#### CalSAWS | Project Steering Committee Meeting



#### Agenda

- Call Meeting to Order
- 2. Agenda Review
- 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 March 19, 2020 PSC Meeting and review of Action Items.

#### Informational Items

# CalSAWS Project Response to COVID-19 Pandemic

#### CalSAWS | COVID-19 Executive Update

Stay Safe, Stay Home, Stay Connected



#### Agenda

- Project Focus and Priorities
- 2 Project Work From Home Approach
- Project Internal Communication Plan
- 4 Project External Communication Plan
- (5) COVID 19 Automation
- 6 CalSAWS COVID 19 "Fast Facts"
- (7) CalSAWS COVID 19 Schedule Risk

#### Project Focus and Priorities

#### Safety First

- Stay Safe, Stay Home, Stay Connected
- Follow local authority directives
  - Social distancing
  - Stay home
  - Hygiene recommendations
- Communications
  - Encourage open and frequent online collaboration using Skype, Teams and Zoom
  - Provide regular updates to the Counties regarding Project actions
- Assist the Counties and State in responding to the Executive Order (EO) and Federal stimulus package (HR 6201)
- Continue to deliver on existing M&O and Migration commitments

#### Work From Home (WFH)

#### Staying Home and Staying Connected

- All staff have been advised to work from home if at all possible
  - Limited, appointment-based technical support is available at all three project sites (Rancho Cordova, Roseville and Norwalk)
- Secure remote access has been provided to all project team members
- Supervisors and managers are closely monitoring work activity and assigned priorities for staff
- Encouraging frequent online meetings at individual and team levels

#### Project Internal Communications

#### Staying Connected II - One Team!

- As noted on the previous slide emphasis on team communications using collaboration tools
- Regular Project Management communications through bi-weekly all staff Zoom meetings
- Bi-weekly project-focused newsletter to provide project information and news
- All project status related information is available to all staff through the Project sharepoint
- All COVID 19 actions are available to view for all project team members with Jira access

#### Project External Communications

#### Staying Connected III - Transparency

- Open lines of communication between the Project, the Counties and Stakeholders
  - Weekly all (40) county calls to review completed and planned automation changes
  - Targeted topic County Information Transmittals (CITs) sent to all counties. They provide updates and instructions based on the subject matter described in the CIT
  - Updates in the weekly status meeting for project stakeholders
  - Planned updates for upcoming Project Steering Committee and JPA meetings
  - Regular calls With the 18 CalWIN counties to review automation changes related to COVID-19

#### **COVID 19 Automation**

#### A Fluid Situation

- We are engaged in an on-going dialogue with State Program Sponsors and the Counties
- The following two slides summarize the Actions taken and those that are planned to be taken to implement the Executive Order and HR 6201
  - See the appendix for details regarding each System Change Request

#### CalSAWS Response Fast Facts 1

#### Automation Summary - Completed

- Goal: Continue benefits for Customers
- Key Actions completed to date:
  - Deactivated batch discontinuance sweeps (CF, CW, MC, LA County GR, CMSP)
  - Reiterated via CITs that workers should stop discontinuances by not processing March reports
  - Deactivated batch processes that would discontinue cases that reach their 48 month time clock
  - For CF/CW cases that had not returned RE packets/SAR 7s in March, continued to issue April benefits
  - Suppressed April SAR 7s (CW/CF), QR 7s (LA County GR) and did not send these to the customers (nor post to the portals)
  - Turned off all text reminders related to SAR 7s, RE packets
  - Turned off reminder notices (Balderas, NEC, NA RE X)
  - Suspended all tax intercept establishments
  - Suppress REs and Annual Agreements (CF, CW, LA County GR, CAPI)
  - Add additional forms to be enabled for eSignature

#### CalSAWS Response Fast Facts 2

#### Automation Summary – In Process

- Key Actions in process (both Systems):
  - Issue CF supplements for March and April to bring CF households to the maximum allotment for their household size
  - Suppress CW/CF RE packets for May 2020 due month
  - Add a COVID-19 override reason
  - Reinstate ABAWD Geographical Waiver

CalSAWS System Status	Count of SCRs
New	14
In Process	16*
In Production	17
Total	47

<sup>\* 6</sup> of the 16 in process SCRs are targeted for releases through 4/11

C-IV System Status	Count of SCRs
New	12
In Process	16+
In Production	19
Total	43

<sup>+ 4</sup> of the 16 in process SCRs are targeted for releases through 4/11

#### CalSAWS Schedule Risk of COVID 19

#### Too Soon To Tell

- The Project has documented the risk of a potential schedule impact caused by the surge of resources to support the COVID 19 relief design, development, test and deployment efforts.
- The Project is monitoring the impact to the CalSAWS Project Schedule of the COVID 19 work.
  - It is too early to tell if there will be a significant impact
  - Project Management will assess priorities and will make every attempt to minimize the impact on the CalSAWS schedule

# **Appendix**

#### **Automation Updates**

#### Purpose:

The following slides describe automation updates for CalSAWS/LRS and C-IV related to COVID 19. The information is compiled at a point in time. Project related SCRs and CITs are provided for reference, along with any references to known, published ACL, ACWDLs, MEDILs, etc.

#### References:

Executive Order issued (<u>link</u>) by Governor referencing changes to MC, CF, CW, CAPI, CFAP, IHSS to "suspend redetermination".

CDSS ACWDL (<u>link</u>) – CalWORKs and CalFresh Implementation of EO- N-29-20 Regarding Eligibility Redeterminations and Time on Aid Limits

DHCS MEDIL I 20-07 (<u>link</u>) Access to Care During Public Health Crisis or Disaster for Medi-Cal

Updated: 3/31/2020, noon

Description	Related SCRs	Related CITs
Medi-Cal Changes:		
Per MEDIL 20-07, DHCS instructed counties to stop all processing of annual redeterminations and to delay all discontinuances and negative actions as a result of renewals and reported changes in circumstances, for 90 days. To assist counties with this request, the Medi-Cal automated EDBC discontinuance process, that evaluates Medi-Cal programs for discontinuance for failure to provide a verification or to return Medi-Cal RE packet in the LRS and C-IV Systems, have been suspended.	MAGI RE Negative Action Job	
Note: Suspending these automated EDBC discontinuances does NOT prevent Medi-Cal beneficiaries from being discontinued from Medi-Cal if EDBC is run either online by a Worker or from some other automated EDBC process that runs for the Medi-Cal program. Suspending the automated EDBC discontinuance processes only ensures Medi-Cal programs are not specifically targeted for discontinuance.	MC Citizenship Interim Verification Due MC SSN Verification Due MC Controlled Form - MC 194 Verification Due C-IV: CIV-106679 suspended automated EDBC discontinuances – implemented on March 18, 2020:  • MAGI RE Negative Action Job • Non-MAGI RE Negative Action Job  SCR CA-214462/CIV-106710 – Add a journal entry to each case where the Medi-Cal program may have been targeted by one of the suspended automated EDBC discontinuance processes. Implemented on March 20, 2020	

Medi-Cal Changes:  C-IV 106763 turn off CMSP discontinuance and recertification batches. Implemented March 26, 2020  2020.	Description	Related SCRs	Related CITs
	CMSP has requested to "stop discontinuances" and provide a list of cases. List of cases was provided to the CMSP project on March 24,	recertification batches. Implemented March 26,	

Description	Related Proposals/Projects/Change	Related CITs
	Orders	
Medi-Cal Changes:	Proposal 54598 COVID-19 state approval to halt	CIT 03-4656 (3/17/20)
	disc for programs for 90 days	Cancellation of Batch Job
Negative Actions and Renewals:	➤ Change Order #3349	RD0M29J for March 2020
Per MEDIL 20-07, DHCS instructed counties to stop all processing of		Renewals
annual redeterminations and to delay all discontinuances and negative		CIT 03-4661 (3/20/20) COVID
actions as a result of renewals and reported changes in circumstances,	due, CalWIN will update the RRR status to	19 Related Activities
for 90 days.		CIT 03-4668 (3/25/20)
	will be inserted.	COVID-19
		CIT 03-4671 (3/26/20)
Per ACWDL 19-01, Counties need to expedite Medi-Cal determinations		COVID-19 CRPC 2195
for new Intake applications and for beneficiaries who have been	Cal negative actions. Analysis is still being	Response E-Signatures
discontinued and reported immediate needs of health care coverage.	completed on mixed/combo cases	CIT 03-4676 (3/27/20)
Self-attestation of verifications under penalty of perjury may be	A many Danas and will be asset advistb	Updated CalWIN COVID-19
accepted.	A new Renewal record will be created with	
	a "P" pending status	CIT 03-4681 (4/1/20, 4/3/20
DHCS has advised a MEDIL with further guidance will be released soon.	A new Renewal cycle will not be created.	REV) CO #3349/PPM 54598
	, , , , , , , , , , , , , , , , , , , ,	Update COVID-19 State
	<ul> <li>Continue to process Auto Renewals for</li> </ul>	Approval to Halt
	June and future months.	Discontinuances for
	Note: Cuspending these systemated FDBC	Programs for 90 Days_REV
	Note: Suspending these automated EDBC discontinuances does NOT prevent Medi-Cal	
	beneficiaries from being discontinued from	
	Medi-Cal if EDBC is run either online by a Worker	
	or from some other automated EDBC process	
	that runs for the Medi-Cal program. Suspending	
	the automated EDBC discontinuance processes	
	only ensures Medi-Cal programs are not	
	specifically targeted for discontinuance.	
	specifically targeted for discontinuation	

Description	Proposals/Change Orders	Related CITs
Transitional Medi-Cal (TMC)Changes: Directions provided by DHCS Transitional Medi-Cal (TMC). TMC reports should be mailed out but not processed and no negative actions should be taken.		CIT 03-4661 (3/20/20) COVID 19 Related Activities CIT 03-4668 (3/25/20) COVID-19 CIT 03-4671 (3/26/20) COVID-19 CRPC 2195 Response E-Signatures CIT 03-4676 (3/27/20) Updated CalWIN COVID-19 Related Activities CIT 03-4681 (4/1/20, 4/3/20 REV) CO #3349/PPM 54598 Update COVID-19 State Approval to Halt Discontinuances for Programs for 90 Days_REV

Description	Proposals/Change Orders	Related CITs
Medi-Cal Related Changes  County Medical Services Program (CMSP) Changes:  CMSP has requested to "stop discontinuances" and provide a list of cases. List of cases was provided to the CMSP project on March 24, 2020.	PPM 54669 COVID-19 CMSP Eligibility Extension (90 Day).  Change Order #3368  Suppress CMSP Batch to prevent Negative Action.	CIT 03-4681 (04/01/2020, 4/3/2020 REV), CO #3349/PPM 54598 Update COVID-19 State Approval to Halt Discontinuances for Programs for 90 Days_REV
CMSP Governing Board issued CIT #0033-20 (3/20/20) to follow Governor Newsom's Executive Order N-29-20.	Generate a Case list to capture all CMSP cases with aid code 50, 5F, 88, 89 that will be extended to May 2020 (90days).  Track Monthly progress of CMSP cases.	

Description	Related SCRs	Related CITs
CW Changes:		
All CalWORKs 48 Month-Time-Clock discontinuances for April 2020 and moving forward are suspended March 19, 2020 in accordance with the Governor's executive order.	Month Time Clock Batch Discontinuances and	CIT 036-20 CW48 Month Time Clock Discontinuance Suspension was sent on March 20, 2020
CDSS has asked to reinstate Time Limit Good Cause reason 407 for 'Lack of Supportive' Services. Confirmed with CDSS this will stop the CalWORKs 48 month clock from ticking on all cases for March, April, May and June.	SCR CA-214490/CIV-106721 – Reinstate Lack of	Interim process CIT in progress.

Description	Related SCRs	Related CITs
CW/CF Changes:  CDSS has approved suspending automated system (batch) processing of SAR and RE/RC for the CalWORKs (CW) and CalFresh (CF) programs. This was done to allow for ongoing benefits during the COVID-19 emergency following the Governor's Executive Order.  This means:  C-IV/LRS will continue to issue benefits even if the RE/RC or SAR is missing or incomplete.  C-IV/LRS will not discontinue programs for incomplete or missing RE/RCs or SARs for CW/CF.  Counties should expect increased issuance amounts for main payroll. The project expects an 6-8% increase in the total amount issued by each county and an 3-6% increase in warrants.  Historically, a small amount of prior month issuances, which have been skipping, will be released as part of this change.	sand discontinuance jobs for Incomplete RE/SAR7.  LRS: implemented March 20, 2020  C-IV: implemented March 26, 2020  SCR CA-214544/CIV-106752 – Purge SAR 7/RE packets to print. SAR 7 and Packets will be created in order to create the customer reporting record but will not be sent to the participants.	CIT 034-20 Suspension of SAR RC RE distributed on March 19, 2020  County Action (from the CIT) 1.IMPORTANT NOTE: If a Worker runs an individual EDBC for CW or CF, the Systems rules will run and the Worker may need to override the EDBC in order to prevent a discontinuance or benefit reduction specific to the RE or SAR determination. 2.Inform the County Auditor Controller/Treasurer of increased Main Payroll amount. 3.Confirm that the county has enough warrant stock, envelopes, and postage. 4.Communicate to staff that no changes, which originated because of a SAR, RE or RC, should result in a benefit reduction or a discontinuance.  CIT 0042-20 COVID-19-ACWDL-CALFRESH AND CALWORKS IMPLEMENTATION OF EXECUTIVE ORDER N-29-20 REGARDING ELIGIBILITY REDETERMINATIONS AND TIME ON AID LIMITS — Rescind Worker Action Discontinuances CIT 0043-20 COVID-19 Interim Instructions to Run EDBC Beyond RE/RC Month

Description	Related Proposals/Projects/Change	Related CITs
	Orders	
CalWORKs Changes:  Time Clocks: All CalWORKs 48 Month-Time-Clock discontinuances for April 2020 and moving forward are suspended March 19, 2020 in accordance with the Governor Newsom's Executive Order N-29-20.	Proposal # 54816 COVID-19 CW Time Clock Exemption March – June 2020 ➤ Change Order #3413  SQL Pack to add Exemption for CalWORKs 48	CIT 03-4681 (04/01/2020, 4/3/2020 REV), CO #3349/PPM 54598 Update COVID-19 State Approval to Halt Discontinuances for Programs for 90 Days_REV
CDSS has asked to reinstate Time Limit Good Cause reason 407 for 'Lack of Supportive' Services. CDSS has confirmed this exemption will apply to both the CalWORKs 48-Month Time Clock and the WTW 24-Month Time Clock for March, April, May and June. WDTIP will not have this code reinstated until the end of April.  All County Welfare Directors Letter (March 30, 2020)	timeclock. Requires coordinating with WDTIP, new tentative date is 4/6/20 (Monday).	
California Work Opportunity and Responsibility to Kids (CalWORKs) Guidance For Employment Services (Welfare-To-Work, or WTW) as Pertains to the 2019 Coronavirus Disease (COVID-19)		

Description	Proposals/Change Order	Related CITs
<ul> <li>CW/CF Changes:</li> <li>SAR 7 and Redeterminations/Recertifications:</li> <li>CDSS has approved suspending automated system (batch) processing of SAR 7s and Redeterminations/Recertifications for the CalWORKs (CW) and CalFresh (CF) programs. This was done to allow for ongoing benefits during the COVID-19 emergency following the Governor Newsom's Executive Order N-29-20.</li> <li>This means:         <ul> <li>CalWIN will continue to issue benefits even if the RE/RC or SAR is missing or incomplete.</li> <li>CalWIN will not discontinue programs for incomplete or missing RE/RCs or SARs for CW/CF.</li> <li>Counties should expect increased issuance amounts for main payroll.</li> <li>Add message to MyBCW about not returning SAR 7s or Periodic Reports.</li> <li>The project expects a 6-8% increase in the total amount issued by each county and a 3-6% increase in warrants.</li> </ul> </li> </ul>	<ul> <li>SAR 7s</li> <li>For March SAR 7s that are in a "Hold" status will be marked "Received" and "Complete" the User Hold removed, and a comment inserted on each case. This will occur on 3/25/2020. Benefits will continue to be issued.</li> <li>Going forward for April and May, CalWIN will generate the SAR 7 but hold the file and not send it for printing. The same process</li> </ul>	4/3/2020 REV), CO #3349/PPM 54598 Update COVID-19 State Approval to Halt Discontinuances for Programs for 90 Days_REV CIT 03-4661 (03/20/2020), COVID 19 Related Activities CIT 03-4668 (03/25/2020), COVID-19 CIT 03-4671 (03/26/2020), COVID-19 CRPC 2195 Response E-Signatures CIT 03-4676 (03/27,2020), Updated CalWIN COVID-19 Related Activities

Description	Proposals/Change Order	Related CITs
CW/CF Changes – continued:  CDSS has approved suspending automated system (batch) processing of SAR 7s and Redeterminations/Recertifications for the CalWORKs (CW) and CalFresh (CF) programs. This was done to allow for ongoing benefits during the COVID-19 emergency following the Governor Newsom's Executive Order N-29-20.  This means:  CalWIN will continue to issue benefits even if the RE/RC or SAR is missing or incomplete.  CalWIN will not discontinue programs for incomplete or missing RE/RCs or SARs for CW/CF.  Counties should expect increased issuance amounts for main payroll.  Add message to MyBCW about not returning SAR 7s or Periodic Reports.	Proposal 54598 COVID-19 state approval to halt disc for programs for 90 days  ➤ Change Order #3349  Redeterminations/Recertifications  • March Recertifications/Renewals that were not previously processed will be marked as "Received" and "Complete", a new certification date will be set for September 2020 and a notice of action will be sent informing the client of the new certification period.  • For April CalWIN will follow the same process and set the certification date to October	CIT 03-4681 (04/01/2020, 4/3/2020 REV), CO #3349/PPM 54598 Update COVID-19 State Approval to Halt Discontinuances for Programs for 90 Days_REV CIT 03-4661 (03/20/2020), COVID 19 Related Activities CIT 03-4668 (03/25/2020), COVID-19 CIT 03-4671 (03/26/2020), COVID-19 CRPC 2195 Response E-Signatures CIT 03-4676 (03/27,2020), Updated CalWIN COVID-19
■ The project expects a 6-8% increase in the total amount issued by each county and a 3-6% increase in warrants.	per regulation.  Text and Email messages will be held.	

Description	Proposals/Change Orders	Related CITs
CalFresh Emergency Allotment  Allow for state supplements for the difference between the current allotment amount and the maximum for the household size. This is very similar to what occurs as a 'mass replacement' during various disasters in the past. CDSS has submitted a waiver to FNS to allow an emergency allotment of \$60 per person per month.  In response to COVID-19, the H.R. 6201 Families First Coronavirus Response Act provides authority for the California Department of Social Services (CDSS) to provide emergency allotments of CalFresh benefits.  All County Welfare Directors Letter, dated 4/2/20-CalFresh Implementation of the Families First Coronavirus Response Act: CalFresh Emergency Allotments.  Mass informing methods to be utilized by Counties.	households for two months, March and April 2020.  • For the month of March 2020, emergency allotments will be issued to eligible CalFresh households on April 12, 2020.	CRFI #04-3044 Communication for PPM 54649 COVID19 CalFresh Emergency Allotment  Purpose of CRFI Counties can select their choices post an announcement on MyBCW main page, post an announcement on the County MyBCW page, and send an email and/or text message to customers who will receive a supplement and that have opted in to receive email/text messages.

Description	Proposals/Change Orders	Related CITs
CW/CF Continued:	Proposal #54581 COVID-19 Review the	
	possibility of recipients using their EBT cards	
Online Purchasing	online	
Online EBT purchasing: Allow for states to authorize online purchasing.	Change Order #3331	
This require a new Transaction Type to be added to FIS and		
corresponding updates to Host-to-Host and the EBT Account Activity	<ul> <li>Modification to Interface C.5 Transaction</li> </ul>	
file.	Code table	
Two Retailers already approved by FNS, Walmart and Amazon.	<ul> <li>Testing activities Apr 13 - Apr 17</li> </ul>	
Tentative live date late April.	Consortia/County Testing	
Restaurant Meals Program (RMP) (proposed)		
CDSS potential change, has not been finalized.		
Make all CalFresh cases eligible to Restaurant Meals Program.		
Overpayments/Overissuances:	Proposal #54663 COVID-19 CalFresh	
CDSS potential change, has not been finalized.	Overissuance Threshold Increase  Change Order #3363	
Overpayment/Overissuance thresholds due to administrative and	Proposal # 54694 COVID-19 CW Overpayment	
indavertent household errors beginning March 4, 20 to \$600.	Claims under \$600 not established	
Collections and Tax Intercepts:	Change Order #3364	
Suspend all tax intercept establishments		

# Automation Updates All SAWS

Reporting Type	Action	March Submit Month	April Submit Month	May Submit Month
SAR 7s	System	Sent	System will generate but not send SAR 7s to customers. System will mark as complete	System will generate but not send SAR 7s to customers. System will mark as complete
	Worker	Rescind any discontinuation per	No worker action - do not process	No worker action - do not process
CW CF REs	System	Sent RE due date will be advanced six months	Sent RE due date will be advanced six months	Will not be sent RE due date will be advanced six months
	Worker	Rescind any discontinuation per	No worker action - do not process	No worker action - do not process

	Description	Related SCRs	Related CITs
(	CW/CF Changes:		
•	Add message to YBN/C4Y about not returning SAR 7s or Periodic Reports	<ul> <li>SCR CIV-106751 – implemented March 25, 2020; LRS/YBN is implemented</li> </ul>	
•	San Bernardino has requested disabling the reminder text messages for SAR 7/RE Turn off Balderas Reminder	<ul> <li>C-IV-106752 – implemented March 25, 2020</li> <li>SCR CA-214613 - implemented March 25, 2020. CIV-106772 – implemented March 24, 2020</li> </ul>	
•	Add override reason to track EDBC overridden due to COVID-19	<ul> <li>SCR CA-214590/CIV-106760 – In Process, target April 10, 2020</li> </ul>	
•	Add six month CW/CF RE Periods. For CalFresh need to send 377.1 even though RE wasn't ran and a 'TBD' CW notice.	<ul> <li>SCR CA-214635/ CIV-106787– in Process</li> <li>SCR CA-214803/106851 - NOT STARTED</li> </ul>	
	CDSS is exploring changing the effective date of the Asset and Vehicle Value Limits in the 20.303 release to be effective 4/1/2020 instead of 6/1/2020	<ul> <li>SCR CA-214520/CIV-106738 – WAITING CONFIRMATION Change Asset and Vehicle Limits Effective Date</li> </ul>	
	eSignature – Adding additional forms to the list of forms that allow eSignature. CRPC 2195 sent to the state and approved on March 25, 2020	<ul> <li>C-IV-11210 – target implementing on April 9, 2020</li> </ul>	

Description	Related SCRs	Related CITs
CW/CF Continued:		
Allow for state supplements for the difference between the current allotment amount and the maximum for the household (HH) size. This is very similar to what occurs as a 'mass replacement' during various disasters in the past. CDSS has submitted a waiver to FNS to bring all SNAP HH to max allotment for HH Size.	SCR CA-214607/CIV-106766 Pending further clarification After discussion with CDSS:  March Supplement – target issuing the weekend of 4/11  April Supplement – target issuing the weekend of 5/9	
Online EBT purchasing: Allow for states to authorize online purchasing. This require a new Transaction Type to be added to FIS and corresponding updates to Host-to-Host and the EBT Account Activity file.	SCR CA-214426/CIV-106689 – target implementation date is April 10, 2020	
Overpayment/Overissuance thresholds: The CalFresh Overissuance and CalWORKs Overpayment threshold is \$400 and \$250 respectively. Due to COVID 19 emergency, increase the thresholds to \$600.	SCR CA-214610/CIV-106768 Pending further clarification NOT STARTED	
Suspend all tax intercept establishments C-IV: Update Welfare Intercept System batch to not send Establishment Reactivate records during COVID-19 LRS: Turn off the TTC referral batch job	CIV-106791 – Target implementation date is April	CIT 0044-20 Tax Intercept Updates due to COVID sent on March 31, 2020

Description	Related SCRs	Related CITs
CW/CF Changes: Transitional CalFRESH		
<ul> <li>TCF RE Updates. TCF will not be subject to changes in RE periods. TCF cases should discontinue as normal. Instructions are forthcoming for March/April cases.</li> </ul>		

Description	Related SCRs	Related CITs
Push CAPI RE dates out 1 year. PML (Program Management Letter) was issued to the counties on March 20, 2020. Clarification coming that mid period reports which are positive should be taken, any that are negative should be ignored. Manually done by counties.  Per COVID-19 EO, the CAPI RE requirement is waived for the March - May 2020 due months. A new 12 months CAPI RE due date must be established.	-April 3, 2020	

Description	Related Proposals/Projects/Change	Related CITs
o	Orders	
Cash Assistance Program for Immigrants (CAPI):  Per CAPI Program Manager Letter (PML) COVID-19 FINAL 3-20-20, Cash Assistance Program for Immigrants (CAPI) will have renewal dates extended 12 months for April, May and June.  Pr	roposal #54598 COVID-19 state approval to alt disc for programs for 90 days  Change Order #3349  roposal #54739 COVID-19 CAPI edetermination  Change Order #3382	CIT 04-4681 (4/01/20, 4/3/20 REV) CO #3349/PPM 54598 Update COVID-19 State Approval to Halt Discontinuances for Programs for 90 Days_REV

## Automation Updates CalSAWS/LRS/C-IV

Description	Related SCRs	Related CITs
Announcements - Self Service Portals (C4Yourself/YBN)		
C4Y: Project has received requests from the counties to add a COVID-19 related message to C4Yourself as a website announcement, C4Yourself Mobile App push notification, and a secured message to all C4Yourself user accounts.	CIV-106694 implemented on March 20, 2020	CIT 0039-20 CIV- 106694_CIV-106705 COVID- 19 Customer Notifications for C-IV Counties – Sent 3/24/2020
YBN: LA County has posted a message on office closures and a link to a DPSS office closure notice.	Implemented	,
Outbound IVR and Text Messaging for clients who have opted in (C-IV)	CIV-106705 implemented on March 23, 2020	
Text message: "Due to COVID-19-County offices may be closed to public. Visit C4yourself.com for case info."		
Call Message: "Hello, Due to concerns with the COVID-19 Coronavirus, some county offices may have changed their existing office hours or closed public access to their offices. Please contact your local county office to confirm office hours and availability before visiting any office. You can Visit C4Yourself.com or call <county ivr="" number="" phone=""> for information on your case. Thank you."</county>		

## Automation Updates CalSAWS/LRS/C-IV

Description	Related SCRs	Related CITs
LA County General Relief		
Stopped GR discontinuance batch jobs in accordance with instructions		
provided by LA County. Provided a list of GR cases that were sweep into	CA-214443 suspended batch EDBC discontinuances	CIT 037-20 GR Discontinuance
other batch processes that resulted in a discontinuance.	for GR only batch runs starting with the March	<ul> <li>Region 6 only – Sent March</li> </ul>
	benefit month. Implemented on March 17, 2020	20, 2020
Stop daily GR time limit discontinuance batch job.		
	CA- 214537 implemented on March 20, 2020	
Disable all discontinuance reasons so that EDBC (online and batch) doesn't		
discontinue for all reasons except CAPI/SSI Income or Death. Any EDBC	SCR CA-214539. In Process. Target implementation	
record that discontinues an active GR program "Read Only" and would	date is April 16, 2020	
preserve the prior EDBC. This update would apply to discontinuances if		
they are NOT for one of the reasons below. If the individual becomes		
ineligible for one of the reasons below, they will continue to be		
discontinued.		
a. Gets CAPI		
b. Gets SSI		
c. Gets SSI/SSP		
d. Deceased		
Suppress QR7s for April, May and June	SCR CA-214703 – Implemented on March 27, 2020	
This process will allow the system to create QR 7 records and customer	(for April QR7s)	
reporting records in the system for future DCR efforts to mark the QR 7 as		
Complete. This process will also prevent the QR 7 from being included in		
the outbound bundle to Central Print, as well as prevent the QR 7 from		
being posted to the Self-Service Portal.		
Suppress REs and Annual Agreements (AA)		
Per COVID-19 EO, the CAPI RE and GR AA requirement is waived for the	SCR CA-214777– target implementation date is	
March - May 2020 due months. A new 12 months CAPI RE and/or GR AA	April 3, 2020	
due date must be established.	SCR CA-214784 – NOT STARTED	

# Automation Updates CalWIN

Several counties have requested SAWS assistance depending upon their respective executive direction.  State Approval to Halt Discontinuances for	Description	Proposals/Change Order	Related CITs
For those counties that Opted out of the SQL for GA Mass Update User Hold and SQL Pack to release GA PR Triggers on Hold for April 2020 Benefits, a SQL List was generated on 3/25/20.  List of GA cases to be worked on for negative active by counties running FME on 3/24/2020 available for counties	General Assistance/General Relief:  Several counties have requested SAWS assistance depending upon their respective executive direction.  For those counties that Opted in for the SQL - GA Mass Update User Hold and SQL Pack to release GA PR Triggers on Hold for April 2020 Benefits, a SQL List was generated on 3/25/20 for CO3349 SQL Pack #7 Output. This SQL Pack was run Pre-Batch on 3/24/20.  For those counties that Opted out of the SQL for GA Mass Update User Hold and SQL Pack to release GA PR Triggers on Hold for April 2020 Benefits, a SQL List was generated on 3/25/20.  List of GA cases to be worked on for negative active by counties running	Change Order #3349	CIT 03-4681 (4/01/20, 4/3/20 REV) CO #3349/PPM 54598 Update COVID-19 State Approval to Halt

## Automation Updates CalSAWS/LRS/C-IV

Description	Related SCRs	Related CITs
Foster Care		
LA County DCFS has been made aware that the Treasury Tax Collector		
(TTC) may be closing soon. This means that the vouchers which are	CA-214463 – Mark vouchers as received. Target	
required to be returned per the County's business process may not be	implementation date is April 8, 2020	
processed. If TTC closes they will not be processing the vouchers if		
returned by providers which will result in a significant number of		
'skipped' benefits.		
LA County DCFS has been notified that due to courts postponing		
hearings, minors who are turning 21 need to remain aided until the		
hearing can occur. Awaiting additional information from CDSS		
incaring can occur. Awaiting additional information from CD33		
CDSS is drafting ACLs specific to Child Welfare programs including new		
rate based calculations and various populations to receive additional		
payments.		

# Automation Updates CalWIN

Description	Proposals/Change Orders	Related CITs
CalWIN Availability	N/A	CIT 03-4672 CalWIN Availability
Due to the evolving crisis with the Coronavirus (COVID-19) there have been requests from counties for additional System availability beyond the current Monday-Saturday, 6:00 AM to 8:00 PM. These changes will remain in effect for the entire month of April, at which time the Consortium will revisit whether the changes need to be extended further or revert to the normal hours of 6:00 AM to 8:00 PM, Monday – Saturday.		

## ABAWD Injunction

Automation Updates CalSAWS/LRS/C-IV

Description	Related SCRs	Related CITs
• Court injunction • Court injunction is in place as of Friday, March 13th • This means no "new" counties are subject to ABAWD  System Changes: Project will need to reset the Geographical Waiver for all counties back to 'Waived'. Project will need to remove the 15% discretionary exemptions.	SCR CA-214411/CIV-106686 – Geographical Waiver – target implementation date is April 9, 2020	CIT 0032-20 ABAWD Geographical Waiver Injunction and H.R. 6201 Efforts – Sent March 19,2020
H.R. 6201 was signed into law by the President on 3/18/20 which lifts the ABAWD time limit statewide effective April 1. Consortia instructed by CDSS to begin procedures to waive the time limit for the 6 currently implementing counties – Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara.	CIV-106058 (Marin County) – No longer necessary per H.R. 6201	CIT 0032-20 ABAWD Geographical Waiver Injunction and H.R. 6201 Efforts – Sent March 19,2020

# ABAWD Injunction

## Automation Updates CalWIN

Description	Related Proposals/Projects/Change	Related CITs
	Orders	
ABAWD Injunction	Project #54579 ABAWD Injunction March	CIT #03-4657 (3/18/20) ABAWD
<ul> <li>Court injunction is in place as of Friday, March 13th</li> </ul>	2020	Injunction Change Order
<ul> <li>This means no "new" counties are subject to ABAWD</li> </ul>	Change Order #3330	#3330/Proposal #54579
	Project #54055 ABAWD Waiver Discretionary	CIT #02-4632 (2/21/20, 3/13/20
System Changes:	Exemption	REV) ABAWD Updates
	Change Order #3120	
Project has reset the Geographical Waiver for all counties back to	Project #54056 ABAWD Waiver expiration	
'Waived'.	April 1, 2020	
Project will need to remove the 15% discretionary exemptions.	Change Order #3085	
	Project #54084 Add/Revise ABAWD NOAs and	l l
CDSS provided guidance for the injunction as follows:	Forms	
34 Counties - The 34 counties, that would have been newly impacted	Change Order #3124	
by the rule, will not implement the ABAWD time limit effective April 1.		
At this time we do not know how long the injunction will last, but the	<ul> <li>Reinstate the ABAWD waiver for the 11</li> </ul>	
rule will not be effective April 1.	counties effective April 1, 2020.	
• Stop the issuance of all ABAWD time limit related notices	<ul> <li>Prevent intake cases from having an</li> </ul>	
<ul> <li>Roll back the issuance of the automated two months of discretionary</li> </ul>	· ·	
exemptions	from being generated.	
March 14, 2020 SAWS received communication from CDSS stating an	Issue automated two months of	
njunction has been granted on the final rule regarding the CalFresh	discretionary exemptions	
time limit for ABAWDs		
H.R. 6201 was signed into law by the President on 3/18/20 which lifts	Project #54579 ABAWD Injunction March	CIT #03-4657 (3/18/20) ABAWD
the ABAWD time limit statewide effective April 1. Consortia instructed	l <mark>2020</mark>	Injunction Change Order
by CDSS to begin procedures to waive the time limit for the 6 currently	Change Order #3330	#3330/Proposal #54579
mplementing counties – Alameda, Contra Costa, Marin, San Francisco	,	CIT #02-4632 (2/21/20, 3/13/20
San Mateo, and Santa Clara.		REV) ABAWD Updates

#### Resources

County Closure Tracking – A list of county office closures can be found on the CalSAWS Web Portal at the following location:

<u>CalSAWS Web Portal/County Documents/[County Share Resources]/COVID-</u> 19/CDSS County Closure Tracking

CalSAWS and C-IV JIRA COVID-19 Dashboard – Counties can follow the SCRs that are specific to COVID-19 initiatives by accessing this dashboard.

C-IV System Availability CIT -0041-20- <u>CalSAWS Web Portal /CRFIs& CITs</u> <u>CalSAWS Information Transmittals (CIT) /2020</u>

CalWIN System Availability CIT 04-4685 - <a href="https://calwinsp.folsom.calwin.eds.com/Ops/Lists/Calendar/calendar.aspx">https://calwinsp.folsom.calwin.eds.com/Ops/Lists/Calendar/calendar.aspx</a>

# AppStream Update



## CalSAWS AWS AppStream for Teleworking

- On April 7<sup>th</sup> CIT **0048-20** was sent out to counties to inform them of the new CalSAWS AppStream which allows users remote access to both the C-IV and LRS applications and MEDS
- AppStream 2.0 is an Amazon Web Services (AWS) cloud product that provides a secure, easy-to-access portal where multiple applications can be made accessible via the cloud.
- AWS AppStream allows you to easily work from anywhere, including your home, with internet access, using almost any type of device, even an iPad or Android tablet.
- AppStream is very secure because it uses "multi-factor authentication", which
  means that in addition to a login and password, you also need to provide a secret
  code that will be emailed to you each time you log in.
- In addition, data security is ensured since all data in AWS AppStream is encrypted
  in transit and at rest, and no data can be saved to your personal device.
- If your County would like to use the AWS AppStream service, please contact your Regional Managers with a list of your employees and associated email addresses

## CalSAWS Conference Discussion

#### CalSAWS Conference

#### Westin San Diego – June 24-26, 2020

- Due to COVID -19 (Coronavirus) Pandemic the Westin San Diego has provided the following options for the CalSAWS Conference:
  - Postpone now: Conference dates can be shifted anytime between now and December 31, 2020 and 70% of the cancellation can be applied toward the rebooking.
  - Wait until the end of April/first week of May: Revisit the COVID-19 situation/travel restrictions, then they MAY be able to apply 95%-100% of the cancellation toward the rebooking (before December 31, 2020).
- CalSAWS contract with Westin states:
  - Cancellation: Group agrees that if it cancels this Agreement for any reason, the Hotel will suffer damages. The closer in time the cancellation occurs, the greater the damages will be. Therefore, Group agrees to pay Hotel at the time of cancellation a liquidated damages fee, as follows:
    - → Date of contract signature December 24, 2019: \$22,205.00 [25% of total anticipated revenue]
    - + December 25, 2019 March 24, 2020: \$44,410.00 [amount equal to 50% of total anticipated revenue]
    - March 25, 2020 May 24, 2020: \$66,615.00 [amount equal to 75% of total anticipated revenue]
    - May 25, 2020 June 24, 2020: \$88,820.00 (amount equal to 100% of anticipated revenue)

## Update on State/Federal Approvals

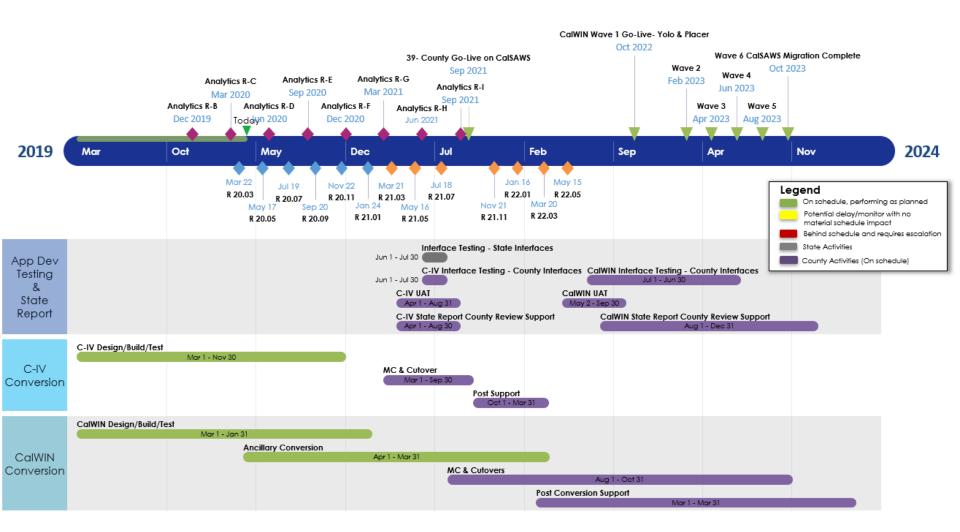
- Functional Design Amendment
- IAPDU
- Schedule Adjustment
- FCED Update

## Revised CalSAWS DD&I Project Schedule

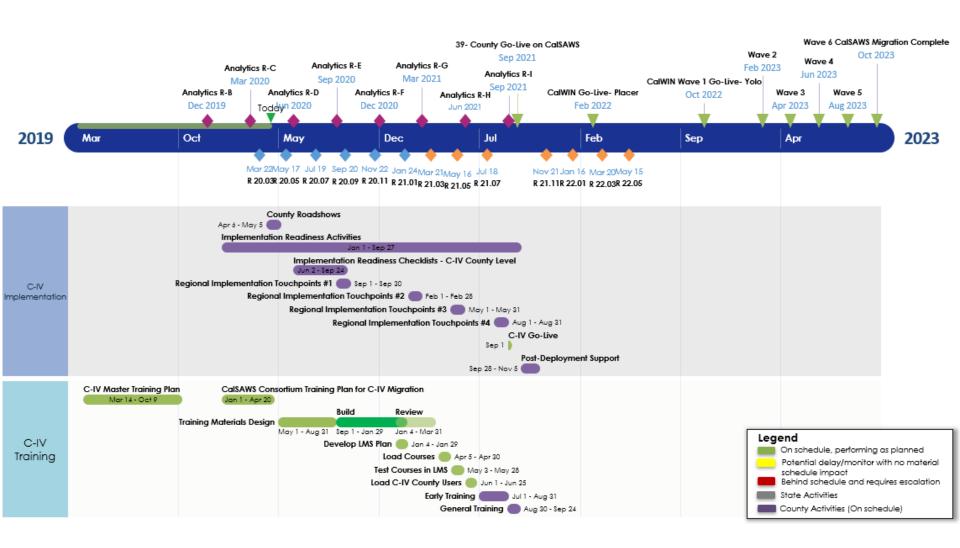
#### Status & Next Steps

Imaging Amendment	State Review Complete	Submitted to Federal Sponsors December 20 <sup>th</sup>	Conducted walkthrough of Imaging Amendment on January 28 <sup>th</sup>	CMS approved Feb 20 <sup>th</sup> ; FNS approved Feb 21 <sup>st</sup>	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	CMS Final Approval Pending, FNS Approval N/A	Board approved Friday, March 27 <sup>th</sup> Contingent on CMS approval
Analytics Amendment	State Review Complete	Submitted FDS Amendment to Federal Sponsors on Feb 20 for review and approval	Walkthrough February 26th	CMS Final Approval Pending, FNS Approval N/A	Board approved Friday, March 27 <sup>th</sup> Contingent on CMS approval
Quality Assurance Amendment	Initiated State Sponsors Review March 23 <sup>rd</sup>	To be submitted to Federal Sponsors	Walkthrough Available Upon Request	Verbal or written approval from Federal Sponsors needed in May	Board approval scheduled for May
As-Needed IAPDU	State Review Complete	Submitted to Federal Sponsors (FNS 3/13, CMS 3/24)	Walkthrough February 26th	Approval April 2020	

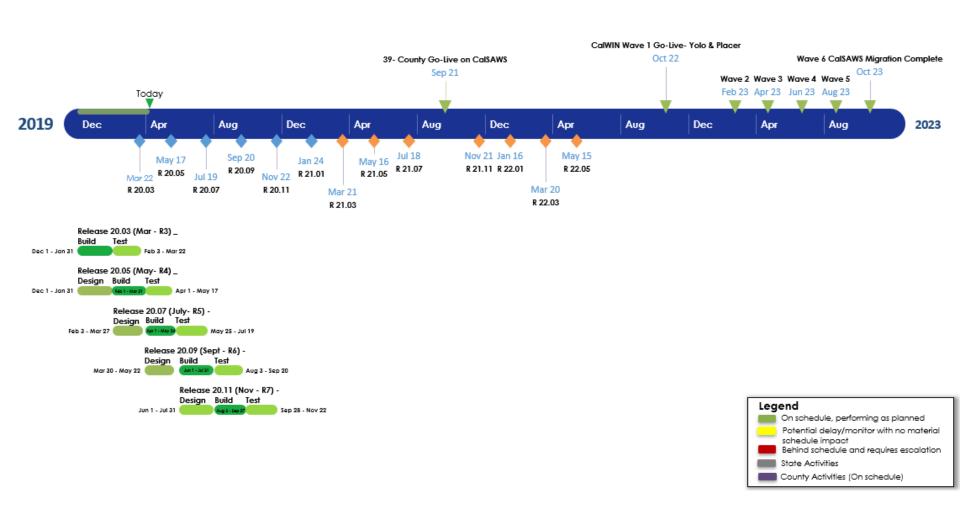
#### High Level Overview - App-Dev & Conversion



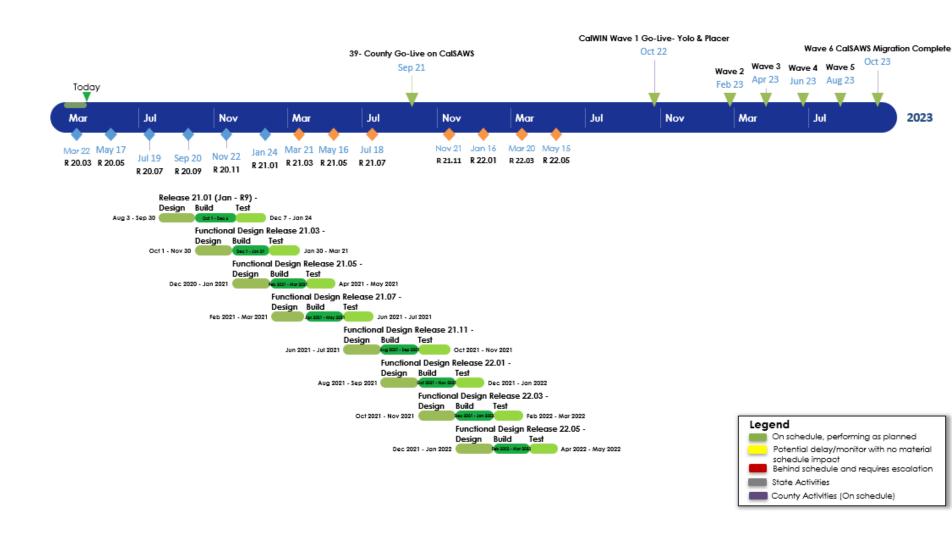
#### **High Level C-IV & Implementation**



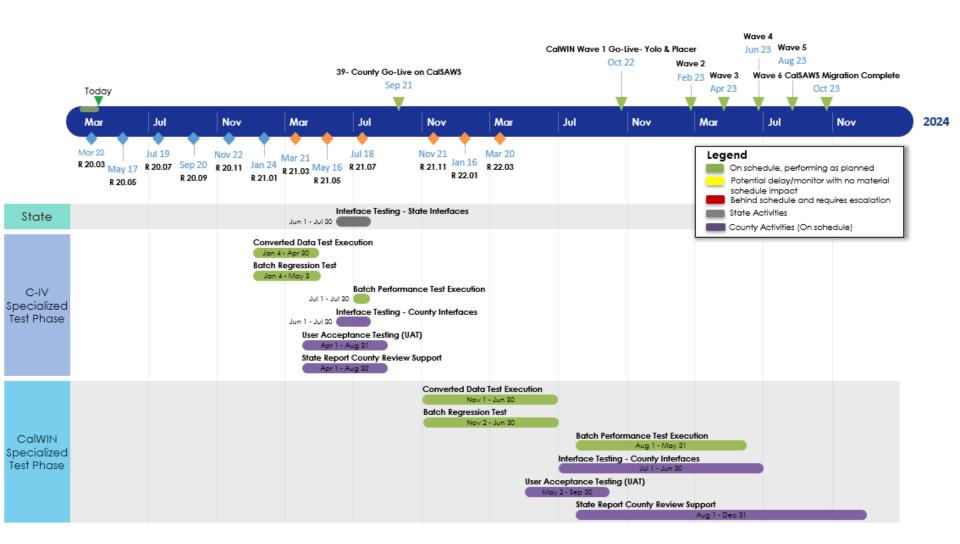
#### **Application Development**



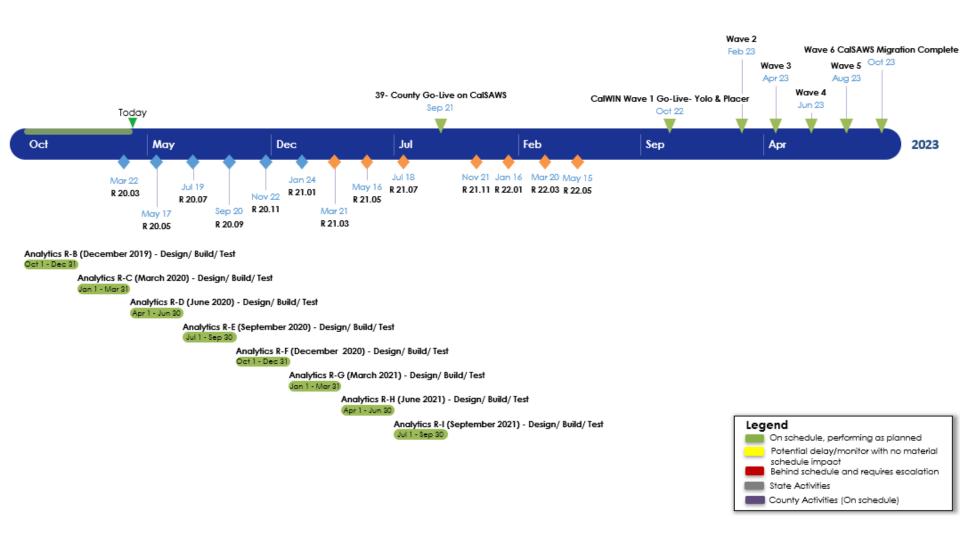
#### **Application Development**



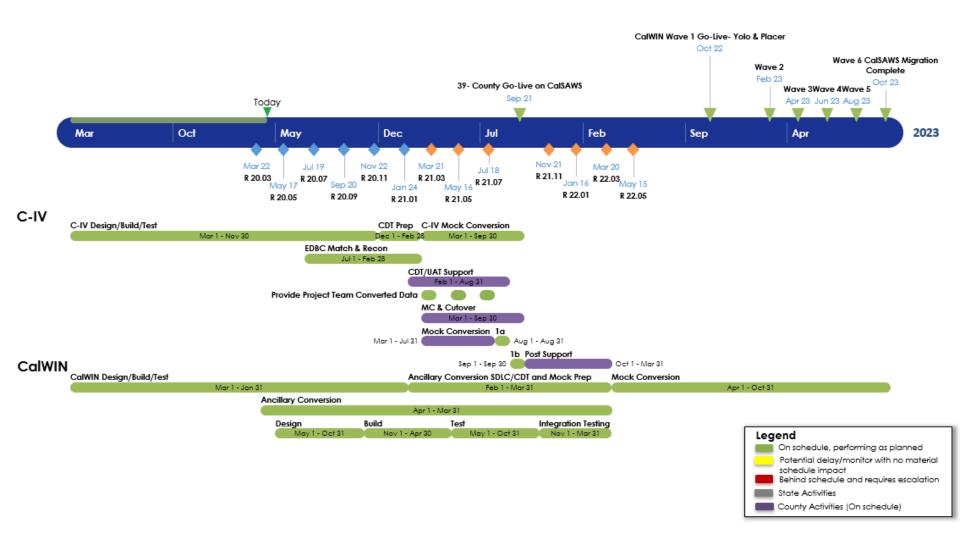
#### **Application Development**



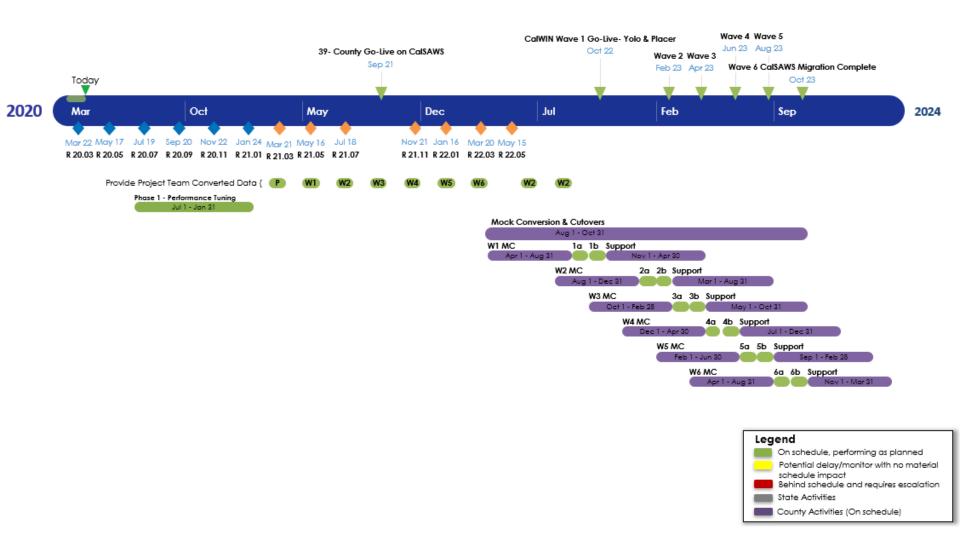
#### Dashboards, State, and BIP Reports Re-platform (Analytics)



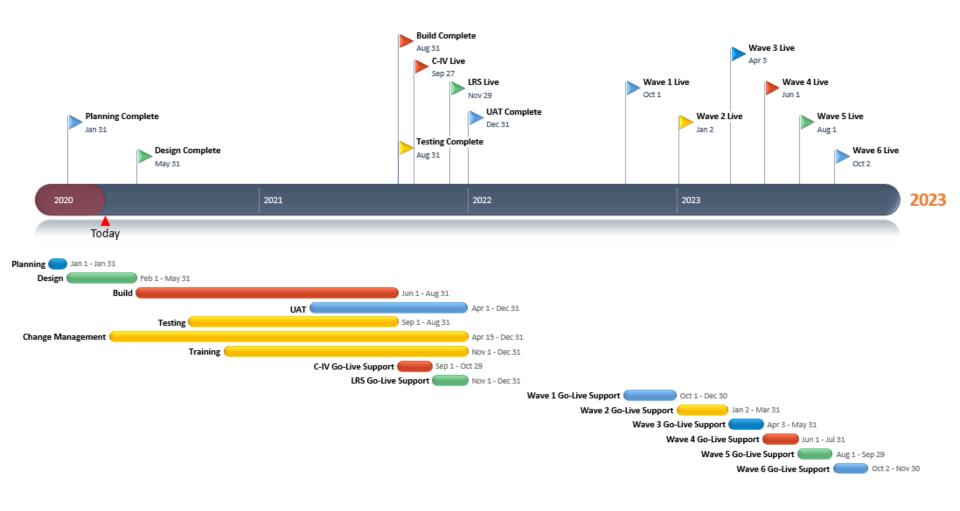
#### Conversion



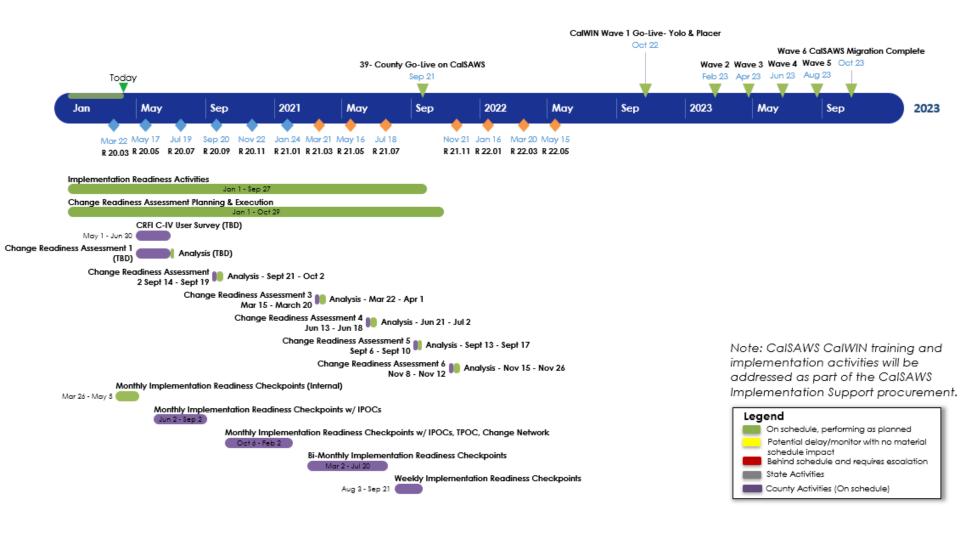
#### Conversion



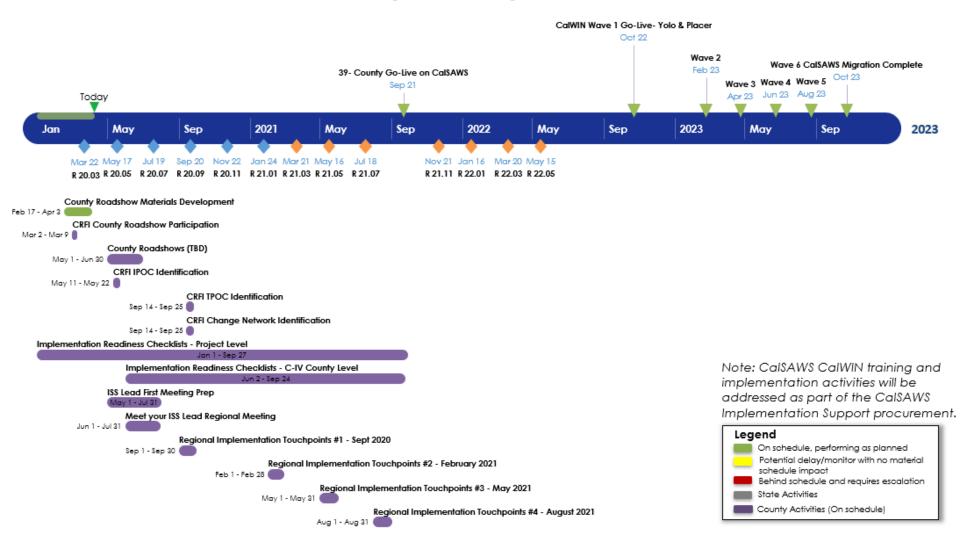
#### **Imaging**



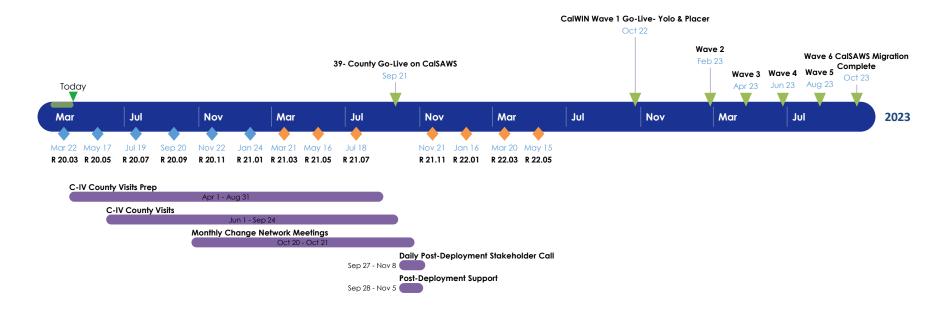
#### **C-IV Implementation & Change Management**



#### **C-IV Implementation & Change Management**



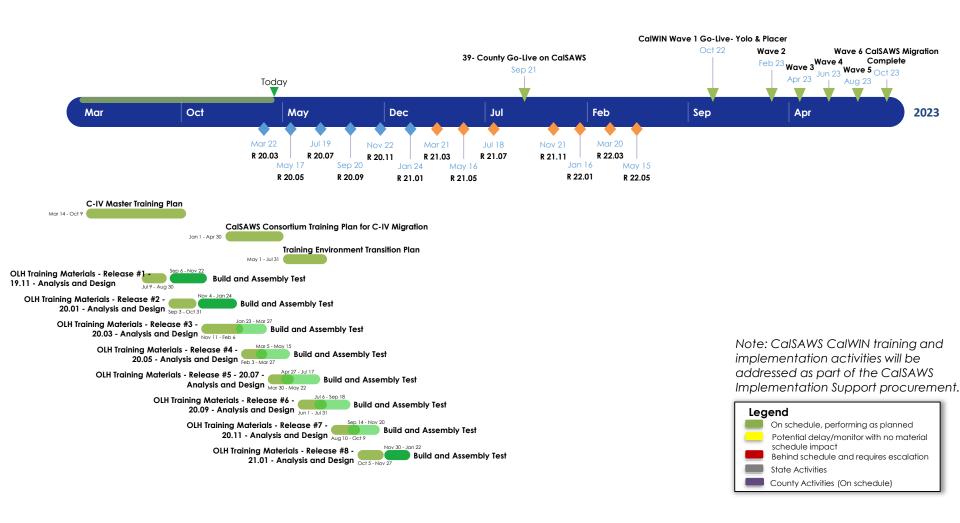
#### **C-IV Implementation & Change Management**



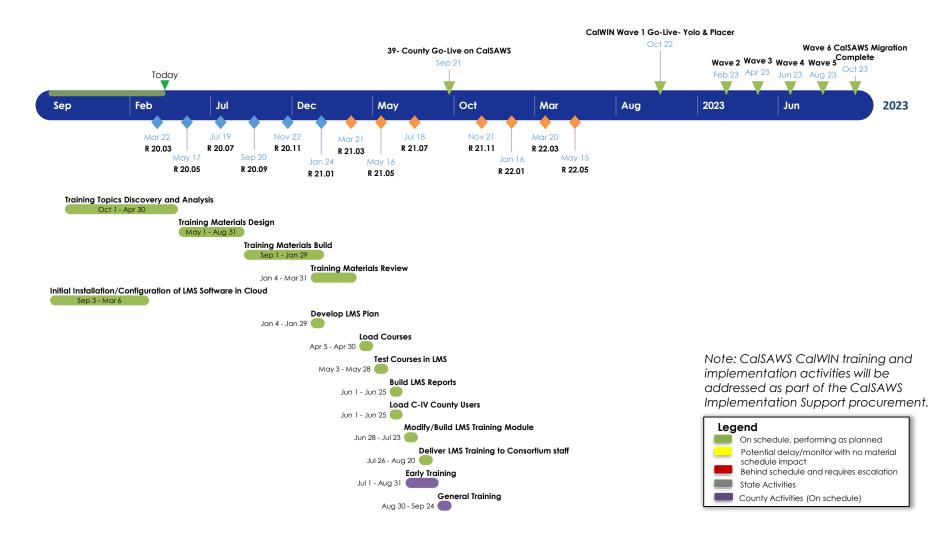
Note: CalSAWS CalWIN training and implementation activities will be addressed as part of the CalSAWS Implementation Support procurement.



#### **C-IV Training**

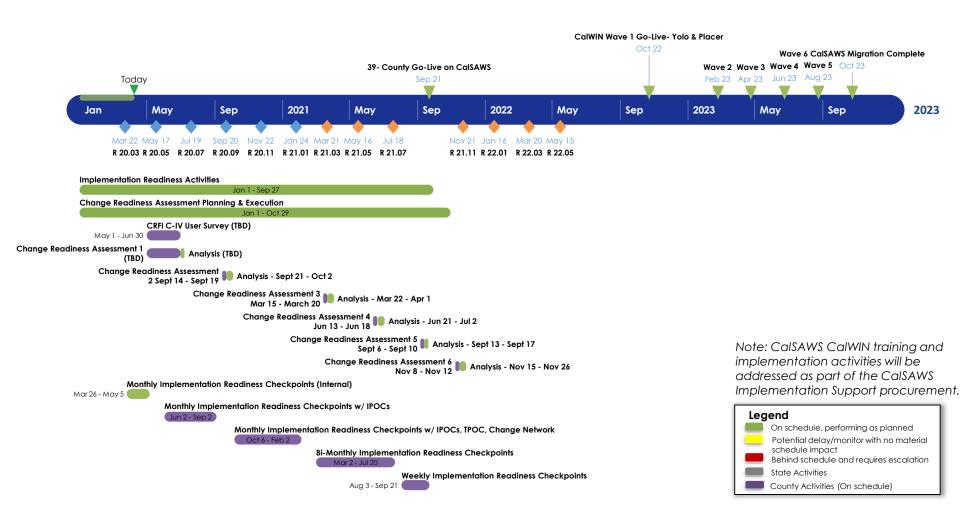


#### **C-IV Training**

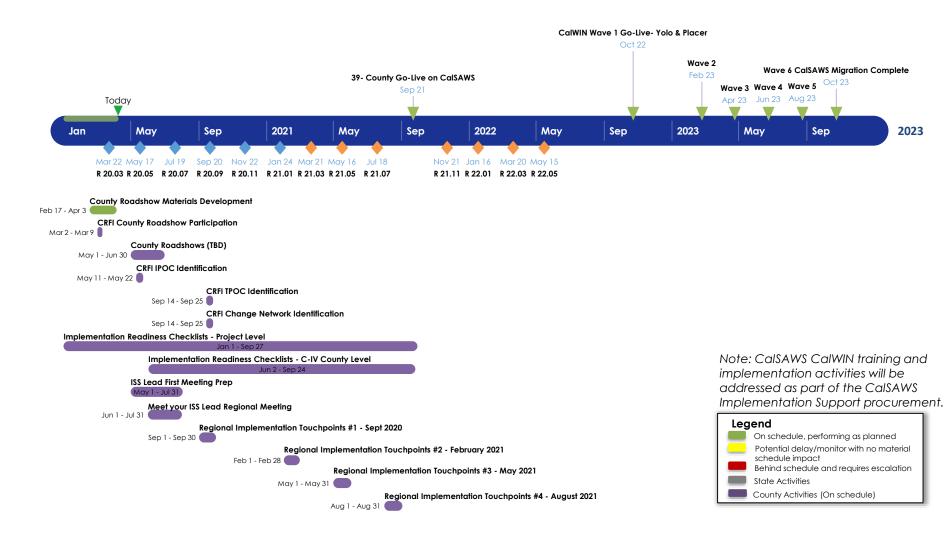


# CalSAWS Implementation for C-IV Counties

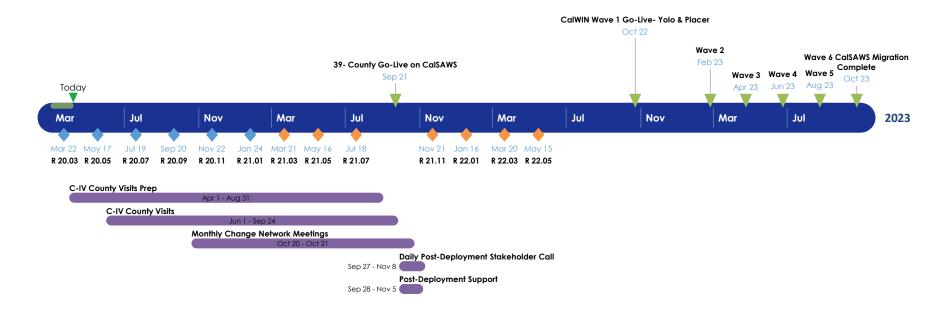
#### **C-IV Implementation & Change Management**



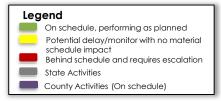
#### **C-IV Implementation & Change Management**



#### **C-IV Implementation & Change Management**



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



## 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:
  - 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 - Purpose

Scope of C-IV Migration Implementation effort

Timeline of known C-IV
Migration Implementation
Readiness Activities

C-IV COUNTY
IMPLEMENTATION KICKOFF ROADSHOWS

Overview of what Readiness means for the C-IV Counties, including key County responsibilities/resources needed for the C-IV Migration effort

Forum to ask questions regarding the C-IV Migration to CalSAWS

## Implementation Readiness

#### CalSAWS Implementation Roadshows Agenda



C-IV County Implementation Point Attend **Implementation** of Contact Checkpoint (status) Meetings (IPOC) on a monthly basis Provide post-Track County/Site Implementation Readiness and support and escalate escalate issues as concerns/issues necessary **IPOC** Responsibilities Work with Disseminate Implementation Implementation Team and TPOC Information to County Users and compile/complete confirm user County Readiness comprehension Checklist Solicit, identify, and confirm County Implementation Support resources and structure

# Technical Point of Contact (TPOC)



Stay informed on Implementation activities and status



Track and Assess
County
Technical
Readiness,
including
domain changes
and networking
requirements



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

<sup>\*</sup> Tentative TPOC identification date September 2020

## Change Network Champions (CNCs)

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



5

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



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



Generating **enthusiasm** and **promoting** the change from within



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

**Support** for County awareness, learning, and change commitment

Targeted On-site Support (TOSS) from CalSAWS Project

# TOSS serves as the Implementation liaison between the CalSAWS Project and the C-IV Counties

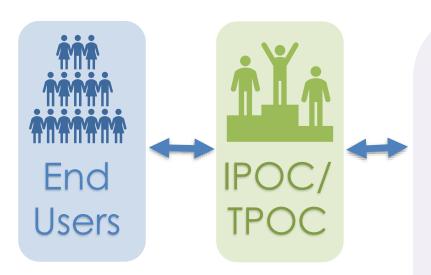
Coordinate pre- and post-C-IV Migration Implementation activities with IPOCs and TPOCs Monitor Regional and County Readiness statuses and report to Project Implementation Team

Serve as first line of local support for Post Deployment issues

Provide additional on-site support at sites with an identified functional support need Manage Implementation Site issue tracking and resolution, escalating any issues and gaps to Project Implementation Team and Regional Managers prior to C-IV Migration

# Implementation Readiness Roles

## Implementation Support Engagement Model



## CalSAWS Project Teams



#### Targeted On-Site Support (TOSS)

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



#### **Implementation** Team

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



- Manage issues and resolutions, and provide associated feedback
- Serve as point of escalation for County staff



#### Technical Team

Provide necessary Technical information and Project Technical support to TPOC



#### **Conversion Team**

Coordinate necessary data conversion, data clean-up, and mock conversion activities

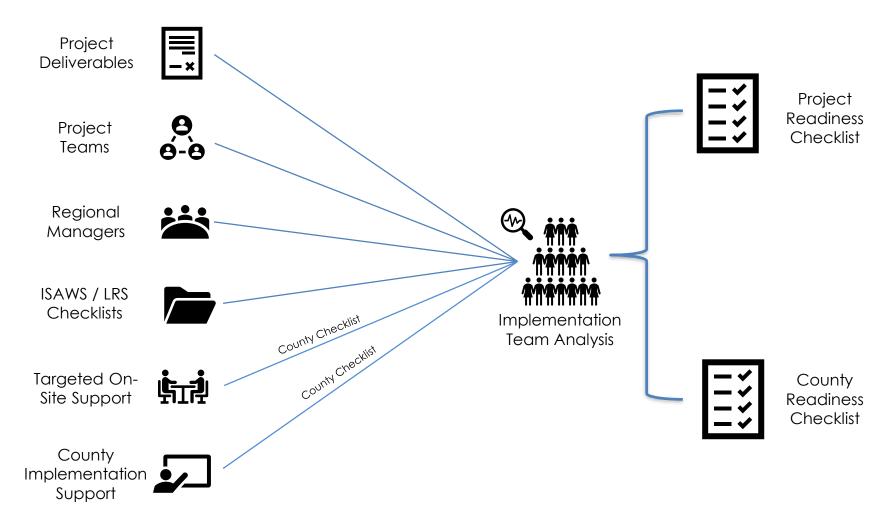
# Implementation Readiness

## Implementation Readiness Meetings

Impleme	entation Read	iness Meeting	Details
Meeting	Begin Date	Frequency	Participants
On-Going Project Meetings			
Joint Powers Authority Meeting		Monthly	RMs, Project Leadership, JPA
Project Steering Committee Meetin	ng	Monthly	RMs, Project Leadership, PSC
Pre-Deployment			
Implementation County Roadshows	TBD	Limited Series of Sessions	County Directors, SMEs, Supervisors, Decision-makers
Internal Pre-meet to Readiness Checkpoints	T-16 Months May 2020	Monthly	Implementation Team, RMs
Monthly Implementation Readiness Checkpoint	T-15 Months June 2020	Monthly	Implementation Team/Training, RMs, IPOCs
Monthly Implementation Readiness Checkpoint (added participants)	T-11 Months October 2020	Monthly	Implementation Team/Training, RMs, IPOCs, TPOCs, CNCs
Bi-Monthly Implementation Readiness Checkpoint	T-6 Months March 2021	Bi-monthly	Implementation Team/Training, RMs, IPOCs, TPOCs, CNCs
Weekly Implementation Readiness Checkpoint	T-1 Month August 2021	Weekly	Implementation Team/Training, RMs, IPOCs, TPOCs, CNCs
Post-Deployment			
Daily Post Deployment Stakeholder Call	September 2021	Daily (30 Business 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 Sys	stem Readiness					
OnTime	CalSAWS Release 3 of 8 - 20.03	System Readiness	2/10/2020		3/23/2020	
	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 Ca	onversion 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 Te	chnical 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	
	Push software update to Kiosks at CalSAWS counties	Technical Readiness	8/11/2021		9/15/2021	
CalSAWS O	CM 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
	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 Tro	aining Readiness					
	LMS Migration to the Cloud	Training Readiness		11/11/2020	3/2/2020	2/28/2020
	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	
	plementation Readiness and Support					
	Conduct C-IV County Implementation Roadshows	Implementation Readiness	4/6/2020		4/30/2020	
	Identify IPOCs	Implementation Readiness	5/4/2020		5/18/2020	
	Perform initial review of County Deployment Readiness Checklist with Identified IPOCs during Implementation Checkpoint meeting	Implementation Readiness	6/2/2020		6/2/2020	

<sup>\*</sup> Dates are estimations and are subject to change

# C-IV Migration Project Readiness Dashboard



#### PROJECT DEPLOYMENT READINESS DASHBOARD TEMPLATE

plementation Category	Owners	Status		Total Milestones	Milestones Behind	Total Detail Tasks	Detail Tasks Settind	Milestone Tasks Complete	Detail Task Complete
echnical Readiness	Laura Chavez (C) Luz Esparza (A)	0	Technical Readiness	-1	- 1	4	15	31	
ystem Readiness	Jo Anne Osborn (C) Lisa Salas (A)	0	System Readiness	2		1	15		
onversion Readiness	Paul Trisler (C) Keith Salas (A)	0	Conversion Readiness	1	8	2		351	ī
unctional Training Readiness	Ashley Arnold (C) Shivani Smith (A)		Functional Training Readiness	7	199	41	134	(*)	
CM Readiness	Helen Cruz (C) Maria Saenz (A)	0	OCM Readiness	3		12	- 2	-	
mplementation Readiness	June Hutchison (C) Ted Anderson (A)	0	Implementation Readiness	1	9	16	<u>.</u>		
© Yellow. <	risks completed on time 7 days past due date days past due date		TOTALS	12		76	<b>1</b>	1	
ones Pasi Due		Slo	alus Owner						

# C-IV Migration County Readiness Checklist

## **CalSAWS**

Status	Activity Description	Primary Owner	Target Stari Date	Actual Starr Date	<sub>↓1</sub> Due Date	Date Completed
County N	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	

<sup>\*</sup> Dates are estimations and are subject to change

# C-IV Migration County Readiness Checklist, Cont'd

## **CalSAWS**

Status	Activity Description	Primary Owner	Target Stair Date	Actual Starr Date	↓↑ Due Date	Date Completed
County T	echnical 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 T	raining 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 I	mplementation 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	

<sup>\*</sup> Dates are estimations and are subject to change

# C-IV Migration County Readiness Dashboard

#### **CalSAWS**

#### C-IV COUNTY DEPLOYMENT READINESS DASHBOARD TEMPLATE

mplen	nentation Cate	gory	Owners	C-IV Migratio
Count	y Technical Re	adiness	Laura Chavez (C) Luz Esparza (A)	•
Count	y Manage Per	sonnel	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		
<ul> <li>Green: Tasks completed on time</li> </ul>			completed on time	
Yellow: < 7 days past due date				
Red: > 7 days past due date Grav: 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

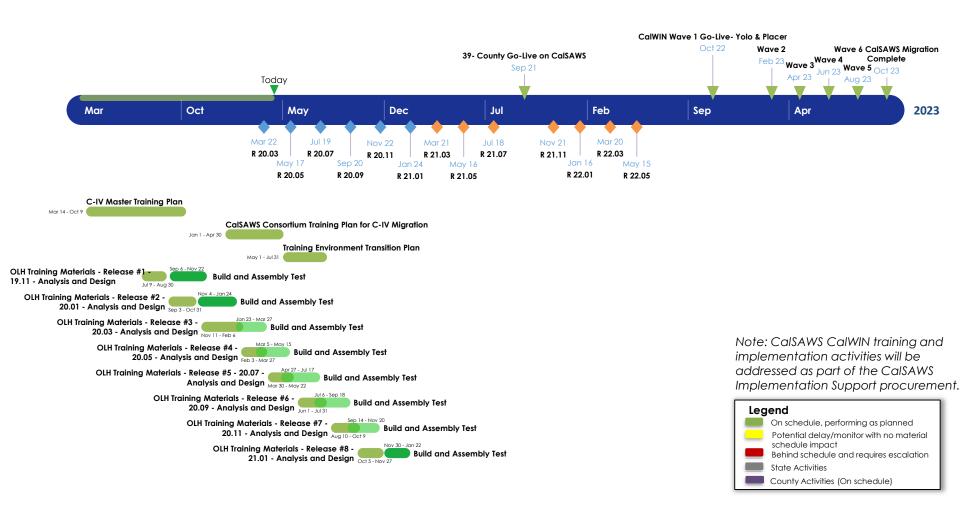
Measuring User Readiness with Pulse Assessment Surveys - Schedule

Readiness Assessment in Relation to C-IV Migration	Planned Distribution Date (Monday)	Response Due Date (Friday after Distribution)	Change Area(s) of Focus
<b>T-18 Months</b> (Establishing a Baseline)	TBD	TBD	Awareness, Knowledge
T-12 Months	9/14/2020	9/19/2020	Awareness, Knowledge, Desire
T-6 Months	3/15/2021	3/20/2021	Knowledge, Desire
T-3 Months	6/13/2021	6/18/2021	Knowledge, Desire, Ability
T-3 Weeks	9/6/2021	9/10/2021	Ability, Acceptance
<b>T+6 Weeks</b> (End of post-deployment support period)	11/8/2021	11/12/2021	Ability, Acceptance

<sup>\*</sup>Distribution of starred surveys will be assessed based on need

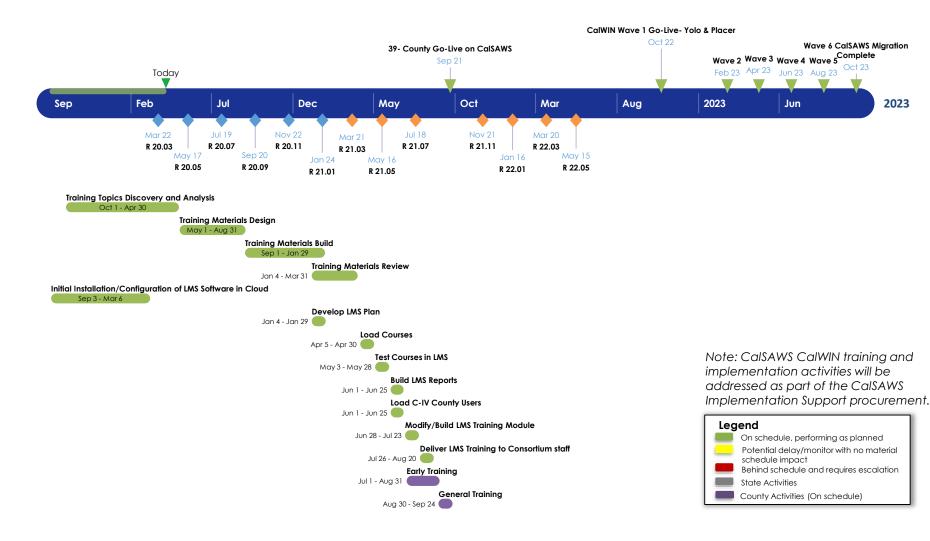
# CalSAWS Project Gantt

## **C-IV Training**



# CalSAWS Project Gantt

## **C-IV Training**



# **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

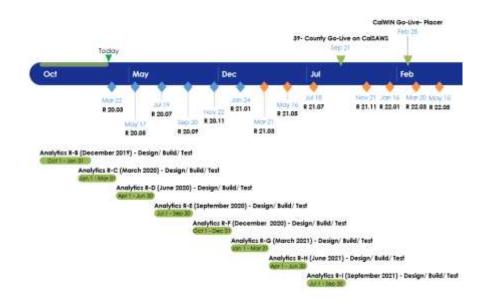
Over the next few PSC discussions we plan to share with you more detail on the following topics:

- 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: Parallel Production Validation

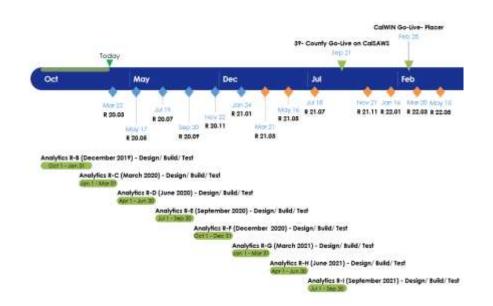
- CalWORKS
- QA

#### Release D: Under Development/Test

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

# State and Management Re-platform

#### **Current Status**



Amendment approved.

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

Release D: Under Development/Test

- Administration (5)
- Case Activity (12)
- Employment Services (4)
- Fiscal (15)
- Special Units (1)
- State Reports (5)

# Webinars

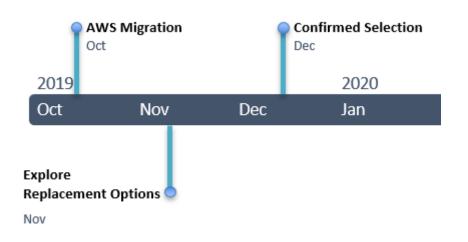
# Upcoming

#	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	<ul> <li>Purpose Built Data Sets Review – CalSAWS team to walk through:</li> <li>Method, key principles and technology used in designing and implementing purpose built data sets</li> <li>Differences between OBIEE subject area and Aurora Purpose Built Data Set</li> <li>Long term roadmap of Purpose Built Data Sets</li> </ul>	February 26, 2020	CalSAWS	Ad Hoc Reporting Committee
3	<ul> <li>Purpose Build Data Sets Feedback - Counties to provide feedback:</li> <li>Where functionality overlaps (e.g. accessing C-IV/LRS database to do ad hoc reporting)</li> <li>Where there are differences between their existing process and the CalSAWS Analytics Solution</li> </ul>	April 22, 2020 (rescheduled from March)	Ad Hoc Reporting Committee	CalSAWS
4	<b>Dashboard Portfolio Review -</b> Counties to do an offline review of all LRS & C-IV dashboards being re-platformed	May 20, 2020	Management Reporting Committee	N/A
5	<ul> <li>Dashboard Portfolio Feedback - Counties to provide feedback:</li> <li>Where functionality overlaps (e.g. using Qlik or equivalent tool for specific county reporting, producing similar dashboards)</li> <li>Where there are differences between their existing process and the CalSAWS Analytics Solution</li> </ul>	June 24, 2020	Management Reporting Committee	CalSAWS

# Overview of ForgeRock Implementation

# ForgeRock

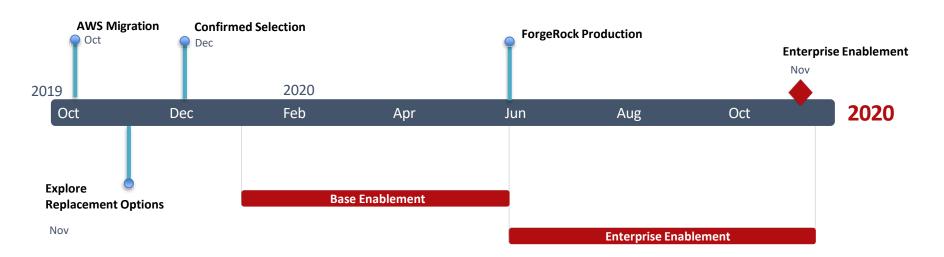
## Transforming to One CalSAWS identity



- 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 development and test environments.
- Completed analysis of impact to LRS/CalSAWS application to integrate (transition away from Oracle Security Stack).
- Started integration sessions with CalWIN (DXC) for connectivity to ForgeRock services to support API integration.

The first two applications planned to leverage ForgeRock are OCAT and the LRS/CalSAWS 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

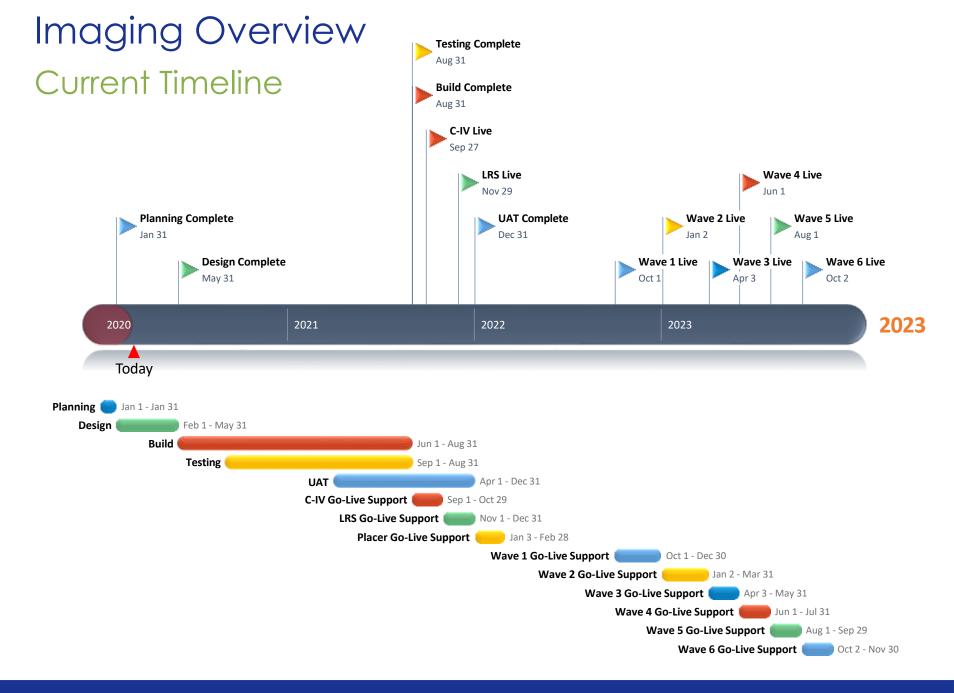
# **Imaging Overview**

- Current Status
- Timeline
- Document Migration
- Potential Alternate 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
- Started Detail Design with Imaging Committee



# **Imaging**

## **Document Migration Process**

- Hold individual document migration kick off discussions with Los Angeles, each CalWIN County, and C-IV Counties
  - Note: CRFI 20-010 distributed to get Imaging Point of Contact (PIC) 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

Los Angeles County kick-off completed March 24, 2020. Discovery Sessions are in progress.

# **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 wandscanning 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

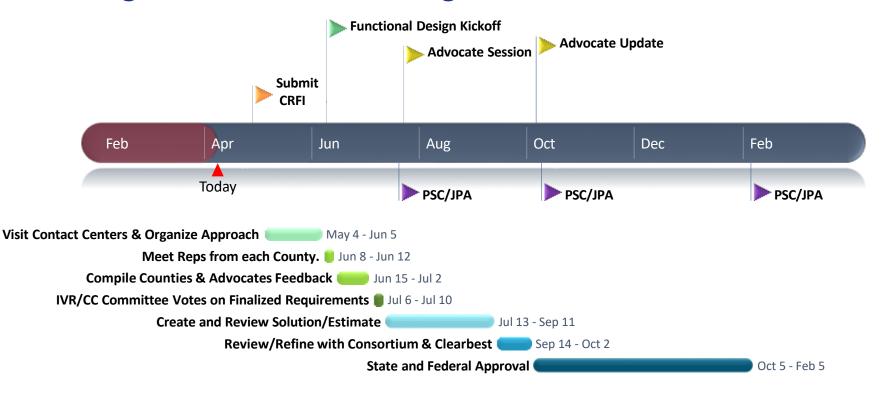
#### Schedule for a 58 County Contact Center Solution



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

\*Note: LA go live to be determined based on the timeline for requirements specific to LA gathered during the Functional Design Session

#### In Progress Functional Design Contact Center Timeline



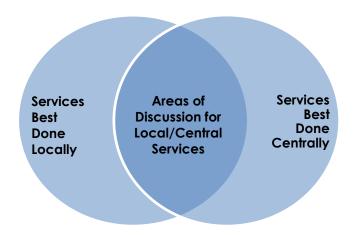
Date	Governing Body	Material
July	PSC/JPA	JPA Board Asked to Approve Recommended Direction of Solution
August	PSC/JPA	Update on Solution/Estimate as Appropriate
September	PSC/JPA	Update on Solution/Estimate as Appropriate
October	PSC/JPA	JPA Board Asked for Approval to Send Out for State and Federal Approval
February	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				W 1	W.	
Final System Test	6/15/20	7/10/20						
Training Delivery	7/20/20	8/20/20	1					
User Acceptance Test	7/20/20	8/20/20	1					
Cutover and Go-Live	8/21/20	8/24/20	1				_	

- Eight (8) week schedule adjustment
- Final System Test
  - Security, performance, and disaster recovery tests
  - End-to-end regression tests
- Training, UAT
  - Planning and preparation underway
- Go-Live
  - Monday, August 24, 2020

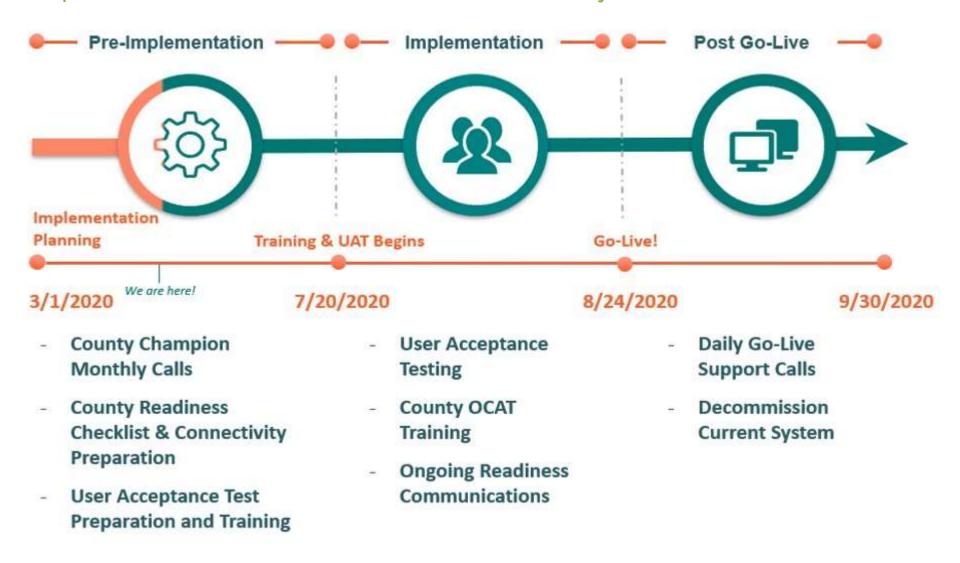
### Design, Development, and Test

#### Key activities updates

- Application development and test
  - Development and test in progress with 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 and technical designs approved
  - Proof of Concept (PoC) completed
  - Development in progress
- OCAT Demo
  - Preparing materials and demo for CalSAWS Annual Strategic Planning Conference

# Training and Implementation

#### Updated activities with schedule adjustment



# Application Development Update

Policy

# Cal-OAR

Policy Effective Date & State Policy Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
7/1/2019 ACL 19-40	SCRs CIV- 103934; CA- 208030 Phase I Implemented Release October 2019  SCRs CIV- 104230; CA- 208720 Implemented Release 19.07 Priority 7/25/19  SCRs CIV- 102191; CA- 204569 Phase II Test Release 20.05	PPM #51772 Phase 1 Implemented October 2019  PPM #52398 Phase II Implemented R60 (2/20)  PPM #53118 Phase II (BI) Design R61 (5/20)	<ul> <li>CalSAWS Update:         <ul> <li>Add functionality to automatically generate and send the monthly, quarterly, and semi-annual Cal-OAR data files to CDSS.</li> </ul> </li> <li>A CIV/LRS functionality demonstration webcast on the system changes to support CalOAR, Housing Support, Home Visiting, and Family Stabilization policy is schedule for April 23,2020.</li> <li>CalSAWS County Business Impact:         <ul> <li>Educate staff on how the system data collection page information will populate the Cal-OAR reports.</li> </ul> </li> <li>-Continued on Next Slide-</li> </ul>

### Cal-OAR

Policy Effective Date & State Policy Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
7/1/2019 ACL 19-40	SCRs CIV- 103934; CA- 208030 Phase I Implemented Release October 2019  SCRs CIV- 104230; CA- 208720 Implemented Release 19.07 Priority 7/25/19  SCRs CIV- 102191; CA- 204569 Phase II Test Release 20.05	PPM #51772 Phase 1 Implemented October 2019  PPM #52398 Phase II Implemented R60 (2/20)  PPM #53118 Phase II (BI) Design R61 (5/20)	CalWIN Update:  Manual Phase I – Manually send the Phase 1 data files to CDSS beginning October 2019. The design for this effort includes input and data validation from a group of volunteer project action team counties: Fresno, Orange, Placer, Sacramento, San Luis Obispo, Solano and Sonoma The following case special indicators were added to the system and allow counties to track HVI at the case level:  HVI Offered HVI Received  The first files have been sent to CDSS; counties will validate on an individual basis now that the files are being routinely generated.  Automated Phase II - Automate the process to send the files to CDSS and use a business intelligence solution to create the files. Adding data elements to core CalWIN application in February 2020. Including the data elements into the Business Intelligence tool in May 2020.  CalWIN County Business Impact: CalWIN is conducting CalWIN SME meetings to review the data fields that must be completed to capture the required data elements outlined in ACL 19-40 and in the Cal-OAR trainings facilitated by CDSS.

### Home Visiting Program (HVP)

Policy Effective Date & State Policy Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
1/1/2019  ACWDL - 4/25/19  ACWDL - 7/31/18  ACL 19-42  ACL 19-82	SCRs CIV- 104230; CA- 208720 Implemented Release 19.07 Priority 7/25/19  SCRs CIV- 104042; CA- 208265 Test Release 20.05  SCRs CIV- 103989; CA- 208155 Test Release 20.05	PPM #51880 Implemented 7/11/19  PPM #52489 Implemented R60 (2/20)  PPM #53118 BI integration Testing R61 (5/20)	Home Visiting program (HVP) supports positive health, development and wellbeing outcomes for pregnant and parenting women, families, and infants born into poverty. The long-term goals for program participants include expanding their future educational, economic, and financial opportunities, stabilizing families and improving the likelihood of exiting poverty.  CalSAWS Update:  Add a Home Visiting List and Detail data collection pages. These pages will track home visiting services offered and accepted.  Add the CW 2224 the CIV and LRS Template Repositories.  Note: Upon implementation of the above changes, counties should stop using the HVI Offered and Received case flags.  A CIV and LRS job aid is being developed for the HVP functionality was developed.  A CIV/LRS functionality demonstration webcast on the system changes implemented to support the CalOAR, Housing Support, Home Visiting, and Family Stabilization is schedule for April 23,2020.  CalSAWS County Business Impact:  Train staff on the policy change and inform them of the changes to the systems.  -Continued on Next Slide-

#### Home Visiting Program (HVP)

Policy Effective Date & State Policy Reference	C-IV/LRS Status	CalWIN Status	Implementation Details
1/1/2019  ACWDL - 4/25/19  ACWDL - 7/31/18  ACL 19-42  ACL 19-82	SCRs CIV- 104230; CA- 208720 Implemented Release 19.07 Priority 7/25/19 SCRs CIV- 104042; CA- 208265 Test Release 20.05 SCRs CIV- 103989; CA- 208155 Test Release 20.05	PPM #51880 Implemented 7/11/19 PPM #52489 Design R60 (2/20) PPM #53118 BI integration Testing R61 (5/20)	CalWIN Update: The following case special indicators were added to the system and allow counties to track HVI at the case level:  HVI Offered HVI Received HVI data at the individual level will be implemented R61 (5/20).  CalWIN County Business Impact: Instructions for using the HVI case special indicators issued via conference calls with county CalWORKs SMEs and CIT #07-4369 (issued 7/24/19).

# Procurement Update Central Print

#### 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

#### Guidelines/Principles

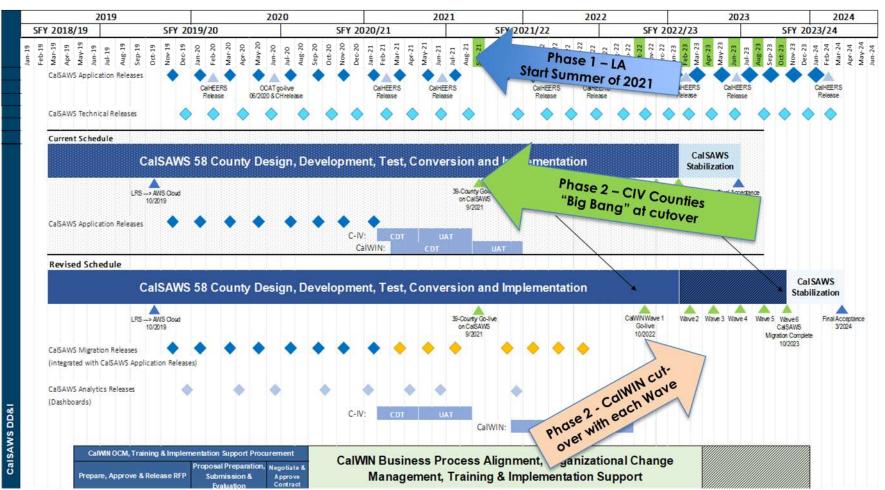
- Adopt Guidelines/Principles for this procurement
  - Strive for maximum standardization across all participating counties
  - Allow for county flexibility where needed.
  - Document mandatory options for future decisionmaking
    - + Braille
    - + Large Print
    - Additional County and State inclusions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

#### 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

#### Open Points Discussion

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



#### 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

#### 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)

#### **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

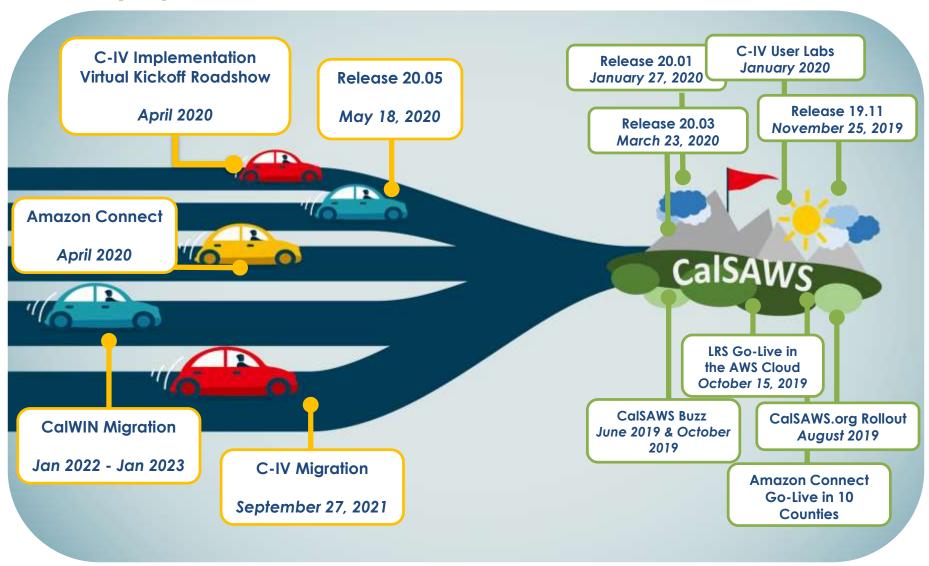
#### Process & Timeline

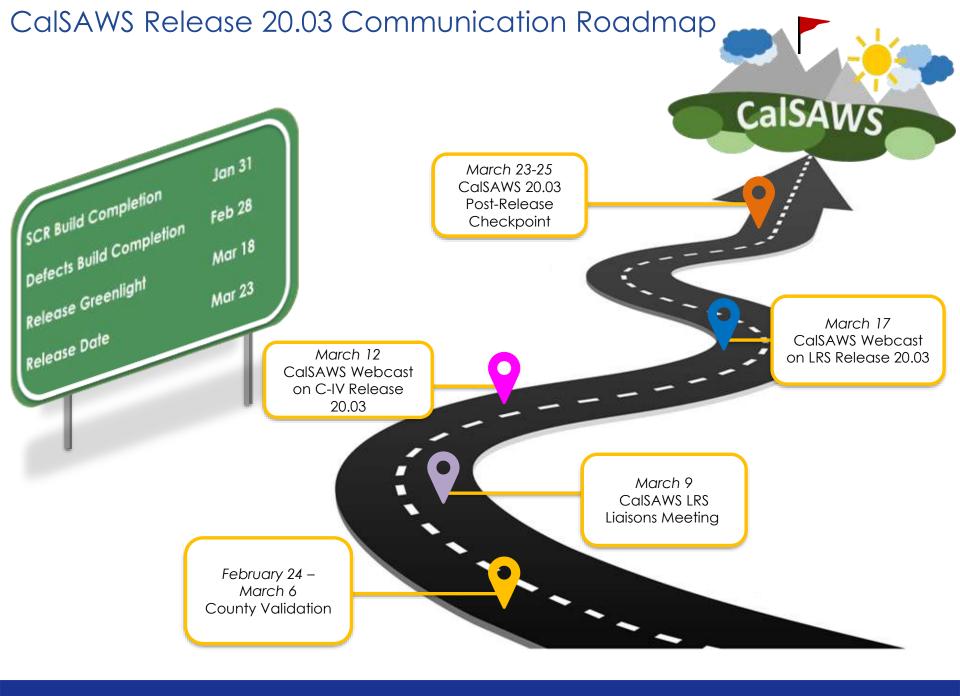
Task	Start	Finish
Consortium Send Asset Listings to Counties via Email	4/20/2020	4/20/2020
Visual Inspection of Consortium Fixed Assets 2020 Kick- off Call	4/20/2020	4/20/2020
County Locators/Recorders Complete Local Visual Inspections	4/21/2020	6/1/2020
Counties Submit Asset Draft Documentation to Consortium Electronically (PDF Format)	4/21/2020	6/1/2020
Counties Submit Asset Hard Copy Documentation (Including Original Signatures in Blue Ink) to Consortium	4/29/2020	6/8/2020
Consortium Conduct Inspection Debriefs (As Needed Per County)	6/9/2020	6/15/2020

Quarterly CalSAWS Communication Update

### CalSAWS Communication Roadmap

#### **Quarterly Update**







# JPA Board April Meeting Overview

# Adjourn Meeting