Conversion Deliverable Status for Next Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
	None for next reporting period	

**6.3 Deviations from Plan/Adjustments**

- ▶ None for the reporting period

## 7.0 Training

### 7.1 Highlights of the Reporting Period

- ▶ Imaging
  - Attended Weekly Training Touchpoint with Consortium Training Lead on December 7, 2021
  - Attended meeting regarding Imaging Model Office for Los Angeles County on December 10, 2021
  - Presented Imaging training updates at CalSAWS Imaging and Contact Center Projects Joint Status Meeting on December 8, 2021
  - Finished addressing reviewer comments on and requested approval for additional Imaging guides based on Web-Based Training (WBT) content:
    - CalSAWS Imaging Guide – Navigation
    - CalSAWS Imaging Guide – Annotations
    - CalSAWS Imaging Guide – Images and Tasks
    - CalSAWS Imaging Guide – Coversheets and Separator Sheets
    - CalSAWS Imaging Guide – Core Capture Profiles
    - CalSAWS Imaging Guide – County-Maintained Workflow Queues
    - CalSAWS Imaging Guide – Document Retrieval
    - CalSAWS Imaging Guide – Return Mail Capture
    - CalSAWS Imaging Guide – Specialty Capture Profiles
    - CalSAWS Imaging Guide – Quality Assurance
  - Began drafting script for testing Imaging after code deployments to Training Production

### Deliverable Management

**Table 7.1-1 – Training Deliverable Status for Current Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
	None for the reporting period	

### 7.2 Activities for the Next Reporting Period

- ▶ Imaging
  - Attend Weekly Training Touchpoint with Consortium Training Lead on December 14, 2021
  - Finalize additional Imaging guides based on web-based training (WBT) content and load to Learning Management System (LMS)
  - Continue drafting script for testing Imaging after code deployments to Training Production
  - Begin planning for Imaging Train-the-SME (ITTSME) refresher sessions for Los Angeles County

## Deliverable Management

**Table 7.2-1 – Training Deliverable Status for Next Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
	None for the next reporting period	

### 7.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

## 8.0 Deployment

### 8.1 Highlights of the Reporting Period

#### 8.1.1 Implementation

- ▶ Imaging
  - Attended Imaging Migration Standup Calls on December 7 and December 9, 2021
  - Hosted meeting regarding Los Angeles County Department of Social Services (DPSS) and Department of Children and Family Services (DCFS) Readiness and Change Enablement for Imaging on December 8, 2021
  - Maintained Los Angeles County and Project Imaging Readiness Checklists in JIRA
  - Continued planning for Los Angeles County post-deployment Imaging support

#### 8.1.2 Change Management

- ▶ Organizational Change Management (OCM) Extension
  - Continued to engage the former C-IV Counties on their personalized OCM approach
    - Continued to host follow-up meetings with the County Implementation Point of Contacts (IPOCs) and Primary Point of Contacts (PPOCs) to cover their individual County dashboard and provide an individualized support approach
    - Met with 21 of the 39 Counties from November 6 – December 10, 2021 to cover their County Action Plan and confirm that it met their engagement needs
    - Scheduled final County touchpoints for the week of December 13, 2021
  - Hosted the Qlik Overview Workshop on December 8, 2021 with Counties that indicated it as a need during their County touchpoint sessions
    - Began to compile a comprehensive Q&A document based on questions received during the sessions
  - Continued to prepare for Office Hours and Functional Workshops for Counties that expressed the need for more support in those areas:
    - Batch Office Hours on December 14, 2021
    - Fiscal Processes Workshop on December 16, 2021

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- o Scheduled two sessions of Imaging Office Hours to go over outstanding Imaging-related questions from the Counties:
  - Session One on December 16, 2021
  - Session Two on December 17, 2021
- o Hosted the Security Assignment Office Hours on December 9, 2021 with Counties submitting questions in advance
  - Began to compile a comprehensive Q&A document based on questions received in advance of and during the session
  - Finalized learning materials (4 Primary Hotspot Learning Aids and 8 sub-guides), received feedback from the Consortium Training team, and published to Forumbree:
    - Correspondence System Change Request (SCR) Intermediate Solutions Guide – provides a list of upcoming System Change Requests (SCRs) that are related to Correspondence. For each item, you will find the difference between the C-IV and CalSAWS systems, the associated SCR/Release Date, and the intermediate solution until the SCRs are released
    - Imaging Materials - provides a comprehensive list of existing and upcoming Imaging materials, broken down by topic, with detailed descriptions of what is included in each one
    - Reports Best Practices - provides CalSAWS users with a variety of best practices for pulling reports and navigating the Qlik Platform, and includes lists of upcoming Reports system changes, dashboards with upcoming availability in Qlik, and the most common dashboards & reports
    - Forms and NOAs Guide – provides the batch trigger conditions for a selection of forms and Notices of Action (NOAs). There are also responses to frequently asked correspondence-related questions. All of the following listed sections are included in the Primary Learning Aid, but each has also been separated into its own document for ease of reference by topic.
      - o WTW Appointment Notices
      - o GEN 202 – Verification of Employment Earnings
      - o CalFresh Recertification
      - o CF 386 – Notice of Missed Interview (NOMI)
      - o Appointment Letters
      - o Time Limit Notice of Actions (NOAs)
      - o Pickle Correspondence
      - o SAWS 1/SAWS 2 PLUS Generating Manual Notices
- o Hosted 2 of 2 Forumbree Kick-offs with County Super Users on December 7, 2021
- ▶ Imaging
  - o Finalized Imaging Post-Deployment infographic based on findings from Organizational Change Management (OCM) Extension Team meetings with Counties
  - o Distributed Document Manipulation and Document Routing Logic infographics to former C-IV Counties

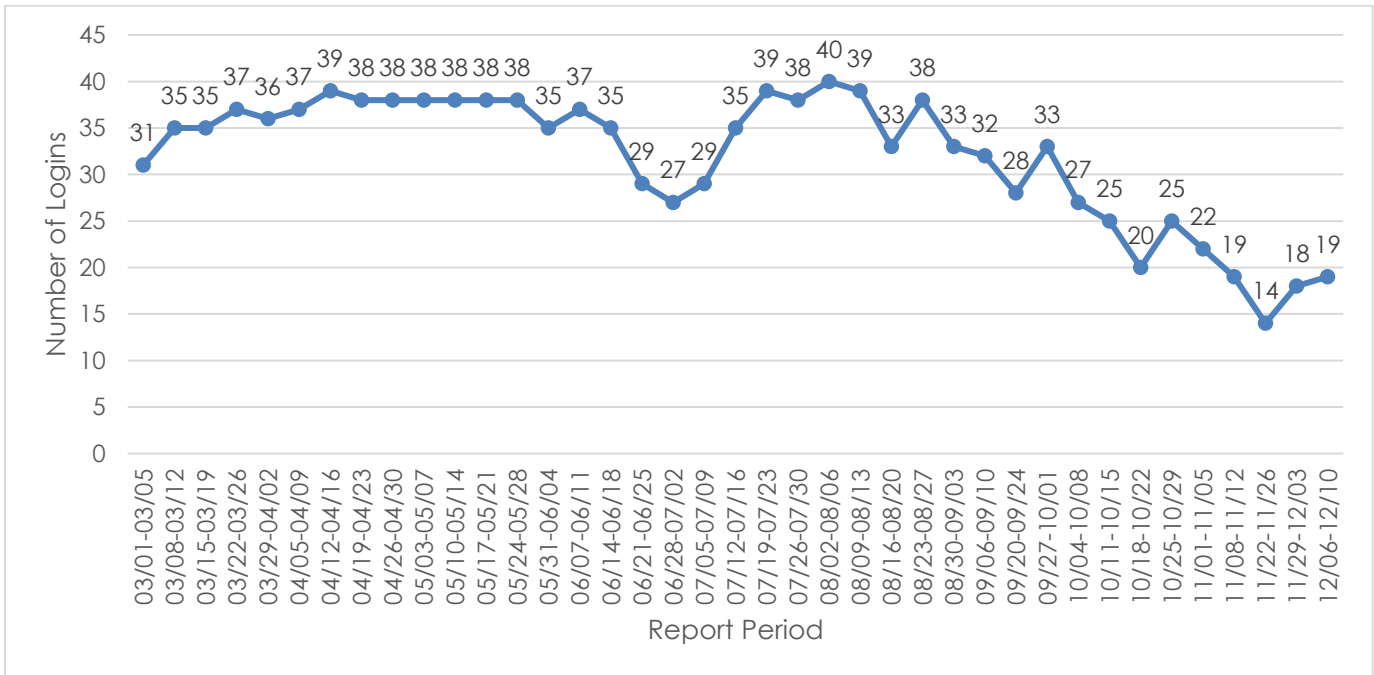
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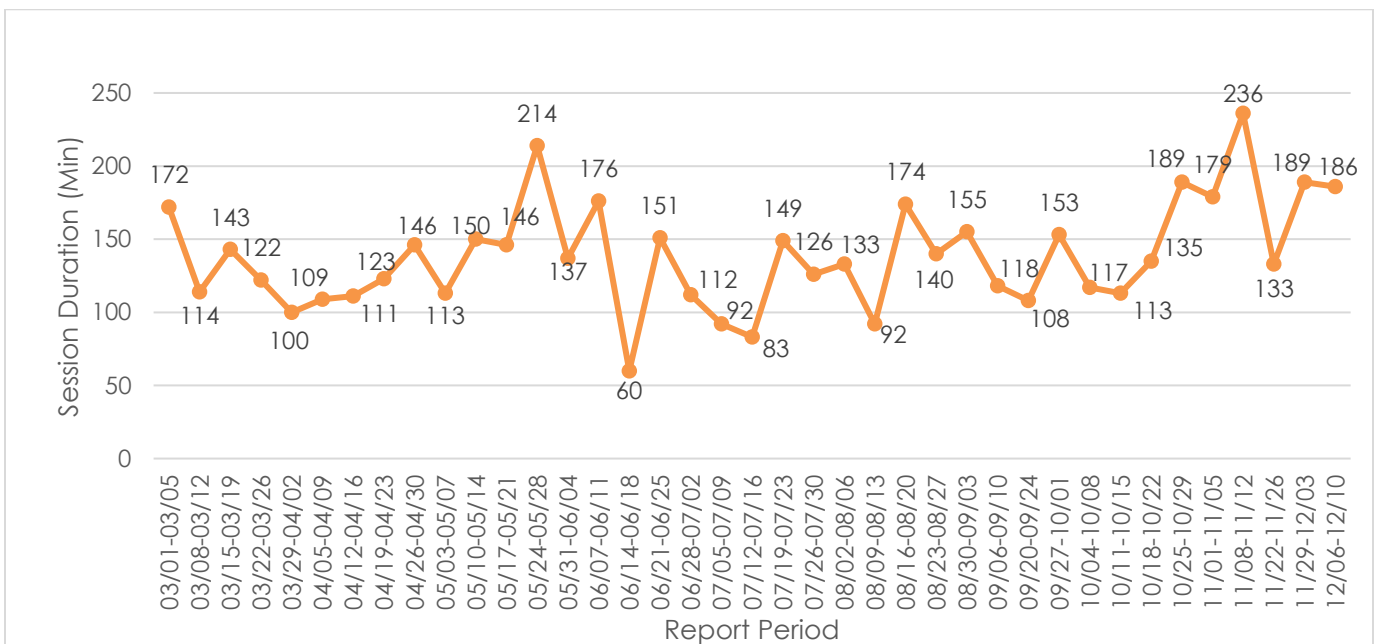
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- o Los Angeles County Imaging Change Management
  - Updated December Imaging communication based on internal reviewer feedback
  - Continued drafting Los Angeles County Imaging Go-Live Packet

**Figure 8.1.2-1 – CalSAWS Sandbox Environment: Total Number of Counties that Logged in per Week (Excluding 09/13/2021-09/17/2021, 11/15/2021-11/19/2021) \***



**Figure 8.1.2-2 – CalSAWS Sandbox Environment: Average Time Users Spent in the Sandbox per Week (Excluding 09/13/2021-09/17/2021, 11/15/2021-11/19/2021) \***





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**Table 8.1.2-1 – Login Counts & Total Logged Time by County During Reporting Period**

COUNTY	USER	LOGIN COUNT	TOTAL LOGGED TIME
Alameda	Users 1, 2, 7	5	01:42:19
Contra Costa	Users 1, 2, 3, 7	18	02:27:15
Del Norte	User 2	1	00:26:47
Los Angeles	Users 4, 6	76	19:40:55
Merced	User 5	1	00:32:46
Orange	Users 1, 2, 3, 4, 5, 6	101	03:20:21
Placer	Users 2, 3	9	06:21:05
Riverside	User 4	2	00:04:06
Sacramento	Users 1, 4, 6	91	09:33:15
San Diego	Users 1, 3, 4, 5, 6	18	04:40:53
San Francisco	Users 1, 7	3	00:26:12
San Luis Obispo	Users 1, 3, 5, 6	7	01:42:38
San Mateo	Users 1, 2, 3, 4, 5, 6	73	21:30:30
Santa Barbara	Users 1, 2, 4	24	12:16:11
Santa Clara	Users 1, 2, 5, 6	25	16:45:14
Santa Cruz	Users 2, 3	5	00:10:32
Tuolumne	Users 2, 4, 5	52	18:55:43
Ventura	Users 3, 6	4	00:58:12
Yolo	User 3	3	00:41:25

**Deliverable Management**

**Table 8.2.1-2 – Deployment Deliverable Status for Current Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
66	CalSAWS Deployment Complete Milestone/Report – C-IV	<ul style="list-style-type: none"> <li>Received approval of the FDEL on December 8, 2021</li> </ul>

**8.2 Activities for the Next Reporting Period**

**8.2.1 Implementation**

- ▶ Imaging
  - Host Los Angeles County Imaging Implementation Readiness Checkpoint on December 13, 2021
  - Attend meeting regarding Los Angeles County Offices Usage Information on December 13, 2021
  - Attend Imaging Migration Standup Calls on December 14 and December 16, 2021
  - Continue monitoring Project and County Imaging Readiness tasks for Los Angeles County Imaging implementation
  - Continue planning for Los Angeles County post-deployment Imaging support
  - Develop Los Angeles County Imaging Readiness Dashboards for County and Project readiness checklists

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- o Attend Imaging Office Hours for former C-IV Counties on December 16 and December 17, 2021

### 8.2.2 Change Management

- ▶ Organizational Change Management (OCM) Extension
  - o Continue to engage the former C-IV Counties on their personalized OCM approach
    - Host the final touchpoint meetings with the County Implementation Point of Contacts (IPOCs) and Primary Point of Contacts (PPOCs) to cover their individual County dashboard and provide an individualized support approach, covering newly created learning materials
  - o Post new Hotspot Learning Aids to Forumbee and inform County Super Users of their availability
  - o Finalize Q&A from Qlik Overview Workshop and Security Assignment Office Hours, post to Forumbee, and inform attendees of the availability
  - o Host the Batch Automation Office Hours on December 13, 2021 with Counties submitting questions in advance
  - o Host the Fiscal Processes Workshop on December 16, 2021 with Counties that indicated it as a need during their County touchpoint sessions
  - o Host the two sessions of Imaging Office Hours on December 16 and 17, 2021 with Counties submitting questions in advance
  - o Compile and present Final Change Report
- ▶ Imaging
  - o Distribute CalSAWS Imaging Post-Deployment infographic to former C-IV Counties
  - o Distribute December Imaging communication to Los Angeles County
  - o Continue drafting Los Angeles County Imaging Go-Live packet

### 8.2.3 Deliverable Management

**Table 8.2.3-1 – Deployment Deliverable Status for Next Reporting Period**

DEL #	DELIVERABLE NAME	STATUS
66	None for next reporting period	

### 8.3 Deviations from Plan/Adjustments

- ▶ None for the reporting period

## **9.0 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

