CalSAWS | Project Steering Committee Meeting

March 19, 2020

Agenda

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

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

Action Items

Action Items

4. Approval of the Minutes of the February 20, 2020 PSC Meeting and review of Action Items.

Informational Items

Update on State/Federal Approvals

- Functional Design Amendment
- IAPDU
- Schedule Adjustment
- FCED Update

Revised CalSAWS DD&I Project Schedule

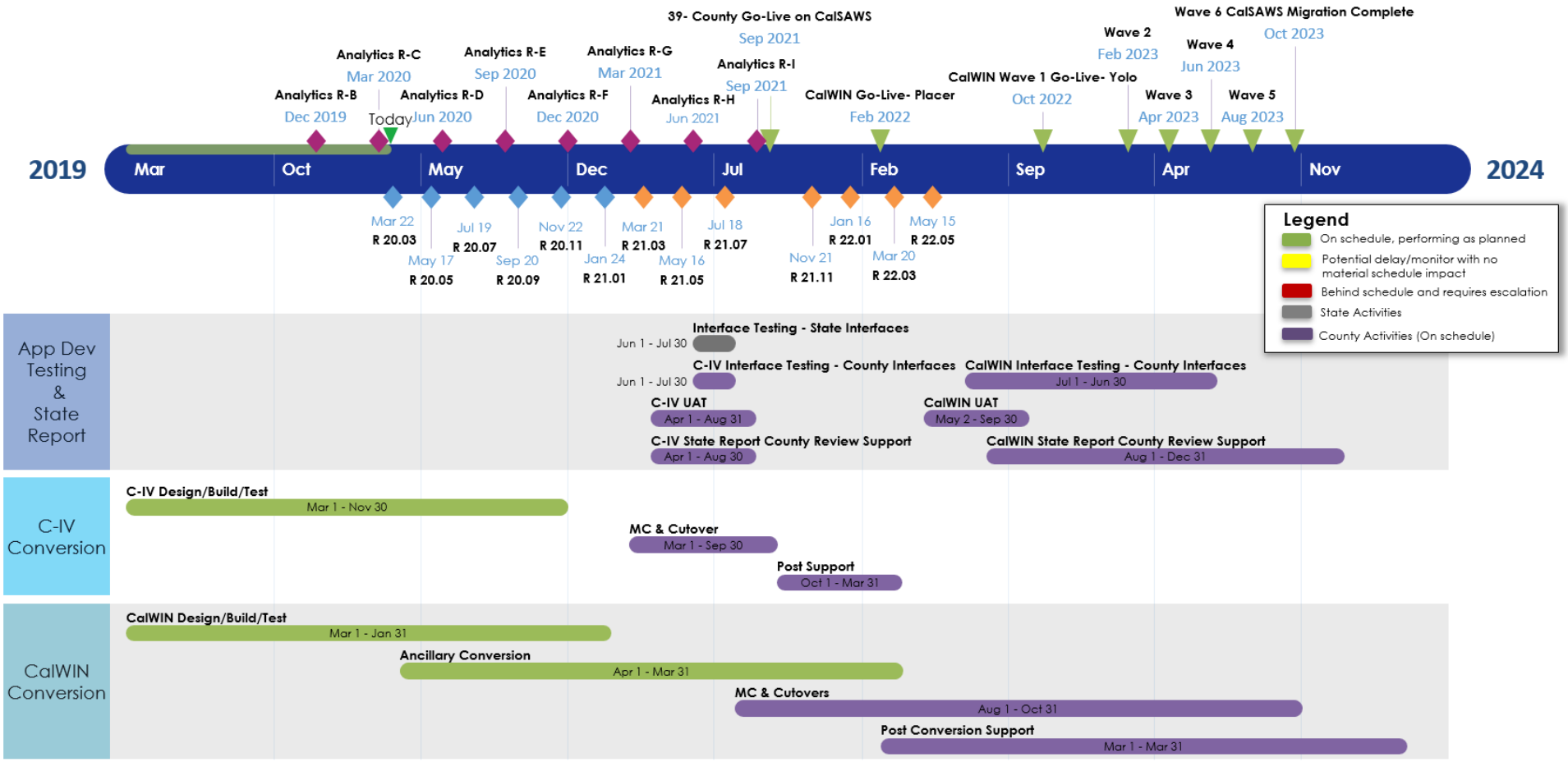
Status & Next Steps

Imaging Amendment	State Review Complete	Submitted to Federal Sponsors December 20th	Conducted walkthrough of Imaging Amendment on January 28th	CMS approved Feb 20th; FNS approved Feb 21st	Board approved Friday, February 14th
Functional Design Amendment	State Review Complete	Submitted FDS Amendment to Federal Sponsors on January 31 for review and approval	Walkthrough February 26th	Verbal or written approval from Federal Sponsors needed by March 18th	Board approval scheduled for Friday, March 27th
Analytics Amendment	Submitted Analytics Amendment to State Sponsors on February 3rd	Submitted FDS Amendment to Federal Sponsors on Feb 20 for review and approval	Walkthrough February 26th	Verbal or written approval from Federal Sponsors needed by March 18th	Board approval scheduled for Friday, March 27th
Quality Assurance Amendment	In Process, Pending Submission to State Sponsors	To be submitted to Federal Sponsors	Walkthrough Available Upon Request	Verbal or written approval from Federal Sponsors needed in April or May	Board approval scheduled for April or May
As-Needed IAPDU	Submitted IAPDU to State Sponsors on February 3rd	Initial Draft submitted to Federal Sponsors (pending formal submission)	Walkthrough February 26th	Approval April 2020	

CalSAWS Project Gantt

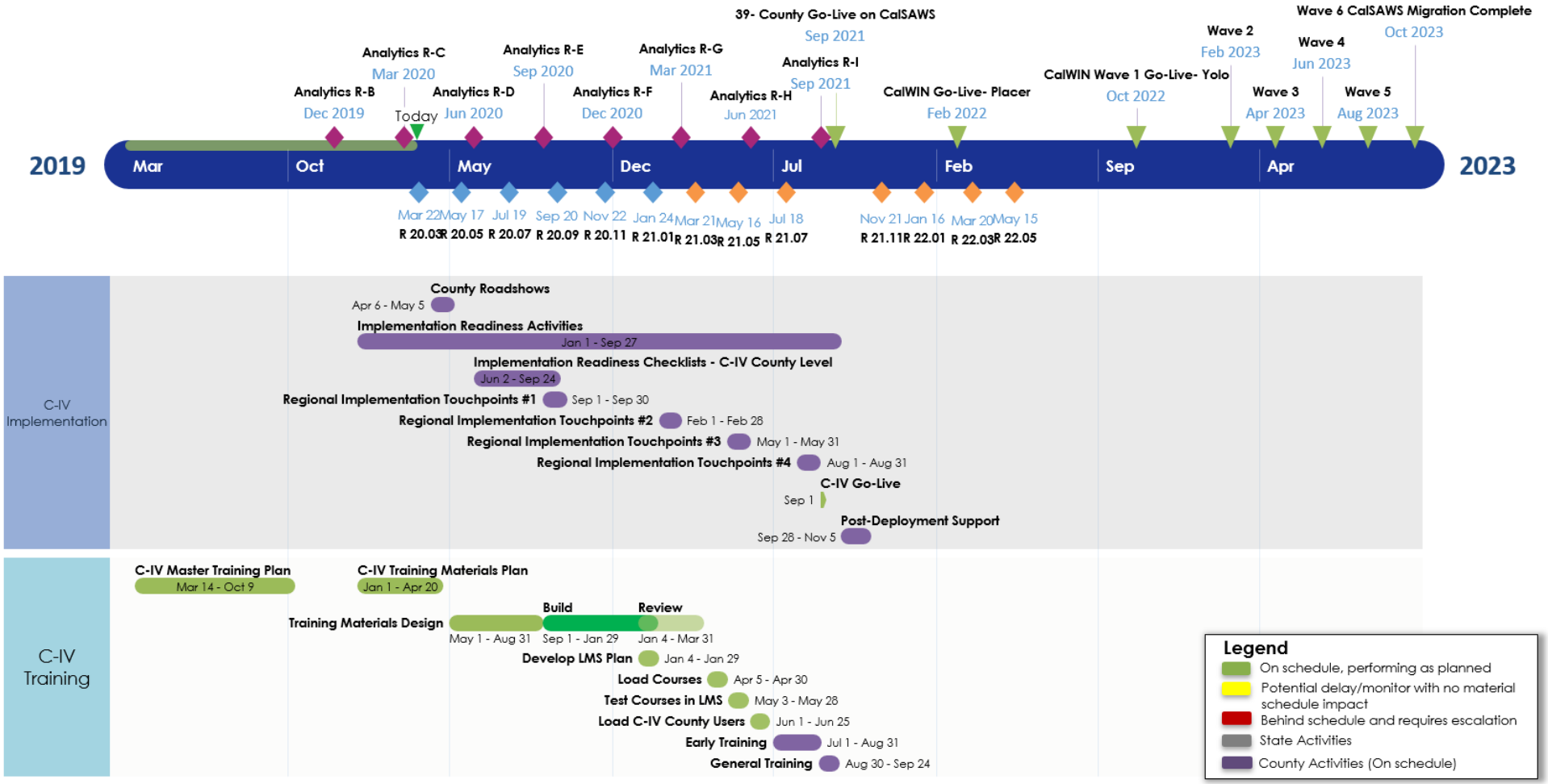
CalSAWS Project Gantt

High Level Overview – App-Dev & Conversion



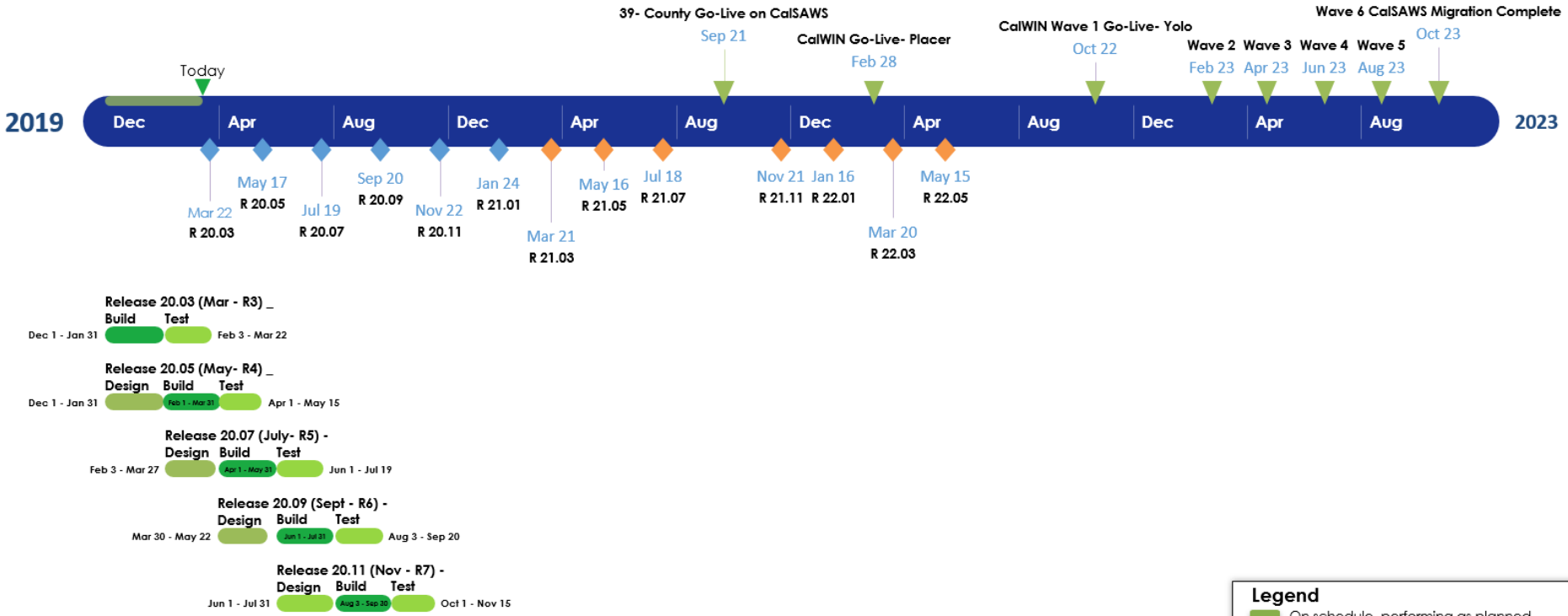
CalSAWS Project Gantt

High Level Overview – C-IV Implementation & Training



CalSAWS Project Gantt

Application Development



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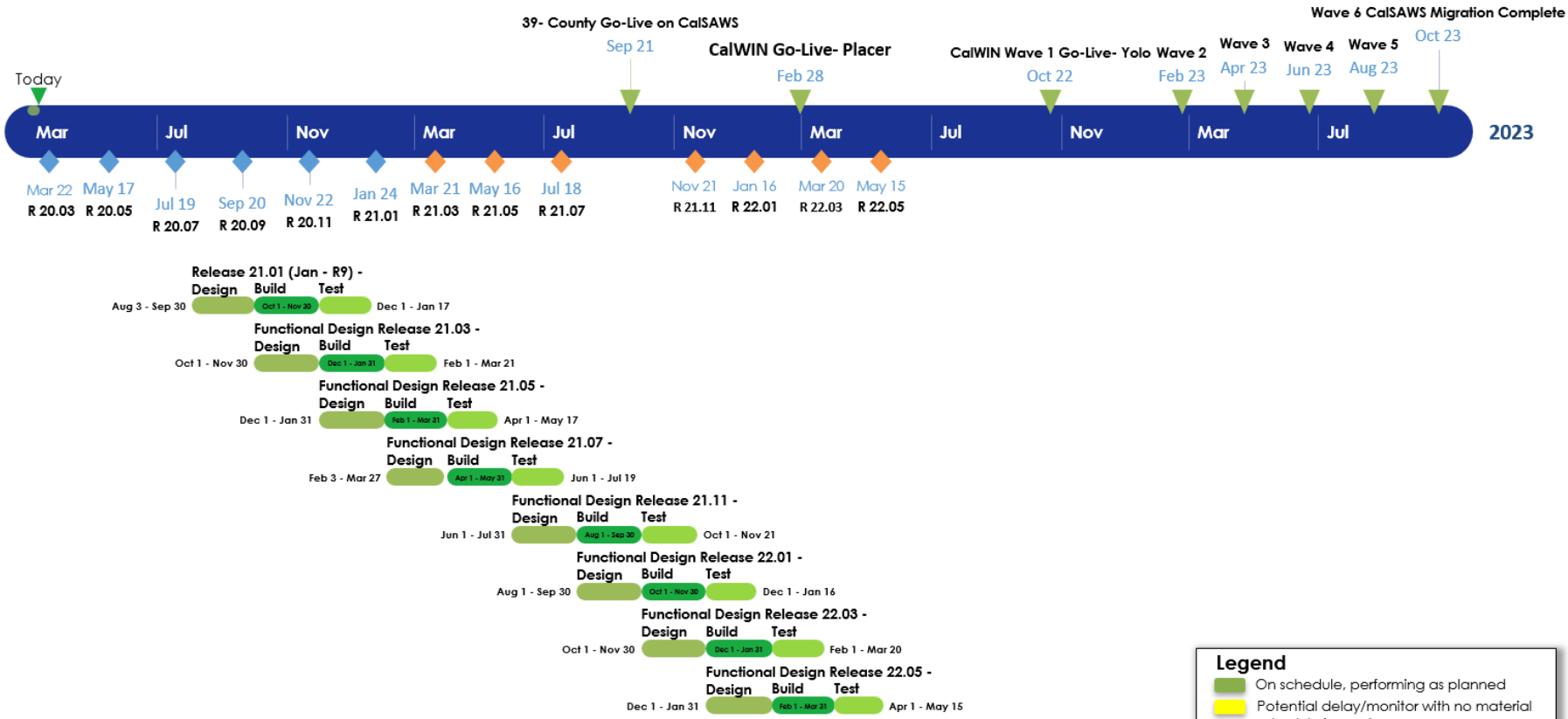

CalSAWS Project Gantt

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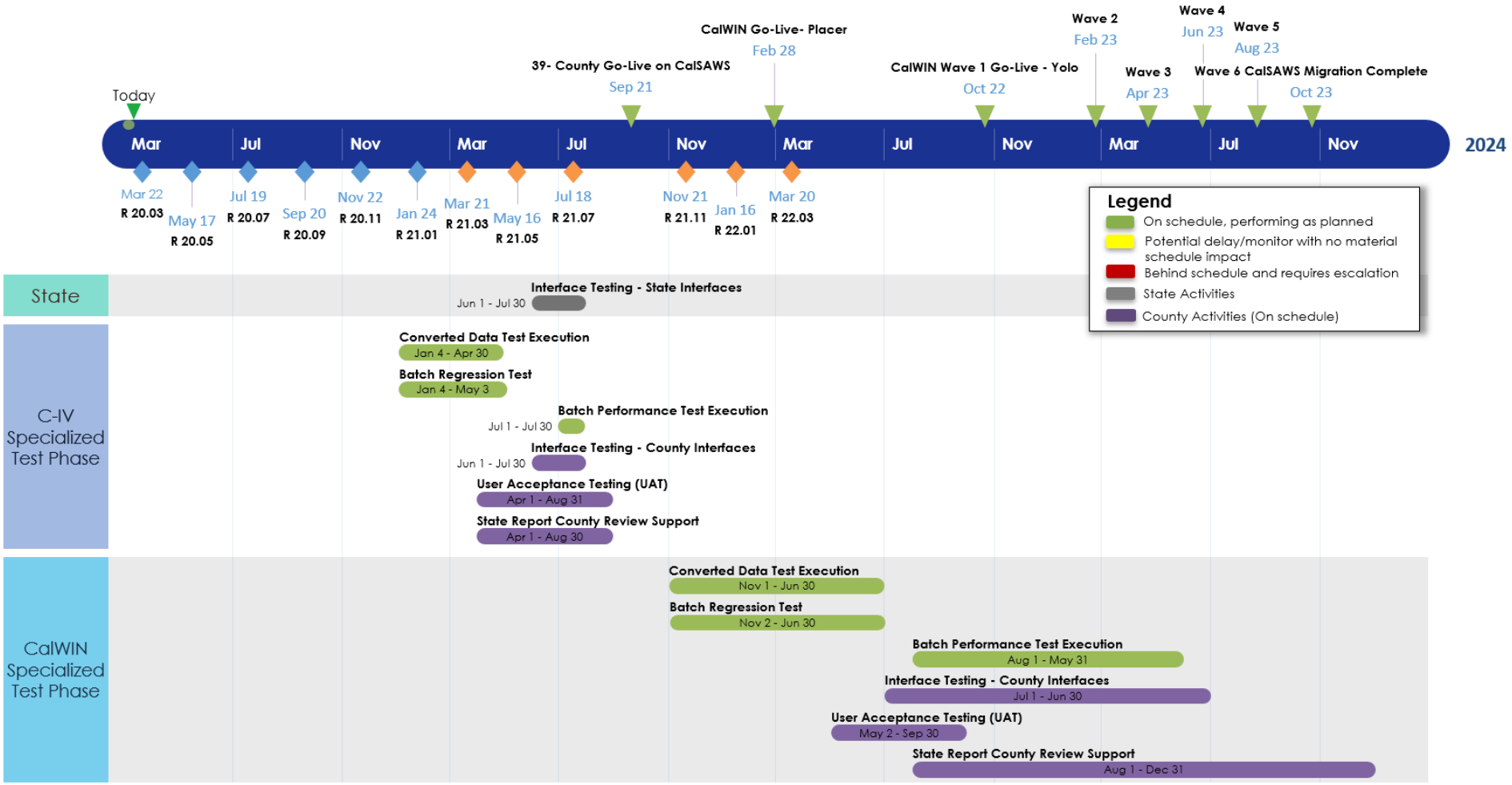
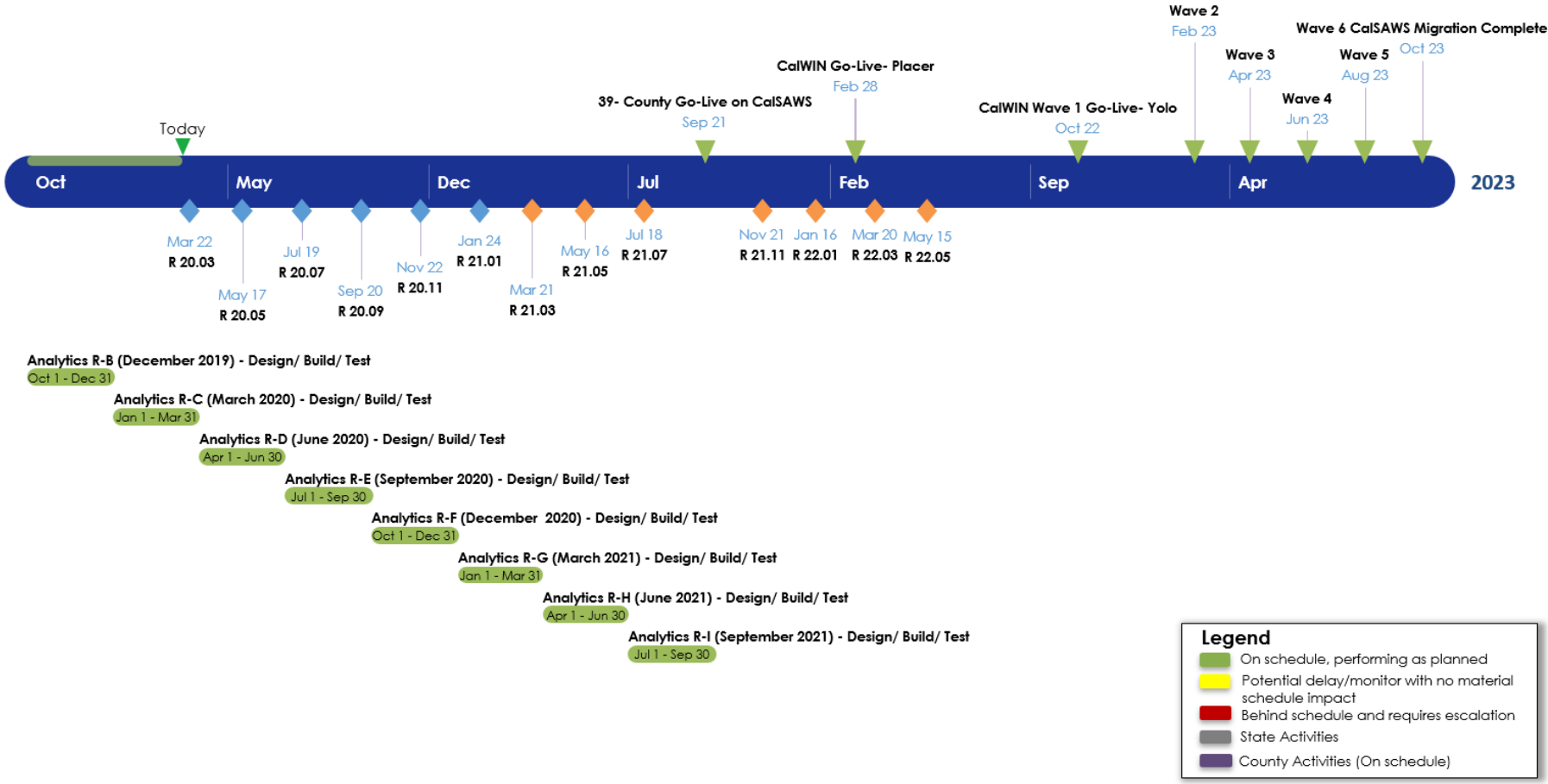


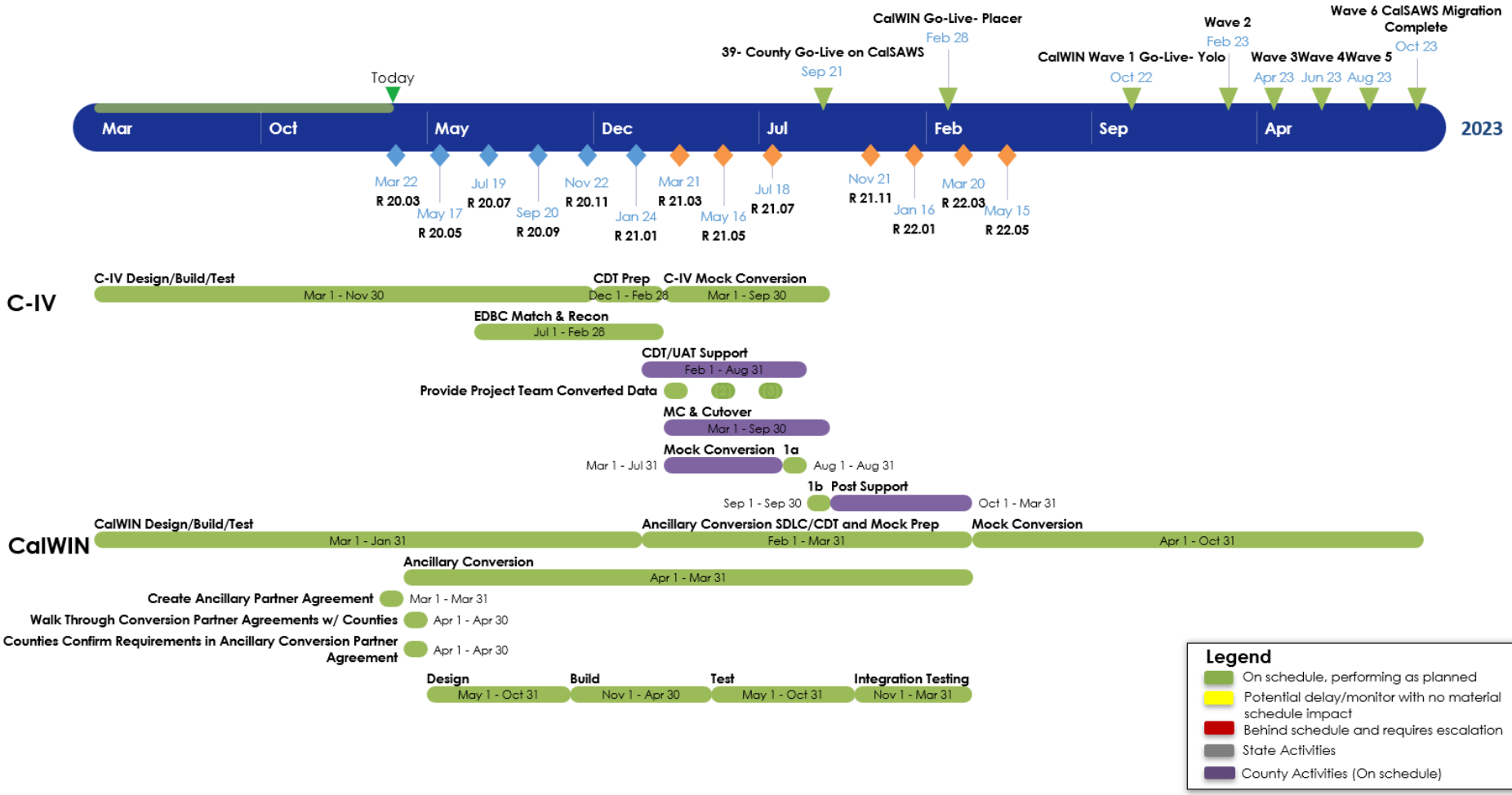
CalSAWS Project Gantt

State/BIP Reports Re-platform (Analytics)



CalSAWS Project Gantt

Conversion



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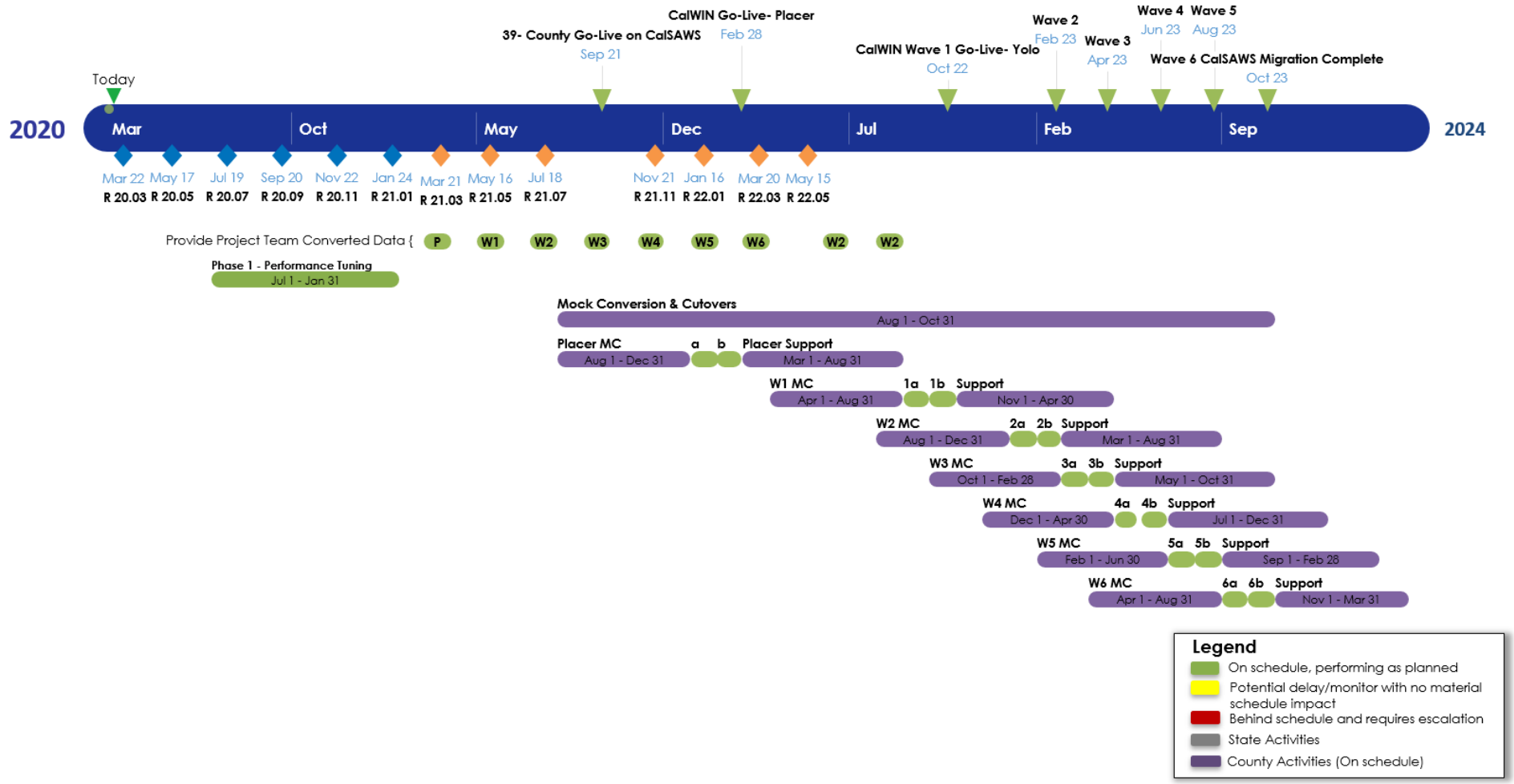
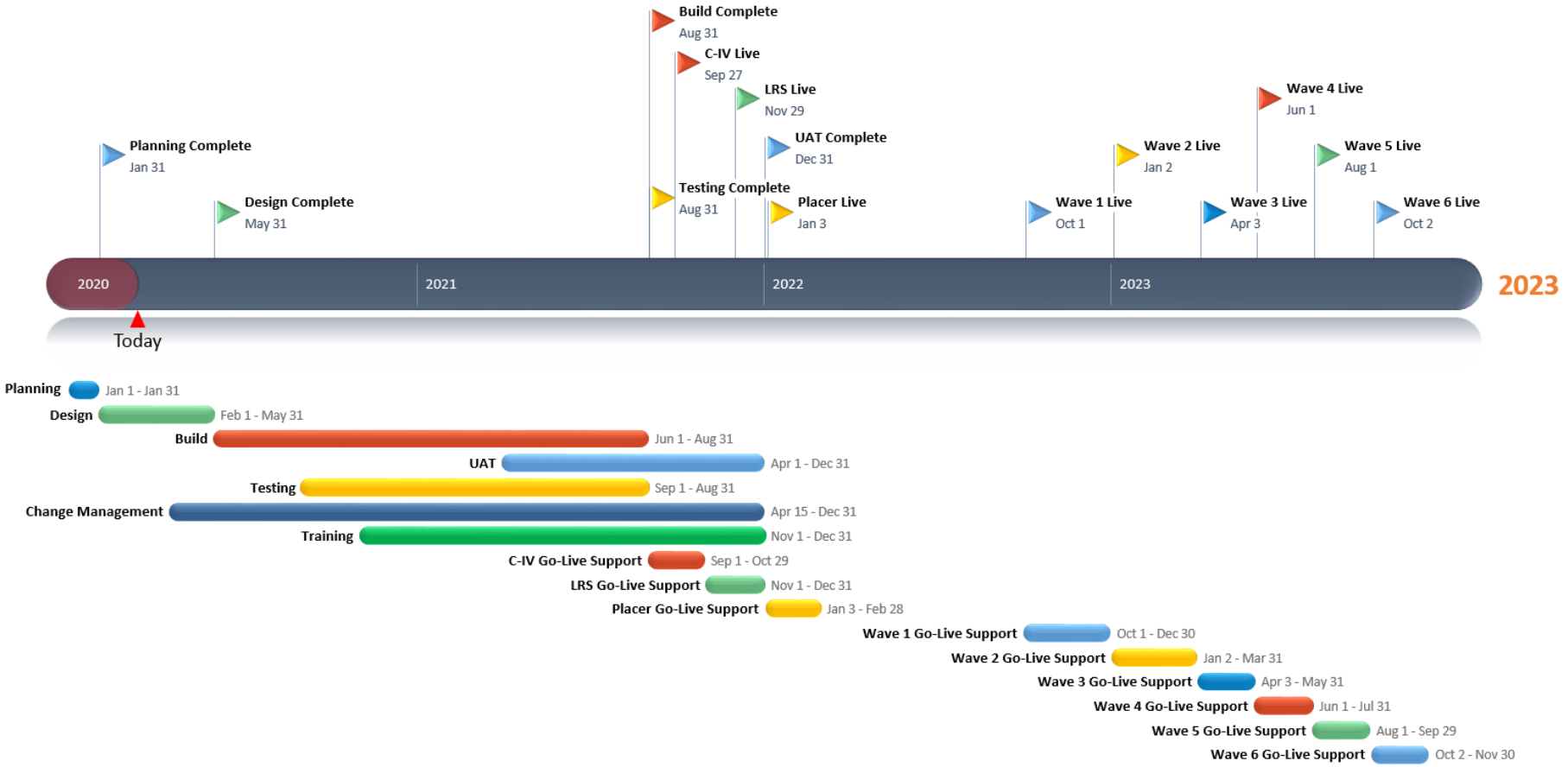


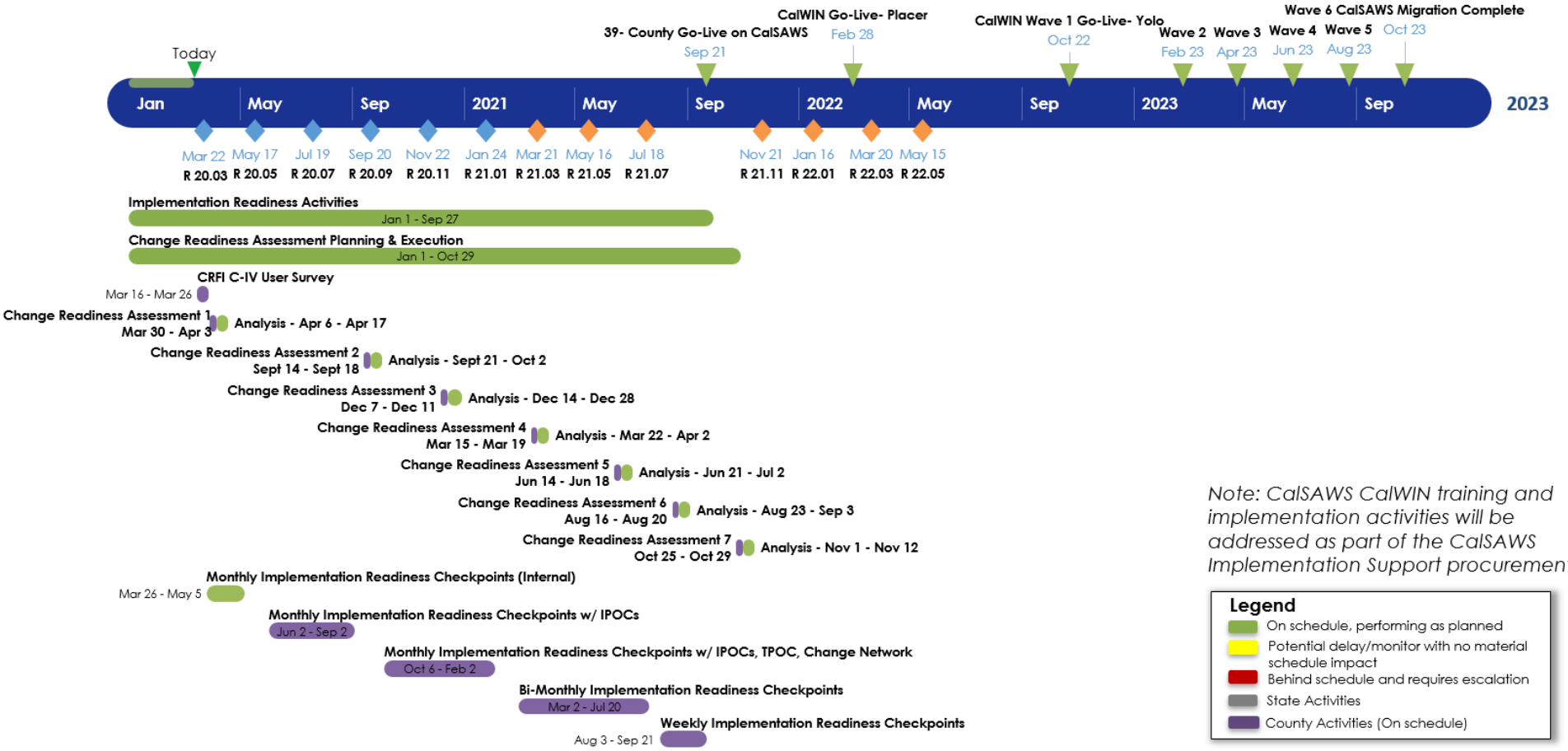
CalSAWS Project Gantt

Imaging



CalSAWS Project Gantt

C-IV Implementation & Change Management



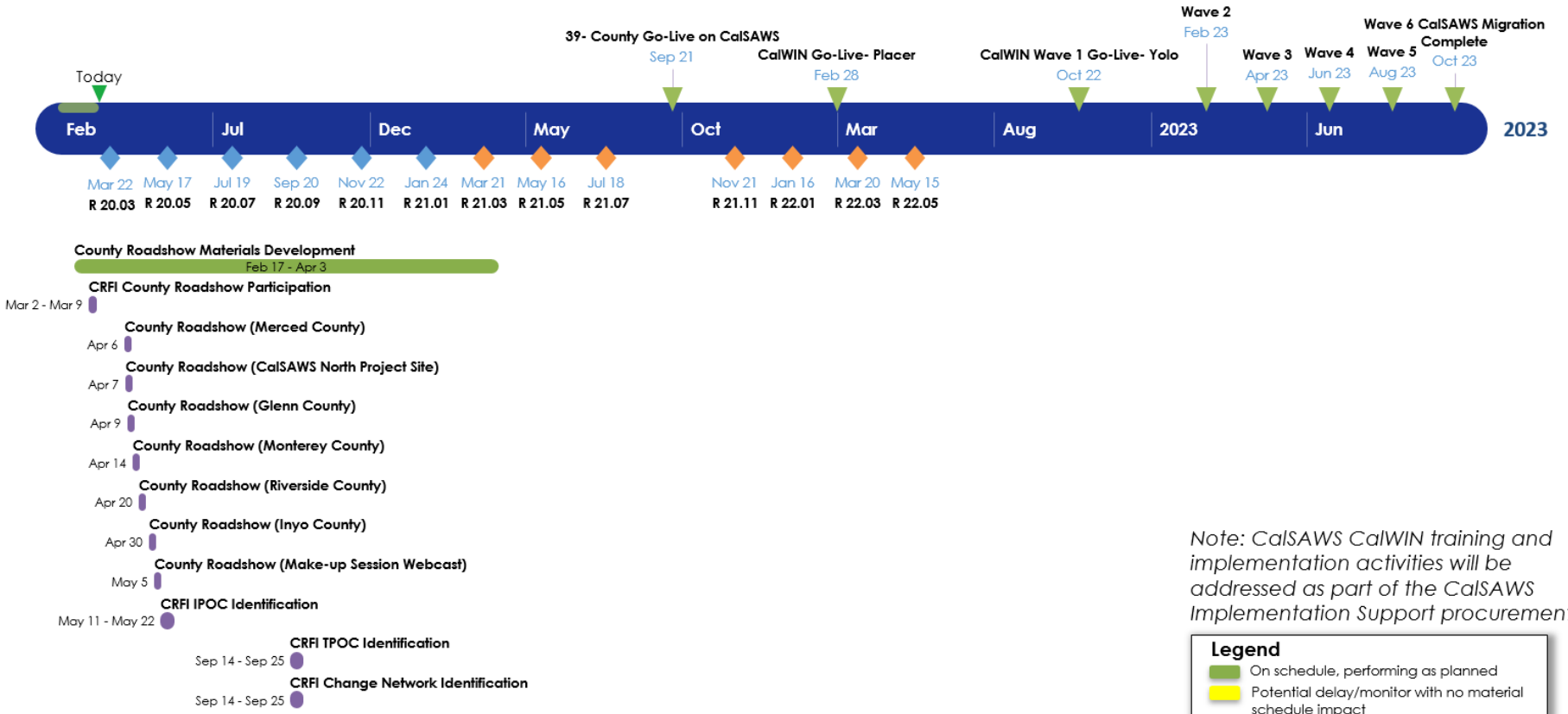
Note: CalSAWS CalWIN training and implementation activities will be addressed as part of the CalSAWS Implementation Support procurement.

Legend

- On schedule, performing as planned
- Potential delay/monitor with no material schedule impact
- Behind schedule and requires escalation
- State Activities
- County Activities (On schedule)

CalSAWS Project Gantt

C-IV Implementation & Change Management



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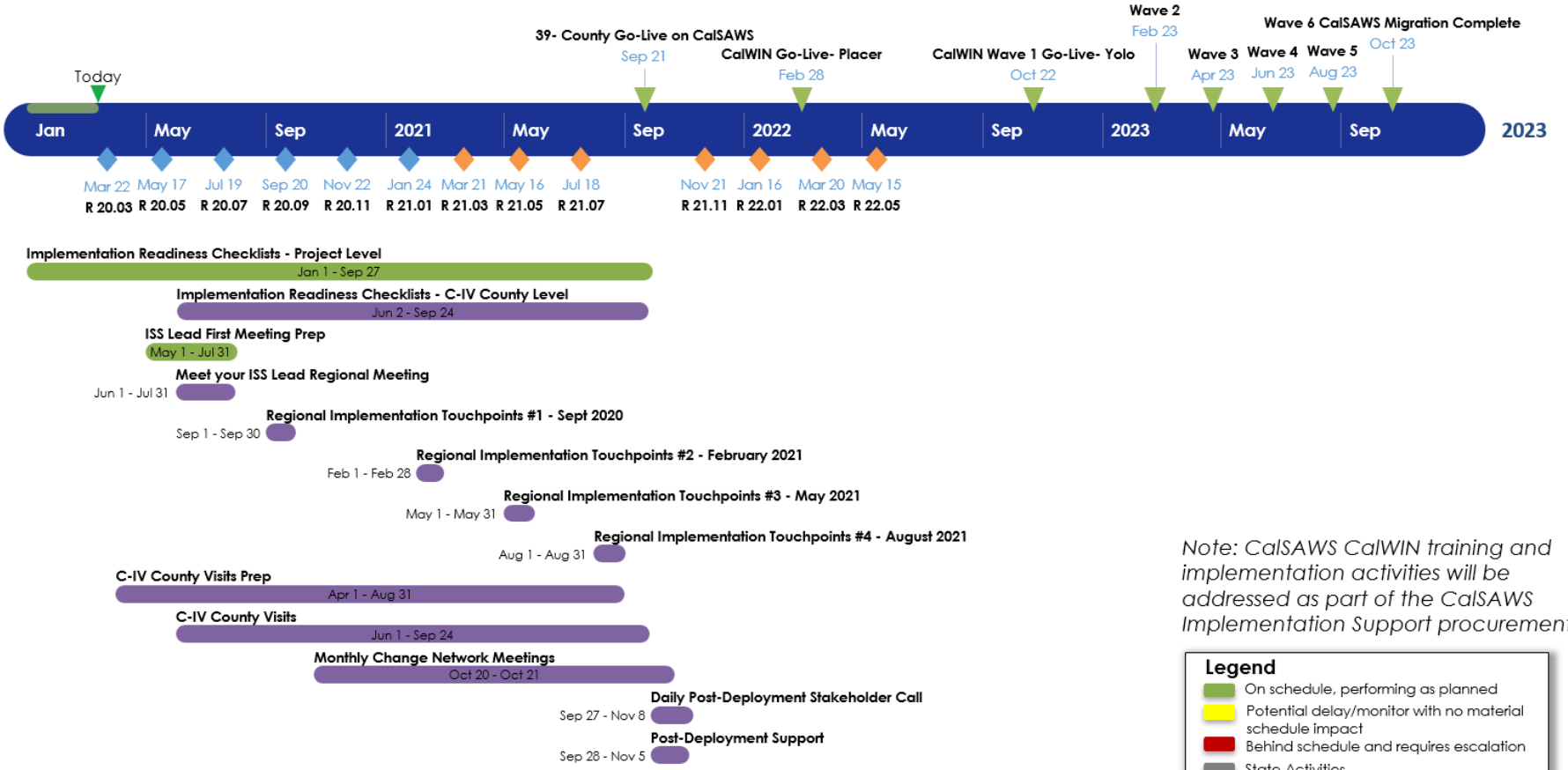

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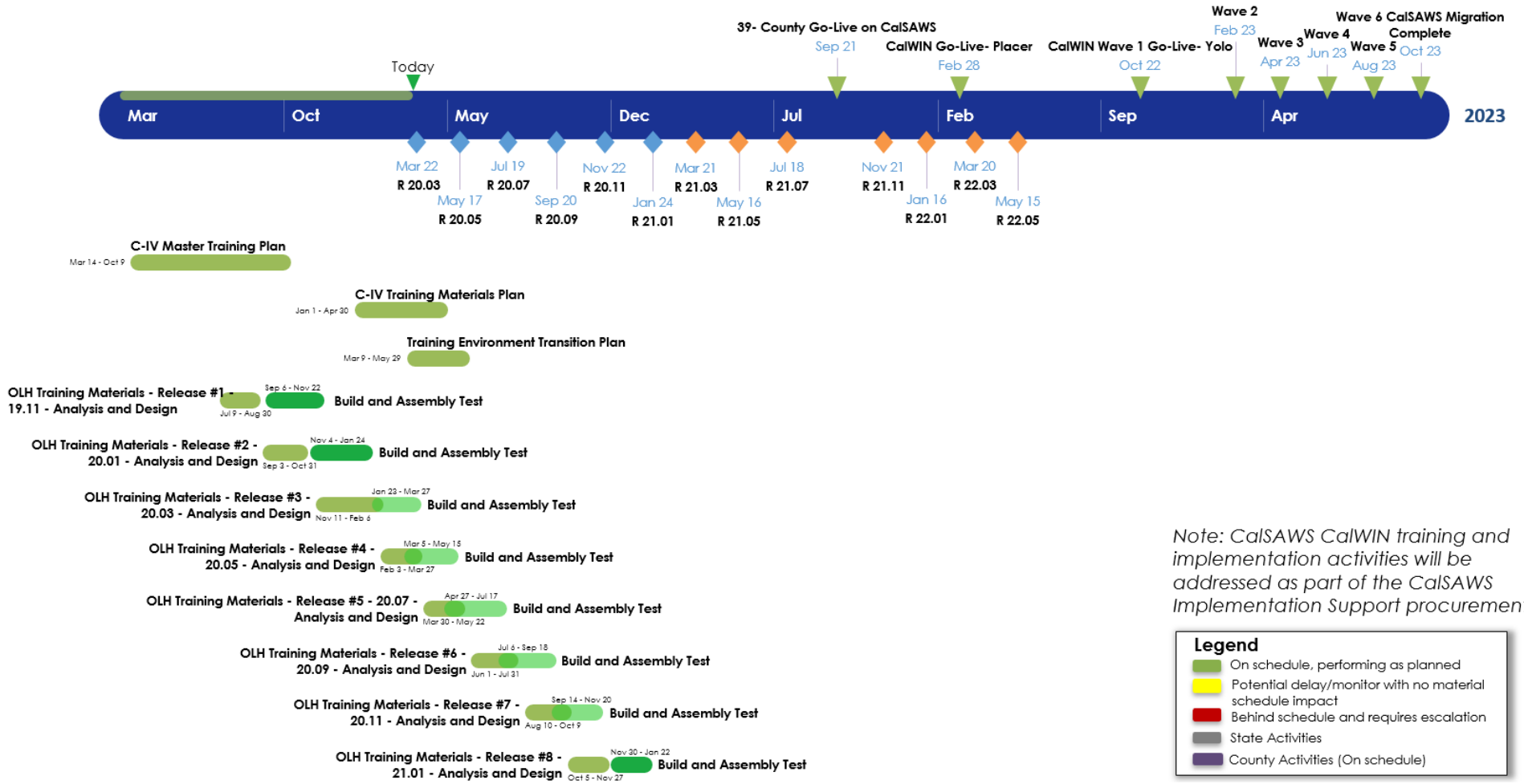
CalSAWS Project Gantt

C-IV Training



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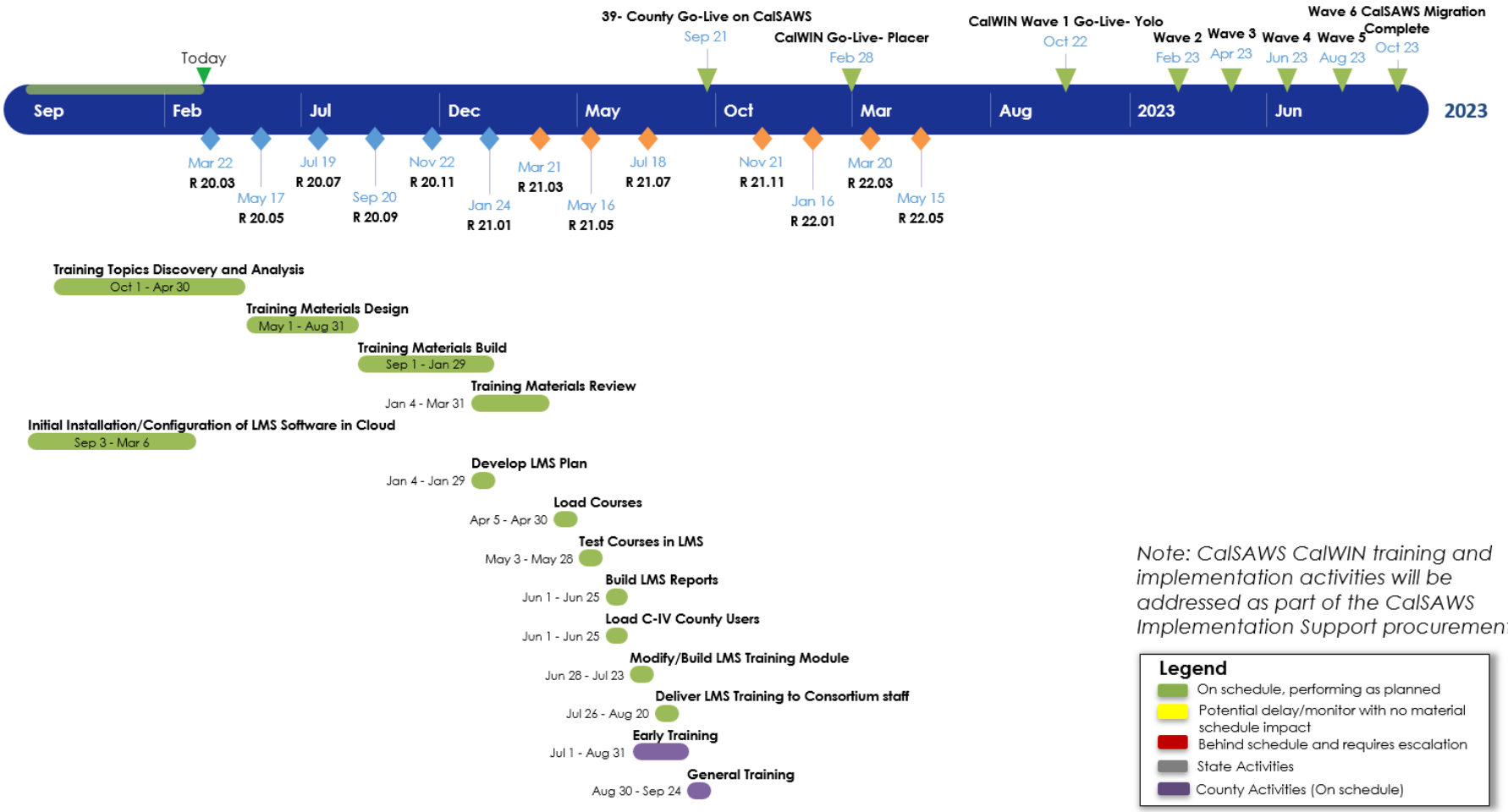
C-IV Training



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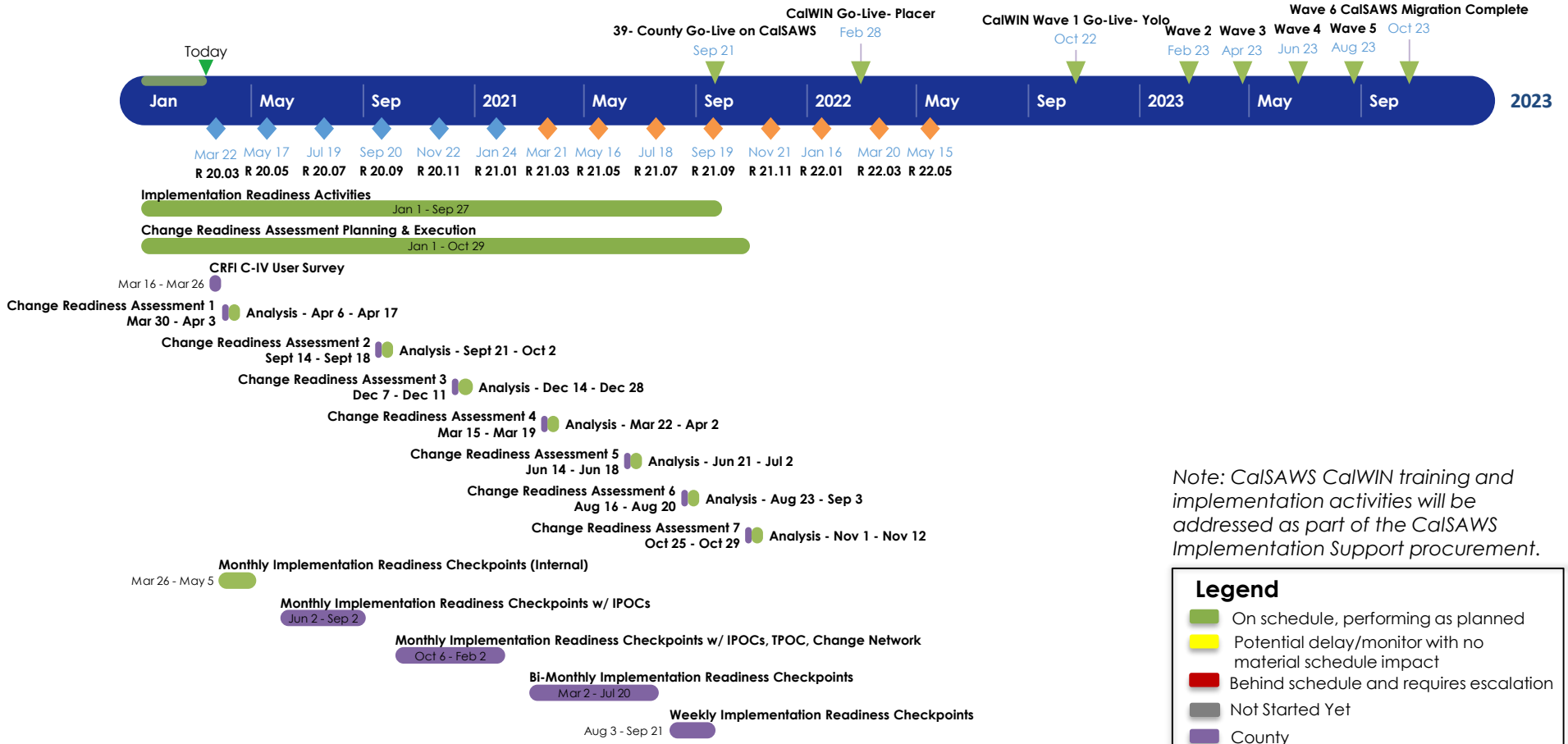
CalSAWS Implementation for C-IV Counties

CalSAWS Gantt Chart

C-IV Implementation & Change Management



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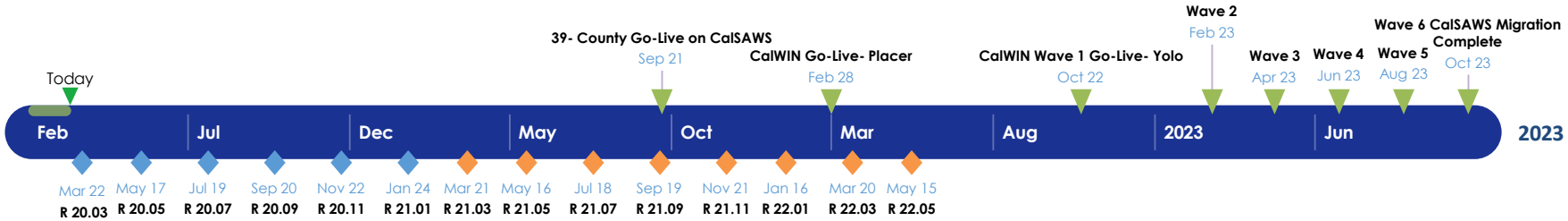
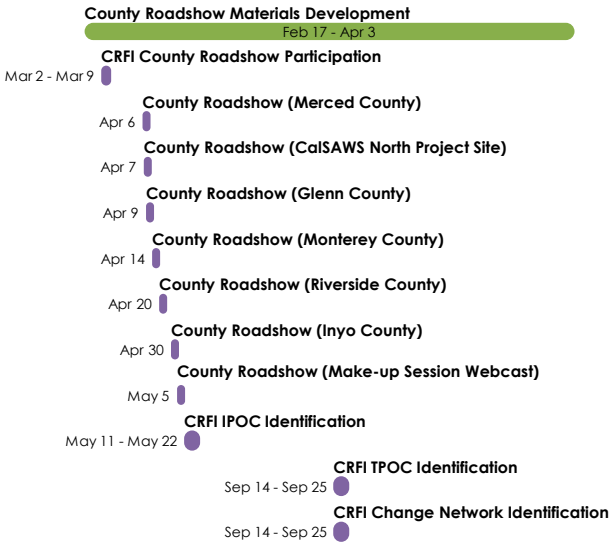
CalSAWS Gantt Chart

C-IV Implementation & Change Management





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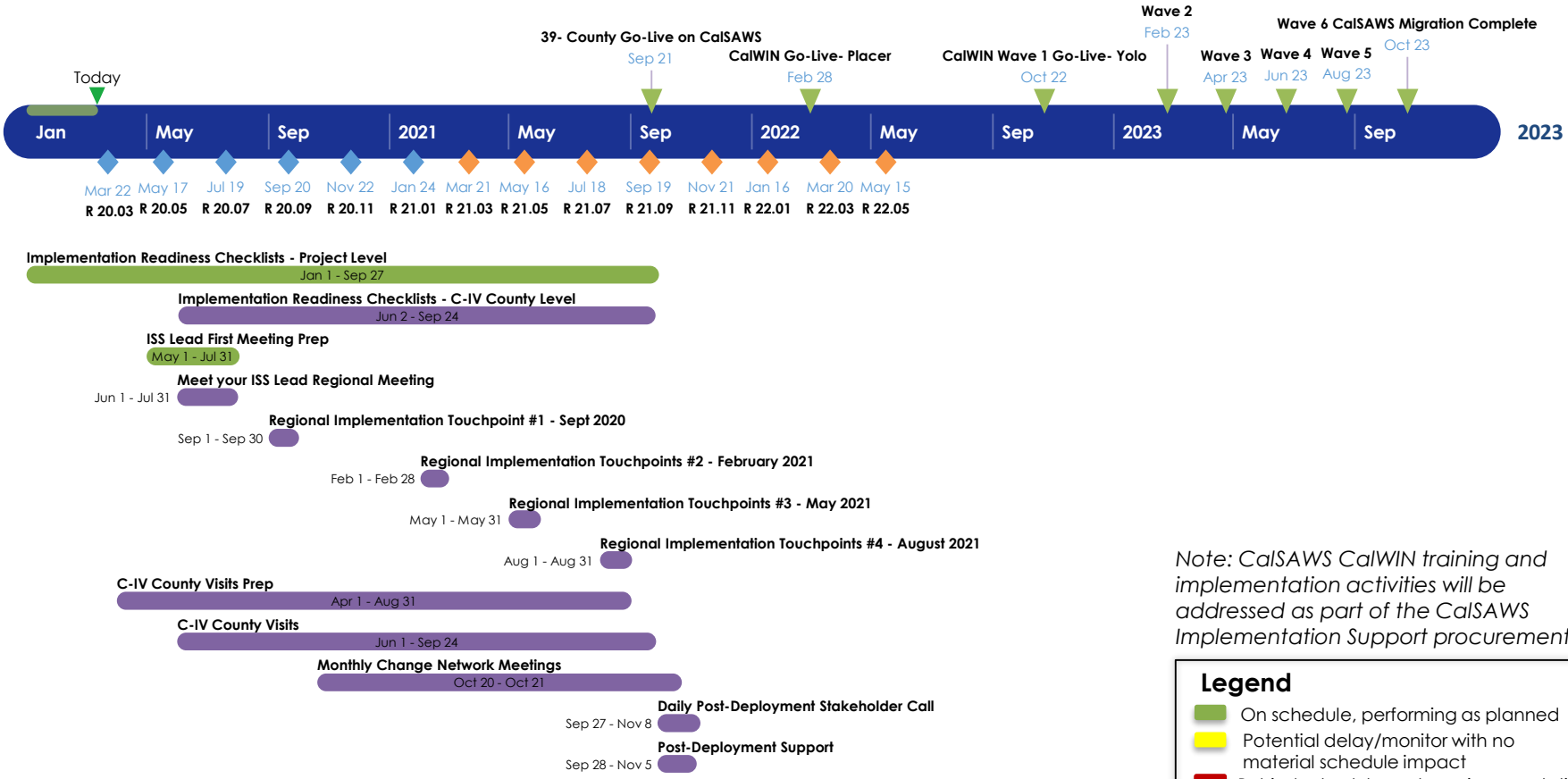
CalSAWS Gantt Chart

C-IV Implementation & Change Management



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Implementation Readiness at PSC

What we Presented at the February PSC:

- Implementation Hierarchy
- High-level Implementation Activities for the Next 6 Months
- Introduction to Implementation Readiness Areas
- High-level Change Management Activities

What we Heard:

- Interest in information on the following:
  - Share actual dates of milestones
  - Specific details on Readiness activities
  - Where and when counties would be involved in Implementation Readiness

What we are Presenting this month:

- Dates for:
  - County Implementation Roadshows
  - Readiness Checkpoint Meetings
  - Readiness Assessment Surveys
  - Readiness Checklist Activities
- Inclusion of specific Implementation Readiness Tasks for each Readiness Area
- County Engagement Strategy

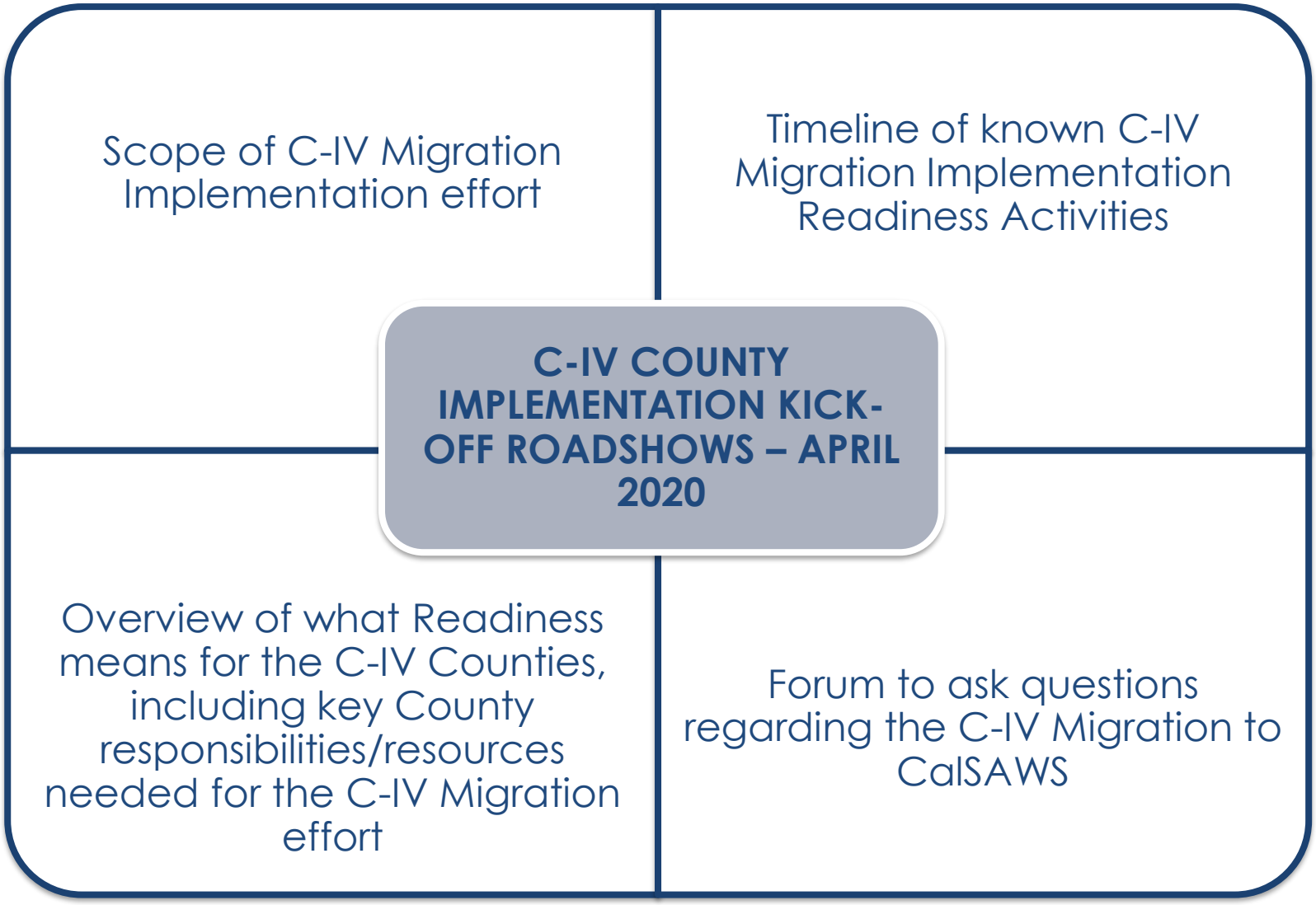
Implementation Readiness

C-IV County Implementation Kick-off Roadshows - Schedule

Day	Start Time	End Time	Location
Monday, April 6, 2020	1:30 PM	4:30 PM	**Merced County** Castle Auditorium Atwater, CA
Tuesday, April 7, 2020	1:30 PM	4:30 PM	**CalSAWS Project** CalSAWS North Project Site Rancho Cordova, CA
Thursday, April 9, 2020	9:00 AM	12:00 PM	**Glenn County** Glenn County Office of Education (GCOE) Orland, CA
Tuesday, April 14, 2020	9:00 AM	12:00 PM	**Monterey County** Cayenne Conference Room Salinas, CA
Monday, April 20, 2020	1:30 PM	4:30 PM	**Riverside County** DPSS Staff Development Training Center Moreno Valley, CA
Thursday, April 30, 2020	1:30 PM	4:30 PM	**Inyo County** Bishop Fire Training Facility Bishop, CA
Tuesday, May 5, 2020	1:30 PM	4:30 PM	**Make-up Session** Conference Call / Webcast for those who are unable travel

Implementation Readiness

C-IV County Implementation Kick-off Roadshows - Purpose

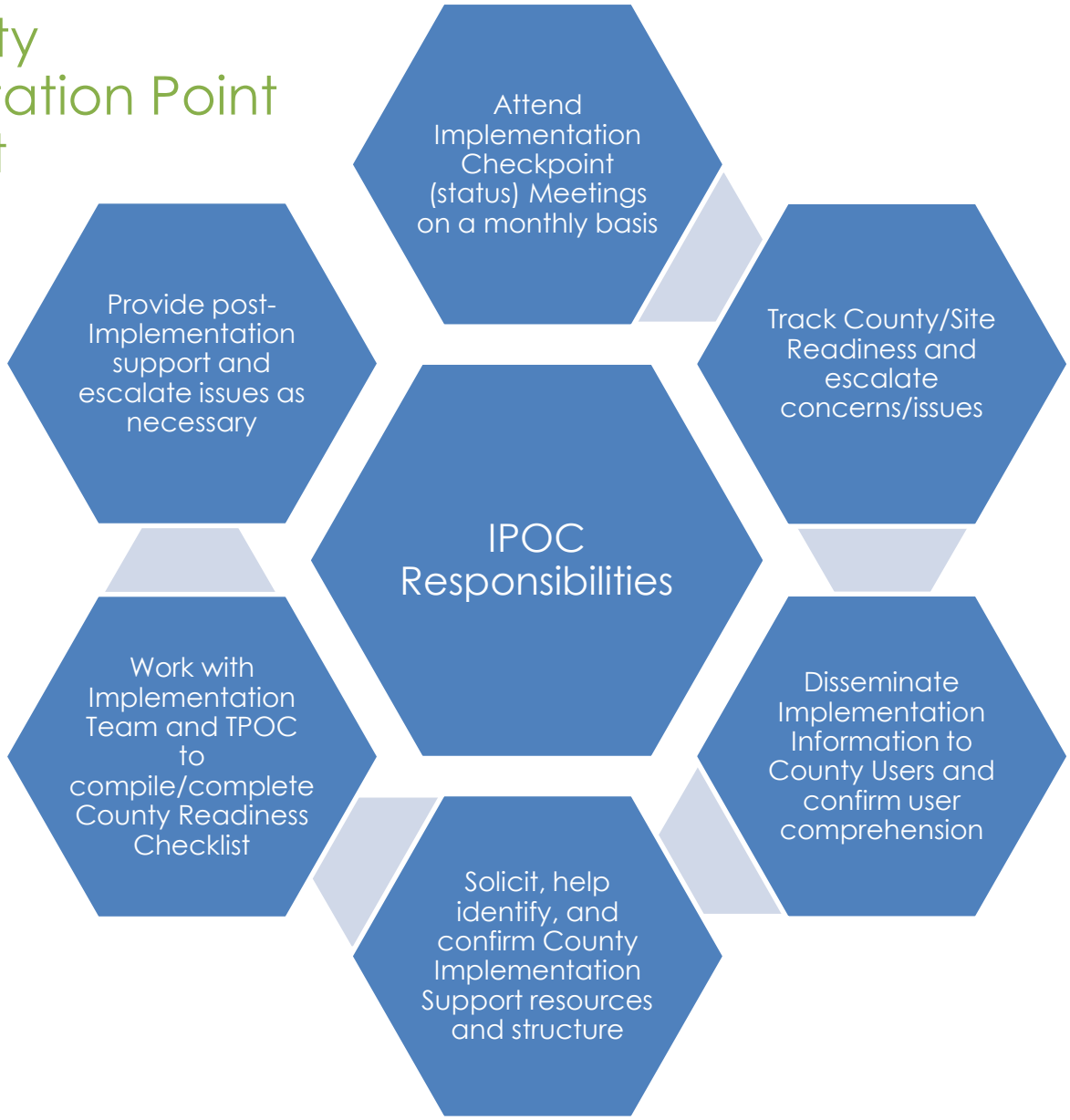


Implementation Readiness

CalSAWS Implementation Roadshows Agenda

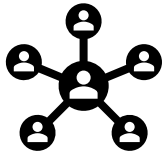
Implementation Readiness

C-IV County Implementation Point of Contact (IPOC)



Implementation Readiness

Technical Point of Contact (TPOC)

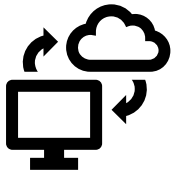


Stay informed on Implementation activities and status

Track and Assess County Technical Readiness

Escalate Technical risks and issues to the Consortium Implementation Manager

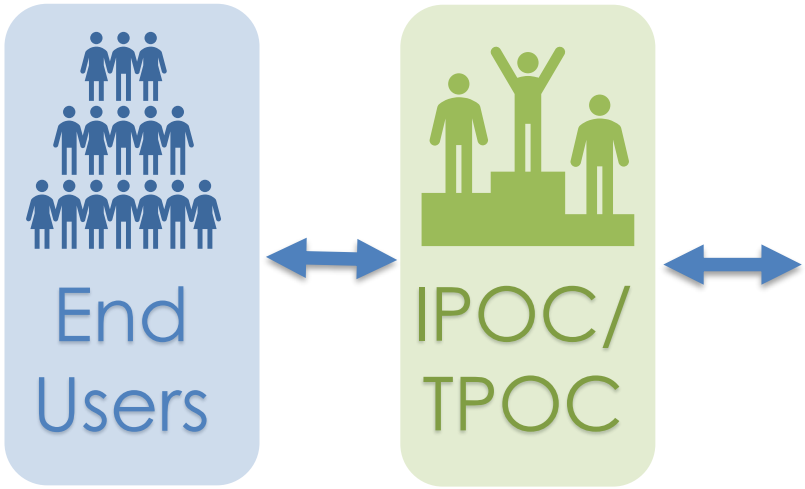
Assist in identifying and resolving technical issues found during Site Preparation and Installation



Assist with Conversion and Technical Cutover activities

Implementation Readiness

Project Support for IPOCs/TPOCs



CalSAWS Project Teams

Regional Managers

- Manage issues and resolutions, and provide associated feedback

Implementation Team

- Host periodic Implementation Checkpoint Meetings
- Provide Project Implementation status updates, including risks, issues, and/or required additional tasks

Implementation Site Support

- Escalate appropriate Site Preparation issues to Project
- First Point of contact for Implementation Readiness
- Assist with County Deployment Readiness Checklist

Technical Team

- Provide necessary Technical information and expertise to TPOC

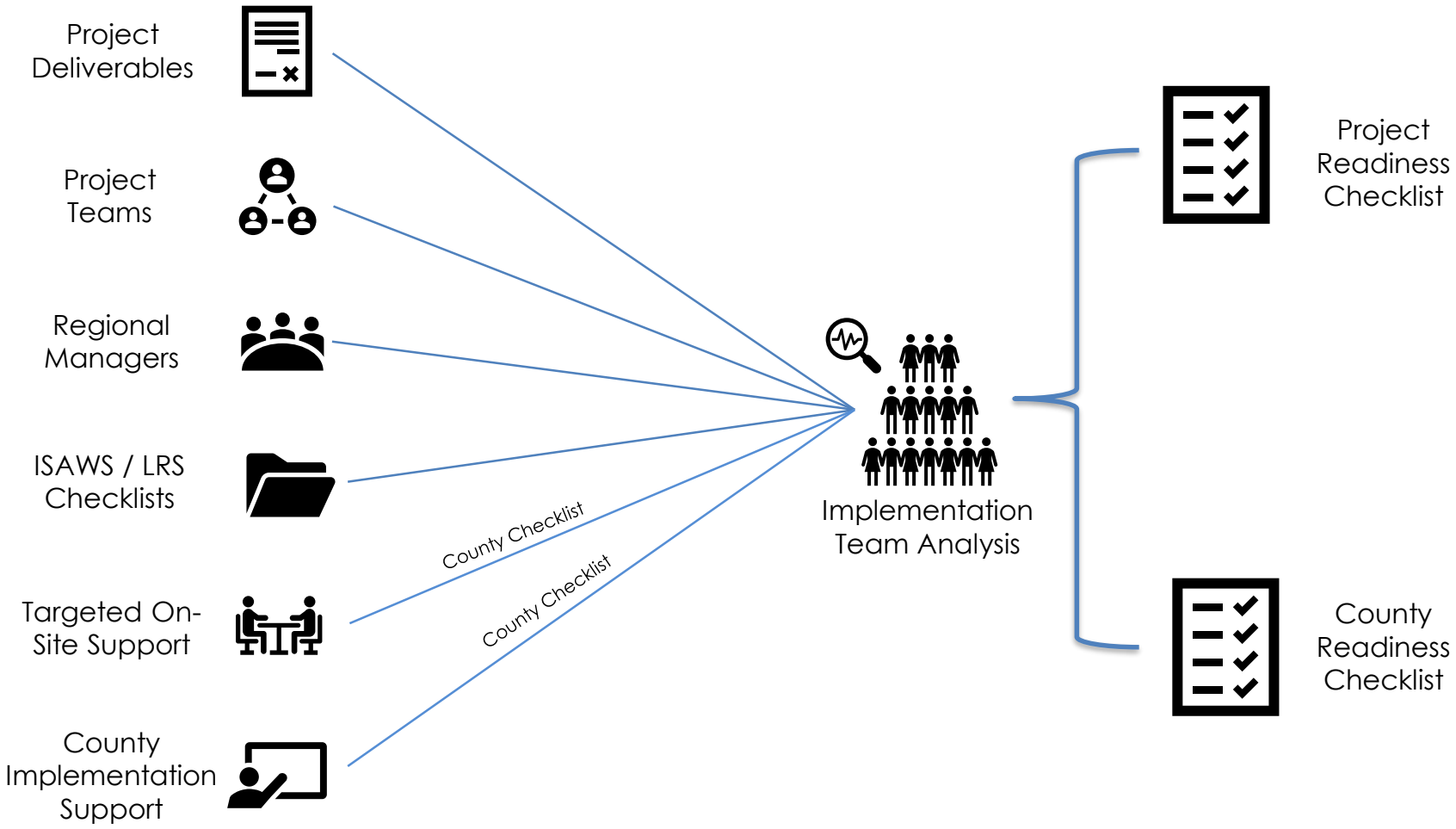
Implementation Readiness

Implementation Readiness Meetings

Implementation Readiness Meeting Details		
Meeting	Frequency	Audience
Pre-Deployment		
Monthly Implementation Readiness Checkpoint - Internal (T-18 March 2020)	Monthly	Implementation Team/Training, RMs
Implementation County Roadshows (April)	6 Visits across County Sites + 1 Virtual	County Directors, SMEs, Supervisors, Decision-makers
Monthly Implementation Readiness Checkpoint w/ IPOCs (T-15 June 2020)	Monthly	Implementation Team/Training, RMs, IPOCs
Monthly Implementation Readiness Checkpoint w/ IPOC, TPOCs, Change Network (T-11 October 2020)	Monthly	Implementation Team/Training, RMs, IPOCs, TPOCs, Change Network
Bi-Monthly Implementation Readiness Checkpoint (T-6 March 2021)	Bi-monthly	Implementation Team/Training, RMs, IPOCs, TPOCs, Change Network
Weekly Implementation Readiness Checkpoint (T-1 August 2021)	Weekly	Implementation Team/Training, RMs, IPOCs, TPOCs, Change Network
Post-Deployment		
Daily Post-Deployment Support Meeting	Daily (30 Busn Days)	Implementation Team (including onsite support team members)
Daily Post Deployment Stakeholder Call	Daily (30 Busn Days)	Implementation Team/Training, RMs, IPOCs, TPOCs, & County Stakeholders

Implementation Readiness Checklists

Inputs



C-IV Migration Project Readiness Checklist

CalSAWS

PROJECT MIGRATION READINESS CHECKLIST TEMPLATE

Status	Activity Description	Category	Target Start Date	Actual Start Date	Due Date	Date Completed
CalSAWS System Readiness						
OnTime	CalSAWS Release 3 of 8 - 20.03	System Readiness	2/10/2020		3/23/2020	
OnTime	CalSAWS Release 4 of 8 - 20.05	System Readiness	3/23/2020		5/18/2020	
OnTime	C-IV Converted Data Test Phase	System Readiness	1/1/2021		4/30/2021	
CalSAWS Conversion Readiness						
Completed	Establish conversion timeline	Conversion Readiness	4/15/2019	4/15/2019	6/10/2019	5/10/2019
OnTime	Identify County staff participants for the review of mock conversion results	Conversion Readiness	1/1/2021		1/14/2021	
OnTime	Execute Mock Conversions and update conversion routines	Conversion Readiness	3/1/2021		9/27/2021	
CalSAWS Technical Readiness						
OnTime	Distribute the CalSAWS URL to computers in Managed Counties	Technical Readiness	8/11/2021		9/15/2021	
OnTime	Verify from the Tech PPOCs that the new CalSAWS URL is distributed to Point of Presence counties and working properly	Technical Readiness	8/11/2021		9/15/2021	
OnTime	Push software update to Kiosks at CalSAWS counties	Technical Readiness	8/11/2021		9/15/2021	
CalSAWS OCM Readiness						
Completed	Host C-IV County User Labs in January 2020	OCM Readiness	1/6/2020	1/6/2020	1/30/2020	1/30/2020
OnTime	First Change Readiness Assessment	OCM Readiness	3/30/2020		4/3/2020	
OnTime	Establish Change Network	OCM Readiness	8/17/2020		9/7/2020	
CalSAWS Training Readiness						
Completed	LMS Migration to the Cloud	Training Readiness	11/11/2020	11/11/2020	3/2/2020	2/28/2020
OnTime	Design, build, and test the Migration WBTs	Training Readiness	10/1/2019		3/1/2021	
OnTime	Confirm Migration County users have access to LMS	Training Readiness	7/1/2021		9/1/2021	
CalSAWS Implementation Readiness and Support						
OnTime	Conduct C-IV County Implementation Roadshows	Implementation Readiness	4/6/2020		4/30/2020	
OnTime	Identify IPOCs	Implementation Readiness	5/4/2020		5/18/2020	
OnTime	Perform initial review of County Deployment Readiness Checklist with Identified IPOCs during Implementation Checkpoint meeting	Implementation Readiness	6/2/2020		6/2/2020	

** Dates are estimations and are subject to change*

C-IV Migration Project Readiness Dashboard

CalSAWS **PROJECT DEPLOYMENT READINESS DASHBOARD TEMPLATE**

Implementation Category	Owners	Status
Technical Readiness	Laura Chavez (C) Luz Esparza (A)	
System Readiness	Jo Anne Osborn (C) Lisa Salas (A)	
Conversion Readiness	Paul Trisler (C) Keith Salas (A)	
Functional Training Readiness	Ashley Arnold (C) Shivani Smith (A)	
OCM Readiness	Helen Cruz (C) Maria Saenz (A)	
Implementation Readiness	June Hutchison (C) Ted Anderson (A)	

Indicator	Definition
	Green: Tasks completed on time
	Yellow: < 7 days past due date
	Red: > 7 days past due date
	Gray: Not started

	Total Milestones	Milestones Behind	Total Detail Tasks	Detail Tasks Behind	Milestone Tasks Complete	Detail Tasks Complete
Technical Readiness	1	1	4	-	1	-
System Readiness	2	-	1	-	-	-
Conversion Readiness	1	-	2	-	-	1
Functional Training Readiness	7	-	41	-	-	-
OCM Readiness	-	-	12	-	-	-
Implementation Readiness	1	-	16	-	-	-
TOTALS	12	1	76	-	1	1

Milestones Past Due	Status Owner

C-IV Migration County Readiness Checklist

CalSAWS

Status	Activity Description	Primary Owner	Target Start Date	Actual Start Date	Due Date	Date Completed
County Manage Personnel						
On-Time	Identify County Implementation Point of Contact	PPOCs, County Directors	5/4/2020		5/18/2020	
On-Time	Identify County Implementation Technical Point of Contact or appropriate substitute	PPOCs, County Directors	9/14/2020		9/25/2020	
On-Time	Identify Change Champions to be a part of the Change Network	IPOC, County Managers, Supervisors	9/14/2020		9/25/2020	
On-Time	Identify County staff participants for the review of mock conversion results	IPOC / TPOC	1/1/2021		1/14/2021	
County Change/User Readiness						
On-Time	Complete Initial User Change Assessment Survey (T-18 Months)	C-IV End-users	3/30/2020		4/3/2020	
On-Time	Complete T-12 Months User Change Assessment Survey	C-IV End-users	9/14/2020		9/19/2020	
On-Time	CalSAWS Change Management Team hosts initial meeting with Change Network	Change Network	10/20/2020		10/20/2020	
On-Time	Change Champions attend monthly Change Network meetings with Change Management Team and provide County updates as applicable	Change Network	11/17/2020		10/21/2021	
County Conversion Readiness						
On-Time	Participate in required training for mock conversion data review	Conversion POC / TPOC	2/1/2021		2/28/2021	
On-Time	Attend Conversion Gatekeeper C-IV migration session	Conversion POC / TPOC	2/15/2021		2/15/2021	
On-Time	Participate in Data Validation and Review activities during Mock Conversion to confirm accuracy of the data mappings and transformation logic for the C-IV System data conversion	Conversion POC / TPOC	3/1/2021		9/23/2021	
On-Time	Report and record results form Mock Conversion, such as identification of data cleanising items	Conversion POC / TPOC	3/1/2021		9/23/2021	
On-Time	In the instance where data discrepancies cannot be resolved programmatically, perform manual data cleansing tasks (manual entry of required data due to data fallout)	Conversion POC / TPOC	3/1/2021		9/23/2021	
On-Time	Identify required output (for example, state and federal reports, checks) to be generated from the C-IV System prior to cutover	Conversion POC / TPOC	6/2/2021		9/23/2021	
On-Time	Determine data retention policy impact to conversion and the C-IV System	Conversion POC / TPOC	6/2/2021		9/23/2021	
On-Time	Complete manual data entry into the C-IV System for mission-critical data that cannot be defaulted and must be in place before the transition into the CalSAWS system (i.e., cutover) can occur	Conversion POC / TPOC	9/27/2021		10/1/2021	
On-Time	Perform post-cutover data validation and clean-up	Conversion POC / TPOC	9/27/2021		10/15/2021	

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C-IV Migration County Readiness Checklist, Cont'd

CalSAWS

Status	Activity Description	Primary Owner	Target Start Date	Actual Start Date	Due Date	Date Completed
County Technical Readiness						
On-Time	Contractors & External Agencies Only: Confirm that contractors' and external agencies' offices have connectivity to CalSAWS and LMS	TPOC	8/11/2021		9/1/2021	
On-Time	Confirm that CalSAWS Icon has been pushed to User Workstations	TPOC	8/11/2021		9/15/2021	
On-Time	Confirm Kiosks are set up	TPOC	8/11/2021		9/15/2021	
On-Time	Confirm C-IV Downtime has been communicated to all C-IV Users	TPOC	9/1/2021		9/23/2021	
County Training Readiness						
On-Time	Identify conference rooms for Training as needed	IPOC	7/1/2021		8/31/2021	
On-Time	Identify County Training resources as needed	IPOC	7/1/2021		8/31/2021	
On-Time	Complete and return Training roster to TOSS	IPOC	7/1/2021		8/31/2021	
On-Time	Provide County-issued headphones for staff to use when taking Web Based Training (WBTs)	IPOC	8/15/2021		9/1/2021	
On-Time	Confirm users have access to the LMS (Learning Management System)	IPOC	8/31/2021		9/1/2021	
On-Time	Confirm users have completed Migration WBTs	IPOC	9/1/2021		9/23/2021	
County Implementation Readiness and Support						
On-Time	IPOC attends their first Monthly Implementation Readiness Checkpoint Meeting with the Project Implementation Team and RMs	IPOC	6/2/2020		6/2/2020	
On-Time	Complete and return Site contact sheet	IPOC	6/2/2020		9/1/2020	
On-Time	Provide Site Floor Plans	IPOC	6/2/2020		9/1/2020	
On-Time	TPOC and Change Network attend their first Monthly Implementation Readiness Checkpoint Meeting with the Project Implementation Team, IPOCs, and RMs	IPOC, TPOC, Change Network	10/6/2020		10/6/2020	

** Dates are estimations and are subject to change*

C-IV Migration County Readiness Dashboard

CalSAWS **C-IV COUNTY DEPLOYMENT READINESS DASHBOARD TEMPLATE**

Implementation Category	Owners	C-IV Migration
County Technical Readiness	Laura Chavez (C) Luz Esparza (A)	
County Manage Personnel	IPOC	
County Change/User Readiness	June Hutchison (C) Ted Anderson (A)	
County Training Readiness	June Hutchison (C) Ted Anderson (A)	
Implementation Readiness	June Hutchison (C) Ted Anderson (A)	

Indicator	Definition
	Green: Tasks completed on time
	Yellow: < 7 days past due date
	Red: > 7 days past due date
	Gray: Not started

	Total Milestones	Milestones Behind	Total Detail Tasks	Detail Tasks Behind	Milestone Tasks Complete	Detail Tasks Complete
County Technical Readiness	1	-	1	-	-	-
County Manage Personnel	1	-	1	-	-	-
County Change/User Readiness	-	-	1	-	-	-
County Training Readiness	-	-	4	-	-	-
Implementation Readiness	1	-	3	-	-	-
TOTALS	3	-	10	-	-	-

Milestones Past Due	Status Owner

Change Management

Measuring User Readiness with Pulse Assessment Surveys

Asking questions in the following Change Areas to determine User Readiness:

AWARENESS

- Has the end-user heard about the upcoming changes?
- What are their primary sources of information about Project initiatives?

KNOWLEDGE

- How much does the end-user understand about how the changes will impact them?

DESIRE

- Does the end-user and their County leadership feel positively toward CalSAWS Implementation?
- Do they understand their role in preparing for the change (needing to take trainings, orientations, etc.)?

ABILITY

- Does the end-user feel they have access to the appropriate trainings and materials to effectively prepare in order to perform their job after Migration?
- Have they gained all of the required information to allow for a seamless transition?

CHANGE ACCEPTANCE

- Does the end-user support and endorse the change?

Change Management

Measuring User Readiness with Pulse Assessment Surveys - Schedule

Readiness Assessment in Relation to C-IV Migration	**Planned Distribution Date**	**Response Due Date** (+5 Days from Distribution)	**Change Area(s) of Focus**
T-18 Months (Establishing a Baseline)	3/30/2020	4/3/2020	Awareness, Knowledge
T-15 Months*	6/22/2020	6/26/2020	Awareness, Knowledge, Desire
T-12 Months	9/14/2020	9/18/2020	Awareness, Knowledge, Desire
T-9 Months	12/7/2020	12/11/2020	Knowledge, Desire
T-6 Months	3/15/2021	3/19/2021	Knowledge, Desire
T-4 Months*	5/17/2021	5/22/2021	Knowledge, Desire, Ability
T-3 Months	6/14/2021	6/18/2021	Knowledge, Desire, Ability
T-2 Months*	7/12/2021	7/17/2021	Desire, Ability, Acceptance
T-1 Month	8/16/2021	8/20/2021	Ability, Acceptance
T+1 Month	10/25/2021	10/29/2021	Ability, Acceptance

*Distribution of starred surveys will be assessed based on need

Change Management

Establish Change Network (September 2020)

A group of influential people who are capable of driving change and adoption within their respective counties by taking part in a structured engagement process

- Assists in identifying and removing barriers to change by understanding local issues/concerns and adjusting communications accordingly to satisfy local needs, creating targeted communications
- Provides Project with end-user perceptions (the "voice of the worker")

THE PRIMARY GOALS OF THE CHANGE NETWORK

Delivery of Project **communications** and **updates**

Continual **feedback and escalation path** from bottom-up (End-Users) and top-down (Project Leadership)

Assisting with **User Readiness** and **Adoption** of new processes, tools, and behaviors

Support for County awareness, learning, and change commitment

CalSAWS Gantt Chart

C-IV Training

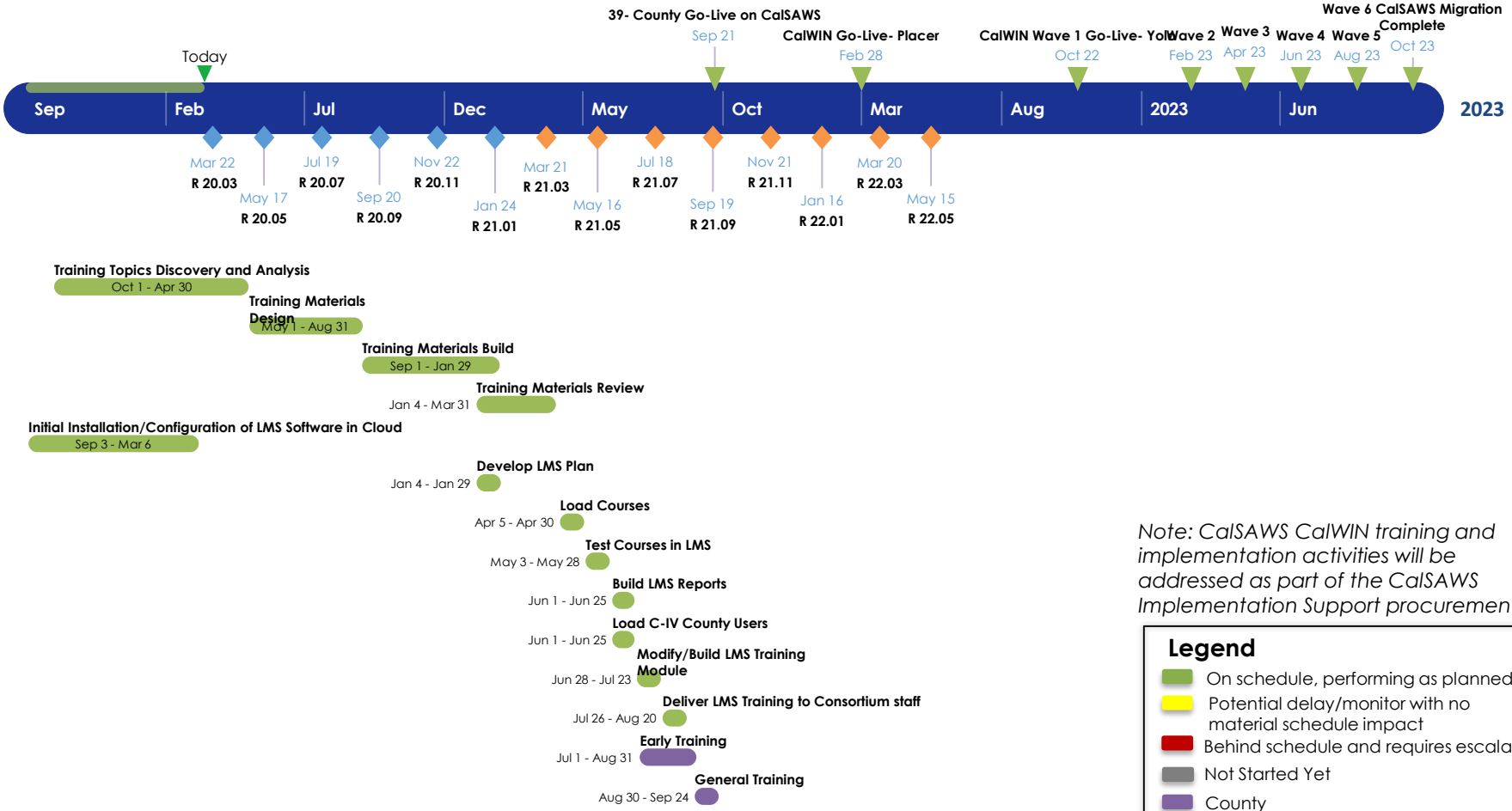
Note: CalSAWS CalWIN training and implementation activities will be addressed as part of the CalSAWS Implementation Support procurement.

Legend

- On schedule, performing as planned
- Potential delay/monitor with no material schedule impact
- Behind schedule and requires escalation
- Not Started Yet
- County

CalSAWS Gantt Chart

C-IV Training



Note: CalSAWS CalWIN training and implementation activities will be addressed as part of the CalSAWS Implementation Support procurement.

Legend

- On schedule, performing as planned
- Potential delay/monitor with no material schedule impact
- Behind schedule and requires escalation
- Not Started Yet
- County

Training

C-IV Migration Training Materials Development

C-IV Migration Training Materials – used to train C-IV County end-users on the key functional differences between C-IV and LRS

Early Training - stakeholder groups will have the opportunity to take the Migration WBTs in LMS. Early Training will be conducted 8 weeks prior to General Training and 12 weeks prior to C-IV Go-Live.

General Training - C-IV County users will take the Migration WBTs in LMS. General Training will be conducted 4 weeks prior to C-IV Go-Live.

Implementation Readiness at PSC - Next Steps

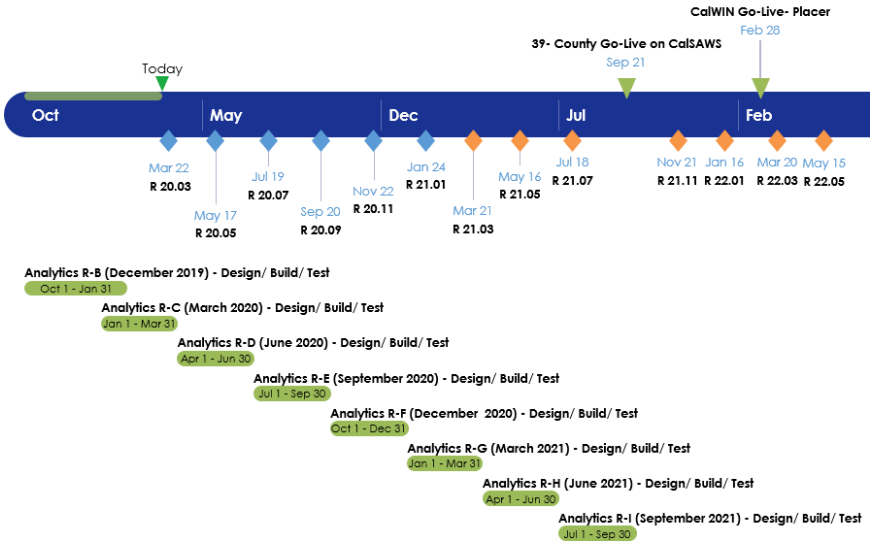
Over the next few PSC discussions we plan to share with you more detail on the following topics:

- Readiness Measurements
  - Dashboard reporting
  - Approach to report out readiness status and compliance
- Method and frequency on distribution of County readiness reporting
- Project support to assist Counties to stay on track with readiness activities and mitigation strategies when delays occur
- Communication plan to illustrate how County Readiness is integrated into the CalSAWS Implementation Green-light decision
- Training - CalSAWS Functionality to be included in Migration WBTs

CalSAWS Analytics Solution Update

Dashboard Re-platform

Current Status



Release B: Parallel Production Validation

- DPSS Stats Scorecard

Release C: Under Development/Test

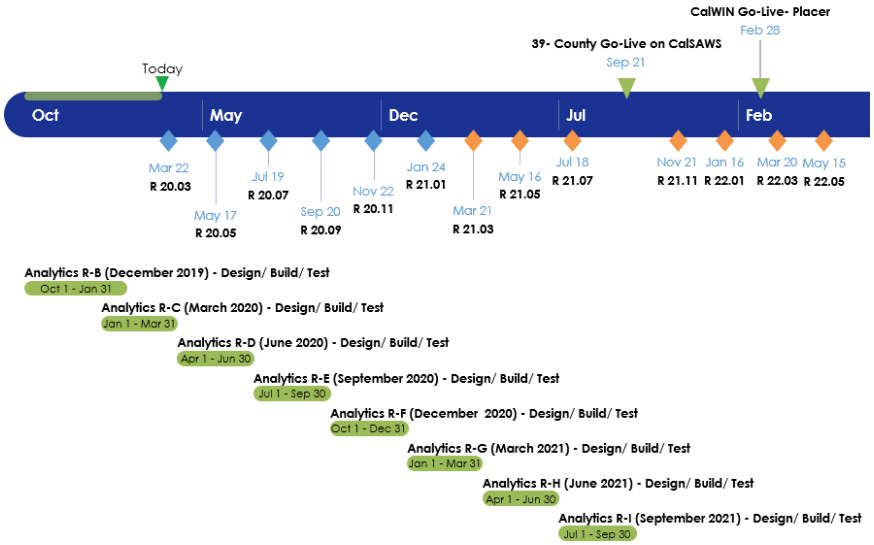
- CalWORKS
- QA
- Planned release date into parallel production validation March 30.

Release D: Planning

- CalFresh
- CalFresh Meals
- Managed Personnel
- SSI/SSP
- Payments

State and Management Re-platform

Current Status



Amendment currently under review. Planning to incorporate first set of reports into the delivery timeline of Release D.

State and management reports will follow the same delivery schedule as the dashboard re-platform.

Webinars

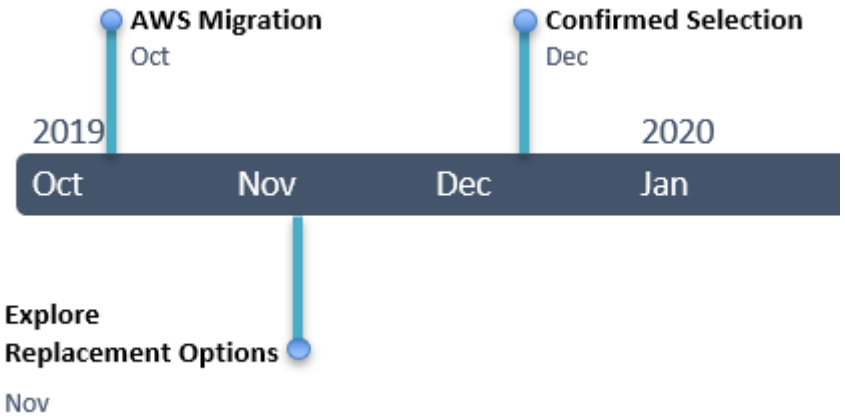
Upcoming

#	Meeting Topics	Date	Led By	Audience
1	**Analytics Project Overview** • Scope • Timeline • Approach • Architecture	January 22, 2020	CalSAWS	Management, State & Ad Hoc Reporting Committees
2	**Purpose Built Data Sets Review –** CalSAWS team to walk through: • Method, key principles and technology used in designing and implementing purpose built data sets • Differences between OBIEE subject area and Aurora Purpose Built Data Set • Long term roadmap of Purpose Built Data Sets	February 26, 2020	CalSAWS	Ad Hoc Reporting Committee
3	**Purpose Build Data Sets Feedback –** Counties to provide feedback: • Where functionality overlaps (e.g. accessing C-IV/LRS database to do ad hoc reporting) • Where there are differences between their existing process and the CalSAWS Analytics Solution	**March 25, 2020**	Ad Hoc Reporting Committee	CalSAWS
4	**Dashboard Portfolio Review -** Counties to do an offline review of all LRS & C-IV dashboards being re-platformed	April 22, 2020	Management Reporting Committee	N/A
5	**Dashboard Portfolio Feedback –** Counties to provide feedback: • Where functionality overlaps (e.g. using Qlik or equivalent tool for specific county reporting, producing similar dashboards) • Where there are differences between their existing process and the CalSAWS Analytics Solution	May 20, 2020	Management Reporting Committee	CalSAWS

Overview of ForgeRock Implementation

ForgeRock

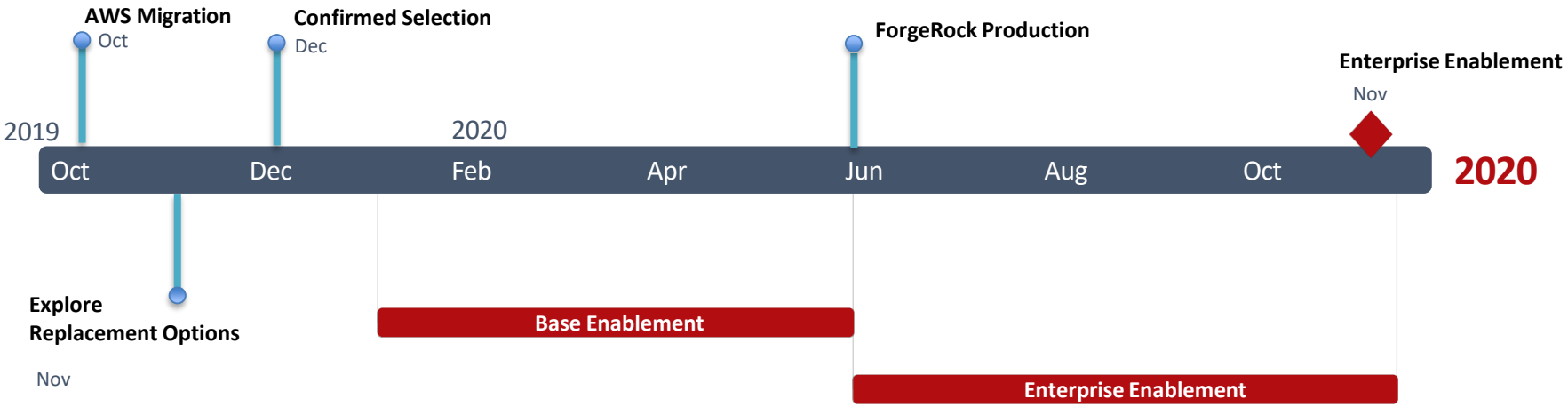
Transforming to One CalSAWS identity



- Identity Access Management(IAM) capabilities were identified to support the long term growth of the CalSAWS ecosystem.
- Capabilities were grouped into following three areas:
  - Access Management
  - Identity Management
  - Platform Foundation
- Based on the analysis, ForgeRock was selected.

ForgeRock

Establishing the enterprise platform across phases



Base Enablement

- Platform installed
- Authentication
- Integration with externally hosted active directories
- Common Log-in Page
- User Self Service
  - Password Reset
- User/Role Lifecycle
- API Security/Apigee Integration
- User Stores

Enterprise Enablement

- Complete Identity Management and Governance
- Enable remaining User and Entitlements life cycle capabilities
- Deploy identity access management for external users (self-registration)
- Ready to support next wave of applications

ForgeRock

Base Installation - Current Status

- Completed technical design.
- Completed installation and configuration of sandbox and development environments.
- Working with OCAT on integration points.

The first two applications planned to leverage ForgeRock are OCAT and the LRS System.

Conversion Team Activities Update

- Duplicate Person Report/Communication
- Overview of Duplicate Person Governance

Conversion Team Activities Update

Duplicate Person Report

- Final validation round completed February
- Reconvene Duplicate Person Workgroup End of March
  - Update Workgroup on the results of data validation
  - Present final version of the Duplicate Person Report
  - Present Duplicate Person Governance
- On track for statewide distribution April 2020

Imaging/Task Management Overview/Timeline

- Update on potential County Imaging options

Imaging Overview

- Current Status
- Timeline
- Document Migration
- *Potential Alt*ernate Options

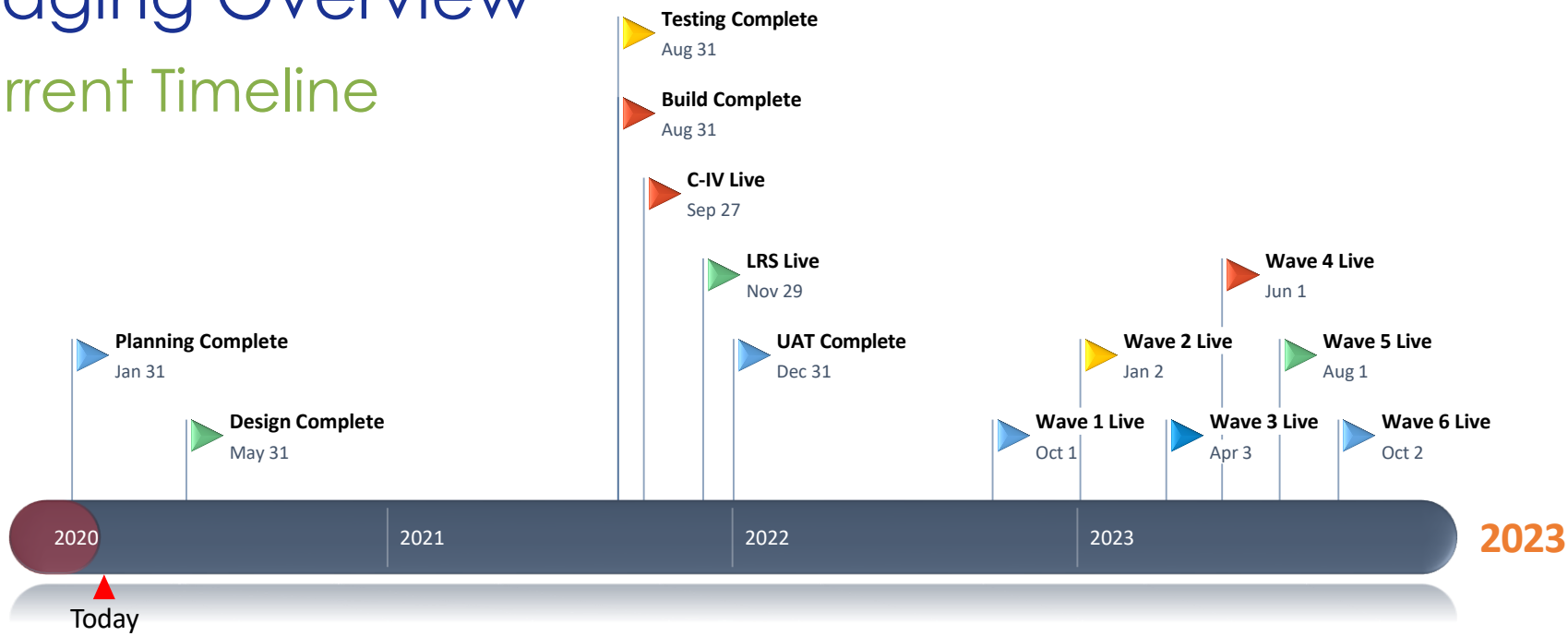
Imaging Overview

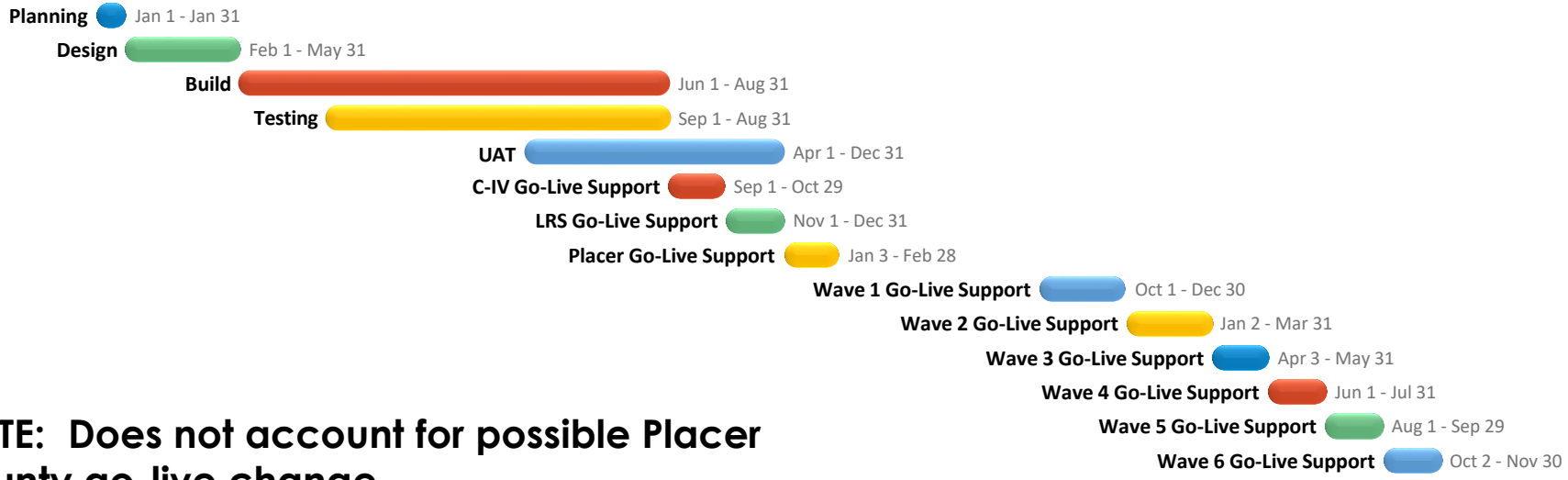
Current Status

- Imaging amendment was approved by the JPA Board and the State/Federal partners
- Project Kick Off on 2/24/20
- Document Migration Plan was reviewed with the Imaging Committee on 2/27/20

Imaging Overview

Current Timeline





NOTE: Does not account for possible Placer County go-live change

Imaging

Document Migration Process

- Hold individual document migration kick off discussions with Los Angeles, each CalWIN County, and C-IV Counties
- Note: CRFI to be distributed to get Imaging Point of Contact to coordinate efforts)
- Hold individual document migration discovery sessions with Los Angeles, each CalWIN County, and C-IV Counties
  - Clearly define roles and responsibilities for the County and Project
  - Work with County to define and set due dates for county responsibilities

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

Note: Los Angeles County kick-off scheduled March 24, 2020

Imaging

Document Migration – County Responsibilities

- Discovery Sessions:
  - Evaluate and transform Metadata for Export
  - Develop process to track newly ingested images, metadata, and metadata changes after initial export
- Test Batches:
  - Export test batch of images and metadata
  - Reconfigure export metadata/images per test batch results
- Data Export:
  - Export Initial batch of images and metadata
    - Verify initial batch of imported images and metadata
  - Export Delta(s) images and metadata
    - Verify imported Delta(s) imported images and metadata
  - Export Final batch of images and metadata
    - Verify imported Final batch of imported images and metadata
- Verify Data:
  - UAT Image/Metadata Validation

Imaging

Potential Alternative Options

- Option 1: Transmit All Images at the Point of Scan
  - Give the county the ability to retain their existing Imaging System for scanning in documents
  - County system will send all scanned documents over to the CalSAWS Imaging Solution via an API
- Option 2: Additional API requests without sending images
  - The county will retain their existing Imaging System
  - Images will not be sent to CalSAWS
  - Additional API's will need to be created to maintain CalSAWS functionality

Imaging Alternative Option 1

Transmit All Images at Point of Scan

Option Considerations

- File format and type
  - Define format (File Size, File Type)
  - Metadata will need to match the CalSAWS Imaging Solution metadata for functionality to work properly
  - Annotation capability may not be available for documents not meeting file type standards
- SLAs between the Project and county Imaging provider would need to be defined
- All scanning related activities will be the responsibility of the County's Imaging System
- CalSAWS Imaging Solution will be the "System of Record"
  - Additional validation steps will be needed to ensure all images are obtained from origin system.
  - Which system will be responsible for indexing documents?
  - Which system will the State auditors use for their work?

Imaging Alternative Option 1

Transmit All Images at Point of Scan

Design/Implementation Considerations

- Can Hyland support the volume of images through their API?
- Marking documents as "Received" may be delayed if document is not transmitted by the county in a timely manner
- Network bandwidth/Routing considerations
  - Impacts to the CalSAWS network would need to be assessed
- How will confidentiality be handled?
- How will security be handled?

Imaging Alternative Option 2

Additional API Request without Sending Images

Option Considerations

- Custom Image links by page in the CalSAWS application might not work
  - Generic link to County Imaging System will need to be developed
- Task functionality might be limited
  - The link back to the document scanned in the task solution may not work and might need to be a generic link to the county imaging system
  - Need to create APIs which will require specific metadata for task generation
- All scanning/indexing/OCR related activities will be the responsibility of the county imaging system
- County imaging system will be the "System of Record"
  - State Agency auditors will need access to County Imaging System

Imaging Alternative Option 2

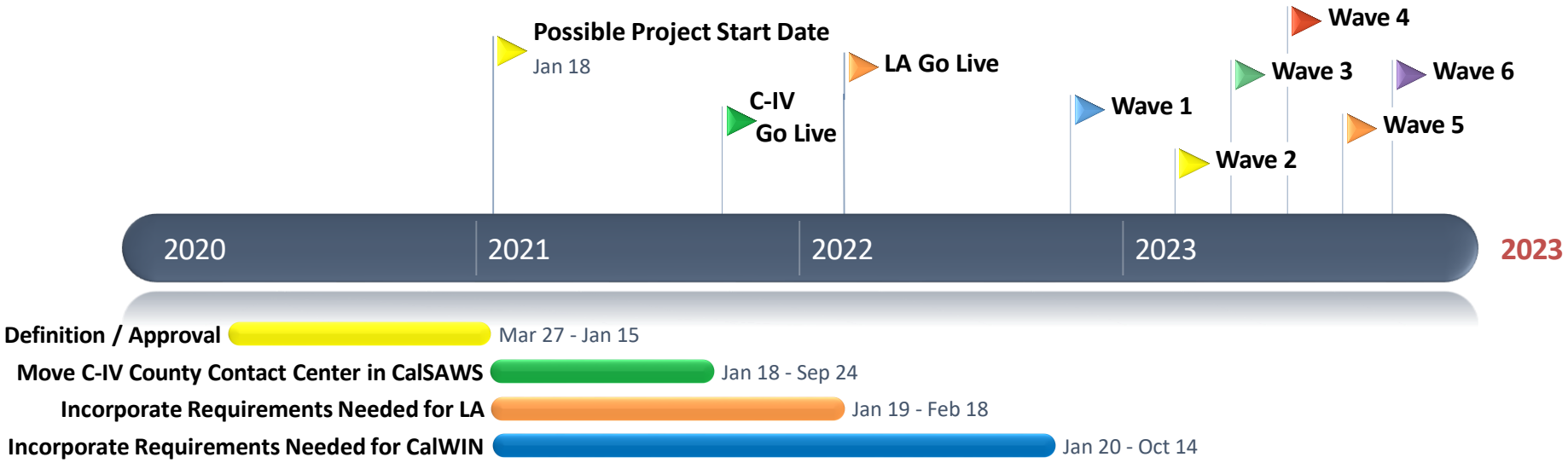
Additional API Request without Sending Images

Design/Implementation Considerations

- Marking documents as received:
  - Barcodes will require processing via wand-scanning in the CalSAWS application
  - Barcode APIs are not currently available for the County Imaging System
- How will confidentiality be handled?
- How will security be handled?
  - How will other counties access person level documents (shared customers)?
  - How will ICT be processed?

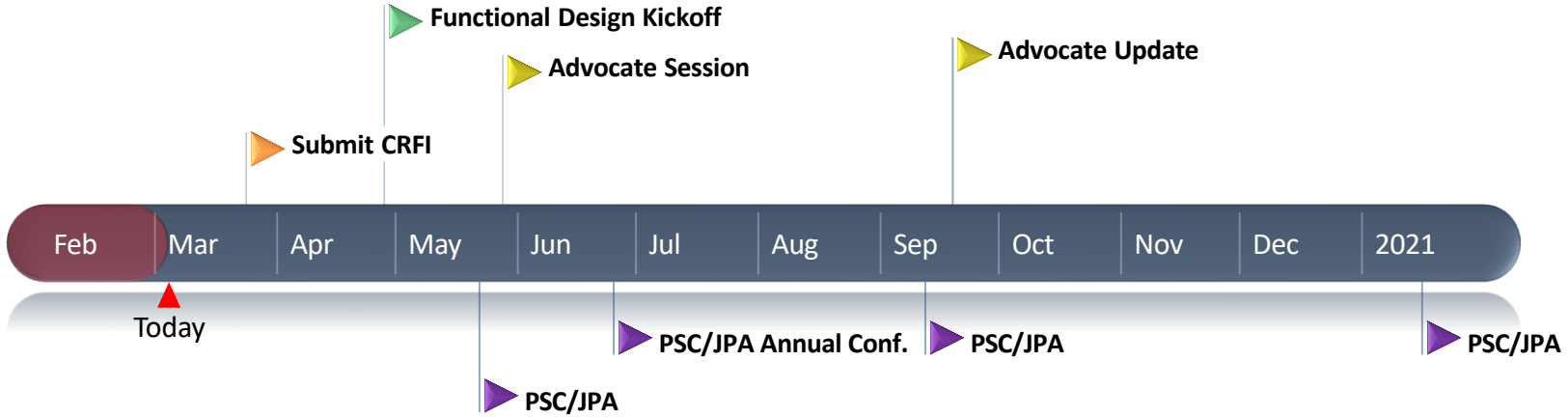
CalSAWS 58-County Contact Center Solution

Schedule for a 58 County Contact Center Solution



Before diving into the 58-County Contact Center solution development and approval process, let's look at the critical path deadlines

In Progress Functional Design Contact Center Timeline



Visit Contact Centers and Organize Approach Apr 27 - May 8

Meet Reps from each County. May 11 - May 15

Compile Counties & Advocates Feedback May 18 - May 29

IVR/CC Committee Votes on Finalized Requirements Jun 1 - Jun 5

Create and Review Solution/Estimate Jun 22 - Aug 21

Review/Refine with Consortium & Clearbest Aug 24 - Sep 11

State and Federal Approval Sep 14 - Jan 15

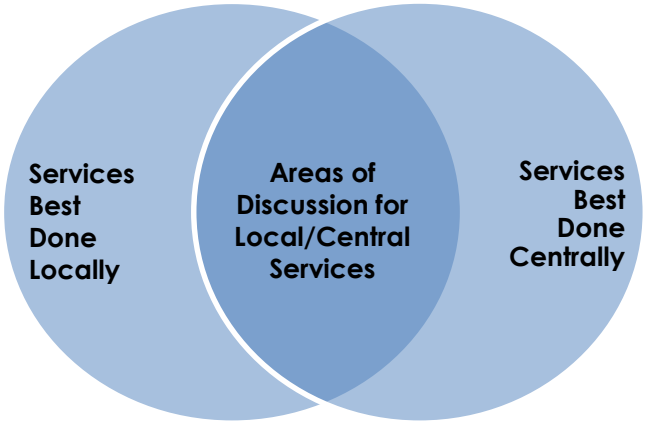
Date	Governing Body	Material
May	PSC/JPA	JPA Board Asked to Approve Recommended Direction of Solution
June	PSC/JPA	General Membership Conference
July	PSC/JPA	Update on Solution/Estimate as Appropriate
August	PSC/JPA	Update on Solution/Estimate as Appropriate
September	PSC/JPA	JPA Board Asked for Approval to Send Out for State and Federal Approval
December	PSC/JPA	Final Board Approval

Key Criteria Used for Determining the Contact Center Solutions

- As part of the process the Consortium will determine a solution that meets the criteria below:
  - Meets all of the requirements from the Contact Center Functional Design process
  - Platform as a Service with a pay only-for-what-you-use cost model
  - Ability to procure the service through a leveraged government contract vehicle
  - The solution needs to be performant (and there will be numerous performance checkpoints throughout the process)

Key Functional Design Topics

- Discuss County vs. Project Managed



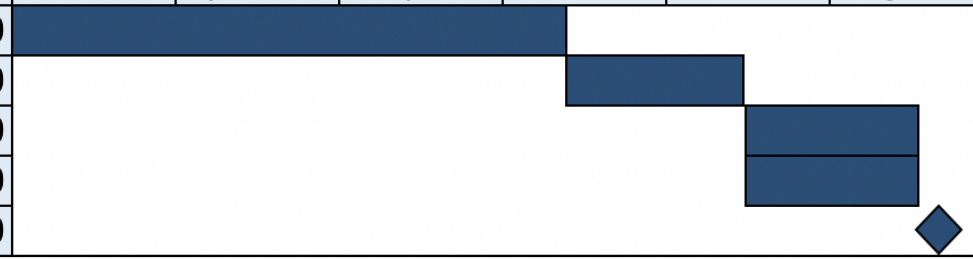
- Discuss Telephonic Signature Solution
- Understand Community-Based Organizations (CBO) Requirements
- Understand Foster Care Requirements
- CRM (Customer Relationship Management)
  - Enhance Call Log
  - Provide API's for counties to call with their own CRM

OCAT Update

OCAT Schedule Update

Schedule adjustment for ForgeRock implementation

Key Activities	Adjusted Schedule		Implementation Timeline
	Start	Finish	Mar / Apr / May / Jun / Jul / Aug
Application Dev/Test		6/12/20	
Final System Test	6/15/20	7/10/20	
Training Delivery	7/20/20	8/20/20	
User Acceptance Test	7/20/20	8/20/20	
Cutover and Go-Live	8/21/20	8/24/20	



- Eight (8) week schedule adjustment
- Final System Test
  - Security, performance, and disaster recovery tests
  - End-to-end regression tests
- Training, UAT, and Cutover
  - Five (5) weeks in duration
- Go-Live
  - Monday, August 24, 2020

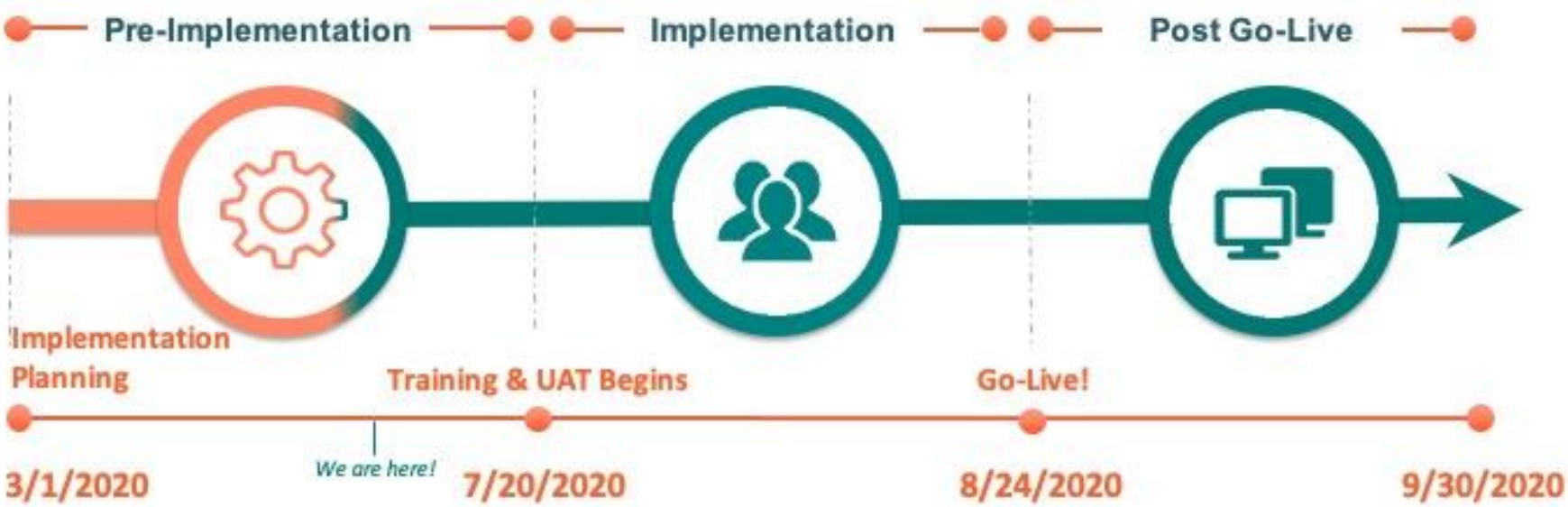
Design, Development, and Test

Key activities updates

- Application development and test
  - Overall development and test on track for final system test to begin 6/15
  - SAWS interfaces testing in progress with CalWIN, C-IV, and LRS
- ForgeRock user identity and access management
  - Functional design submitted 2/28
  - Technical design submitted 3/13
  - Proof of Concept (PoC) build in progress with the Consortium and Accenture
- OCAT Demo
  - Preparing materials and demo for CalSAWS Annual Strategic Planning Conference in June

Training and Implementation

Updated activities with schedule adjustment



- County Champion Monthly Calls
- County Readiness Checklist & Connectivity Preparation
- User Acceptance Test Preparation and Training
- User Acceptance Testing
- County OCAT Training
- Ongoing Readiness Communications
- Daily Go-Live Support Calls
- Decommission Current System

Application Development Update

- GEN1365

Policy Update

GEN 1365 – Notice of Language Services

Policy Effective Date & State Letter Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
ACWDL 17-23	**SCRs CIV-100774;CA-202307** New TBD	N/A	DHCS policy requires that counties send a multilingual notification, such as the GEN 1365, with all forms, notices, and/or other written material mailings, regardless of the preferred language specified by the applicant/recipient. CDSS and DHCS have landed on including the GEN 1365 in all mailings going forward. **CalSAWS Update:** LRS Process - The GEN 1365 is included with every piece of outgoing mail (even English). The GEN 1365 is printed, folded, and provided to the print center to be included in every mailing. C-IV Process - The GEN 1365 is included in customer correspondence mailings, including RE packets when the customers language is not English. The project is working on estimates for print and postage cost for the additional mailings to submit to CDSS and DHCS. **CalWIN Update:** CalWIN sends the GEN 1365 with all customer correspondences, one per envelope.

Policy Update

Funding for Emergency Caregivers

Policy Effective Date & State Letter Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
7/1/2018 ACL 18-75 CFL 18-19/81 ACL 19-84 Draft ACWDL Aid Code 5L	**SCR CIV-102912; CA-205913** Design Release 20.09 **SCR CIV-102757;CA-205633** Design Release 20.11 **SCR CIV-106585;CA-214133** New Release TBD	**PPM #48555** BENDS (workaround) issued 8/18 **PPM #50565** Implemented R59 (11/19)	Under the current program, relative caregivers and NREFMs are eligible for payment for up to six months during the approval process in 2018-19, and in 2019-20 are eligible for up to three months of payments, funded primarily under the Emergency Assistance TANF program. Aid code 5L is used to identify the emergency caregiver placements that are not eligible to federal Foster Care funding and they are not eligible to emergency assistance funding. Aid code 5L is available in MEDS. On 3/19/19, SAWS received a draft copy of the ACWDL for aid code 5L, the release date for the ACWDL is TBD. The CFL for aid code 5L was published on 5/10/19. ACL 19-84, introduced a change to TANF Emergency Assistance (EA) funding, which only allows TANF EA cases to use EA funding for up 6 months. This is different from the emergency caregiver population, which can use the EA funding for up to 12 months if good causes exists. -Continued on Next Slide-

Policy Update

Funding for Emergency Caregivers

Policy Effective Date & State Letter Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
7/1/2018 ACL 18-75 CFL 18-19/81 ACL 19-84 Draft ACWDL Aid Code 5L	**SCR CIV-102912; CA-205913** Design Release 20.09 **SCR CIV-102757;CA-205633** Design Release 20.11 **SCR CIV-106585;CA-214133** New Release TBD	**PPM #48555** BENDS (workaround) issued 8/18 **PPM #50565** Implemented R59 (11/19)	**CalSAWS Update:** • Add aid code 5L to CIV and LRS • Exclude aid code 5L from the clothing allowance batch process • Update the EC/EA Tracking Report to include aid code 5L **TANF Emergency Assistance (EA) funding**: The project is going to provide a list of TANF EA cases with a Date of Risk 3/1/2019 or later, the NTE date is more than 180 days and the case was active on aid code 5K in the 7th month or beyond. A CIT will be sent to the counties once the list is ready. **CIT County Action:** The Worker will update the NTE date to reflect 180 days and run EDBC for the applicable benefit month(s). **CalSAWS County Business Impact:** Unknown pending design completion for SCRs CIV-102912;CA-205913 and CIV-102757;CA-205633. -Continued on Next Slide-

Policy Update

Funding for Emergency Caregivers

Policy Effective Date & State Letter Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
7/1/2018 ACL 18-75 CFL 18-19/81 ACL 19-84 Draft ACWDL Aid Code 5L	**SCR CIV-102912; CA-205913** Design Release 20.09 **SCR CIV-102757;CA-205633** Design Release 20.11 **SCR CIV-106585;CA-214133** New Release TBD	**PPM #48555** BENDS (workaround) issued 8/18 **PPM #50565** Implemented R59 (11/19)	**CalWIN Update:** • Reference Table updated, manually select 5L aid code • Adding an On/Off Switch for EC Funding 5L • Extending Relative/NREFM up to 180 days for 5L & up to 365 day for Good Cause. • Change Other Placements of Regular EA Funding to 180 days from 120 days • Create new Client Correspondence for Interim Funding ***Note:*** *ACL 19-84 posted in September included the change from 180 days to 120 days.* **CalWIN County Business Process Impact:** County business processes utilizing functionality to issue now automation implemented.

Policy Update

Able-Bodied Adults Without Dependents (ABAWD)

Policy Effective Date & State Policy Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
ACL 19-93 ABAWD Handbook 2.0 Draft ACL CalFresh Discretionary Exemptions for ABAWD Received on 1/15/20	**SCRs CIV-7215; CA-57971 Phase II** Implemented Release 19.09 **SCRs CIV-103743 CA-207637 Phase III** Design Release 20.09 **SCRs CIV-106058;CA-212648** Build Release 20.02 **SCRs CIV-106060;CA-212650** Implemented Release 20.02	**PPM #46539** Implemented 8/2018 **PPM #47411** Implemented 8/2018 **PPM #51360** Implemented 8/19 **PPM #52397** Implemented R60 (2/20) **PPM #54056** Implemented March 2020 **PPM #54055** Implemented February 2020 **PPM #54084** New March 2020	Food and Nutrition Service (FNS) published the final rule, *Supplemental Nutrition Assistance Program: Requirements for Able-Bodied Adults without Dependents* on December 5, 2019. The new rule limits the conditions under which FNS would waive, when requested by States, the ABAWD time limit in areas that have high unemployment. Changes to time limit waiver criteria are effective April 1, 2020. In addition, the new rule limits carry over of unused discretionary exemptions, previously known as "percentage exemptions" or "15 percent exemptions." Changes to discretionary exemptions are effective October 1, 2020. California is implementing temporary changes to discretionary exemption policy as a result of the new rule. The temporary changes apply to the period between April 1, 2020 and September 30, 2020. Because FNS has not issued complete implementation guidance, the CDSS will provide more information for CWDs about California's long term discretionary exemption and how to proceed after October 1, 2020 in the coming months. -Continued on Next Slide-

Policy Update

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Policy Update

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Policy Update

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Policy Update

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Procurement Update
Central Print

Central Print Procurement

Requirements and RFP Development

- Central Print Center RFP and Requirements under development
- Key Activities:
  - Develop Requirements and RFP – 1/ 21 – 4/22/20
  - County Review Sessions – 3/31, 4/1, 4/2
  - Consortium RFP Review and Approval – 4/23 – 5/5
  - State RFP Review and Approval – 5/6 – 5/22
  - Federal RFP Review and Approval – 5/26 – 7/24
  - RFP Release – 7/28/20

Central Print Procurement

Guidelines/Principles

- Adopt Guidelines/Principles for this procurement
  - Strive for maximum standardization across all participating counties
  - Allow for county flexibility where needed.
  - Document mandatory options for future decision-making
    - Braille
    - Large Print
    - Additional County and State inclusions in the future

Central Print Procurement

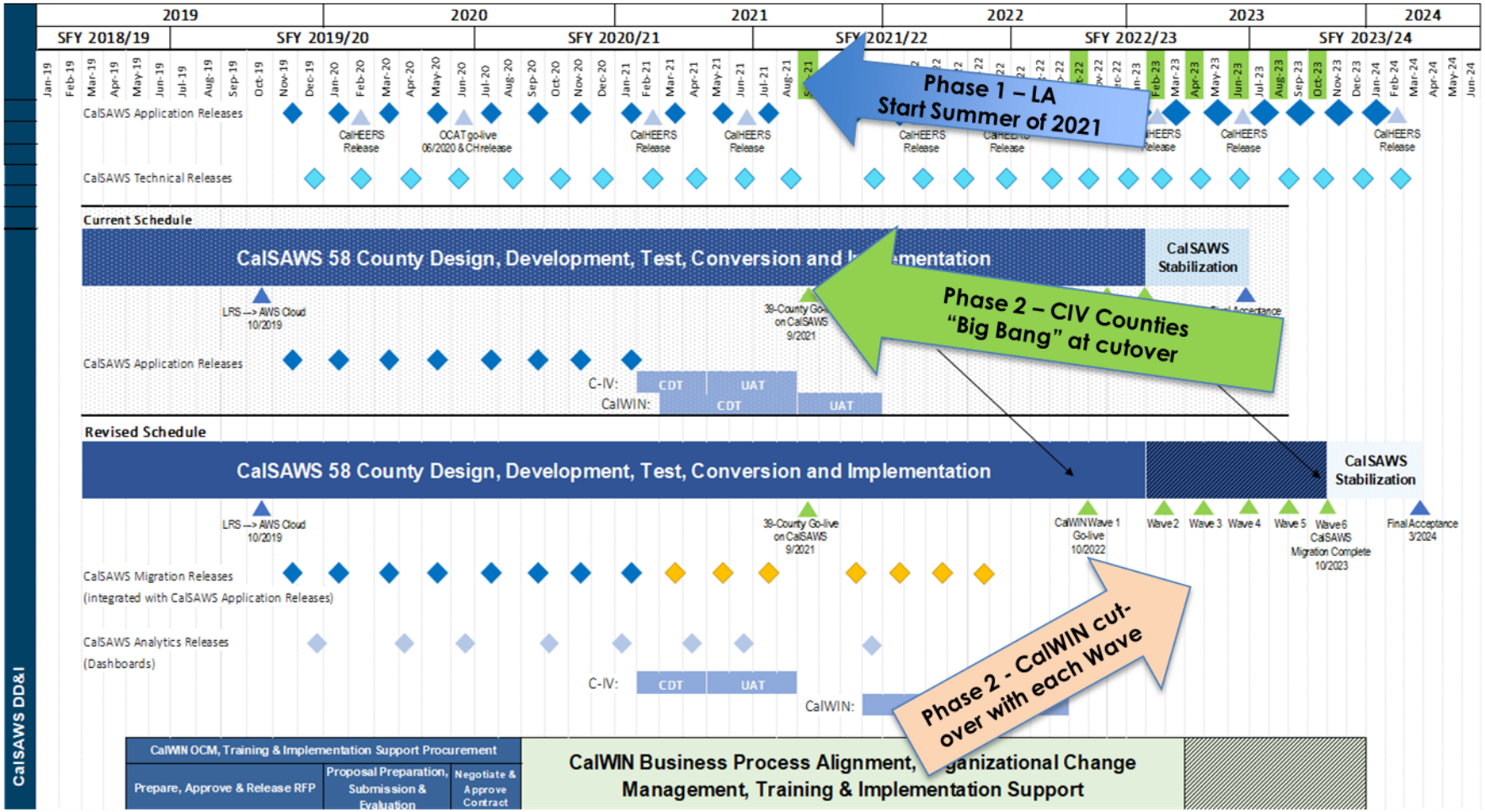
Open Points Discussion

- Method for Counties to submit special stuffers to the Print Contractor
  - From the individual counties to the Consortium to the Print Contractor
    - Would become a standard process
  - From the individual counties direct to the Print Contractor
    - Would require additional processes for the Print Contractor
- Confirm if requirements will support processing of automated and manual RE packets
  - LA has expressed their desire to continue to drop off packets
    - This requires location and storage requirements at Primary Print Facility close to LA County
    - Would these also be required at Backup Print Facility locations?
  - Will this option be open to other counties?
    - Would require the location of facilities and storage in proximity to counties that have selected this option
- Confirm approach to Postage Meter accounts
  - Account directly with the Print Center Contractor for all counties, or
  - Individual county accounts
- Determine approach to creation and mailing of the GEN 1365 Notice of Language Services
  - Consortium to generate the GEN 1365 as part the noticing file to the Central Print Vendor for mailing
  - Central Print Contractor to produce and mail as a stuffer

Central Print Procurement

Open Points Discussion

- Confirm Central Print transition will align with migration activities enabling a single testing/validation process prior to cutover with each migration.



Central Print Procurement

Requirements Status

- Requirements drafted in the following areas:
  - Functional
  - Non-functional (Facility)
  - Security/Compliance
  - Deliverables
  - Operational
  - Service Level Agreements
- CRFI in process requesting region/county SME's to review requirements.
  - County/Consortia review sessions tentatively scheduled 3/31, 4/1, 4/2

Inventory Process Overview

Inventory Process Overview

Background

San Bernardino County Auditor-Controller/Treasurer/Tax Collector (ATC) has set forth instructions to conduct the annual certification of CalSAWS property

- Applicable only to JPA owned equipment
- Requires visual inspection of all Capital Assets (over $5K)

Inventory Process Overview

Participants

Counties Impacted This Year

- Amador
- Butte
- Colusa
- Humboldt
- Imperial
- Kern
- Kings
- Madera
- Marin
- Mariposa
- Merced
- Modoc
- Monterey
- Napa
- Plumas
- Riverside
- San Benito
- San Bernardino
- San Joaquin
- Shasta
- Sierra
- Siskiyou
- Stanislaus
- Sutter
- Trinity
- Yuba

Counties NOT Impacted This Year

- Alpine
- Calaveras
- Del Norte
- El Dorado
- Glenn
- Inyo
- Lake
- Lassen
- Los Angeles
- Mendocino
- Mono
- Nevada
- Tehama
- Tuolumne
- CalWIN Counties

Inventory Process Overview

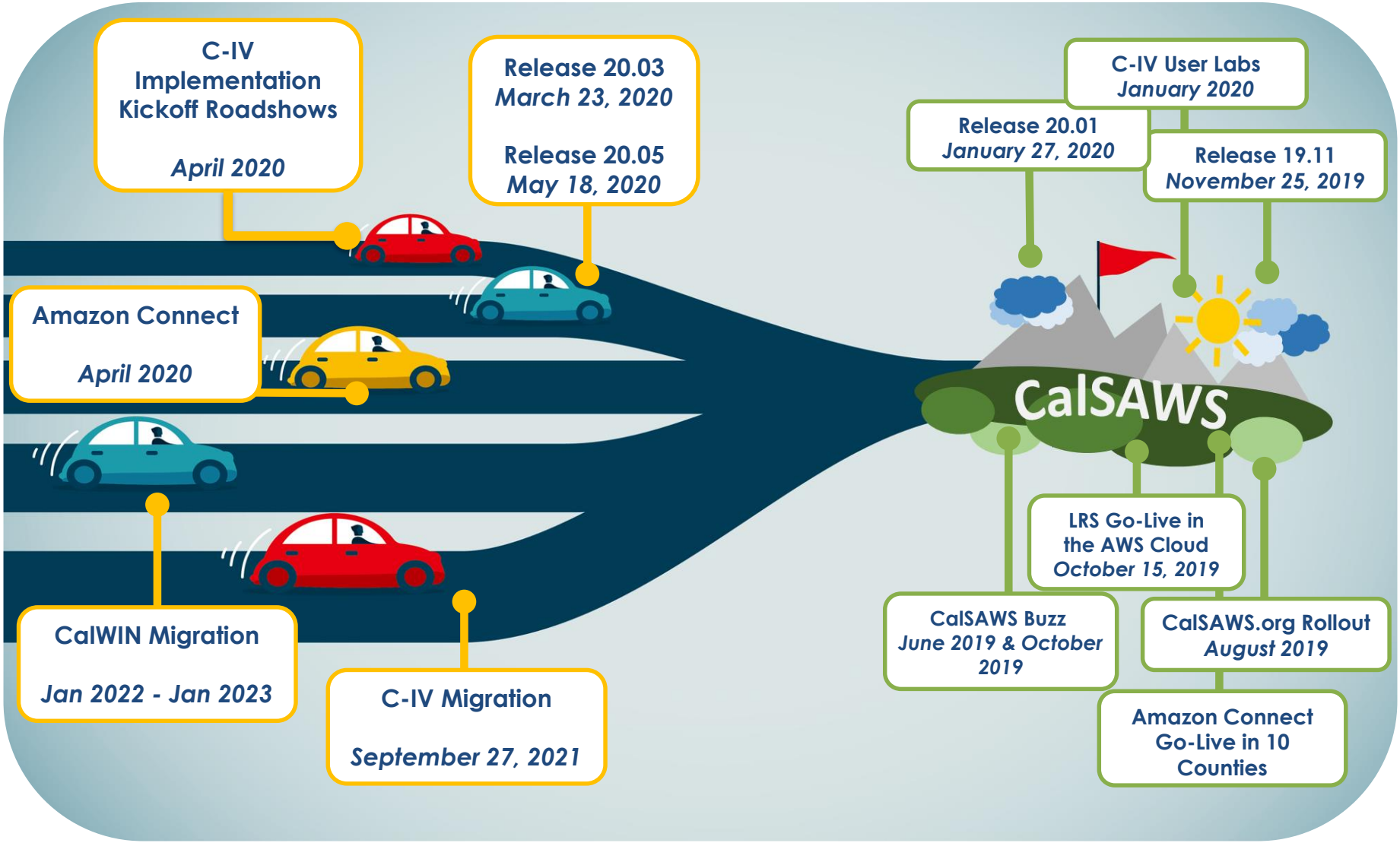
Process & Timeline

Task	Start	Finish
Consortium Send Asset Listings to Counties via Email	4-15-2020	4-15-2020
Visual Inspection of Consortium Fixed Assets 2020 Kick-off Call	4-15-2020	4-15-2020
County Locators/Recorders Complete Local Visual Inspections	4-16-2020	5-18-2020
Counties Submit Asset Draft Documentation to Consortium Electronically (PDF Format)	4-16-2020	5-18-2020
Counties Submit Asset Hard Copy Documentation (Including Original Signatures in Blue Ink) to Consortium	4-24-2020	5-18-2020
Consortium Conduct Inspection Debriefs (As Needed Per County)	5-19-2020	5-22-2020

Quarterly CalSAWS Communication Update

CalSAWS Communication Roadmap

Quarterly Update



CalSAWS Release 20.03 Communication Roadmap

March 23-25
CalSAWS 20.03 Post-Release Checkpoint

March 24
County Office Visit

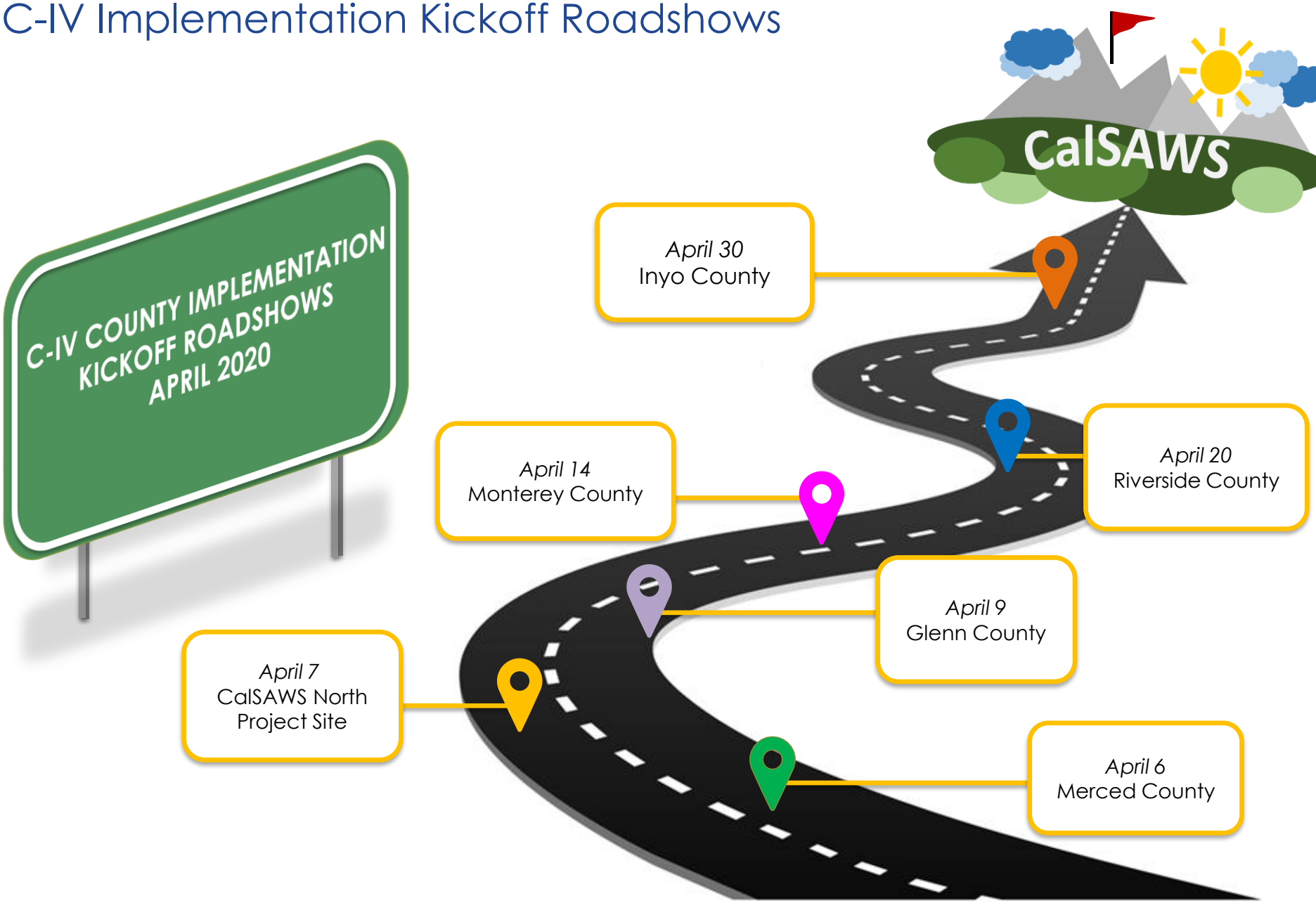
March 12
CalSAWS Webcast on C-IV Release 20.03

March 17
CalSAWS Webcast on LRS Release 20.03

March 9
CalSAWS LRS Liaisons Meeting

February 24 – March 6
County Validation

C-IV Implementation Kickoff Roadshows



All 39 counties are invited to the Implementation Kickoff Roadshows.

JPA Board March Meeting Overview

Adjourn Meeting