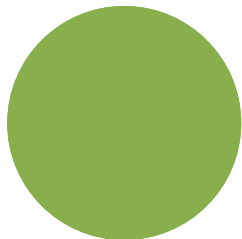


CalSAWS

WCDS SUBCOMMITTEE MEETING
AGENDA PACKAGE

Friday, July 8, 2022
12:00 P.M. – 2:00 P.M.

Virtual Meeting
Dial-In: 1 323-886-6772
Conference ID: 416 484 486#



Meeting Reminder

Please:

1. Mute phone when not speaking
2. Do not put your phone line on hold
3. Unmute and identify yourself to speak and limit background noise

Agenda

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

Note: The public may also speak on any Item ON the Agenda by waiting until that item is read, then requesting recognition from the Chair to speak.

- *See supplemental document for full agenda.*



Action Items

Action Items

4. Action items:

4.1 Approval of May 20, 2022, WCDS Subcommittee Meeting Minutes*

- **Refer to attached supplemental document.*



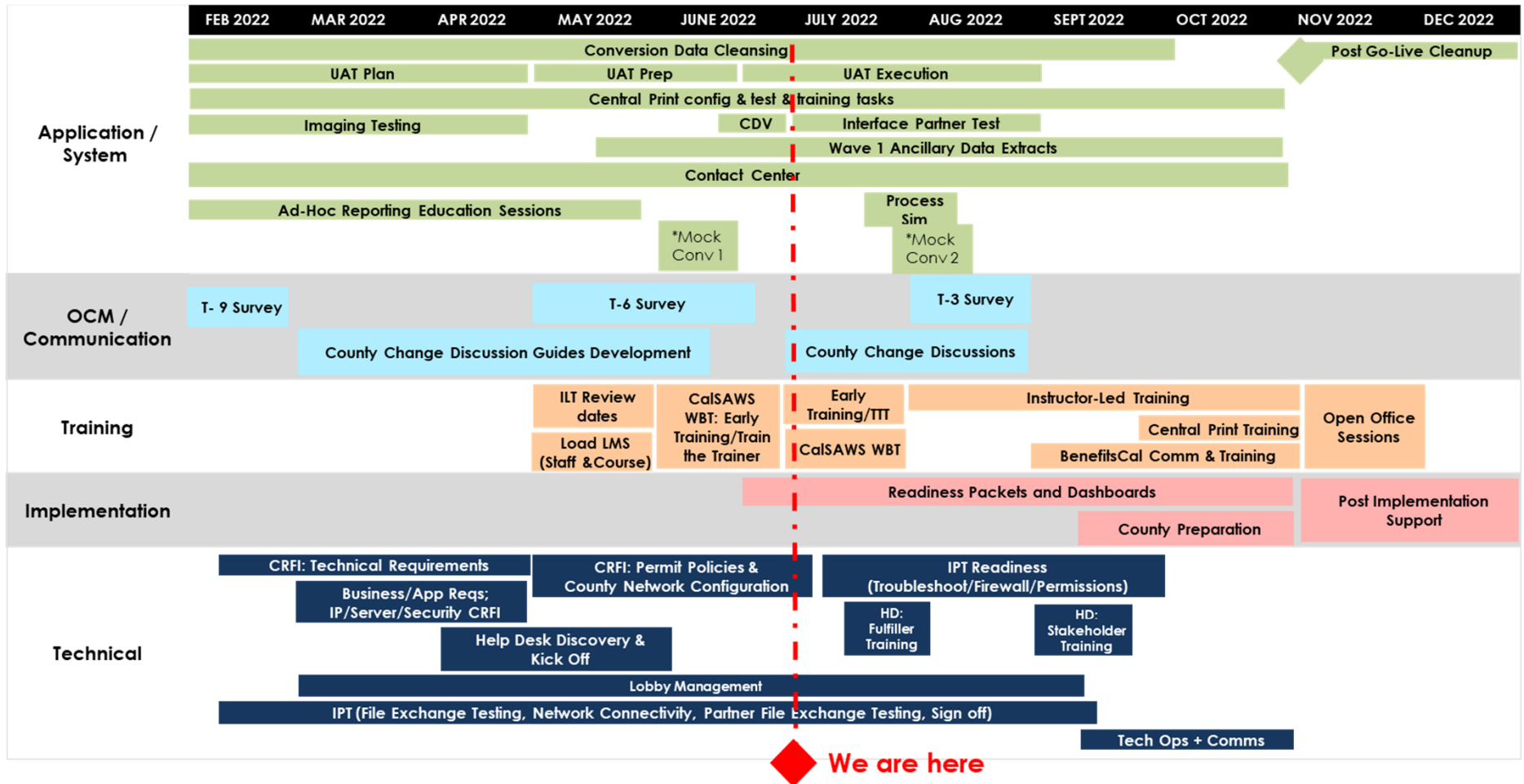
Informational Items



5. CalWIN Implementation Readiness & Milestones

CalWIN Implementation Readiness & Milestones

Wave 1 Schedule Overview



We are here

Wave 1 Ancillary Date Extracts
 May 23, June 11, Aug 6
 October 27-31 (final cutover)

*Mock Conversion 1 6/11 – 6/14
 *Mock Conversion 2 8/6- 8/9

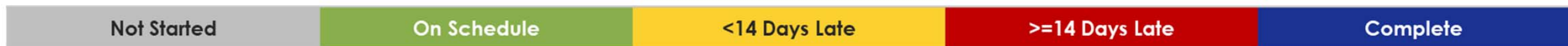
County Data Validation (CDV) – June 20-July 1
 Process Simulation – July 25 – Aug 19
 Interface Partner Testing (IPT) – June 27 – Aug 31

UAT
 Group 1 6/27 – 7/22 (retest 7/25 – 8/12)
 Group 2 7/25 – 8/12 (retest 8/22 – 9/2)

CalWIN Implementation Readiness & Milestones

Wave 1 Readiness Overview

Readiness Area*	Readiness Category		Comments
Application	G	Deploy CalSAWS Releases 22.05 - 22.09	
	G	Contact Center Readiness	
	G	Imaging Readiness	
	G	BenefitsCal Readiness	CBO Mock Run 1 in process and on schedule
	G	Central Print Readiness	
	Y	UAT Prep	UAT Test Script Creation (Project): 964 of 1064 test scripts completed as of 06/17/2022. Group 1 is 100% complete and Group 2 is 91% complete (Risk 271)
	NS	UAT Execution	
Integration	NS	County Interface Partner Test (IPT) Execution	IPT Execution: Started June 27, 2022
	NS	State Interface Partner Test (IPT) Execution	IPT Execution: Started June 27, 2022
Conversion	G	CDT Defects Resolution	
	G	EDBC Match – Auto Review Rates	68% Match in Assembly (GDS#7 was 58%).
Technical	Y	County Network Connectivity	Connectivity: 34 of 58 Actual, 5 behind target (39 of 58) Impact: Backup equipment to be delivered and installed by 6/28. No impact to go live or IPT/UAT as primary equipment is connected. Risk 273 Placer County will not be mirroring the production process for passing interface files during IPT. Due to a firewall issue, the passing of interface files during IPT will be executed using a workaround. Risk 275
	NS	Performance Testing	Batch Performance: Execution began June 27, 2022 Online Performance: Execution began June 27, 2022 Analytics/Reports Performance: Execution began June 27, 2022



*The status should be reflective of the readiness category trending at the time of reporting period.

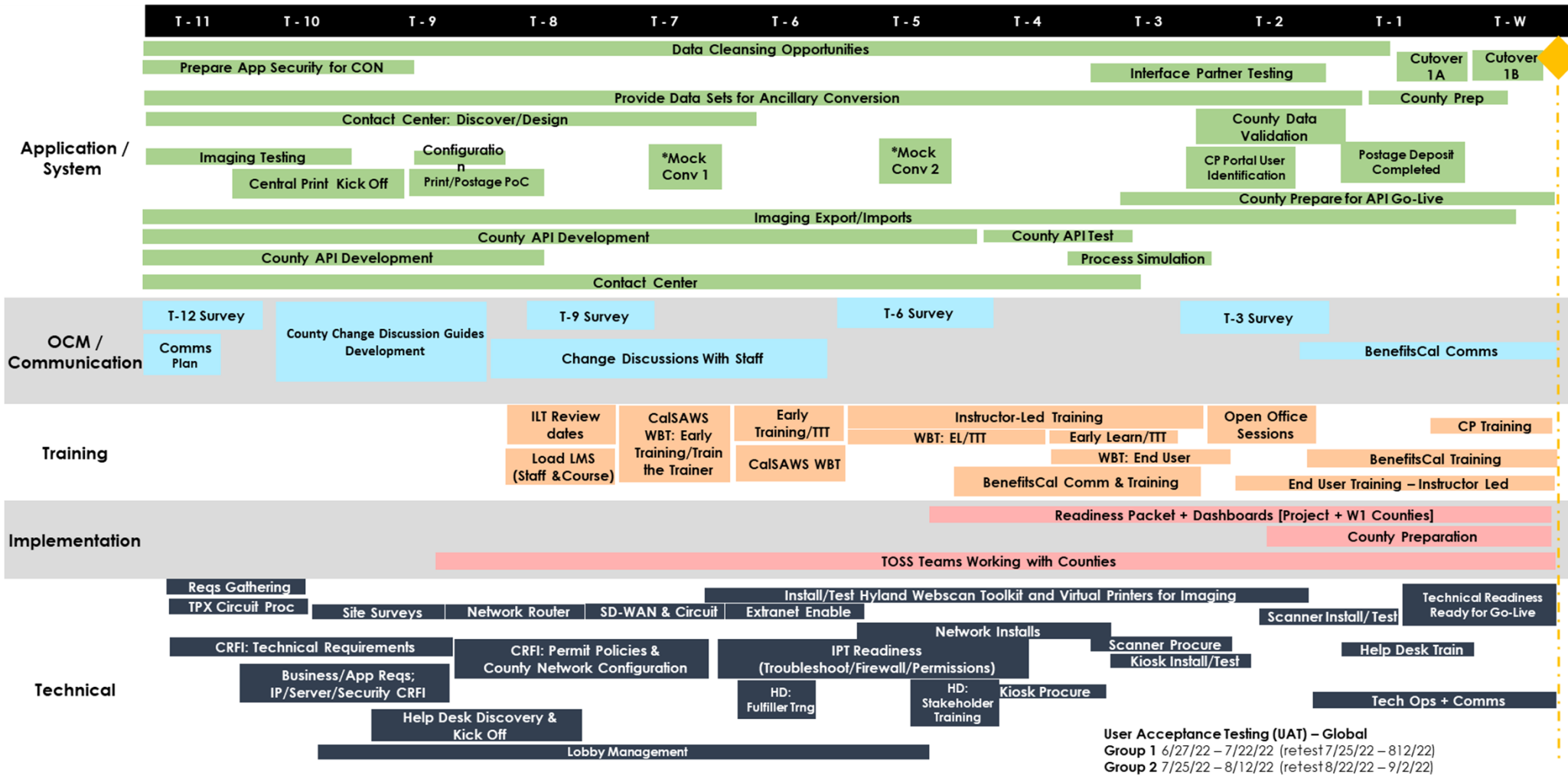
CalWIN Implementation Readiness & Milestones

Wave 1 Readiness Overview

Readiness Area*	Readiness Category		Comments
Training	C	FDEL 8 Master Training Plan	Approval received 6/17/22
	C	ILT Training Curriculum Complete	Complete for Wave 1 Counties
	NS	Wave 1 County Classroom Set-Up	Not started
	NS	Training Delivery	Not started
Organization	R	Change Discussion Guides (CDGs)	<ul style="list-style-type: none"> Facilitation meetings held with Yolo and Placer Facilitators confirmed Materials for Change Discussions drafted and distributed
	G	Communications	Wave 1 Infographics for June distributed via CIT
	C	Business Process Reengineering	<ul style="list-style-type: none"> All To-Be Sessions Complete All Closeout Sessions Complete All Work Products Signed-Off and Deliverables Approved
	G	Process Simulation	<ul style="list-style-type: none"> Scenarios Defined Participants Determined Detailed Scenario Definition and Data Prep In-Progress
	G	Configuration	<ul style="list-style-type: none"> Guide and Worksheets Documented & Distributed Working Sessions In-Progress
Implementation	R	Implementation Planning	Readiness Dashboard <ul style="list-style-type: none"> Met Yolo and Placer on 6/23 for pre-review of the Dashboard Submitted CIT w/Dashboard and Packet (as an Appendix) on 6/24
	G	County Prep	38 of 39 County Prep activity instructions drafted; on schedule to complete all drafts by 6/30/22
	R	Pre & Post Implementation Support	<ul style="list-style-type: none"> Meetings set on 6/20 and 6/24 to gain alignment between Consortium, Deloitte, Accenture, QA on the plan for On-Site Support, Virtual Support, Command Center and Roles and Responsibilities. Documentation of this alignment will be reflected in DDEL 10 – Implementation Support Plan This will also include next steps on how to put the plan into action, including recruitment and scheduling of resources
	G	Help Desk	County Delegated Admin Training: Completed for Wave 1
	G	County Ad Hoc Reports/APIs	Ad Hoc Reports: For Wave 1 Counties (Placer and Yolo): <ul style="list-style-type: none"> CalSAWS has facilitated 90% (or 9 of the 10) planned Ad Hoc Support Curriculum to the Wave 1 Counties. Counties have Refactored 0% of their Ad Hoc Reports and are approx. 0% to plan (i.e., Behind Plan). Placer only has 3 reports to refactor while Yolo does not have any identified

CalWIN Implementation Readiness & Milestones

Wave 2-6 T-12 Schedule Overview





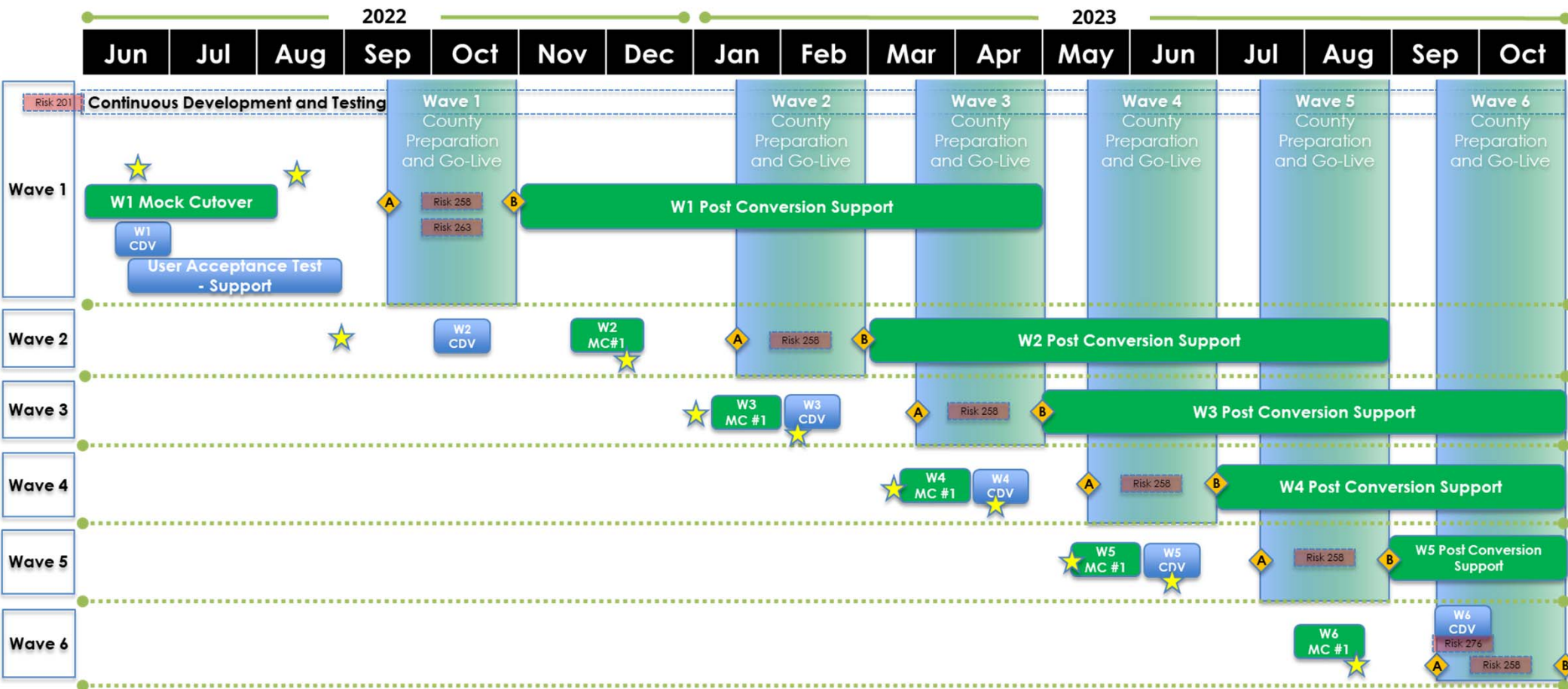
6. CalWIN Conversion Update



CalWIN Conversion Update

Highlights from Mock Cutover 1 and County Data Validation (CDV)

- Wave 1 Mock Cutover executed in June (1A – County and 1B – Go-Live) completing on June 15th
- Conversion Delivered Golden Data Set (GDS) 8



CalWIN Conversion Update

Highlights from Mock Cutover 1 and County Data Validation (CDV)

- Consortium and QA Facilitated County Data Validation (CDV) between June 20th and July 1st
- CDV included participants from Contra Costa (14), Placer (11) and Yolo (13)
- Conversion (CalWIN and CalSAWS), Online, Eligibility, and Fiscal teams supported CDV

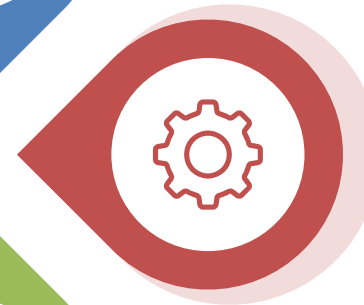
County Participants

Eligibility, Employment Services and Fiscal staff participate in a self-paced, script driven, review of their cases asking themselves “Do my cases look right? “



CDV Occurs after Mock Cutover

The CalWIN and CalSAWS Projects execute a Mock Cutover for each Wave; which creates the data set used for CDV.



Findings resolutions

Findings were discussed on the Daily Triage Call with the counties, and Jira Items were logged as needed. A log of all findings was maintained and shared daily with the counties.



Case Review Findings

As the counties executed their scripts if encountered something that didn't look right they could discuss with the CDV Team during Daily Office Hours (9:00 – 10:30) or submit a Findings Report.





7. CalWIN UAT Status Update

UAT CalWIN

County UAT Timeline

Group 1

6/27 – 7/22: UAT
Group 1 Execution

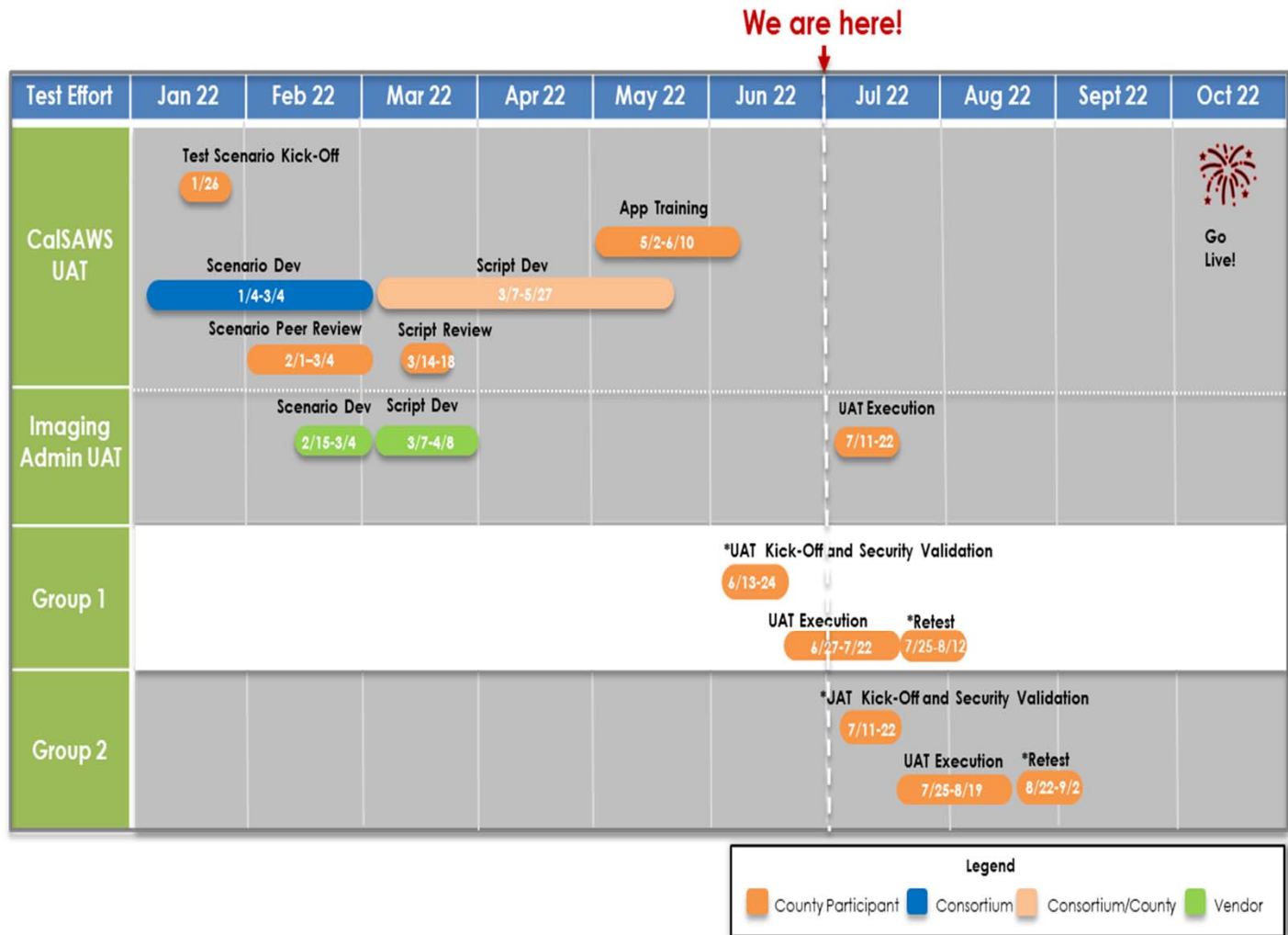
Group 2

6/13 – 7/8:
Application training

7/5 -7/9: Group 2
GAGR Script
reconciling

7/20 – 7/22: UAT
Execution process
Training

7/25 – 8/19: UAT
Group 2 Execution



- Group 1**
1. Manage Personnel
 2. Lobby Management
 3. CW, CF, Non-FC Resource Data Bank (RDB)
 4. CAPI
 5. Child Care
 6. WTW, FSET, Cal-Learn

- Group 2**
8. GAGR
 9. MC, CMSP
 10. FC, AAP, KG, ARC, FC RDB
 11. Fiscal Issuance, Reports
 12. Fiscal OP/OI, Reports
 13. Special Units – Hearings & investigations
 14. Special Units – QA, Error Prone, IEVS
 15. State Reports

UAT CalWIN County Group 1 UAT Participants



UAT Participation Dates	Program/Functional Area	SME & Testers
6/27/22-8/19/22	Manage Personnel	36
*6/27/22- 7/8/22	Lobby Management	22
6/27/22-7/22/22	CW, CF, Non-FC Resource Data Bank (RDB)	30
*6/27/22- 7/8/22	CAPI	11
6/27/22-7/22/22	WTW, FSET, Cal-Learn	22



UAT Execution

UAT Group 1 Execution Goals



Week 1 Goals

- ✓ Execute 108 scenarios
 - ✓ Executed 155 of 108 target goal
- ✓ New data and Intake scenarios
- ✓ Goal exceeded



Themes

What are testers finding

Security profiles

- Security setup based on CRFI
- Additional rights required in all areas

Training

- Notice of action functionality in both CW/CF and WTW
- Terminology

Script clarifications

- ### Upcoming Week
- ✓ Execute accumulated 216 scenarios
 - ✓ Existing and ongoing scenarios



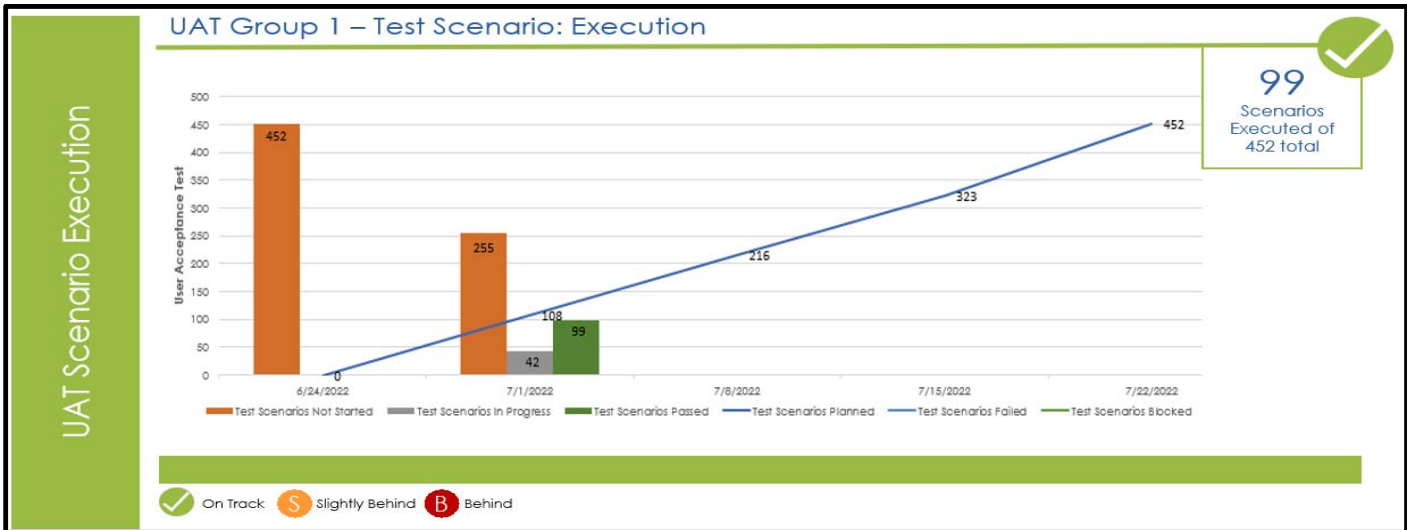
CAPI
Currently testing for two weeks.
Testers would like to test longer

CalSAWS UAT: Script Execution

Group 1 UAT Execution Status

Group 1 Execution as of July 1, 2022

- 30 % Passed
- CAPI, Lobby Management, CW_CF, WTW
- Child Care starts 7/11/22



CalSAWS UAT Execution	Total Test Scripts	Not Started	In Progress	Failed	Blocked	Passed
CalSAWS CalWIN UAT	431	322 (56%)	42 (9%)	31 (7%)	25 (6%)	99 (30%)

Findings

All initial findings are logged as findings triaged and categorized as:

- Defect
- Duplicate
- Functioning as designed
- Security profile
- Script related
- Training

Programs Impacted	Findings					Total:
	DONE	REJECTED	IN PROGRESS	OPEN		
All	0	1	0	0	1	1
CAPI	0	0	2	6	8	8
CalFresh	0	1	0	12	13	13
CalLearn	0	1	0	0	1	1
CalWORKs	0	0	0	3	3	3
Welfare-to-Work/Gain	1	0	1	0	2	2
None	1	0	1	13	15	15
Total Unique Findings:	2	1	4	32	39	39

* Most findings were logged July 1, 2022, and are in initial stages of the triage process



8. Key Risks and Mitigation Plans Update



Key Risks and Mitigation Plans Update

Risks related to Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk ID	Risk Name	Risk Description	Readiness Area (Owner)
258	The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window	The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window.	Conversion (Project)
263	Unresolved High Priority Conversion defects not resolved prior to Wave 1 Go-Live could impact County Case Worker business Post Go-Live	Remaining CDT as well as New UAT defects will need to be resolved prior to the Wave 1 Go-Live. Defects not resolved could result in a schedule slippage of and/or impact the counties experience after Wave 1 Go-Live	Conversion (Project)
267	GA/GR UAT and County Data Validation functionality may be delayed past July 2022	If all required CalSAWS GA/GR EDBC/CC functionality is not delivered by July 2022 then the GDS to support UAT, County Data Validation may not contain all of the GA/GR automation or converted GA/GR data.	Application (Project)
271	CalSAWS CalWIN UAT Script development may not be completed timely due to a lack of resources	CalWIN UAT script writing is at risk due to loss of consortium resources and lack of participation from CalSAWS county resources	Application (Project)

Key Risks and Mitigation Plans Update

Risks related to Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk ID	Risk Name	Risk Description	Readiness Area (Owner)
272	Changes to CalWIN Counties PoP site locations occurring less than 12 months prior to go-live may be at risk of not having connectivity with CalSAWS or meeting cutover milestones	Any CalWIN County that make changes to their designated Point of Presence (PoP) site locations after procurement and planning tasks have been complete, or occurring within 12 months prior to go-live, are at risk for not meeting targeted connectivity dates needed for go-live	Technical (County)
275	CalWIN Counties unable complete tech readiness activities(network) (CRFI 22-040) required for start of IPT and Go-Live for their respective waves	Placer County has indicated that due to a conflicting firewall replacement project (County driven) that failed and being reattempted, the county would delay the configuration of technical changes requested by CalSAWS in CRFI 22-040 (Due on June 10). Effort to re-deploy the firewall and navigate through change process would be effort intensive causing the technical changes (CRFI 22-040) be postponed. This would impact completion of technical readiness and start of Interface Partner Testing by ~8 weeks (from June 27 until early August).	Technical (County)

Key Risks and Mitigation Plans Update

Risks related to Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk ID	Risk Name	Risk Description	Readiness Area (Owner)
262	The CalWIN counties may not be fully prepared for go-live if they do not have sufficient or timely information	The CalWIN counties and County Directors have voiced concern that they do not have sufficient information or direction from the CalWIN ISS team to adequately prepare for go-live. In some cases, they have begun creating their own materials based on what they understand. If the counties do not have a framework within which to prepare, they may not be ready for cutover. This includes clear communication and timelines for what is needed to be completed by when, readiness checklists, early conversations on the transition from the current state to the future state, and clear direction.	Implementation (Project)
268	Implementation Readiness for CalWIN Cutover to CalSAWS	If implementation readiness (project and county) is not on track to meet their respective exit criteria by 04/29/2022, then the CalWIN Wave 1 cutover to CalSAWS could either be delayed or require significantly greater support to help counties through outstanding issues. Individual risks have been opened related to the ability to be fully ready in time for a successful CalWIN Wave 1 cutover to CalSAWS on October 27, 2022 and subsequent waves. This risk serves as an overarching risk for the overall readiness of the project and CalWIN counties to cutover to CalSAWS	Implementation (Project)

Key Risks and Mitigation Plans Update

Risks related to Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk ID	Risk Name	Risk Description	Readiness Area (Owner)
269	CalWIN Counties may not have enough development and testing timeline to Refactor their Ad-hoc Reports and Ancillary System before Go-Live	The CalWIN Counties need time in the schedule, leading up to their respective Go-Live, to Refactor Ad-hoc Reports and/or Ancillary Systems. To do so, the counties need connectivity and access to CalSAWS environments, data model (and definitions), as well as data. The current CalSAWS delivery schedule (of these) is compressing the CalWIN counties Design, Development, and Testing timelines (i.e., schedule) and putting their County Readiness for Go-Live at-risk	Implementation (County)

CalSAWS | 9. CalWIN Implementation Go-Live Governance

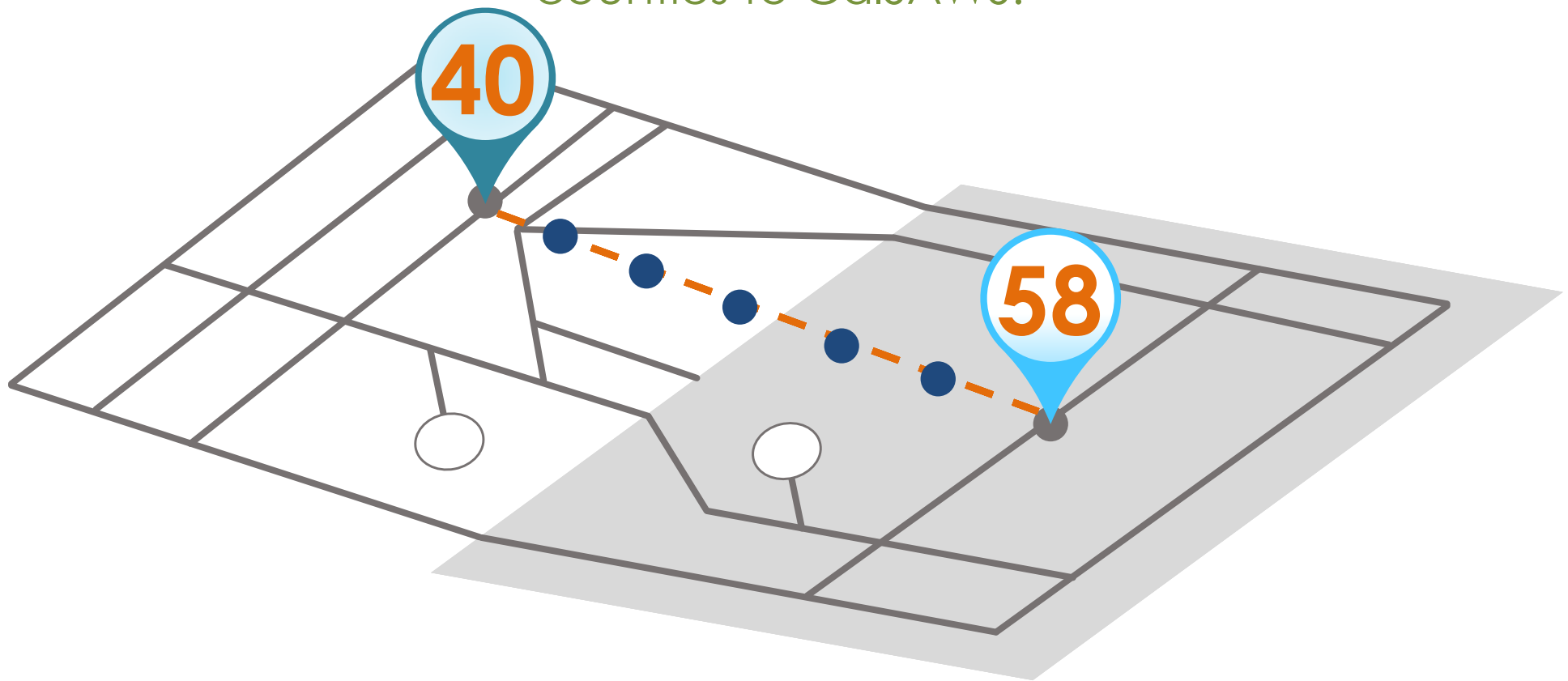


The Road to CalSAWS

May 2022

How we'll navigate to a 58-county system

There are a series of meetings on the path to Go-Live, to assess project and county readiness for the transition of 18 CalWIN counties to CalSAWS.



Here is more information on each type of meeting, the participants, frequency, format, and materials.

Go-Live Readiness Meetings - Overview

Wave 1 Go-Live
Oct 31, 2022

	Who and What	May 2022 (T-5M)	June 2022 (T-4M)	July 2022 (T-3M)	August 2022 (T-2M)	September 2022 (T-1M)	October 2022 (T-4W to T-1W)	
County Readiness Checkpoints	County checkpoints include CalSAWS TOSS/County POC meetings, CalWIN ISS Standups, Global IPOC Checkpoints, and Management Site Visits (MSVs) that occur regularly with counties and/or Regions. Implementation Readiness Packet distributed monthly to counties	County Checkpoints Global IPOC and TPOC Checkpoints	County Checkpoints Global IPOC and TPOC Checkpoints	County Checkpoints Global IPOC and TPOC Checkpoints	County Checkpoints Global IPOC and TPOC Checkpoints	County Checkpoints Global IPOC and TPOC Checkpoints	County Checkpoints Global IPOC and TPOC Checkpoints	
Project Readiness Checkpoints	Weekly and monthly status reported via regular meetings and reports at project level. State and IV&V involved in weekly. CMS involved in monthly. Internal Project Teams report Milestone/Task completion and escalate issues to CalSAWS Leadership	Weekly and Monthly Reporting of Status (Project and CMS/FNS)						
Governance Check-ins	Implementation Team informs JPA, PSC, OPAC, and WCDS members of readiness status during regularly scheduled monthly meetings and responds to questions. State stakeholders, county directors, and advocates may also be in attendance.	PSC JPA OPAC WCDS	JPA Mbr Rep & Conf. OPAC	PSC JPA OPAC WCDS	PSC JPA OPAC	PSC JPA OPAC WCDS	OPAC JPA	
State and County Stakeholder Checkpoints	RMs meet with their County Directors to inform them of status and timelines, escalate any issues/risks, and obtain agreement Go-Live readiness. Receive support from project, as needed. CalSAWS Leadership and Implementation team informs State Stakeholders of status, timelines, and issues/risks and obtains support of Go-Live readiness				County Director T-2 Checkpoint State IT T-2 Checkpoint State T-2 Checkpoint	County Prep Check State IT County Prep Check State County Prep Check	County Director T-3W Checkpoint State IT T-3W Checkpoint State T-3W Checkpoint	
Pre-Green Light	Internal Project Teams, Section Directors, and RMs conduct Pre-Green Light to report readiness to CalSAWS Leadership. RMs report on behalf of Region/County Directors (align with Regional governance voting). State Partners, IV&V, and County Directors (observers) Dry Runs – Internal only	Suggestion: Combine Pre-Green Light with PSC/JPA meetings if possible. Include as an Informational Item only. No voting by PSC or JPA members.				Dry Run County Prep	Pre-GL County Prep	Dry Run Go-Live
Green Light	Internal Project Teams, Section Directors, and RMs conduct Green Light to report readiness to CalSAWS Leadership. RMs (Approvers) to vote on behalf of Region/County Directors (align with Regional governance voting). State Partners, IV&V, and County Directors observers. PSC/JPA informed post green-light. If attend, they are observers only. During cutover weekend, communications will be provided by the Project Teams. Only RMs will vote on final Go-Live. All others are observers to the process.					GL County Prep	GL Go-Live GL Cutover Wkd	

County Readiness Checkpoints to Go-Live



Participants



County Staff

Implementation Points of Contact
Technical Points of Contact
Identified County Staff



CalSAWS Staff

Targeted Onsite Support Staff (TOSS)
CalSAWS Project Team
Regional Managers

Format



County Checkpoints: TOSS Teams work with County IPOCS and TPOCs to review Milestone/Task completion and escalate issues to Customer Engagement Management and RMs.

Global IPOC Checkpoints provide an update to county staff on all project activities leading up to Go-Live.

CalWIN ISS Standups informational meeting for counties using CalWIN on upcoming migration activities

Frequency and Duration



County Checkpoints

Monthly or agreed upon frequency between TOSS and County Team, that began at T-9M
Approx 1 hour meeting with each county



Global IPOC Checkpoints

Monthly meetings are scheduled by the ISS team
1 hour meeting with all CalWIN county IPOCS



CalWIN ISS Standup

Monthly meetings are scheduled by the Consortium
1 hour meeting with all CalWIN County representatives

County Checkpoint Materials

INPUTS

County Readiness Work Plan and Checklist, one per county

OUTPUTS

Implementation Readiness Dashboard

Implementation Readiness Packet

Documented discussions, issues, and decisions

Project Readiness Checkpoints to Go-Live

Weekly and Monthly Reporting of Status (Project and CMS)

Project Team Checkpoints

Participants



Weekly and Monthly Reporting of Status (Project/CMS)

Section Directors
Regional Managers
CMS staff (monthly only)



Project Team Checkpoints

ISS Team
CalSAWS Project Team Leads

Format



Weekly and Monthly Reporting of Status (Project/CMS): Updates from Section Directors and Regional Managers

Project Team Checkpoints: Team Leads provide updates to checklists milestone and tasks

Frequency and Duration



Weekly and Monthly Reporting (Project/CMS)

Weekly and monthly status reported via regular meetings and reports at project level. State and IV&V involved in weekly. CMS/FNS involved in monthly.

CMS: T-2W, Monday, 10/17/2022



Project Team Checkpoints

All project teams report on project readiness task status on a weekly basis

Materials

Weekly and Monthly Reporting (Project/CMS)

Implementation Readiness Packet

Implementation Readiness Dashboard

Project Team Checkpoints

Project readiness checklists milestones and tasks

PSC, JPA, and JPA Member Rep Checkpoints



Participants



Project Steering Committee

County PSC Members
Section Directors
Regional Managers
CalSAWS Project Leads



Joint Powers Authority

County JPA Members
Section Directors
Regional Managers
CalSAWS Project Leads



CalSAWS Conference & JPA Member Rep. Meeting

Format



PSC: PSC members are informed of readiness status during regularly scheduled meetings. State stakeholders, county directors, and advocates also in attendance.

JPA: CalSAWS Project Teams inform the General Membership of readiness status during regularly scheduled monthly meetings and responds to questions.

CalSAWS Conference/JPA Member Meeting: JPA membership is informed of readiness status in the annual meeting.

Frequency and Duration



Project Steering Committee Checkpoints

Monthly on the 3rd Thursdays, 8:30AM to 12:00PM

T-5: Thursday, 5/19/2022 **T-2:** Thursday, 8/18/2022
T-3: Thursday, 7/21/2022 **T-1:** Thursday, 9/15/2022
T-2W: TBD



CalSAWS Conference & JPA Member Rep. Meeting Checkpoint

Annual

T-4: JPA Member Rep. Meeting, Wed, 6/22, 8:30am - 10:30am
Annual Conference, Thursday, 6/23, 8:30am - 4:30pm



Joint Powers Authority Checkpoints

Monthly

T-5: Fri 5/13/2022 12:30-3:30 **T-2:** Fri 8/12/2022, 12:30-3:30
T-3: Fri 7/22/2022 12:30-3:30 **T-1:** Fri 9/9/2022, 12:30-3:30
T-3W: TBD

Materials

Implementation Readiness Dashboard

OPAC and WCDS Checkpoints

OPAC

WCDS

Participants



OPAC

OPAC Members
Section Directors
Regional Managers
CalSAWS Project Leads



WCDS

WCDS Members
Section Directors
Regional Managers
CalSAWS Project Leads

Format



OPAC: OPAC members are informed of readiness status during recurring meetings. Stakeholders, and county representatives also in attendance. Closed meeting.

WCDS: CalSAWS Project Teams inform WCDS members of readiness status during regularly scheduled bimonthly meetings and responds to questions.

Frequency and Duration



OPAC Checkpoint

Monthly on the 4th Thursdays, 8:30AM to 4:00PM

T-5: Thursday, 5/26/2022

T-2: Thursday, 8/25/2022

T-4: Thursday, 6/16/2022

T-1: Thursday, 9/22/2022

T-3: Thursday, 7/28/2022

T-2W: Thursday, 10/27/2022



WCDS Checkpoint

Bimonthly (every 2 months)

T-5: Fri 5/20/2022 12-2pm

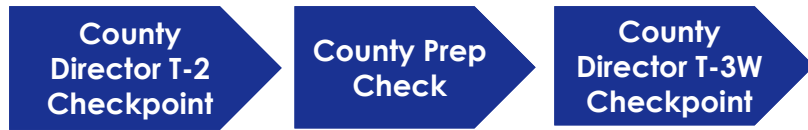
T-1: Fri 9/16/2022, 12-2pm

T-3: Fri 7/8/2022 12-2pm

Materials

Implementation Readiness Dashboard

County Stakeholder Checkpoints Starting at T-2M



Participants



County Leadership

Director
Deputy Director(s)
County/OPAC Managers



Regional Managers



County Staff

Primary Point of Contact
Implementation Point of Contact
Change Network Champion

Format



ISS prepares the materials. Regional Managers share overall county readiness and gather county feedback.

Dates



County Director T-2 Checkpoint

Timeframe: 8/19/2022 - 8/30/2022
Approx. 1 hour meeting conducted with each county or group of counties



Director's County Prep Check

County Prep Check Meeting: Tuesday, 9/12/2022
RMs conduct checkpoint within 2 days (by 9/14/2022)



County Director T-3W Checkpoint

Timeframe: 10/10/2022 - 10/14/2022
Approx. 1 hour meeting conducted prior to Pre-GL meeting

Materials

INPUTS

Implementation Readiness Dashboard

Implementation Readiness Packet

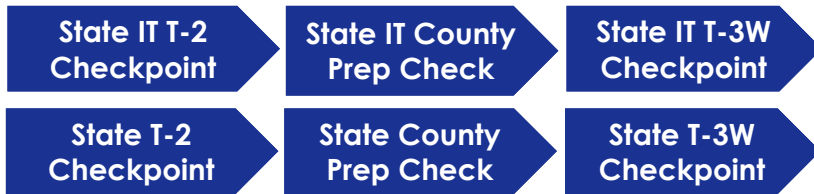
OUTPUTS

Checkpoint results

County Director feedback

County concerns, if any

State Stakeholder Checkpoints Starting at T-2M



Dates

Participants



State Partners

DHCS CWDA
CDSS IV&V
OSI



CalSAWS Leadership

Customer Engagement Section
Director
Deloitte Delivery Managers

Format



CalSAWS Leadership and Implementation team informs State Stakeholders of status, timelines, and issues/risks and obtains support of Go-Live readiness, and build awareness of the content to be presented in JPA/PSC



State IT T-2 Checkpoint

Wed 8/10/22 (@ State Monthly IT Status Report Meeting, 2nd Wednesday Monthly)

State T-2 Checkpoint

Week of 8/8/22



State IT County Prep Check

Wed 9/14/22 (@ State Monthly IT Status Report Meeting, 2nd Wednesday Monthly)

State County Prep Checkpoint

Week of 9/12/22



State T-3W Checkpoint

Wed 10/12/22 (@ State Monthly IT Status Report Meeting, 2nd Wednesday Monthly)

State T-3W Checkpoint

Week of 10/10/22

Materials

INPUTS

Implementation Readiness Dashboard

Implementation Readiness Packet

OUTPUTS

Checkpoint results

State feedback

State concerns, if any


Pre-Green Light Meetings Starting at T-1M







Participants & Observers

-  **County Leadership**
PSC Board Members (optional observers)
County PSC Members (optional observers)
-  **State Partners**
DHCS, CDSS, OSI, CWDA, IV&V
-  **CalSAWS Staff**
CalSAWS Executive Leadership
Regional Managers
CalSAWS Leads

Format

-  Internal Project Teams, Section Directors, and RMs conduct Pre-Green Light to report readiness to CalSAWS Leadership. RMs report on behalf of Region/County Directors (align with Regional governance voting).
State Partners, IV&V, and County Directors (observers)
Dry Runs – Internal only

Dates

-  **Dry Run County Prep**
Wednesday 9/7/2022, Morning
Duration: 2 hours
-  **Pre-Green Light County Prep**
Thursday, 9/15/2022 - an agenda item @ PSC meeting
Same information shared in 9/9/2022 JPA meeting
Duration: 2 hours
-  **Dry Run Go-Live Event**
Tuesday, 10/11/2022
Duration: 2 hours
-  **Pre-Green Light Go-Live Event**
Tuesday, 10/18/2022
Duration: 2 hours

Materials

INPUTS

- Pre-Green Light Presentation (same format as Green Light Presentation)
- Supplemental Materials:
Implementation Readiness Dashboard,
Implementation Readiness Packet

OUTPUTS

- Session results
- Decisions documented
- Participant feedback

Green Light Meetings Starting at T-1M



Participants & Observers



County Leadership

PSC Board Members (optional observers)
County PSC Members (optional observers)



State Partners

DHCS, CDSS, OSI, CWDA, IV&V



CalSAWS Staff

CalSAWS Executive Leadership
Regional Managers
CalSAWS Leads

Format



Internal Project Teams, Section Directors, and RMs conduct Pre-Green Light to report readiness to CalSAWS Leadership. RMs vote on behalf of Region/County Directors (align with Regional governance voting structure). State Partners, IV&V, and County Directors (observers) PSC/JPA informed post green-light. If attend, they are observers only.

Dates



Green Light County Prep

Wednesday 9/14/22
Duration: 2 hours



Green Light Go-Live Event

Wednesday, 10/26/2022
Duration: 2 hours



Green Light Cutover Weekend

Sunday, 10/30/2022
Duration: 2 hours

Materials

INPUTS

Green Light Presentation

Supplemental Materials:
Implementation Readiness
Dashboard, Implementation
Readiness Packet

OUTPUTS

Session results

Decisions documented

Participant feedback



10. CalSAWS Financial Update



CalSAWS Quarterly Financial Updates

Overview

CalSAWS DD&I/M&O
and Premise

CalWIN M&O

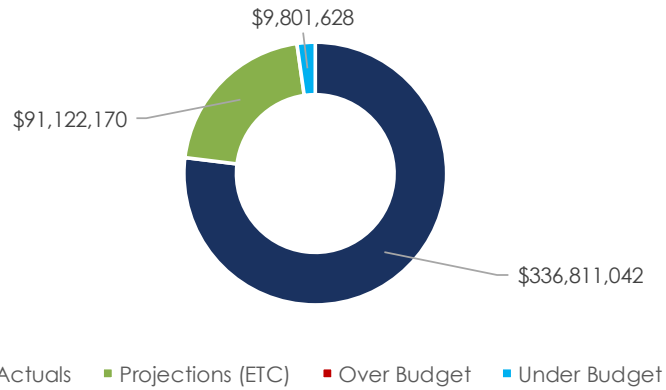
C-IV M&O

LRS M&O

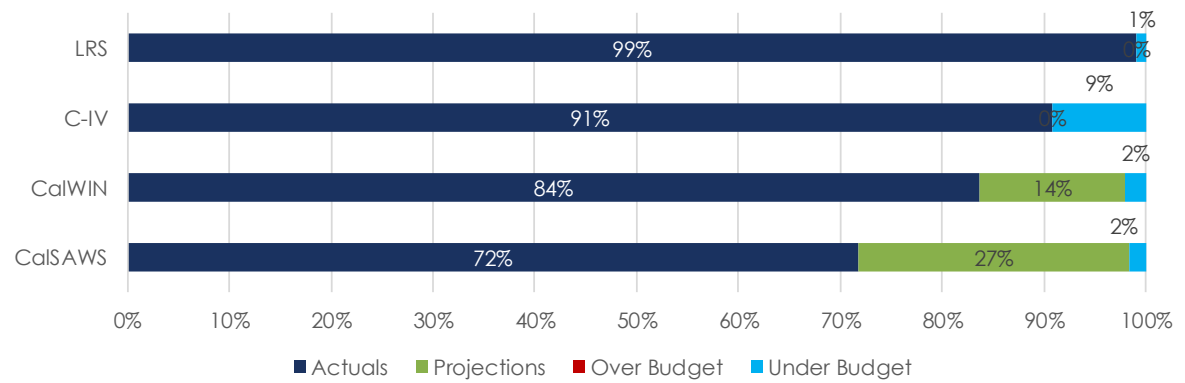
JPA Admin

- 1 Actuals to Date
Based on Vendor Invoices & County Claims
- 2 Projections (Estimates to Complete)
Estimated Costs for Future Months
- 3 Estimate at Completion (EAC)
Actual Costs Plus Estimated
- 4 Total Allocation/Budget
Amount Allocated by Line Item for the Approved Budget
- 5 Balance
Difference Between EAC and Budget
Negative balance is over budget
Positive balance is under budget
- 6 % Expended to Date (Actuals)
Percent of Actuals to Date Divided by the Budget
- 7 % EAC to Budget
Percent of EAC Divided by the Budget

Total Actuals & Projections



% Expended to Date



Category	Actuals to Date ¹	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
CalSAWS	\$204,662,827	\$75,737,996	\$280,400,823	\$285,105,467	\$4,704,644	71.8%	98.3%	
DD&I App. Dev.	\$10,707,785	\$11,264,001	\$21,971,786	\$21,981,708	\$9,922	48.7%	100.0%	
DD&I Non-App. Dev.	\$64,445,045	\$22,241,936	\$86,686,981	\$86,774,366	\$87,385	74.3%	99.9%	Staff & travel less than planned
DD&I Training	\$1,652,195	\$503,760	\$2,155,955	\$2,664,243	\$508,288	62.0%	80.9%	Staff & travel less than planned
DD&I GA/GR	\$4,231,452	\$85,990	\$4,317,442	\$4,317,630	\$188	98.0%	100.0%	
DD&I Procurement	\$170,213	\$0	\$170,213	\$250,481	\$80,268	68.0%	68.0%	Staff & travel less than planned
CalSAWS M&O	\$106,699,651	\$37,609,539	\$144,309,190	\$144,319,131	\$9,941	73.9%	100.0%	
M&O Procurement	\$609,262	\$185,451	\$794,713	\$1,337,140	\$542,427	45.6%	59.4%	Staff & travel less than planned
CalHEERS Interface	\$2,866,221	\$1,091,003	\$3,957,224	\$5,441,930	\$1,484,706	52.7%	72.7%	App Maintenance Services less than planned
Covered CA CSC	\$0	\$152,569	\$152,569	\$176,092	\$23,523	0.0%	86.6%	WAN less than planned
CalSAWS Premise	\$13,281,003	\$2,603,747	\$15,884,750	\$17,842,746	\$1,957,996	74.4%	89.0%	Actuals less than planned and expected shifts
CalWIN M&O	\$88,750,995	\$15,233,042	\$103,984,037	\$106,109,803	\$2,125,766	83.6%	98.0%	
CalWIN M&O	\$80,214,650	\$13,939,256	\$94,153,906	\$94,578,843	\$424,937	84.8%	99.6%	Software cost less than planned
CalHEERS Interface	\$7,265,601	\$1,178,422	\$8,444,023	\$9,924,409	\$1,480,386	73.2%	85.1%	App Maintenance Services less than planned
CalHEERS CSCN	\$1,270,744	\$115,364	\$1,386,108	\$1,606,551	\$220,443	79.1%	86.3%	
C-IV M&O	\$25,522,754	\$0	\$25,522,754	\$28,094,581	\$2,571,827	90.8%	90.8%	
LRS M&O	\$17,545,982	\$0	\$17,545,982	\$17,703,729	\$157,747	99.1%	99.1%	
JPA Admin. Budget	\$328,484	\$151,132	\$479,616	\$721,260	\$241,644	45.5%	66.5%	
Total	\$336,811,042	\$91,122,170	\$427,933,212	\$437,734,840	\$9,801,628	76.9%	97.8%	

¹: June Payment Month (partial actuals per advance), pending county claims for May-June

CalSAWS | SFY 2021/22 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS	\$24,442,574	\$3,176,658	\$27,619,232	\$28,136,343	\$517,111	86.9%	98.2%
Consortium Personnel - County ¹	\$10,665,513	\$1,487,476	\$12,152,989	\$12,154,584	\$1,595	87.7%	100.0%
Consortium Personnel - Contractor ^{2,3}	\$13,777,061	\$1,689,182	\$15,466,243	\$15,981,759	\$515,516	86.2%	96.8%
CalWIN M&O	\$2,894,588	\$292,079	\$3,186,667	\$3,375,753	\$189,086	85.7%	94.4%
Consortium Personnel - County ¹	\$109,125	\$7,363	\$116,488	\$166,068	\$49,580	65.7%	70.1%
Consortium Personnel - Contractor ^{2,3}	\$2,785,463	\$284,716	\$3,070,179	\$3,209,685	\$139,506	86.8%	95.7%
C-IV M&O	\$1,646,967	\$0	\$1,646,967	\$1,647,906	\$939	99.9%	99.9%
LRS M&O	\$4,244,622	\$0	\$4,244,622	\$4,402,284	\$157,662	96.4%	96.4%
Premise	\$208,770	\$95,031	\$303,801	\$354,926	\$51,125	58.8%	85.6%
Consortium Personnel - County	\$84,613	\$87,255	\$171,868	\$171,868	\$0	49.2%	100.0%
Consortium Personnel - Contractor ²	\$124,157	\$7,776	\$131,933	\$183,058	\$51,125	67.8%	72.1%
Total	\$33,437,521	\$3,563,768	\$37,001,289	\$37,917,212	\$915,923	88.2%	97.6%

SFY 2021/22 - Consortium Personnel FTE Counts	Current/Planned FTEs (As of 10/2021)
CalSAWS DD&I and M&O	192
Consortium Personnel - County ¹	85
Consortium Personnel - Contractor ²	78
Consortium Personnel - Contractor Limited Term ³	19
TBD ⁴	10
CalWIN M&O	21
Consortium Personnel - County ¹	1
Consortium Personnel - Contractor ²	12
Consortium Personnel - Contractor Limited Term ³	7
TBD ⁴	1
Premise	2
Consortium Personnel - County ¹	1
Consortium Personnel - Contractor ²	1
Total	215

¹Includes only Consortium Staff, does not include County Support Staff

²Includes RGS and CSAC employees

³Includes RGS, CSAC, and First Data Staff (Non-Employees)

⁴Does not account for backfill considerations

CalSAWS | SFY 2021/22 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalWIN M&O	\$16,069,170	\$4,360,465	\$20,429,635	\$22,266,095	\$1,836,460	72.2%	91.8%
CalWIN M&O	\$10,403,576	\$3,272,851	\$13,676,427	\$13,676,427	\$0	76.1%	100.0%
CalHEERS Interface Change Budget	\$2,883,112	\$792,815	\$3,675,927	\$4,881,964	\$1,206,037	59.1%	75.3%
CalHEERS CSCN Change Budget	\$0	\$0	\$0	\$0	\$0	0.0%	0.0%
CalWIN Premise	\$2,782,482	\$294,799	\$3,077,281	\$3,707,704	\$630,423	75.0%	83.0%
CalSAWS M&O	\$20,345,922	\$5,517,590	\$25,863,512	\$27,680,003	\$1,816,491	73.5%	93.4%
CalSAWS M&E	\$16,367,468	\$4,068,662	\$20,436,130	\$20,436,131	\$1	80.1%	100.0%
CalHEERS Interface Change Budget	\$2,155,125	\$615,737	\$2,770,862	\$4,255,568	\$1,484,706	50.6%	65.1%
BenefitsCal	\$527,762	\$440,647	\$968,409	\$968,409	\$0	54.5%	100.0%
CalSAWS Premise	\$1,295,567	\$392,544	\$1,688,111	\$2,019,895	\$331,784	64.1%	83.6%
TOTAL	\$36,415,092	\$9,878,055	\$46,293,147	\$49,946,098	\$3,652,951	72.9%	92.7%

Note: Includes 8,000 hours/month for LRS, C-IV and CalWIN M&O per system, 15,075 hours/month for CalSAWS, plus premise hours. Reduced CalWIN CalHEERS and CSCN as part of June 2022 OAPDU as not needed.

CalSAWS | SFY 2021/22 CONTRACT OBLIGATIONS

Warranty & Liquidated Damages Detail - SFY 2021/22

Category	Contract	Service Month	Amount	Invoice Month	Invoice #
System Availability/Performance/Disaster Rec.	CalWIN	Jun-Dec	\$157,013	July-Apr	Various
CalWIN System Availability	CalWIN	March-22	\$12,000	June-22	TBD
CalWIN System Availability	CalWIN	April-22	\$7,500	June-22	TBD
Blank Forms - Postage	CalWIN	November-21	\$3,869	County Reimbursement	
LRS Daily Prime	LRS/CalSAWS	July-Sept	\$18,000	July-Dec	Various
Imaging LDs - Hyland Software	CalSAWS	September-21	\$25,000	February	1100811556
LRS Daily Prime Business Hours Availability	LRS/CalSAWS	Sep 21 - Oct 21	\$6,000	March-22	1100820812
Daily Batch Production Jobs Completion	LRS/CalSAWS	Sep 21 - Oct 21	\$35,000	March-22	1100820812
Postage Credit	LRS/CalSAWS	November-21	\$12,801	February	1100811556
Daily Batch Production Jobs Completion	LRS/CalSAWS	November-21	\$25,000	March-22	1100820812
LRS Daily Prime Business Hours Availability	LRS/CalSAWS	December-21	\$2,000	March-22	1100820812
Daily Batch Production Jobs Completion	LRS/CalSAWS	December-21	\$15,000	March-22	1100820812
CalSAWS System Availability	LRS/CalSAWS	December-21	\$5,000	April-22	1100828852
Daily Batch Production Jobs Completion	LRS/CalSAWS	January-22	\$10,000	April-22	1100828852
Response Time on Eligibility Determination	LRS/CalSAWS	January-22	\$2,000	April-22	1100828852
Daily Batch Production Jobs Completion	LRS/CalSAWS	February-22	\$10,000	April-22	1100828852
Imaging LDs - Hyland Software	CalSAWS	Oct 21 - Jan 21	\$86,639	May-22	1100836362
Total			\$432,822		

Hours & Credits

Category	Actuals	Projections (ETC)	EAC	Allowance	Balance
CalWIN Modernization ("Modification") Hours	\$6,167,267	\$1,644,558	\$7,811,825	\$9,428,370	\$1,616,545
CalWIN Business Intelligence (BI)	\$3,971,215	\$0	\$3,971,215	\$3,971,215	\$0
CalWIN IDMS	\$1,500,000	\$0	\$1,500,000	\$1,500,000	\$0
CalWIN Business Rules Engine (BRE)	\$1,509,830	\$1,990,170	\$3,500,000	\$3,500,000	\$0
Total	\$13,148,311	\$3,634,728	\$16,783,040	\$18,399,585	\$1,616,545

Notes:
 Modernization Hours are updated each August with 8,500 hours; includes hours for Contract Years 1-7.
 IDMS \$1.5M applied to CalSAWS GA/GR.
 BRE \$3.5M to be applied to CalSAWS GA/GR.
 Retired C-IV contract, therefore removed LDs and Credits as no longer applicable.

CalSAWS | SFY 2021/22 CHANGE NOTICE TRACKING

CalSAWS Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 23)	\$50,000,000	
Previously Approved through June 2021	\$21,229,544	ONE - NINE
Previously Approved June 2021 through October 2021	\$9,182,789	TEN - ELEVEN
CalHEERS Maintenance	\$448,009	TWELVE
Extended C-IV Post-Deployment Support	\$300,000	TWELVE
CDSS Reports Support	\$299,976	THIRTEEN
CalSAWS Correspondence	\$4,329,375	THIRTEEN
Additional CalSAWS M&E Services for SFY 2021/22	\$670,590	THIRTEEN
CalSAWS Accessibility Testing	\$143,320	FOURTEEN
Addl M&E and Functional Support; Various Premise	\$2,049,409	FIFTEEN
American Recovery Plan Act (ARPA)	\$272,658	SIXTEEN
American Recovery Plan Act (ARPA) - ROI	\$279,270	SEVENTEEN
Virtual Assistants	\$2,543,913	EIGHTEEN
Total Allocated Amounts	\$41,748,853	
Total Remaining Allocation	\$8,251,147	

CalSAWS Contract (County Purchases)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 23)	\$20,000,000	
Approved County Purchases	\$1,702,883	FIFTEEN
Total Allocated Amounts	\$1,702,883	
Total Remaining Allocation	\$18,297,117	

Deloitte Portal/Mobile	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 3)	\$5,000,000	
Customer Compensation Payments	\$7,728	ONE
Pre-populated Medi-Cal Redetermination Forms	\$682,583	TWO
Get CalFresh (Code for America)	\$422,067	THREE
American Recovery Plan Act (ARPA)	\$1,705,148	FOUR
American Recovery Plan Act (ARPA) - ROI	\$428,379	FIVE
Get CalFresh (Code for America) - Security Monitoring	\$50,001	SIX
Total Allocated Amounts	\$3,295,905	
Total Remaining Allocation	\$1,704,095	

Deloitte CalWIN ISS (County Purchases)	Total Amount	Work Order Ref.
Total Baseline Allocation (Amendment 2)	\$8,000,000	
Total Allocated Amounts	\$0	
Total Remaining Allocation	\$8,000,000	

Note: Removed First Data C-IV Premise as N/A as of 9/30/2021. Removed Accenture C-IV Premise and County Purchase as N/A of 12/3/21.

CalWIN Contract (Premise/App Maintenance Services)	Total Amount	Change Order Ref.
Total Baseline Allocation	\$54,516,908	
Previously Approved Projects	\$18,419,400	N/A
Previously Approved Projects	\$2,422,849	TWO - THREE
Elderly Simplified Application Project	\$156,500	FOUR
Cal-OAR Modifications and Cal-OAR Client Satisfaction Survey	\$99,182	FOUR
Total Allocated Amounts	\$21,097,931	
Total Remaining Allocation	\$33,418,977	

CalWIN Contract (County Purchases)	Total Amount	Change Order Ref.
Total Baseline Allocation	\$6,968,662	
Previously Approved	\$2,021,592	N/A
Projects 60548 and 60549	\$177,419	FOUR
Projects 60858, 60859, 61078 and 61377	\$262,105	FIVE
Total Allocated Amounts	\$2,461,116	
Total Remaining Allocation	\$4,507,546	

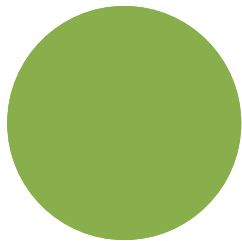
First Data LRS Contract (Staff Augmentation Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 7)	\$1,000,000	
Previously Approved through June 2021	\$337,792	ONE - TWO
Testing Staff Augmentation	\$40,832	THREE
Testing Staff Augmentation	\$116,928	FOUR
Total Allocated Amounts	\$495,552	
Total Remaining Allocation	\$504,448	

Infosys Contract (App Maintenance Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation	\$10,000,000	
Previously Approved	\$7,002,152	
Total Allocated Amounts	\$7,002,152	
Total Remaining Allocation	\$2,997,848	

ClearBest	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 6)	\$4,000,000	
Previously Approved	\$775,418	ONE - SEVEN
CalFresh Public Assistance Definition Alignment	\$86,184	EIGHT
QA Project Management Services	\$737,968	NINE
Addl M&E Testing and County Data Validation Support	\$732,108	TEN
American Recovery Plan Act (ARPA)	\$270,307	ELEVEN
American Recovery Plan Act (ARPA) - ROI	\$116,691	TWELVE
Ocat	\$385,920	THIRTEEN
Total Allocated Amounts	\$3,104,596	
Total Remaining Allocation	\$895,404	



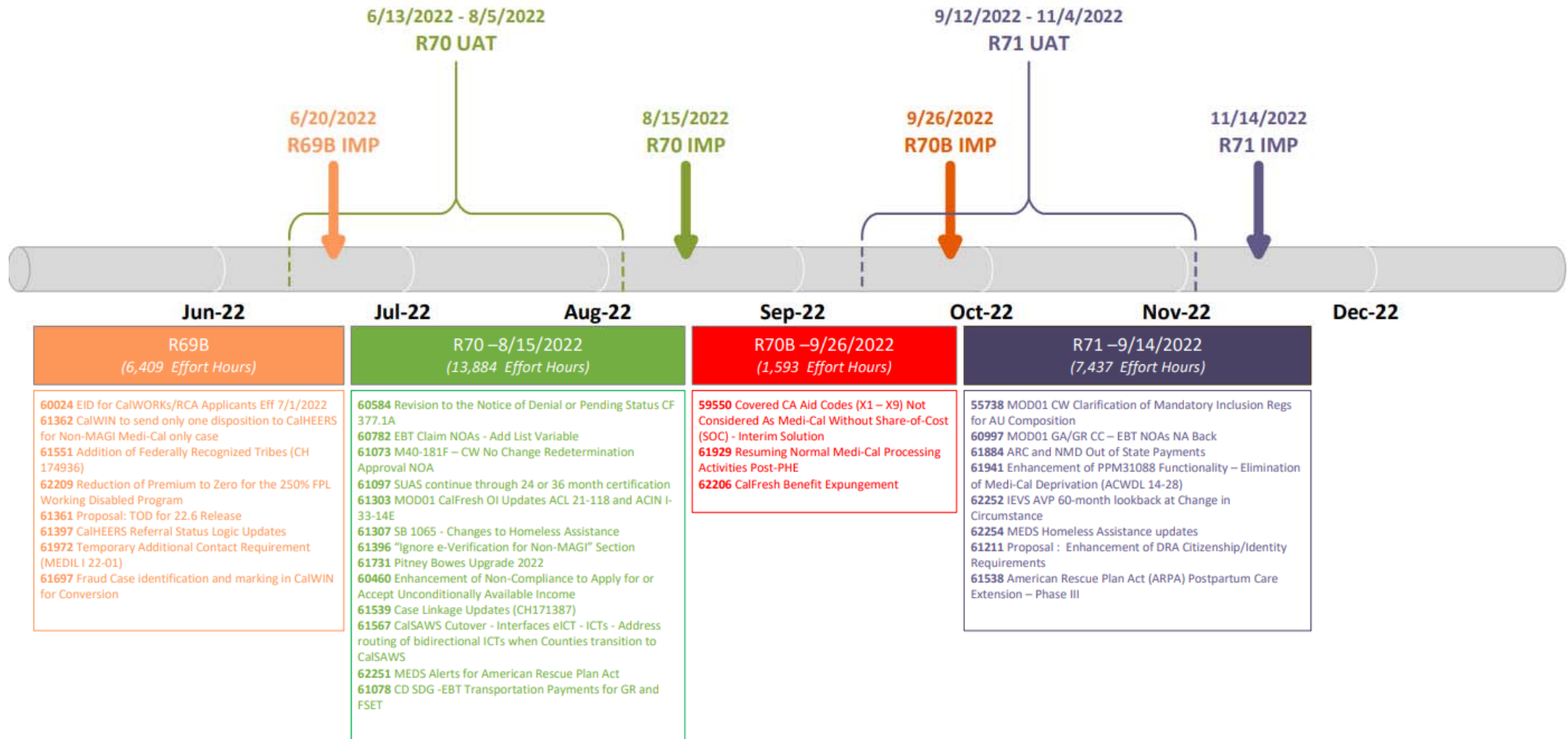
11. Policy Update



Policy Update

Rev: 6/8/2022

CalWIN Release Delivery Impact



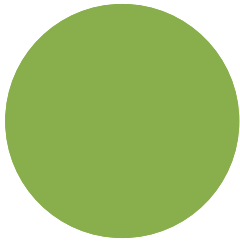
Policy Tracking

2022 May Revise and Legislative Items

		Policy Effective
CalWIN Support/Implement	<input type="checkbox"/> CalWORKs: Grant Increase AB 85 and May Revise (21%)	Oct-22
	<input type="checkbox"/> CalWORKs: New grant increase proposed (10%)	Jan-23
	<input type="checkbox"/> SSI/SSP: New grant increase proposed	Jan-23
	<input type="checkbox"/> CAPI: Grant Increase -exact date TBD	2023
Post Migration		
CalSAWS Implement	<input type="checkbox"/> Medi-Cal: Full Scope for 26-49 yr olds, regardless Immigration	Jan-24
	<input type="checkbox"/> Medi-Cal: Continuous MC coverage Children 0-5	Jan-25
	<input type="checkbox"/> CalFresh/CalWORKs: Pre-pop SAR 7	2024
	<input type="checkbox"/> CalFresh: CFAP Expansion	2024
	<input type="checkbox"/> Medi-Cal: Eliminate Asset Test	Jan-24
Based on Spring 2024 revenue projections and appropriations		
Monitoring	<input type="checkbox"/> CalWORKs: Additional MAP increase	TBD
	<input type="checkbox"/> Medi-Cal: Align maintenance need to income limit for MC without Share of Cost - needs federal approval	TBD
	<input type="checkbox"/> Medi-Cal: Continours MC eligibility children 0-4 yrs - needs federal approval	TBD
	<input type="checkbox"/> CalWORKs/Child Support: Full passthrough of child support payments those on CalWORKs	TBD
Collaboration with CalSAWS		
COLAs	<input type="checkbox"/> CalFresh COLA -effective October 2022 and 2023	2022 & 2023
	<input type="checkbox"/> CalWORKs: COLA-MAP and IRT -effective October 2022,2023 and proposed additional increase January 2023	2022 & 2023
	<input type="checkbox"/> SSA COLA -effective January 2023	2023
	<input type="checkbox"/> SSI/SSP COLA -effective	2023
	<input type="checkbox"/> CalWORKs: MBSAC and In-Kind Income -effective July 2023	2023
	<input type="checkbox"/> CAPI: impacted by SSA COLA and proposed grant increase 2023	2023



12. Stakeholder Updates

- CDSS
 - DHCS
 - OSI
 - CWDA
- 
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13. Adjourn Meeting

