CalSAWS | Project Steering Committee Meeting



July 16, 2020

Agenda

- 1. Call Meeting to Order
- 2. Confirmation of Quorum and 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.

- All lines will be muted when meeting begins.
- To unmute:
 - + When connected via computer click the microphone icon.
 - + When connected via telephone press *6.

Action Items



Action Items

4. Approval of the Minutes of the:

- a. May 21, 2020 PSC Meeting and review of Action Items
- b. June 25, 2020 PSC Meeting.

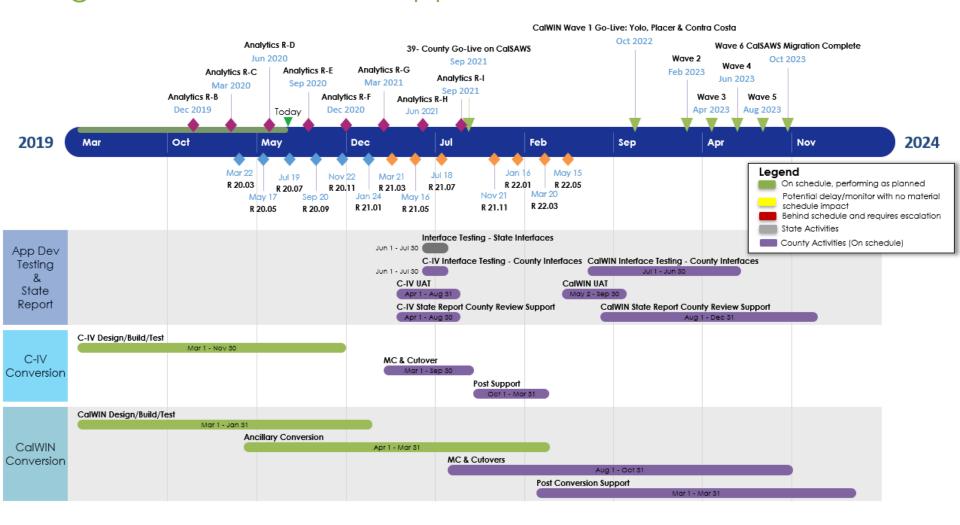
Informational Items



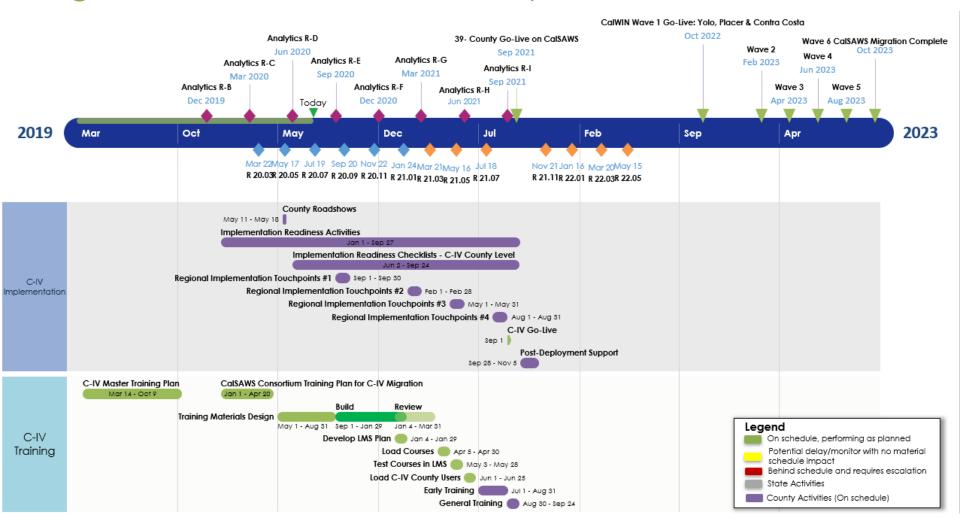
CalSAWS Gantt Chart Update



CalSAWS Project Gantt High Level Overview – App-Dev & Conversion



CalSAWS Project Gantt High Level Overview - C-IV & Implementation



Overview of June JPA MemberRepresentatives MeetingPublic Comment Log process



CalSAWS and State Budget Update

- Policy Update
- Status Update on Non-State Forms Process
- Scaling back on enhancements



CalSAWS and State Budget Update Premise Funding

CalSAWS Project Budget - FY 20/21		Funding
ABAWD Automation		\$8,189,000
Brown Tapia Settlement		\$398,430
CalFresh Over-issuances (SB 278)		\$37,900
CalFresh Periodic Report (SAR 7 Reminder)		\$869,000
CalFresh Public Assistance Cases Tracking		\$3,000,000
CalFresh Safe Drinking Water Pilot (SB 89)		\$1,200,630
CalWORKs Earned Income Disregard (SB 80)		\$809,700
CalWORKs Overpayments (SB 726)		\$431,250
Disaster CalFresh		\$533,658
Foster Care Eligibility Determination (FCED)		\$2,650,838
Home Visiting Program (HVP) Automation		\$803,184
Medi-Cal Automation (SB 1341)		\$7,090,016
Online CalWORKs Assessment Tool (OCAT)		\$3,193,515
Removal of HA Consecutive Day Rule		\$805,385
SAWS Shared Application Forms Revision		\$8,079,000
SSI Cash-out Reversal Automation (AB 1811)		\$108,860
Stage One Continuous Eligibility		\$3,895,000
	Total	\$42,095,366

2019 – 2020 State Policy Commitments **Completed**

Program	Policy Item	C-IV/CalSAWS Implementation Month	CalWIN Implementation Month
CalFresh	CalFresh Expansion to SSI Population	May 2019	May 2019
CalWORKs	SB 726 Overpayment Threshold Increase Phase I	July 2019	July 2019 (Minor Updates) *February 2020 (Phase I)
CalWORKs	Maximum Aid Payment (MAP) Increase	July 2019	September 2019
CalFresh	ABAWD Year 2	September 2019	August 2019
CalWORKs	CalOAR Phase I	October 2019	October 2019
CalFresh	Increase Over issuance Threshold	November 2019	July 2019 (Minor updates) *February 2020 (Major automation)
Medi-Cal	Young Adult Expansion	November 2019	November 2019

2019 – 2020 State Policy Commitments **Completed**

Program	Policy Item	C-IV/CalSAWS Implementation Month	CalWIN Implementation Month
Child Care	Update CCP 7/New CCP 8	January 2020	November 2020
CalFresh	ABAWD Discretionary Exemptions and Notices	February/March 2020	February/March 2020
CalWORKs	Increases to Asset Test & Vehicle Equity	March 2020	April 2020
CalWORKs	CalOAR Phase II	May 2020	May 2020
CalWORKs	Home Visiting Data Collection	May 2020	May 2020
CalWORKs	Earned Income Disregard and Income Reporting Threshold Change	May 2020	May 2020
CalWORKs CalFresh Medi-Cal	COVID-19 Efforts including suspending renewals and reporting requirements	March 2020	March 2020

2020 – 2021 State Policy Commitments In Progress

Program	Policy Item	C-IV/CalSAWS Targeted Implementation Month	CalWIN Targeted Implementation Month
CalWORKs	Homeless Assistance 16 Cumulative Days	July 2020	August 2020
CalFresh	Automate the Disaster CalFresh Determination	July 2020	N/A
CalWORKs	OCAT Rebuild & SAWS Integration	August 2020	August 2020
CalFresh	ABAWD Phase III	May 2021*	N/A
CalFresh	Safe Drinking Water	Release is dependent on receipt of final policy*	N/A
Child Care	Report and Online Provider Screen	November 2020	November 2020
CalWORKs	Continue COVID-19 related good cause exemption to untick the 24/48 month time clocks – ends August 31,2020	August 2020	August 2020
CalWORKs CalFresh	COVID-19 - Resume renewals and reporting requirements	May 2020 –July 2020	May 2020 –July 2020

* Targeted for implementation in the CalSAWS system only.

2020 – 2021 State Policy Commitments In Progress

Program	Policy Item	C-IV/LRS/CalSAWS Targeted Implementation Month	CalWIN Targeted Implementation Month
Medi-Cal	Continue COVID-19 - suspending renewals and reporting requirements	Ongoing	Ongoing
Medi-Cal	COVID- 19 –resume renewals and reporting requirements	TBD	TBD
Foster Care	Continue COVID-19 support payments for non-minor dependent past the age of 21 though June 30, 2021	No automation – Managed via CIT 0089- 20	No automation – Counties are using existing non-system determined issuance functionality

2020 – 2021 Key Proposals Reliant on SAWS Automation Changes

Program	Policy Item	Proposed Policy Effective Date	Proposed Implementation Date	Final Policy Needed By Date+
CalWORKs	Child support disregard increase the pass- through payment to families	January 1, 2022	November 2021	September 1, 2020
CalWORKs	Establish a single 60- month CalWORKs time limit and allow clients to participate in a greater array of welfare-to-work activities for the entire 60 months	May 1, 2022	March 2022	August 1, 2020
CalWORKs	CalOAR data validation and continued development of performance indicators	TBD	TBD	12 Months prior to the policy effective date
CalFresh	Pre-pop SAR form and pre-pop applications with Medi-Cal Renewals	January 1, 2024	November 2023	April, 1, 2022

* The SAWS are in discussions with the administration about their ability to automate these proposals during the CalSAWS migration, and the dates by which policy is needed to begin this work.

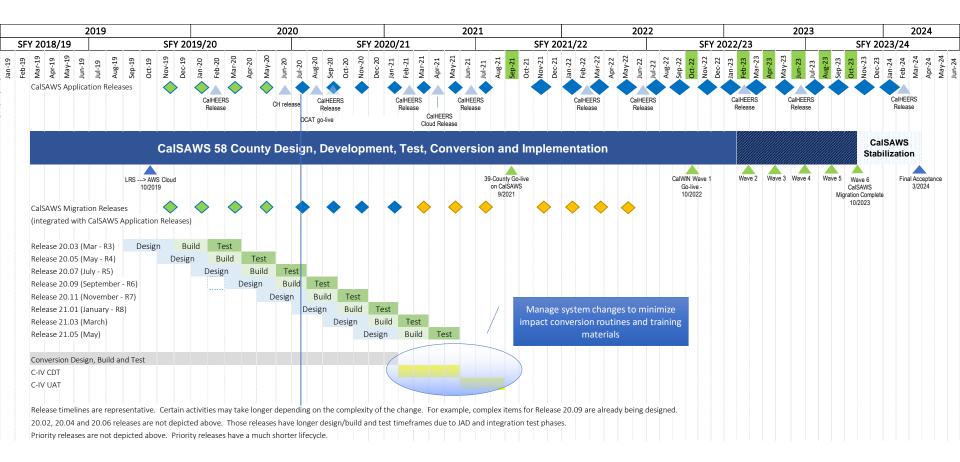
2020 – 2021 Key Proposals Reliant on SAWS Automation Changes

Program	Policy Item	Proposed Policy Effective Date	Proposed Implementation Date*	Final Policy Needed By Date+
Foster Care	Transitional Housing Supplements for Non Minor dependents	TBD	July 2021 (CalWIN) September 2022 (CalSAWS)	August 1, 2020
Medi-Cal	Medicare part B disregard	TBD	TBD	12 Months prior to the policy effective date
Medi-Cal	Support Act Juvenile	TBD	TBD	12 Months prior to the policy effective date
Medi-Cal	Aged Blind and Disabled FPL Expansion	TBD	May 2021	November 1, 2020

* The SAWS are in discussions with the administration about their ability to automate these proposals during the CalSAWS migration, and the dates by which policy is needed to begin this work.

CalSAWS and State Budget Update Timeline: Recap

- User Acceptance test for the C-IV Counties is only 11 months away!
- Go-live for the C-IV Counties to CalSAWS is only 15 months away!



Status Update on Non-State Forms Process

August PSC will review the Non-State Forms process:

- State objective and review process
- Advocate Review
- Ongoing State process of new/updated state forms
- CalSAWS process for new/updated Non-State (58county) forms

- For SFY 20-21, COVID-19 changes continue to be a priority along with migration changes and upcoming key State policy changes
 - Consortium staff continue to work closely with CWDA, OSI, CDSS and DHCS to align on policy priorities and to assess impact on migration activities
 - Consortium staff continue to work with Accenture to identify potential impacts to migration scope and timelines for new State policy changes
 - In March 2020, the project asked committees to stop prioritizing their top 10 lists due to COVID-19 emergency changes taking precedence
 - To date, over 65 COVID-19 related system changes have been implemented in both CalSAWS and C-IV, with over 10 more in flight for each system

Current priorities for the CalSAWS and C-IV Systems:

- Emergency policy items. E.g. COVID related system changes
- Migration Requirements, inclusive of DDIDs, SCRs, DDCRs
- Upcoming state policy items with agreed upon implementation dates that require changes to both systems before C-IV migration E.g. COLAs
- Single county operational changes (e.g. new EBT printers, office moves, bank change)

What is no longer being prioritized for the C-IV System:

- Enhancements, other than operational enhancements
- Policy items with a state approved implementation date of CalSAWS migration or later for the 39 C-IV Counties
- SCRs that increase the scope of conversion or other migration teams such as training
- Job Aids and OLH

Statewide Portal Project:

- Vendor negotiations complete
- Contract and APD with the Feds for approval
- JPA Board approval targeted for August 2020

Existing LRS, C-IV, MyBenefits CalWIN Portal/Mobile Applications:

- Any enhancement requests received for any of the existing portals will be considered for the new portal
- No planned enhancements unless there is an immediate need/emergency E.g COVID-19 message updates

Medi-Cal RE Process Update



Medi-Cal RE Process Update

- Turning on MC RE/discontinuance batch is currently still on hold.
- It appears the PHE will be extended for another 90 days, through 10/25/2020.
- The Project has discussed with DHCS the need to put together ideas for moving forward once the PHE is ended.
- The Project is finalizing automation to protect MC cases from auto discontinuing through batch when certain criteria are set. Targeted release is mid-August.

Review CIT 0128-20 Regarding Legacy Data Solution



CIT 0128-20 Decommissioning of LDS Application

Summary: Notified C-IV Counties that pursuant to the CalSAWS data retention policy, CalSAWS will no longer be storing the Legacy Data Solution (LDS) data/hosting the LDS application. LDS was implemented in 2009 to allow the 35 ISAWS Counties access to the legacy data from the ISAWS system. When the LDS was created, the ISAWS project was aided by the fact that there was a Windows server version of MAPPER available. The ISAWS project created a read-only version of the ISAWS System called LDS. C-IV has been hosting a copy of this application and it has been hosted by the C-IV Project since that time.

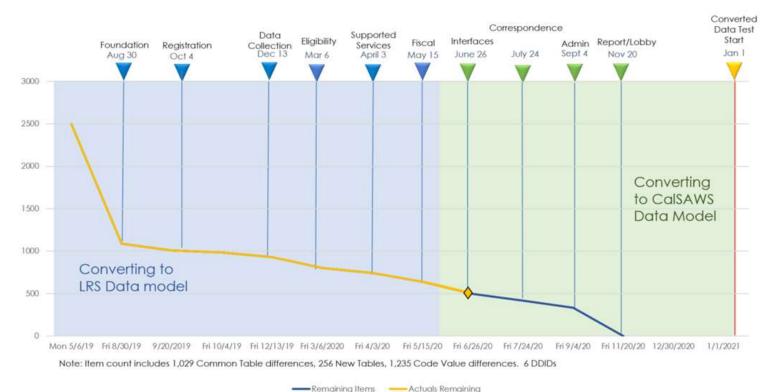
CIT 0128-20 Decommissioning of LDS Application

- The CalSAWS Project no longer supports the LDS Application and is proposing to decommission the CalSAWS hosted LDS November 30, 2020. However, due to some counties' desire to continue to retain this data, a pilot was recently conducted with one county where they and successfully loaded a copy of LDS locally for county hosting. As a result, CalSAWS will provide a copy of the LDS application to any other Counties interested in retaining this data.
- County Action: LDS is a Windows 2003 Virtual Machine. If a County would like to host the LDS system, the following is required:
 - Hardware/Software Requirements:
 - + A Hypervisor environment, such as Hyper-V that can support 3 hosts
 - Approximately 3TB of free storage space
 - + 2 drives per host, c: and d:
 - + 12GB of available memory (4GB) per host
 - Network access on TCP port 3986
 - Counties who decide they would like to host their LDS data should create a C-IV Service Desk Change Order to request a copy of the LDS Application, and the C-IV Tech Team can work with your County to get it installed.

Conversion Status and Accomplishments



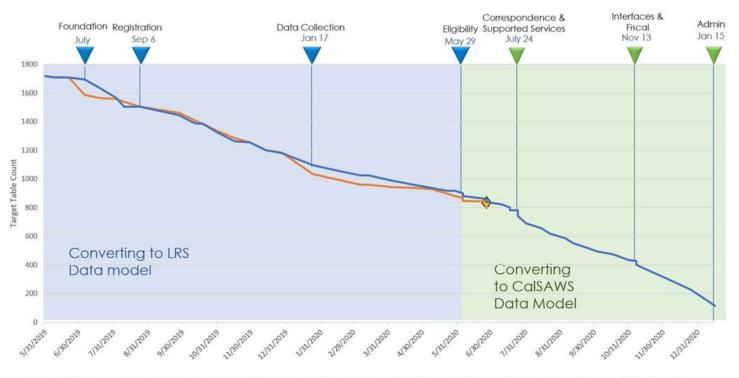
Conversion Status and Accomplishments C-IV Burndown Chart and Progress



C-IV Conversion Continues On-Schedule with:

- Foundation, Registration, Data Collections, Eligibility, Supported Services, and Fiscal areas Complete;
- Interfaces are In-Progress; and,
- Correspondence, Admin, Reports, and Lobby areas On-Schedule to Complete Prior to the Next C-IV Conversion Phase/Milestone (Converted Data Test and Mock Conversion).

Conversion Status and Accomplishments CalWIN Burndown Chart and Progress



Note: 1718 is the cumulative tables to be looked at. This includes looking at tables multiple times as tables cross functional area. There are 708 unique tables identified for conversion evaluation

CalWIN Conversion Continues On-Schedule with:

- Foundation, Registration, Data Collections, and Eligibility areas Complete;
- Supported Services and Correspondence areas In-Progress; and,
- Fiscal, Interfaces, Admin, Reports, and Lobby areas On-Schedule to Complete Prior to the Next CalWIN Conversion Phase/Milestone (Converted Data Test and Mock Conversion).

Conversion Status and Accomplishments Ancillary Systems and Duplicate Person Update

- Ancillary Systems
 - Discovery sessions scheduled through July
 - + Collections session held July 7
 - Planning sessions will be scheduled for August
- Duplicate Persons
 - Person De-Duplication Business Process and Communication Protocol Document
 - Person De-Duplication Report

Conversion Demonstration

Converted Placer Case

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Conversion Demonstration Converted Placer Case

CalWORKs				
Worker: Worker ID:			Primary Applicant/Recipient:	23F
Program SI		Ative	Language: Phone Number:	English
Reporting	Type:	Semi-Annual Reporting	Email:	-Ogmail.c
Aid Code:		35 - CW-Two Parent (Fed)	Payee:	23F
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Name		Deprivation	Role Role Reason	Status Status Reason
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	238		MEM	Active
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Conversion Demonstration Converted Placer Case

 CalFresh 							
Worker: Worker ID:				Primary Applicant/Recipi	ent:		23F
Program Status:	Active			Language: Phone Number:	i	English	
Reporting Type:	Semi-Ann	ual Rep	orting	Email:	ļ	n	Ogmail.co
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Meets ESAP Criteria:	0.0252			Application Date:	:)	01/30/2020	
Public Assistance Indicator:	Yes						
FBU:	3						
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Conversion Demonstration Converted Placer Case

Medi-Cal Worker: Primary 23F Applicant/Recipient: Worker ID: Language: English **Program Status:** Discontinued Phone Number: **Discontinued Date:** 01/01/2020 Email: m 23F Payee: Application Date: 01/30/2020

Requested Medi-Cal Type

Name

Name	DOB	A	ge Gender	SSN	CIN	Person # Household Status
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Role

Role Reason

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Implementation Team Activities Update



Implementation Team Activities Update County Engagement





And need County insider help and support to get there!



C-IV PPOCs received a CRFI to identify IPOCs (Implementation Points of Contact) for each C-IV County by June 9, with whom we then hosted an Orientation on June 30. Implementation Team Activities Update IPOC Orientation: Topics Covered & Next Steps

Topics Covered

- Provided a timeline of ongoing county engagement
- Introduced each region's TOSS (Targeted On-Site Support) Team, consisting of the ISS Leads, Implementation Coordinators, and QA Implementation Support
- Reviewed IPOC Roles and Responsibilities
- Showed Network of Support within Counties and on Project
- Introduced Implementation Readiness Tools and Materials

Next Steps

- Provide IPOCs with Implementation Readiness Materials
- Introduce Monthly Readiness Checkpoint Engagement with IPOCs
- TOSS Team to engage with IPOCs at the County-level

Implementation Team Activities Update

Upcoming Checkpoints

Upcoming Meetings and Support Roles	Target Date
First Implementation Readiness Checkpoint	July 9, 2020
First Regional Touchpoint	August 2020
Identification of TPOCs (Technical Points of Contact)	September 2020
Identification of CNCs (Change Network Champions)	September 2020

- Implementation Readiness Checkpoints (Monthly)
 - Updates on Implementation Milestones and Timeline
 - Tracking and Reporting on Implementation Readiness Checklists
 - Escalation of high-impact risks or issues
- Regional Touchpoints (Quarterly)
 - Regional Support Staff
 - Implementation Project Timeline Updates
 - Training Updates
 - Details on upcoming role recruitments, if applicable

Change Management User Assessment Survey Results

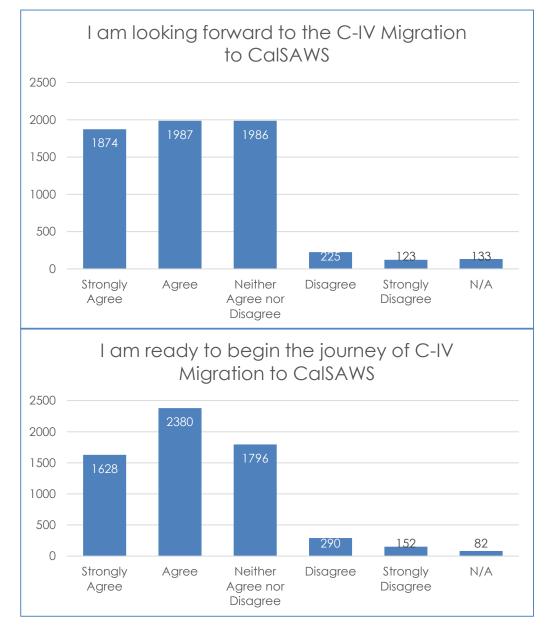


Change Management

Baseline Assessment Survey was distributed on June 9, 2020

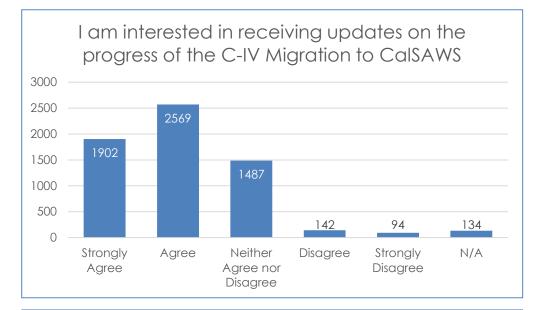
What:	C-IV User Baseline Readiness Assessment Survey
Who:	Sent to Active Users of 32 of the C-IV Counties 7 Counties opted-out of receiving the survey Received 6,631 responses
Why:	To establish a baseline assessment of CalSAWS Communication effectiveness and Implementation Readiness for the C-IV Migration. The objective of the survey results is to assist the CalSAWS Project in improving Communication and Implementation strategies to best fit the needs of all C-IV Users.
When:	Distribution: June 9, 2020 – June 15, 2020
How:	Hosted by Survey Tool (SurveyMonkey), whose link was distributed directly from SurveyMonkey via NoReply@CalSAWS.org

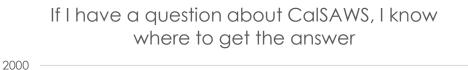
Perception of C-IV Migration to CalSAWS

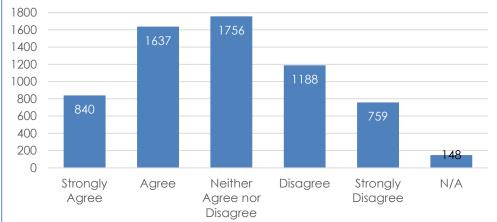


Users are open to being engaged with CalSAWS

CalSAWS Project Information





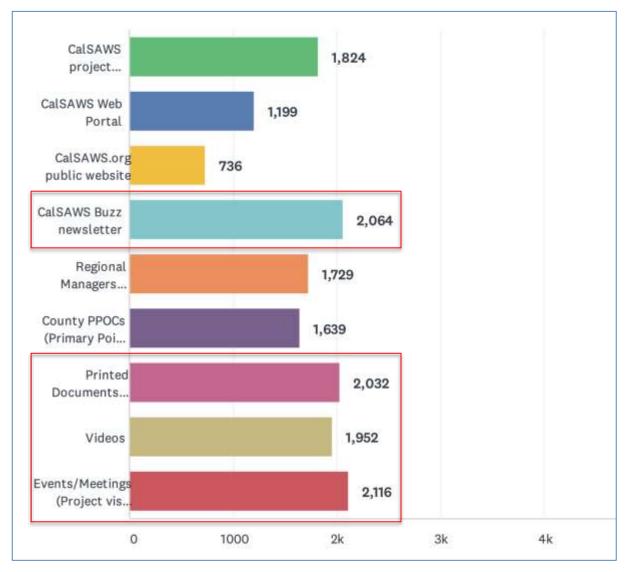


Users would like to receive information and learn more about CalSAWS:

- System Functionality & Demonstrations
- Timelines & Go-Live Date
- Updates on Project Goals and Milestones
- Training Plan

The Project must help the counties understand where the tools are and how to get to them

How would C-IV Users prefer to receive information about CalSAWS?



Change Management Recommendations Items under Consideration

- Infographic Series
 - What is CalSAWS?
 - Implementation Roadmap
 - Training Overview
 - CalSAWS Resources, Materials, and Contacts
- Short-Video Series
 - Implementation Timeline & Key Dates
 - Training Plan
 - Conversion Plan
 - System Benefits*
 - + Highlight of main system benefits & enhancements
- Implementation Newsletters/Brochures
 - A newsletter specific to Implementation Highlights & Updates

*Short system benefits videos will be in addition to long-form, monthly Targeted Topic demonstrations

C-IV Migration Training



C-IV Migration Training Program Benefits of Web-based Training





Self-paced

No travel required

Consistent

Scalable

C-IV Migration Training Program Supplemental materials – User Guides

CalSAWS Quick Guide

The purpose of the CalSAWS Quick Guide is to provide the end-user with functional instructions on the differences between C-IV and CalSAWS.



CalSAWS Migration Guide (CMG)

The purpose of the CalSAWS Migration Guide (CMG) is to provide the end-user with a list of training materials, including WBTs and supplemental training guides, by topic/area.

CalSAWS Reference Guide

The CalSAWS Reference Guide will contain new terminology, name changes, or Questions & Answers (Q&A).

Determining C-IV Migration Training Topics The approach to identify the Training Topics

GATHER

- Gather resources that allow for the Training Topics Analysis
 - Change Impact Analysis (in progress)



- C-IV/LRS Gap Analysis (side by side)
- JIRA reports on CalSAWS development
- C-IV User Lab Outcomes

ANALYZE

- Analyze each resource and collect data on the changes and new functionality
- With the applicable resources in hand, begin analyzing key changes between C-IV and LRS
- Document training topics



• Determine new and key changes between C-IV and LRS that warrant a WBT or a supplemental material (user guides)

C-IV Migration Training Program Draft Web Based Training (WBT) Topics

Training Topic Examples	Description
Multi-month EDBC	This WBT explores the difference between running a single month EDBC in C-IV to running a multi-month EDBC in CalSAWS, and the benefits of doing so.
Non-Compliance	This WBT explores the non-compliance system functions, data collection pages, the triggers by program, the verification list and verification details.
WTW AU Summary Page	This WBT explores the WTW Assistance Unit Summary page with an overview of the entire assistance unit as it pertains to the WTW program. It will provide details on what is displayed on the page, including the required core (Federal) and total (Federal) hours of participation for the WTW Assistance Unit and how monthly core required hours are automatically calculated by EDBC.
Change Reason	This WBT explores the change reasons, how they work and how they will impact EDBC runs. It provides details on the actions that occur after a change reason is selected.
Homeless Assistance	This WBT explores the Homeless Assistance process, how to run THA + PHA concurrently, and how to set up this function.
Imaging – Document Retrieval	This WBT explores the process for accessing documents captured using the Imaging Solution and available via Tasks, Distributed Documents, or Page Specific Searches.

*The above list is non-exhaustive and serves as an example.

WBT Development Life Cycle

Developed to train C-IV County users on the key differences between C-IV and LRS, including new functionality



General Design

Initial phase that outlines the various components of the WBT.



Detailed Design

The WBT detailed desian

is created and

presented using a

PowerPoint storyboard.



Design Review

Review sessions are conducted for the appropriate audience (BAs, QA, etc.). The Design owners walk the reviewers through the General and Detailed Designs.



Build & Test

WBT development uses Adobe Captivate software to develop eLearning modules.

It's an iterative process in collaboration with key stakeholders, Project BAs and application designers.

WBT Knowledge Assessment Pass Rate

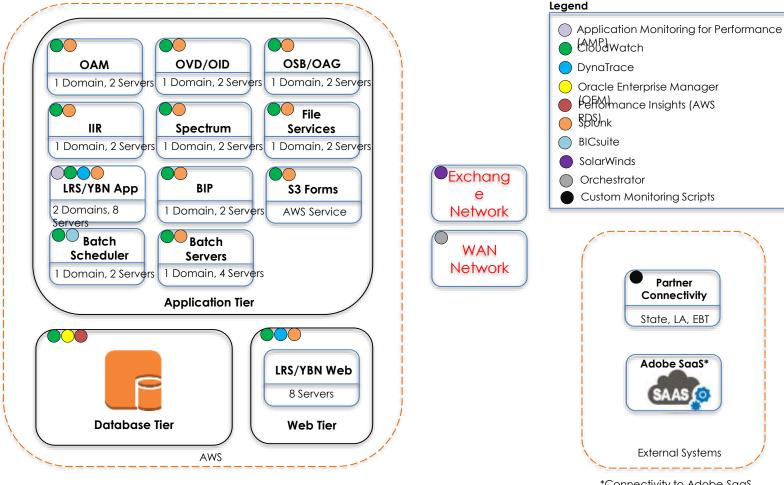


- Trainees must score 80% or more on the WBT knowledge assessment in order to receive a Certificate of Completion
- Trainees will be able to retake the assessment as many times as needed to pass
- Counties have the responsibility to decide corrective actions needed or next steps for staff who do not complete their Training

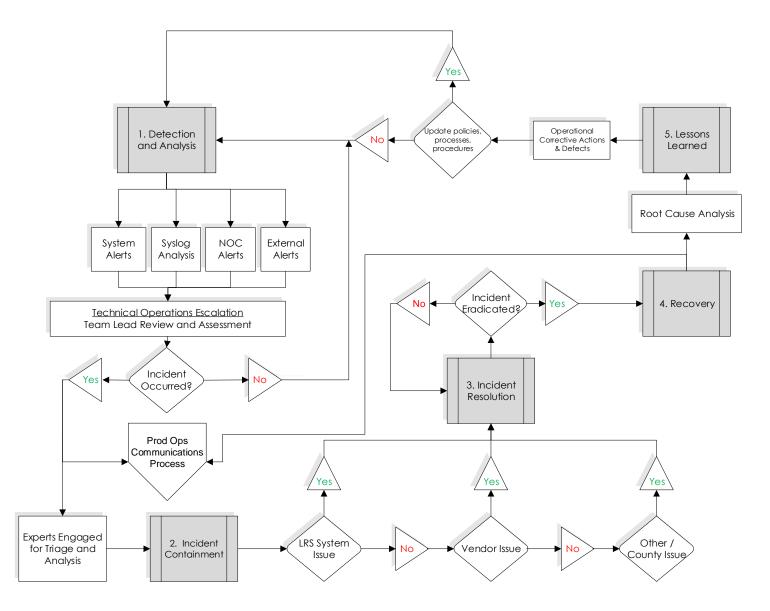
Technical Operations Team Activities Update



Component Monitoring Overview



Monitoring and Incident Management Process



OCAT Update



Executive Summary

- Critical path: schedule is for System Test to complete on 7/10, UAT to begin on 7/20, Training to begin on 7/27, and Go-live on 8/24
- Schedule is tight but here's the plan for critical activities

Critical Path Activity	Plan
As of 7/9, system test pass rate is 89%	4 defects are scheduled to be resolved by 7/10;
and 15 high/medium defects exist.	remaining defects may be resolved after 7/10
Areas of highest fails/defects are:	but before UAT. System Test exit criteria is
ADA and Reports	planned to be met by 7/17.
UAT preparation activities have had some impacts due to system test defects and UAT environment availability	UAT environment delivered to Consortium UAT team on 7/13. System defects impacting UAT to be resolved by 7/10 with a few resolved after 7/10 but before UAT. Cambria and Consortium are working together to review and finalize UAT test scripts and prepare for UAT kickoff.
Training materials review and	Some agreed upon adjustments have been
updates have had some impacts	made to training schedule without impacting
due to system test defects and	overall end dates. Training materials review and
limited environment access	updates are in progress for FDEL date.

High Level Project Timeline

Key Activities	Adjusted Schedule		Impl	on Timeline	
	Start	Finish	Jun	Jul	Aug
Final System Test	6/15/20	7/17/20			
Final UAT Prep/Readiness Check	7/13/20	7/17/20			
UAT Execution	7/20/20	8/20/20	1		
Training Delivery	7/27/20	8/20/20	1		
Cutover and Go-Live	8/21/20	8/24/20			

- Schedule risk opened to monitor/mitigate some delays with finalizing system test and potential impacts to other critical implementation activities converging on tight timelines
 - System test exit criteria
 - Non-functional test exit criteria
 - UAT entry and exit criteria
 - Implementation readiness (deliverables, stakeholders, cutover tasks)
 - Review and update of final training materials
 - Review and update of final system documentation for M&O
- Go-Live
 - Monday, August 24, 2020

Application Development and Test

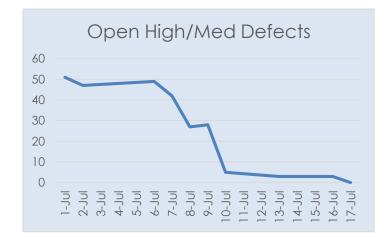
- Development phase was 99.4 % complete as of June 12
- Cambria has requested and the Consortium approved deferral of two items
 - Chatbot provides county users on-screen access to FAQs, how to contact the help desk, how to reset a password
 - No change to go-live date
 - + Plan is to deliver to UAT by 8/10 and allow 2 weeks to test this functionality
 - Business Rules User Interface only for Consortium Admin user to edit
 existing business rules
 - + Change from August go-live to September
 - Does not impact county users as this function is limited to a Consortium Admin role

Final System Test

Sustan Test	Test Cases						Open [Defects	
System Test 7/9/20	Passed	Failed		Execution Coverage	Pass Rate	High	Med	Low	Total
Totals	400	43	8	98%	89%	1	14	17	32

Exit criteria: execute all tests and resolve all high/med defects

- Test cases
 - 8 test cases not executed (related to 5 reports and data extract)
 - 32 test cases failed with High/Med priority defects (steps executed)
 - 11 test cases failed with only Low priority defects (steps executed)
- Defects open
 - High
 - + 1 to be resolved by 7/12
 - 14 Medium
 - + 4 to be resolved by 7/10
 - + 4 to be resolved by 7/12
 - + 4 to be resolved by 7/17
 - + 2 determined not required for UAT



Final System Test

Closeout

 Resolve 13 open High/Med defects required for UAT + 7 potential new defects (projected) from not executed/failed tests = 20 potential defects

			Asc	9 yluL fc		loseout or week	projections 5
	Week 1	Week 2	Week 3	Week 4	Week 5 🥌		Test cases with
Test Cases	15-Jun	22-Jun	29-Jun	6-Jul	13-Jul	_	low priority
Passed	40	250	334	400	437		defects only
Failed	9	53	104	43	15		
Executed	49	303	438	443	452		
Not Executed	403	149	14	9	0		
Pass Rate	82%	83%	76%	90%	97%		20 defects closed;
Total Open Defects	45	71	65	32	12	Contract of Contra	low priority open
Cumulative Closed Defects		54	73	100	120		ien lenen / eleen
					Closing		fects

per week

- Performance test to be completed with analysis and tuning
- Disaster recovery test to be completed
- Penetration test is scheduled to begin on 7/13 and will be conducted by an independent third party

Training and Implementation

Training Materials

- Draft desk guides and web-based training (WBT) materials were submitted on 6/29/20
- Materials are currently in review with Consortium, QA, and some county feedback
 - High volume of comments and documents to review and update
 - Some application functionality being finalized through system test (e.g., reports, ADA) which will result in changes needed to materials

System Maintenance Plan

- Draft system documentation was submitted on 6/26/20
- Materials were reviewed and comments provided
 - High volume of comments and documents to review and update
 - Additional detail and clarifications are needed

County Readiness Tracking

Tasks

ID	Task	Start Date	End Date
1	Define Your Project Team & Communication Plans	4/9/2020	5/7/2020
2	Know Your Stakeholders	4/9/2020	5/7/2020
3	Identify & Prepare for Process Changes	5/7/2020	6/11/2020
4	Prepare for Connectivity	6/11/2020	7/09/2020
5	Prepare for Training	6/11/2020	7/9/2020
6	Execute Self-Paced Training	7/27/2020	8/21/2020
7	Cutover to New System	7/9/2020	8/24/2020
8	Post-Go-Live Support	8/24/2020	9/30/2020

OCAT User Acceptance Test

Preparation Activities

- Logistics
 - Planning for remote testing
 - Preparing tools and support resources needed
 - Testing with CalWIN, C-IV, and LRS Counties
- Testers
 - Up to 35 testers identified
 - Testers will be trained by the OCAT team on UAT execution on OCAT system, tools, and processes
- Scenarios and Cases
 - End-to-end scenarios with OCAT, LRS, C-IV, and CalWIN
 - Currently finalizing test scenarios, cases, and data
 - Received county feedback on test scenarios

OCAT User Acceptance Test Execution Activities

- Test Execution
 - Daily/weekly test execution plans
 - Testers will execute planned test cases, record results, identify defects, and retest/close defects
 - Daily test status and defect triage meetings
 - Weekly test status reports

Staffing Update



CalSAWS Staffing Update Recruitment Statistics

Team	Position	Open	Applicants
	Business Analyst	4 Limited- Term	6
Policy, Design, Governance /	Business Analyst / Tester	3 Long-Term	19
Application Development & Test	Lead Business Analyst	1 Long-Term	10
	Lead Business Analyst CDSS	1 Long-Term	7
	Change Management Lead	1 Limited- Term	13
Customer Engagement	Implementation Coordinator	3 Limited- Term	15
	Cloud Analyst	1 Long-Term	4
Technical Operations	Conversion Analyst	3 Limited- Term	6
	Help Desk Analyst	1 Limited- Term	5
РМО	PMO Analyst	1 Long-Term	11
	Total	19	96

Individual Applications: 43

CalSAWS Staffing Update

Next Steps

- Select Candidates to Interview and Schedule Interviews 7/1 – 7/10
- Interviews 7/13 7/31
- Identify selections 8/3 8/14
- Notify Directors and Receive Director Confirmation 8/17 – 8/21
- Candidate Notifications & Accept/Reject 8/24 8/28

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28	29	30	31		

Procurement Update

- Portal/Mobile
- CalWIN OCM
- Central Print



CalSAWS Statewide Portal/Mobile Application Timeline

PROCUREMENT EVENT	DATE
Released RFP	November 4, 2019
Contractor Proposal Due Date	January 22, 2020
Evaluated Proposals and Prepared Vendor Selection Report	January 23 – April 21, 2020
Consortium Issued Notice of Intent to Award to Deloitte	April 22, 2020
Contract Negotiations	April 27 – May 13, 2020
State, Federal and JPA Board of Directors Approval of Agreement	May 14 – August 7, 2020
Start Date of Statewide Portal/Mobile App Vendor	August 10, 2020
Portal/Mobile App Go-Live	September 2021

CalWIN Training, OCM & Implementation Support Timeline

	DATE
Released RFP	December 17, 2019
Contractor Proposal Due Date	April 23, 2020
Evaluate Proposals and Prepare Vendor Selection Report	April 24 – August 5, 2020
Consortium Issues Notice of Intent to Award	August 6, 2020
Contract Negotiations	August 10 – September 1, 2020
State, Federal and Consortium JPA Board of Directors Approval of Agreement	September 4 – December 1, 2020
Planned Start Date of CalWIN Contractor	December 2, 2020

• Vendor oral presentations and key staff interviews: July 6-9.

Central Print Procurement New Timeline

PROCUREMENT EVENT	DATE
Develop Requirements and RFP	January 21 – April 22, 2020
Consortium RFP Review and Approval	April 23 – May 5, 2020
State RFP Review and Approval	May 6 – July 6, 2020
Federal RFP Review and Approval	July 8, 2020
RFP Release	July 8, 2020
Bidder's Conference	July 16, 2020
Contractor Proposal Due Date	September 8, 2020
Evaluate Proposals and Prepare Vendor Selection Report	September 9 – October 30, 2020
Consortium Issues Notice of Intent to Award	November 2, 2020
Contract Negotiations	November 4 – 12, 2020
State, Federal and Consortium JPA Board of Directors Approval of Agreement	November 16, 2020 – February 9, 2021
Planned Start Date of Central Print Contractor	February 22, 2021

• Have requested waiver from prior approval from CMS and expedited review from FNS. In order to accommodate a new start date of February 2021, the Consortium has moved the RFP release date to July 8, 2020 (from July 28). Should federal sponsors require changes, addenda to the RFP will be issued.

CalSAWS Risks and Issues Update



CalSAWS Risk & Issues Executive Summary

	1 Minimal	2 Minor	3 Significant	4 Major	5 Unacceptable
90% Near Certainty					201
70% Highly Likely				203 228 211 225	
50% Possible			208 219 227 P		204 225
30% Unlikely				209 214	102 221
10% Highly Unlikely			206 223 224	104	

DD&I = 16

M&O= 2

High = 7

Med = 7

Low = 4

Risk Total: 18

Issue Total: 1

New Risk Total: 1

Avg Project Exposure: 1.7

Legend

Risk 102: Lack of Annual Project Funding may cause schedule delay or reduction in scope for CalSAWS M&O, and all existing projects

Risk 104 (Med to Low): Functionality gaps between the 3 systems may result in a loss of functionality for some counties during migration to CalSAWS

Risk 201: Pace of Policy Changes may exceed capacity of App-Dev team, resulting in less automation

Risk 203: Project communications must be enhanced, otherwise stakeholder / audience needs will not be met

Risk 204: Volume of changes to baseline code may cause degradation in quality & increase in defects

Risk 206 (Med to Low): Delays in staffing the Consortium and/or Accenture teams may delay the project schedule

Risk 208: CalHEERS release readiness delays may negatively impact CalSAWS delivery timelines, slowing critical updates to counties

Risk 209: CalWIN Counties may not be adequately supported for change readiness prior to December 2020 until the CalWIN Change Management Procurement vendor starts

Risk 211: Delay in consolidated portal procurement and implementation may impact C-IV and CalWIN go-live dates

Risk 214: If counties are not able to adapt to the regional governance structure, the project schedule is at risk regarding decision making

Risk 219: Facilitation across Committees is inconsistent, which may impact the project schedule and quality of decisions

Risk 221: The instability of two 3rd party software products from Oracle causes LRS production performance degradation.

Risk 223 (Med to Low): CalSAWS DD&I / LRS Technology Operations ability to manage, maintain, monitor, and deliver a scalable and sustainable 58 county CalSAWS.

Risk 224 (Med to Low): The implementation of ForgeRock may delay the OCAT Schedule

Risk 225: The ForgeRock solution may not perform as expected, causing LRS production performance degradation.

Risk 226: COVID-19 relief efforts may impact CalSAWS DD&I schedule.

Risk 227: County ancillary funding availability may impact counties' availability to align with the Ancillary System Conversion project plan.

Risk 228 (New): Delayed access to the OCAT system may impact review/approval timeline for OCAT Training Material deliverable.

Issue 118: Some non-production environments using Delphix software do not have the desired responsiveness

CalSAWS Project Issue and High/New Risk Update

Risk/ Issue #	Risk/Issue Name	Risk Status	Risk Trend
Issue 118	Some non-production environments using Delphix software do not have the desired responsiveness	The Project team is continuing to work with AWS and Delphix for the new 6.0.2 version; throughput tests with various workloads are being conducted to assess configurations and performance. Simulated online and batch performance tests on the new Delphix version showed significant improvement over the existing Delphix engine.	N/A
201	Pace of Policy Changes may exceed capacity of the project teams, resulting in less automation	The team continues to work through upcoming proposed policy changes with the State to determine appropriate implementation dates. This approach was effective with the many COVID-19 changes, and we continue to work together. The budget has been agreed to and we are awaiting final budget numbers. There are some agreed to dates for implementation of some of the budget items if final policy is received in a timely manner. There are also some items that don't have specific implementation dates, and the dates will be dependent on receipt of final policy. Estimates of timeline were provided to the State within our policy spreadsheet in June as part of the budget process. The Project is initiating meetings with OSI and CDSS on priority and timeline of policy items introduced through the budget process.	\Leftrightarrow
203	Project communications must be enhanced, otherwise stakeholder / audience needs will not be met	The YBN and C4Yourself broadcast is a new feature to be deployed in Release 20.07. Information on Contracts/Financials was added under Public Information in "About Us" on the CalSAWS.org site. As part of the CalSAWS Enhanced Communications Strategy, the team began to determine Creative Campaign Tactical Experience and analyzed Survey Pulse Polls data. The Communication strategy team is continuing to work through the proposed CalSAWS communication campaign and will be meeting with Leadership on proposed implementation channels, working closely with Customer Engagement.	\Leftrightarrow
204	Volume of changes to baseline code may cause degradation in quality & increase in defects	Mitigation measures include: Future scheduled Automated Regression Test (ART) enhancement including OCAT Automation R20.05 and transaction coverage by business area (R20.05.x priority). Implement SonarQube for automated code quality assessment with each build.	\Leftrightarrow
211	Delay in consolidated portal procurement and implementation may impact C-IV and CalWIN go- live dates	The onboarding of the Deloitte team is in process with the Consortium. The vendor plans to start the Statewide Portal/Mobile App work on August 10, 2020 and deploy in September 2021. This is a high level risk that is trending to medium.	
225	The ForgeRock solution may not perform as expected, causing LRS production performance degradation	The team is conducting performance testing in coordination with LA County. The Performance test results demonstrate that the ForgeRock platform is able to support the load/scale and expected response times of the LRS/CalSAWS application. The ForgeRock deployment into the System Test Environment was completed on June 19, 2020. The Performance Test with ForgeRock will be executed in the 20.07 Release and Operational Readiness Verification is scheduled to complete by July 17, 2020. The Security Stack replacement is scheduled for August 8, 2020 as part of the 20.07 Priority Release. The ForgeRock implementation was moved to early August and is currently in System Test. This is a high level risk that is trending to medium.	
226	COVID-19 relief efforts may impact CalSAWS DD&I schedule	The priority for the CalSAWS Project is responding to emergency and policy updates related to COVID-19. To date, the Project has handled the COVID-19 changes without impact to the migration schedule. The Project continues work to undo COVID-19 changes. It appears the PHE will be extended for another 90 days, through October 25, 2020 and the project has discussed with DHCS the need to put together ideas for moving forward once the PHE is ended.	\Leftrightarrow
228 (New)	Delayed access to the OCAT system may impact review/approval timeline for OCAT Training Material deliverable	Inability to access the OCAT system prevents training material reviewers from fully validating the functionality of 24+ desk guides and 4-5 training videos. If the timeline for training material review/approval slips, there may be a direct impact to training timeline for County Champions, UAT Participants, CalSAWS staff and End Users. Limited system access has been granted for review.	
Risk Tre	end Legend Remains same	e 🖉 Trending to High 🕎 Trending to Medium 🐋 Trending to Low 🛛 Realized into an Issue 💽 Retired Risk	

State Partners Updates

- OSI
- CDSS
- DHCS



Regional Updates



JPA Board July Meeting Overview



Adjourn Meeting

