Cal**SAWS** | Project Steering Committee Meeting

May 20, 2021

Agenda

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

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

   • 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 April 15, 2021 PSC Meeting and review of Action Items.

Informational Items
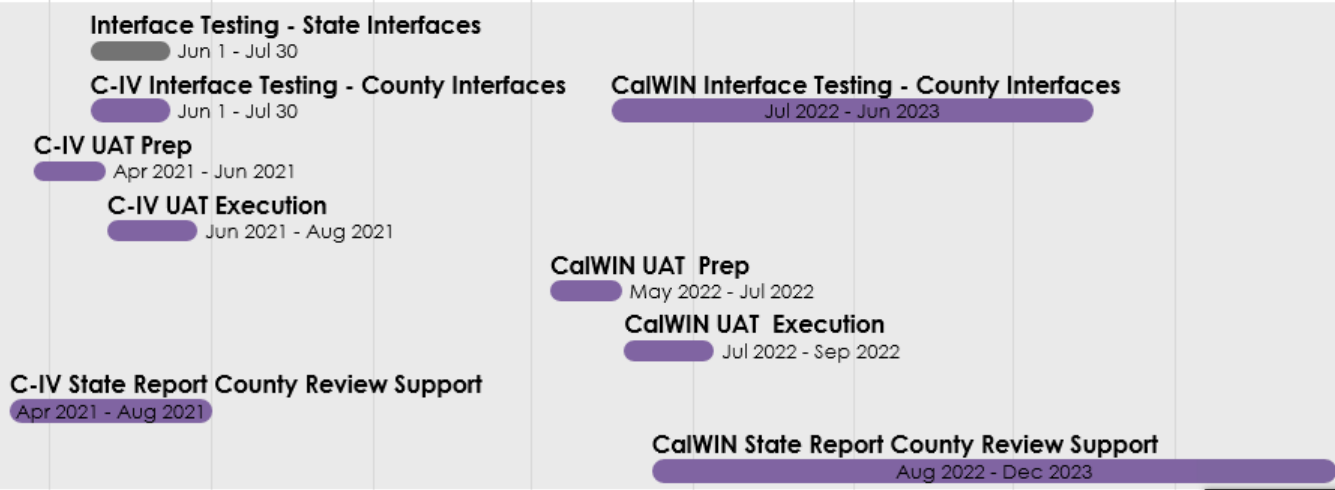
CalSAWS Gantt Chart Update

CalSAWS Project Gantt

High Level Overview – App Dev & Test

CalSAWS Project Gantt

High Level Overview - Conversion

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

39- County Go-Live on CalSAWS
BenefitsCal Release 1.0
Imaging C-IV Go-Live
Central Print C-IV Go-Live
Sep 2021

Central Print LA Go-Live
Aug 2021

Imaging LA Go-Live
Nov 2021

Today

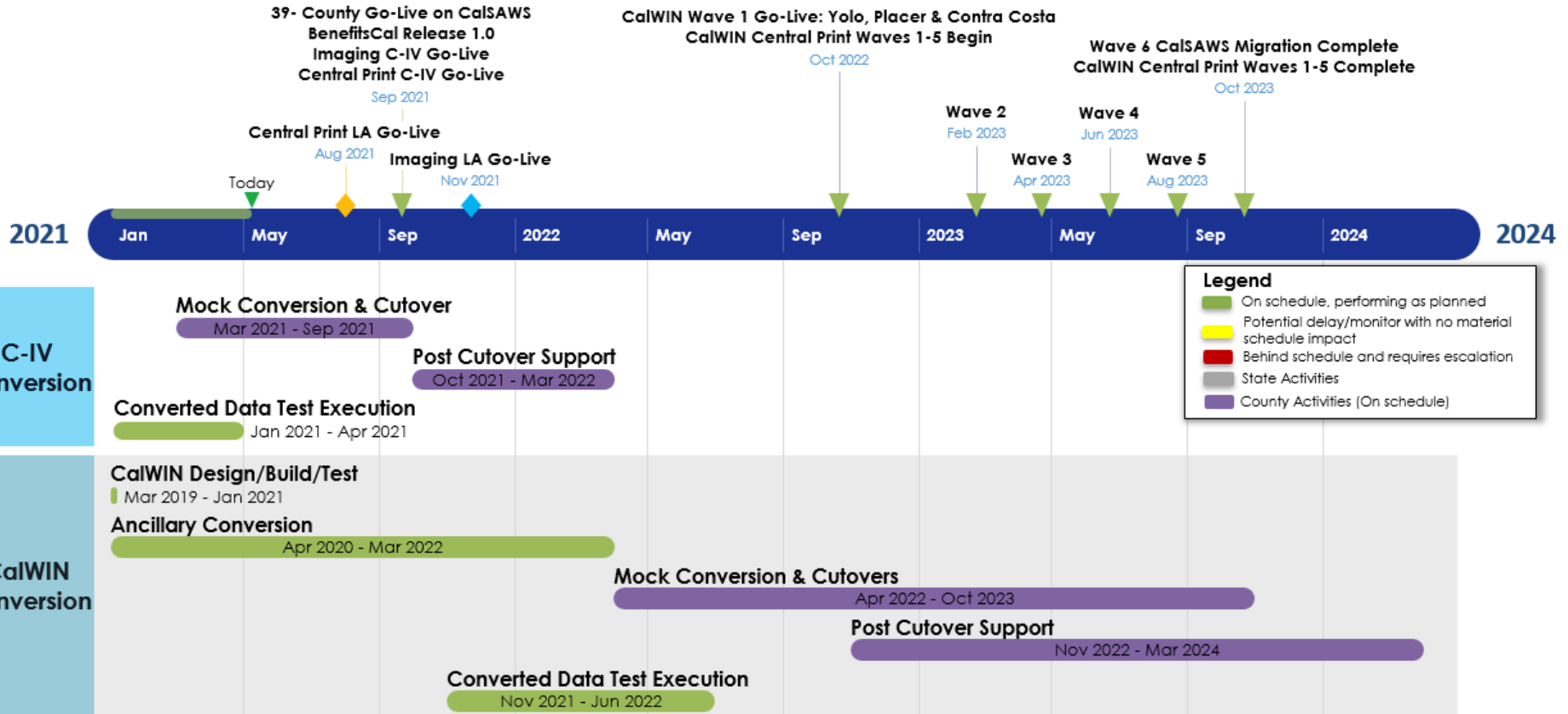| 2021 | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | 2021 |

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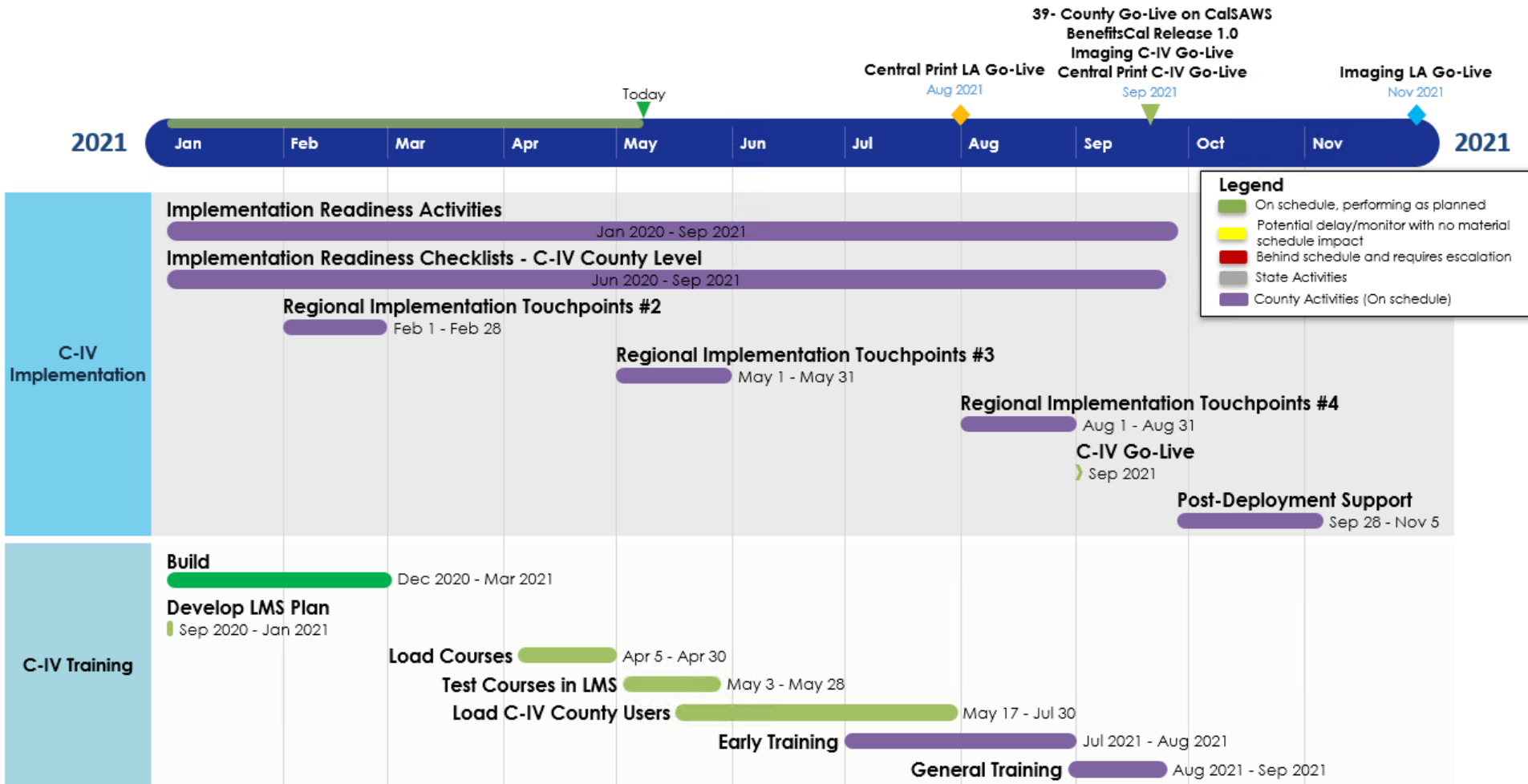- State Activities
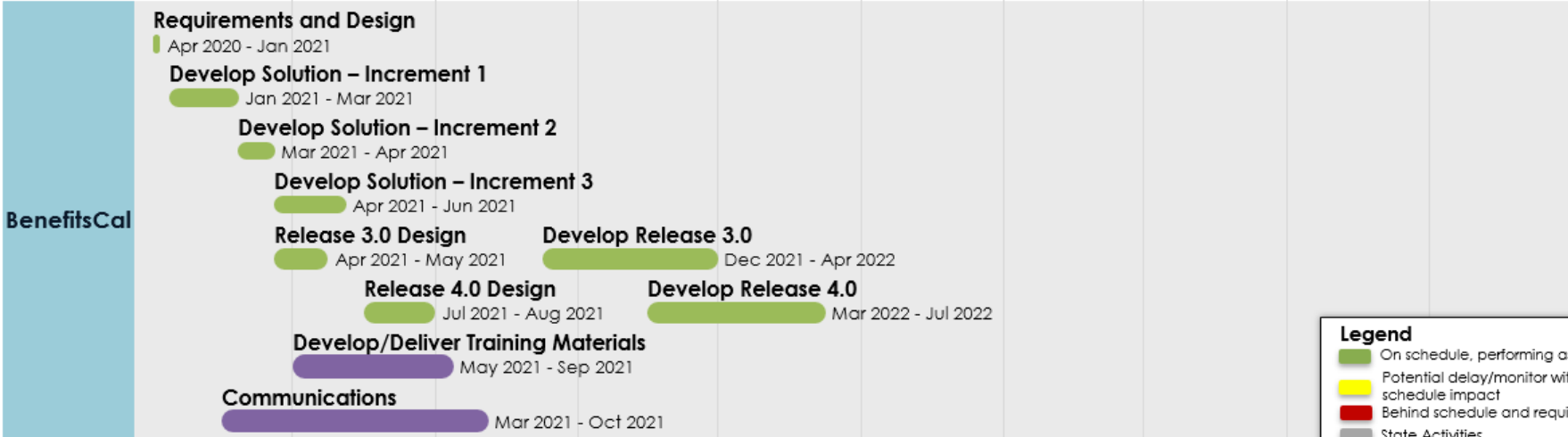- County Activities (On schedule)

C-IV Implementation

Implementation Readiness Activities
Jan 2020 - Sep 2021

Implementation Readiness Checklists - C-IV County Level
Jun 2020 - Sep 2021

Regional Implementation Touchpoints #2
Feb 1 - Feb 28

Regional Implementation Touchpoints #3
May 1 - May 31

Regional Implementation Touchpoints #4
Aug 1 - Aug 31

C-IV Go-Live
Sep 2021

Post-Deployment Support
Sep 28 - Nov 5

C-IV Training

Build
Dec 2020 - Mar 2021

Develop LMS Plan
Sep 2020 - Jan 2021

Load Courses
Apr 5 - Apr 30

Test Courses in LMS
May 3 - May 28

Load C-IV County Users
May 17 - Jul 30

Early Training
Jul 2021 - Aug 2021

General Training
Aug 2021 - Sep 2021

CalSAWS Project Gantt
High Level Overview - Imaging

CalSAWS Project Gantt

High Level Overview - BenefitsCal

39- County Go-Live on CalSAWS
BenefitsCal Release 1.0
Imaging C-IV Go-Live
Central Print C-IV Go-Live
Sep 2021

CalWIN Wave 1 Go-Live: Yolo, Placer & Contra Costa
CalWIN Central Print Waves 1-5 Begin
Oct 2022

Wave 6 CalSAWS Migration Complete
CalWIN Central Print Waves 1-5 Complete
Oct 2023

Imaging LA Go-Live
Nov 2021

Central Print LA Go-Live
Aug 2021

BenefitsCal Release 2.0
Dec 2021

BenefitsCal Release 3.0
Apr 2022

BenefitsCal Release 4.0
Aug 2022

Wave 2
Feb 2023

Wave 3
Apr 2023

Wave 4
Jun 2023

Wave 5
Aug 2023

Today

2021 — Jan — May — Sep — 2022 — May — Sep — 2023 — May — Sep — 2024 — 2024

BenefitsCal

Requirements and Design
Apr 2020 - Jan 2021

Develop Solution – Increment 1
Jan 2021 - Mar 2021

Develop Solution – Increment 2
Mar 2021 - Apr 2021

Develop Solution – Increment 3
Apr 2021 - Jun 2021

Release 3.0 Design
Apr 2021 - May 2021

Develop Release 3.0
Dec 2021 - Apr 2022

Release 4.0 Design
Jul 2021 - Aug 2021

Develop Release 4.0
Mar 2022 - Jul 2022

Develop/Deliver Training Materials
May 2021 - Sep 2021

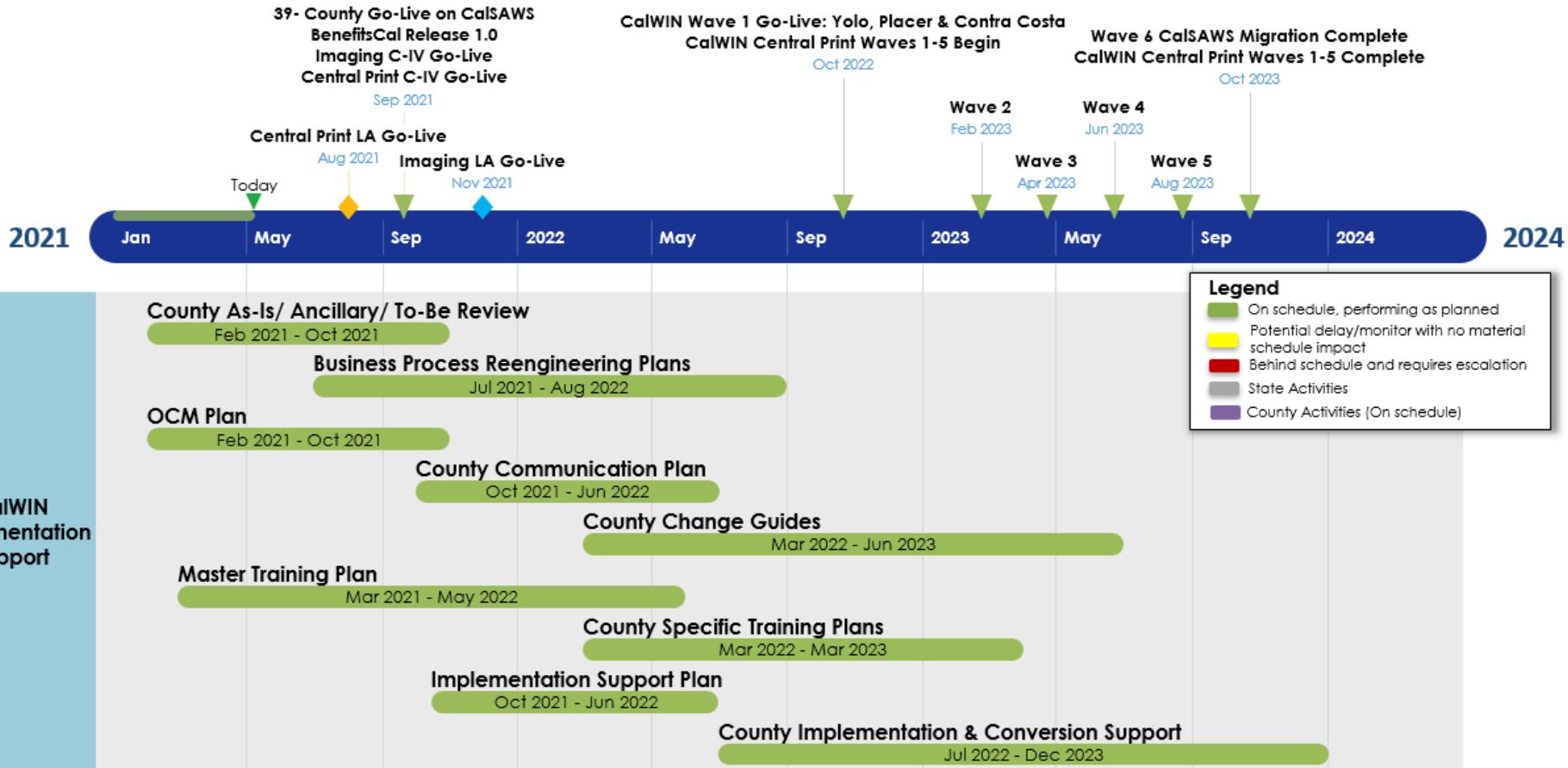**Communications**
Mar 2021 - Oct 2021

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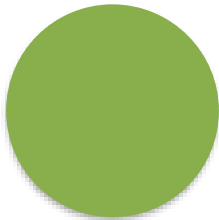- State Activities
- County Activities (On schedule)

CalSAWS Project Gantt

High Level Overview – CalWIN OCM

39- County Go-Live on CalSAWS
BenefitsCal Release 1.0
Imaging C-IV Go-Live
Central Print C-IV Go-Live
Sep 2021

CalWIN Wave 1 Go-Live: Yolo, Placer & Contra Costa
CalWIN Central Print Waves 1-5 Begin
Oct 2022

Wave 6 CalSAWS Migration Complete
CalWIN Central Print Waves 1-5 Complete
Oct 2023

Central Print LA Go-Live
Aug 2021

Imaging LA Go-Live
Nov 2021

Wave 2 — Feb 2023
Wave 3 — Apr 2023
Wave 4 — Jun 2023
Wave 5 — Aug 2023

Today

2021 | Jan | May | Sep | 2022 | May | Sep | 2023 | May | Sep | 2024 | **2024**

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

CalWIN Implementation Support

- **County As-Is/ Ancillary/ To-Be Review** — Feb 2021 - Oct 2021
- **Business Process Reengineering Plans** — Jul 2021 - Aug 2022
- **OCM Plan** — Feb 2021 - Oct 2021
- **County Communication Plan** — Oct 2021 - Jun 2022
- **County Change Guides** — Mar 2022 - Jun 2023
- **Master Training Plan** — Mar 2021 - May 2022
- **County Specific Training Plans** — Mar 2022 - Mar 2023
- **Implementation Support Plan** — Oct 2021 - Jun 2022
- **County Implementation & Conversion Support** — Jul 2022 - Dec 2023

CalWIN Implementation Support Services

Business Process Reengineering (BPR) Update

- Received sign-off for formal the As-Is Work Products for Contra Costa, Placer, Yolo, Tulare, Santa Barbara, Santa Clara Counties, Orange, and Ventura counties.

- Solano and Santa Cruz county-specific As-Is BPR Sessions are complete.

- Conducted an onsite pilot visit to San Diego for As-Is BPR Sessions and a virtual visit for San Mateo County's As-Is Sessions.

- Began As-Is process sessions in Fresno and Alameda Counties on May 17th

- Presented the pre-work approach to prepare Wave-1 Counties for To-Be Processes at the April OPAC meeting.

- Began planning for the global To-Be Process Flows and Feedback from CalSAWS BAs and SMEs.

BPR Team: As-Is Progress Report

Highlighted = Complete

As of 05/17/21

County	Session Start Date	Session End Date	First Review Start Date	First Review End Date	Incorporate Feedback	Start Final Review	County Sign-Off on FINAL As-Is Processes
Wave 1							
Contra Costa	02/22/21	03/25/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
Placer	02/22/21	03/12/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
Yolo	03/01/21	03/19/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
Wave 2							
Tulare	03/01/21	03/19/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
Santa Clara	03/22/21	04/02/21	04/06/21	04/16/21	04/23/21	04/26/21	04/30/21
Wave 3							
Santa Barbara	03/22/21	04/02/21	04/05/21	04/16/21	04/23/21	04/26/21	04/30/21
Orange	04/05/21	04/16/21	04/19/21	04/30/21	05/07/21	05/10/21	05/14/21
Ventura	04/05/21	04/16/21	04/19/21	04/30/21	05/07/21	05/10/21	05/14/21
Wave 4							
Solano	04/19/21	04/30/21	04/30/21	05/14/21	05/21/21	05/24/21	06/01/21
Santa Cruz	04/19/21	04/30/21	04/30/21	05/14/21	05/21/21	05/24/21	06/01/21
San Mateo	05/03/21	05/14/21	05/17/21	05/28/21	06/07/21	06/08/21	06/15/21
San Diego	05/03/21	05/14/21	05/17/21	05/28/21	06/07/21	06/08/21	06/15/21
Wave 5							
Alameda	05/17/21	05/28/21	06/01/21	06/18/21	06/22/21	06/23/21	06/30/21
Fresno	05/17/21	05/28/21	06/01/21	06/18/21	06/22/21	06/23/21	06/30/21
Sonoma	06/14/21	06/25/21	06/28/21	07/09/21	07/16/21	07/19/21	07/23/21
Wave 6							
San Francisco	06/07/21	06/18/21	06/21/21	07/02/21	07/09/21	07/12/21	07/16/21
Sacramento	06/14/21	06/25/21	06/28/21	07/09/21	07/16/21	07/19/21	07/23/21
San Luis Obispo	06/01/21	06/11/21	06/14/21	06/25/21	07/02/21	07/06/21	07/09/21

Organizational Change Management Updates
We're Up & *Running!*

Key Takeaways from the April & May Sessions:

- ✦ POCs gained understanding of key OCM concepts.

- ✦ Counties already actively communicating about journey to CalSAWS.

- ✦ Offered deeper dive into OCM activities.

- ✦ Counties engaged in identifying areas of impact.

- ✦ Counties already progressing on the Adoption Curve.

- ✦ Introduction to engaging County end users.

Organizational Change Management Update

OCM Point of Contact (POC) Meetings are held monthly

Discussion Topics:

April

- Kickoff Session
- Intro to OCM Approach
- Intro to POC Role
- Shared Training's CalSAWS Awareness & Learning Toolkit

May

- Intro to County End User Engagement Approach
- POC Roles & Responsibilities

June

- Intro to Change Impacts
- Change Impact Analysis
- Change Impact Tracker

Training Update

Training Advisory Council (TAC) Meetings are held monthly.

April
- CalWIN to CalSAWS: Overview & Demonstration
- CalSAWS Awareness & Learning Toolkit

May
- Approach to Training CalWIN Counties
- Approach to Audience Analysis

June
- Review of Instructional Design Maps & ILT Templates

Key Takeaways from the April TAC

- ✓ The workshop, ***CalWIN to CalSAWS Overview and Demonstration***, was attended by over 300 CalWIN county staff.
- ✓ Q & A from the session was distributed to the counties.
- ✓ The *CalSAWS Awareness and Learning Toolkit* is available to the counties now in the CalSAWS Web Portal.

What's in the Toolkit and How Do I Use it?

A set of existing Project tools and materials identified **for you** to expand your understanding of CalSAWS

- ✦ All in one place – CalSAWS Web Portal
- ✦ Easy to access

Follow the instructions, click the links, and go!

Resources Accessed in One Place

Implementation Support Services Timelines

- Created a holistic view of the project, by Wave, to show the activities and key milestones: Waves 2 and 3 are now ready, as follows.

- Intent is to delineate activities by responsibility for the lifecycle of the project.

- Depict the interdependencies for the lifecycle of the project.

- Each Wave will have their own timeline.

- Wave-by-Wave meetings will start within the next few months.

Implementation Support Services Timeline
Wave 2: Tulare and Santa Clara
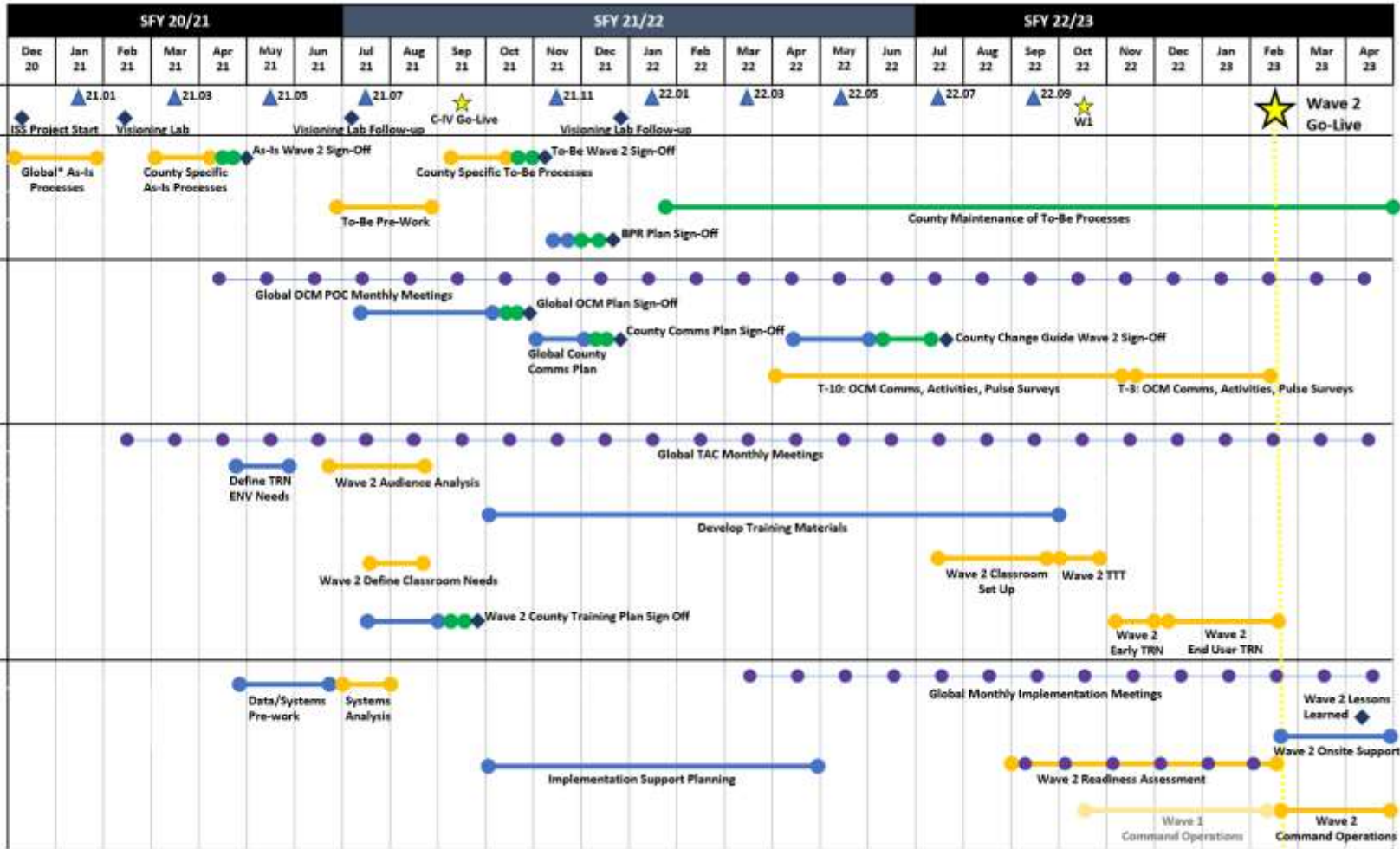
Implementation Support Services Timeline
Wave 3: Santa Barbara, Orange, and Ventura
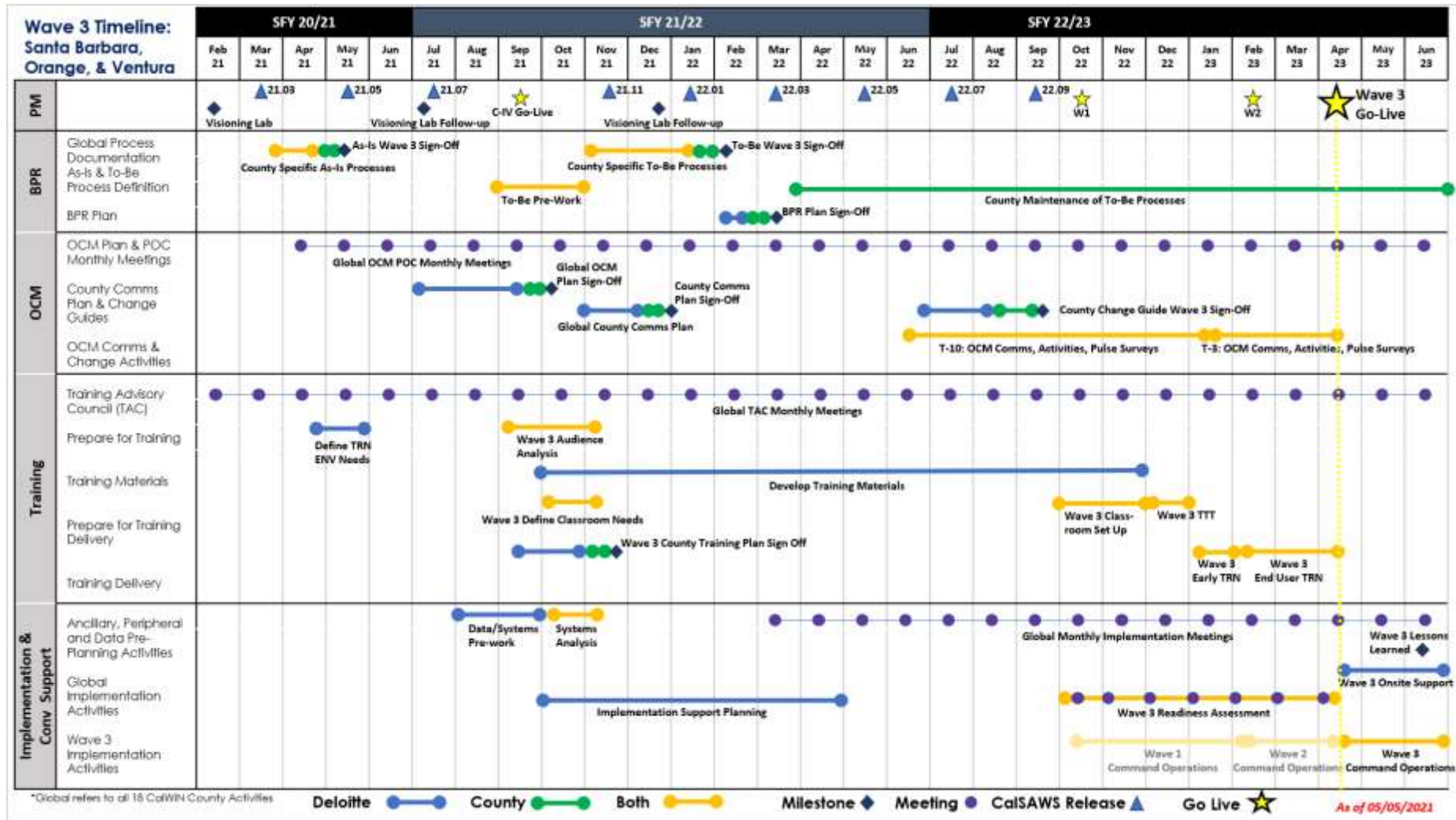
BenefitsCal Update
- Outreach, Training, and Public Awareness Plans
- Conversion of Customer Accounts
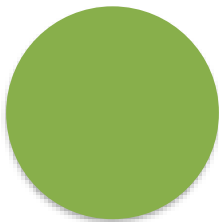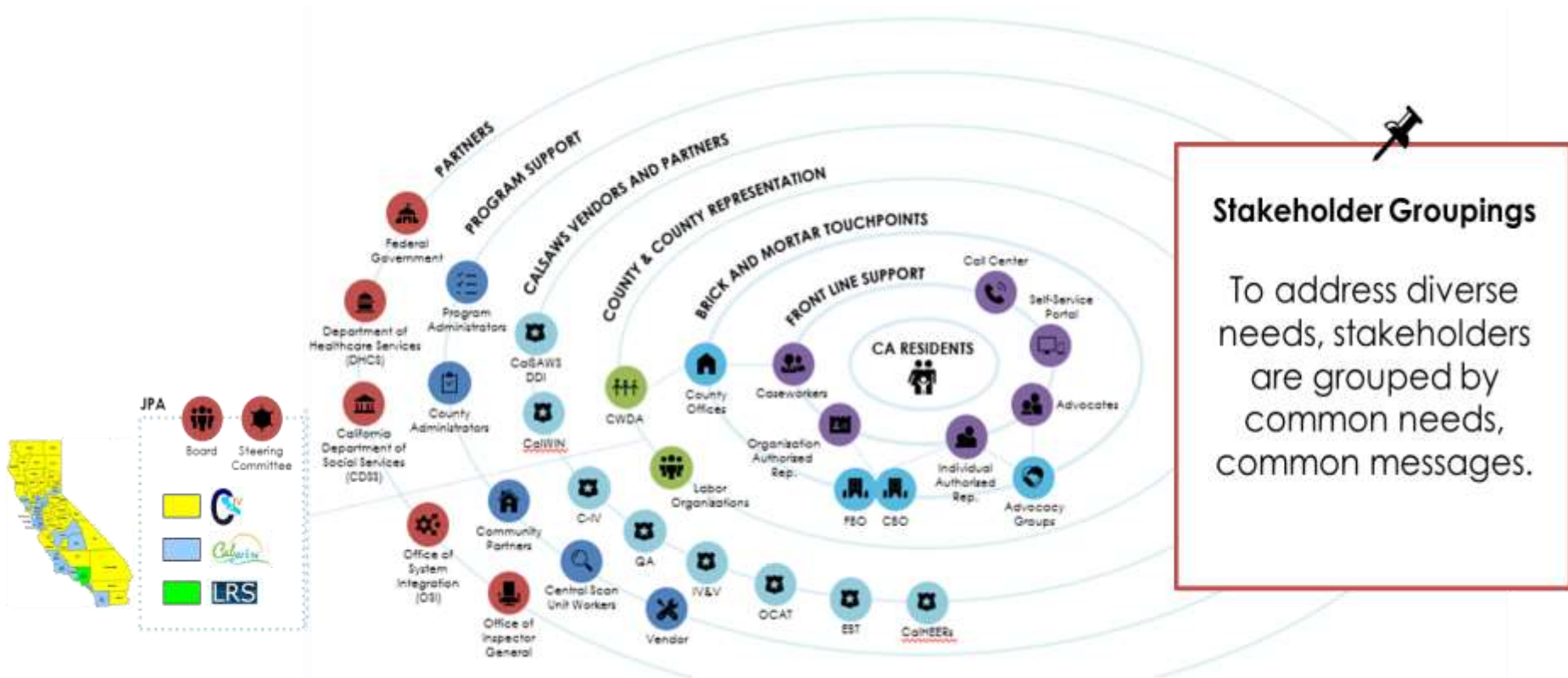
Communications Strategy
Our Aspiration

To communicate the right messages to stakeholders, at the right time, to provide a **positive Customer-first experience** with the new BenefitsCal.

Through proactive communication, we can **build trust** and increase **long-term adoption**.
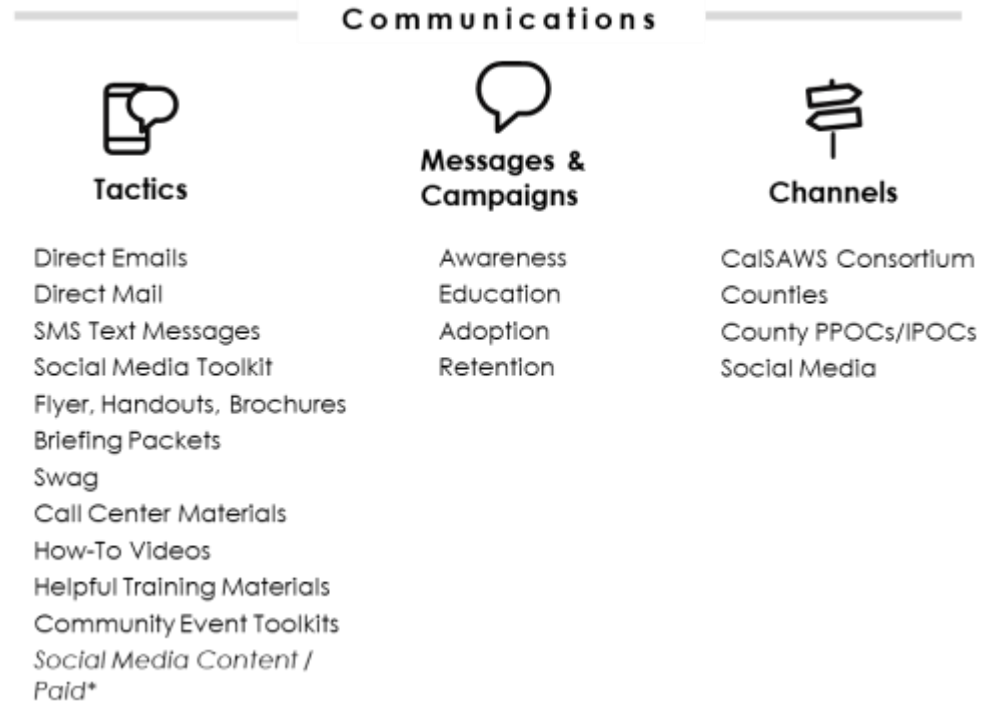
BenefitsCal Stakeholders

The stakeholder ecosystem for BenefitsCal is broad and diverse.

Stakeholder Groupings

To address diverse needs, stakeholders are grouped by common needs, common messages.

Communications Strategy

Leverage a centralized multi-channel communications strategy to drive adoption of BenefitsCal and #EngagePeopleBetter with hyper-targeted messaging to the right people at the right time.

Key tenets of the approach

Lead with Value

Craft communications that lead with the value statement for the targeted audience.

Data-Driven

Use data to drive the plan, share the right information with Customers at the right time.

Keep It Simple

Communicate with Customers at their reading level and in their preferred language.

Timing is Everything

Send Customer communications at the right time, in segments, based on the Customer's benefits status.
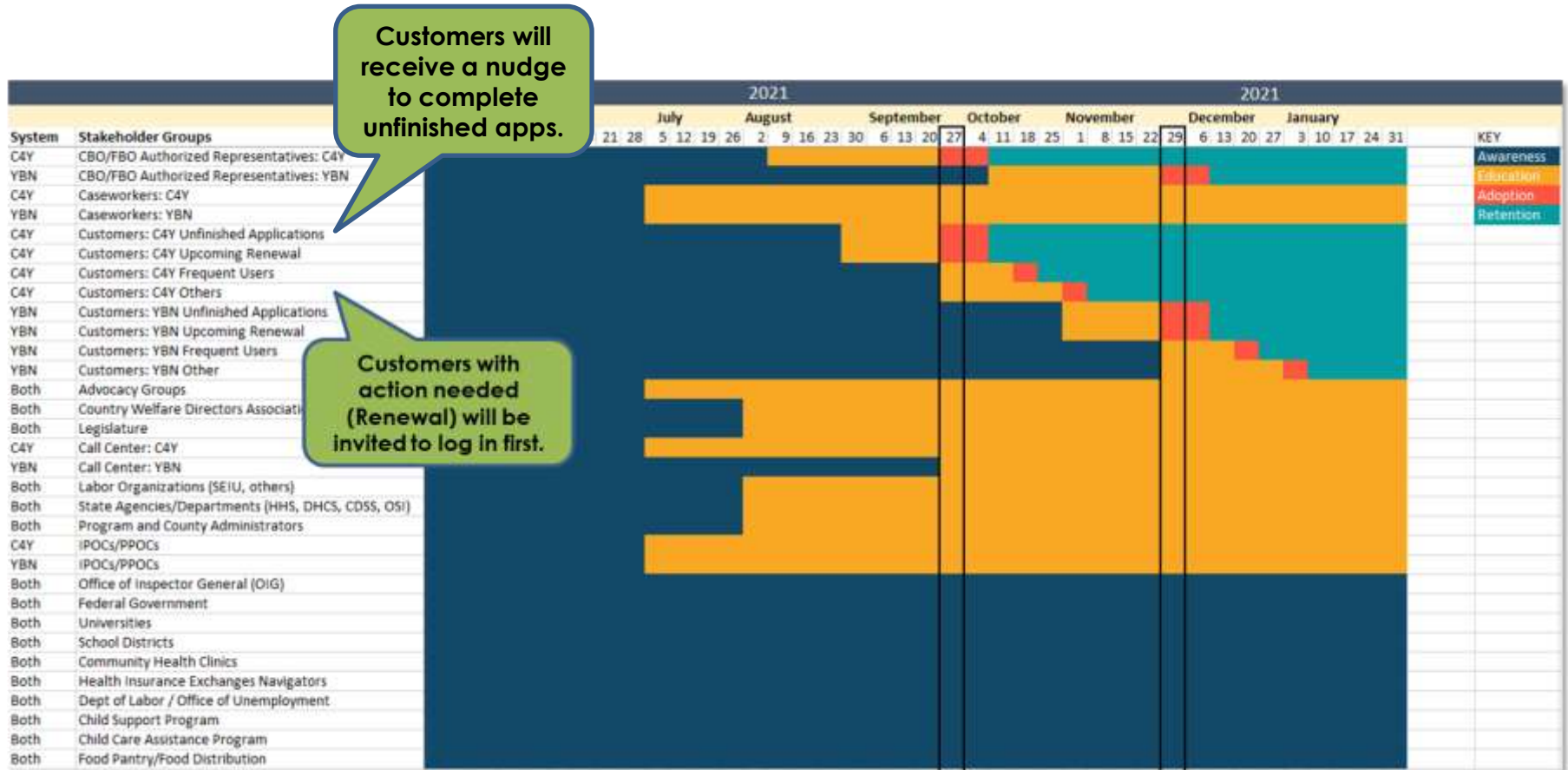
Communications

Tactics

Direct Emails
Direct Mail
SMS Text Messages
Social Media Toolkit
Flyer, Handouts, Brochures
Briefing Packets
Swag
Call Center Materials
How-To Videos
Helpful Training Materials
Community Event Toolkits
Social Media Content / Paid

Messages & Campaigns

Awareness
Education
Adoption
Retention

Channels

CalSAWS Consortium
Counties
County PPOCs/IPOCs
Social Media

Planning BenefitsCal Communications

BenefitsCal Campaigns

Key messages for different phases include awareness, education, conversion, and support.

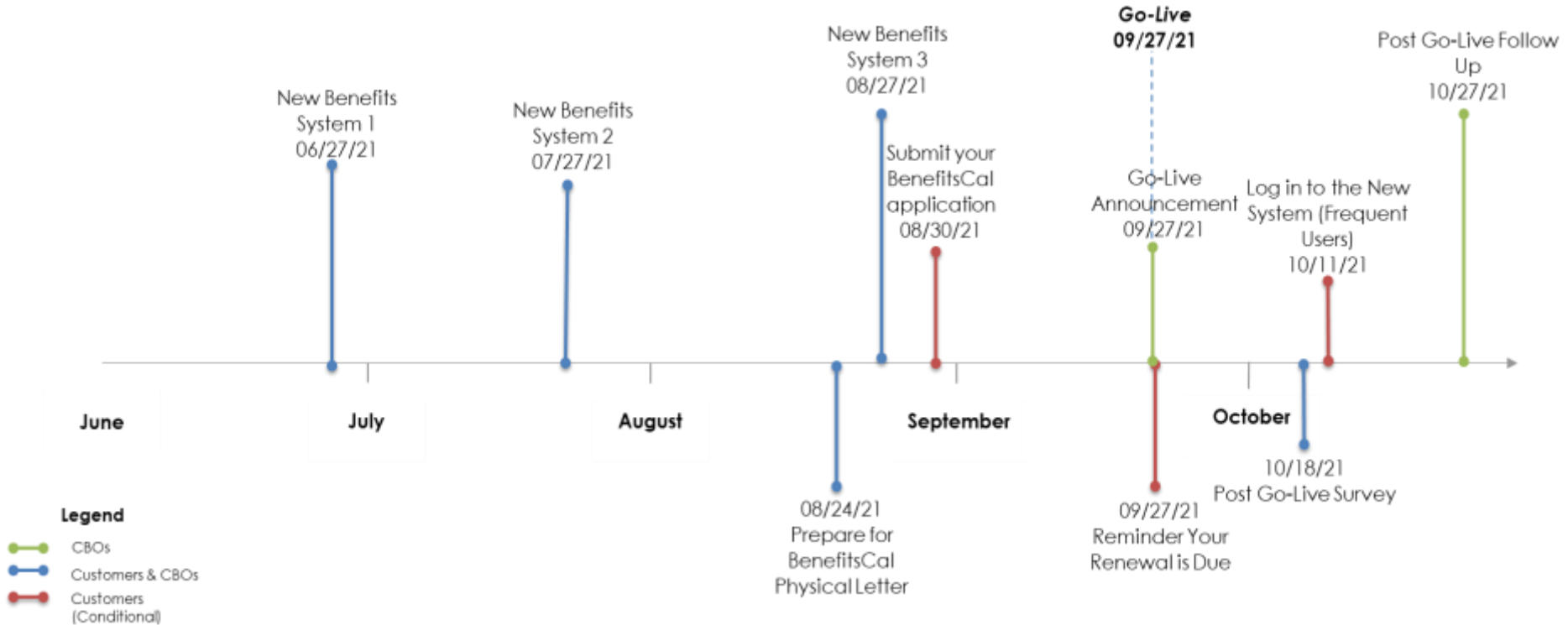|	Examples	Tools	
1 Awareness	• What is BenefitsCal • Who can use it • When is it available • Where can I find it	• Organic Social Media • Paid Social Media* • Paid Search * • SEO	• Community Event Toolkit • Lobby Toolkits
2 Education	• How do I get started / create an account • Training Materials • Key Facts (# of apps, Customers)	• Social Media Toolkits • Direct Mail • Briefing Packets	• Mass Email • SMS Outreach
3 Adoption	• Call-to-action (Log in today) • What do I need to do to log in • FAQs	• SMS Outreach • Mass Email	• How-to Videos • Training Guides/FAQs
4 Retention	• Post go-live emails and encouragement • Surveys to learn more • Renewal Reminders	• Surveys • Mass Emails • SMS Reminders	

Timing of Campaigns

Timing is everything. Using Customer and case data, we will time the communications and segment them by stakeholder group and application/case status.
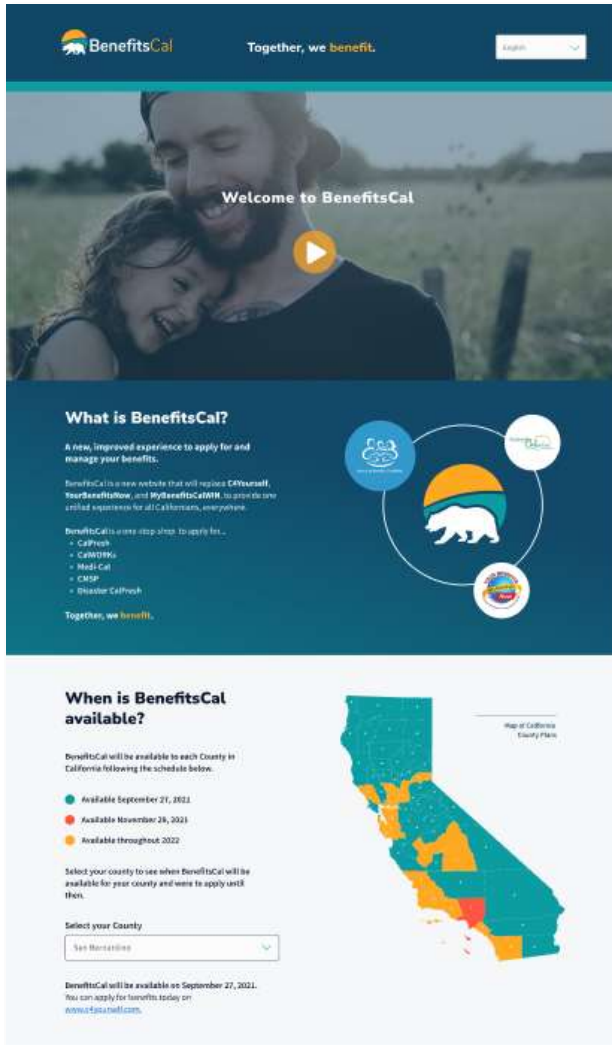
Example: September Release

Planned Communications for CBOs and Customers

New Benefits System 1
06/27/21

New Benefits System 2
07/27/21

New Benefits System 3
08/27/21

Submit your BenefitsCal application
08/30/21

Go-Live
09/27/21

Go-Live Announcement
09/27/21

Log in to the New System (Frequent Users)
10/11/21

Post Go-Live Follow Up
10/27/21

June   July   August   September   October

08/24/21
Prepare for BenefitsCal Physical Letter

09/27/21
Reminder Your Renewal is Due

10/18/21
Post Go-Live Survey

Legend
- CBOs
- Customers & CBOs
- Customers (Conditional)

BenefitsCal.com

A go-to resource for project updates

- In the coming weeks, a new BenefitsCal.com website will be published

- Site will include project updates, go-live dates by counties, as well as the **social media toolkit**

- Site will continue to redirect users to C4Y, YBN, or MyBCW as appropriate for current needs

BenefitsCal Training Plans

Summary Plans

How-To Video
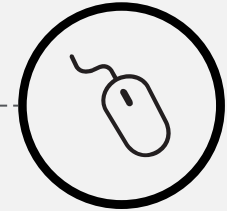*16 videos*
to assist all users with common tasks.

Quick Reference Guide
17 quick reference guides to support County Staff and CBOs/FBOs.

Job Aid
1 job aid for System and County Administrators.

Training Scenarios
6 training scenarios that County Staff can use within the Training Environment.

Plan	Develop	Deliver
April - May 2021	*June - July 2021*	*August 2021*

User Conversion Plans

User Account Conversion

Frequently Asked Questions (FAQ)

1

Which user accounts will be converted?

Accounts will be converted IF...

- The account has been accessed within the last two (2) years, AND

- The account is linked to an application or case

2

What do users need to login to BenefitsCal?

1. Username or Email from the current portal(s)

2. Password from the current portal(s)

No special link or code is required.

3

What's the first-time login experience like?

Easy.

- User will be prompted to enter missing information

- Users will set a new password

Please see the next slide for a preview...

> More information will be shared as we approach go-live (September 2021).

BenefitsCal Account Conversion

First Time Login Experience

User can login with their existing credentials

Missing information is requested

Account registration then proceeds as usual…

UAT Update

UAT Update
CalSAWS UAT Readiness Activities

Next: Test Scenario Review
- April 19 – May 21 Review, Update, and Create UAT Test Scenarios
- Q&A continues
- Execution prep activities are underway

CalSAWS UAT Kick-off
March 18, 2021 C-IV
April 19. 2021 LA & CalWIN

Q&A's
Open Zoom
Support Calls
9:00 am – 11:00 am

June 7th UAT Execution Kick-off

UAT at a glance

- CalSAWS UAT Web-Portal
  - 55 Training materials uploaded
  - 332 design documents uploaded
- 8 Q & A sessions completed as of 05/06/21
  - 403 Questions answered

- 869 BenefitsCal Scenarios written
- 959 CalSAWS Scenarios written/Modified
- 55 Imaging Scenarios written
- 45 State reports scenarios written

UAT Update
CalSAWS UAT Activities, what is next?

UAT Confirmed Participant selection for Execution					
	CalSAWS	**State Reports**	**Imaging**	**BenefitsCal**	**Triage Team**
C-IV	305	27	30	45	24
LA			15	15	1
CalWIN				42	8

April 19 – May 21, 2021

• All testers continue to review of training materials and design documents.

• Review, update, and create UAT scenarios and data based on UAT baseline scripts

• Validate UAT CalSAWS environment access

• Continuing to work on defining UAT processes and detailed planning of scenario execution

June 7 – June 11, 2021

• Attend the CalSAWS UAT Execution Kick-Off

• Validate UAT CalSAWS and BenefitsCal environment access, if needed

June 14 – August 20, 2021

• CalSAWS UAT Execution (includes Imaging and State Reports)

June 14 – September 3, 2021

• BenefitsCal UAT Execution

Training

- Update on Number of Attendees that can be Accommodated at Early Training (Action Item from 4/15/2021 Meeting)
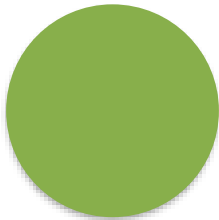
Early Training Overview

Purpose & Expectations

Early Training is the phase when select staff from the 39 C-IV Counties will take the Migration WBTs in advance to learn the key system changes between C-IV and CalSAWS, so they may support county users as coaches and champions during the General Training phase.

Counties are not expected to conduct separate or individualized training sessions or develop custom materials for the C-IV migration. Early Training is not a pilot or intended for counties to provide review on training material content.

Timeframe

User Acceptance Test (UAT) Execution: June 14, 2021 – August 20, 2021
Early Training: July 6 - August 27, 2021
Imaging Train The Subject Matter Expert (ITTSME): August 12, 2021 – August 26, 2021 (Ten 1-day sessions)
General Training: August 30 – September 24, 2021

Early Training Participants

What type of staff should participate?

Suggested participants for Early Training:
- County Trainers
- Supervisors
- Super Users
  - Examples: lead workers, coaches, help desk staff
- County Program/Policy staff

When do counties identify their staff for Early Training?

Early Training participants shall be identified through a **CRFI** to be issued **mid-May 2021**, with information due by **mid-June 2021**, to allow time to create the credentials in the Learning Management System (LMS).

Who identifies the participants?

Counties will identify their Early Training participants. Regional Managers will help facilitate the identification of county staff that will participate in Early Training if necessary.

Participant Estimates

Background

Accenture **FDEL 13: C-IV Master Training Plan** v.1.09, dated October 9, 2019 includes a statement on the scope of Early Training:

5.18. EARLY AND GENERAL TRAINING

The Consortium is responsible for executing Early and General Training. The Consortium Plan to oversee training delivery is a Consortium responsibility, and not in Accenture's scope. All online updates to the CalSAWS Software will be in a completed state at least twelve (12) weeks prior to Early Training in order for the WBTs to be completed by Consortium staff. Additionally, the Consortium will conduct four one-week sessions of up to fifty (50) attendees each and include Early Training of the one-time Migration WBTs, Navigation WBTs, and other specific WBTs resulting from migration.

Participant Estimates - continued

Structured Early Training Plan

The CalSAWS Project recommends at least one Early Training participant per office location, or the following ratios of Early Training participants to C-IV Users by County size:

1. Small – 1 per 50-100 staff (Between 1 and 5 for each small County)
2. Medium – 1 per 100-150 staff (Between 6 and 13 for each medium County)
3. Large – 1 per 100-250 staff (Between 14 and 20 for each large County)

Regional Managers will help facilitate the identification of county staff that will participate in Early Training if necessary.

How many County staff can Early Training accommodate?

320 Early Training Participants Total
4 total 2-week sessions

All sessions are virtual

Each session can accommodate 80 people.

Note: ITTSME participants (approx. 250 total – 25 per session) will be required to take the Imaging WBTs during the Early Training period. ITTSME participants are not included in the 80 person Early Training count. While ITTSME participants will have access to all WBTs during Early Training, they will NOT be automatically enrolled in the Early Training Office Hours or any other hosted Early Training activities.

If Counties want their ITTSME participants to participate in the structured Early Training program, they must enroll them in ITTSME and Early Training separately.

Project Support During Early Training

CalSAWS Training Office Hours

- As support for counties, the CalSAWS Training Team will host interactive, virtual **Office Hours** sessions to help coaches/champions deepen their understanding of the changes coming with CalSAWS functionality.
  - Prerequisite: County staff will complete the WBTs prior to attending the hosted sessions, and jot down questions/open items as they conduct their WBTs in preparation.
- Each virtual Office Hours session will accommodate every participant enrolled in that Early Training session.
- Dates, times and topics will be posted in advance so participants may attend the specific sessions that interest them.
- Sessions are organized to cover a group of WBT subjects and/or guides, such as: General, Program Specific (e.g. Cash Aid and Other Assistance), and Imaging.

Project Support During Early Training

Live Sessions: System Demonstrations, Discussion, Q&A

System Demonstrations
- System demonstrations will be conducted by the CalSAWS Training Team or a subject matter expert.

Q&A
- Q&A time will be included each session to answer county questions or demonstrate functionality from staff requests. The Q&As will be topic specific so attendees will know what topics will be discussed according to the schedule and should plan to take their WBTs prior to the session.
- Q&As will be captured and published for reference.

Hands-On
- Staff will have a hands-on experience in a live system environment (where possible) to practice what they've learned. This practice further enhances their knowledge of the changes.

Project Support Calendar

- Repeat throughout the 8 weeks, every 2 weeks, at 4 sessions (80 participants each) total per WBT/supplemental grouping (repeats 4 times)

- Monday(except Monday, July 5th), Tuesday, Wednesday, Thursday, Friday – each topic is 1 to 2.5 hours (morning and afternoon) and includes system demonstrations, Q&A, and potentially hands-on practice

- 320 total people can be accommodated virtually

Additional LMS Access - Background

County Requests

Counties have expressed concern that the Early Training Session total number (320) is not enough staff to support the large volume of county staff participating in General Training.

Counties requested to have additional staff (ie. Supervisors, coaches, super users) attend Early Training so that participants can adequately support staff during the General Training period.

The CalSAWS Project has formulated an approach to address this need, while preserving the original intent of the structured Early Training program.

Approach

New: The Additional LMS Access Option

An **Additional LMS Access Option** is offered to supplemental staff. These participants will complete their C-IV Migration Training prior to the General Training period.

Participants will have a separate avenue of support from the Training Team as they complete their training.

This approach prepares the participants to adequately support staff as coaches/champions during the General Training period.

Additional LMS Access Option

Overview & Timeframe

What does Additional LMS Access mean?

The Additional LMS Access Option grants LMS access to specific staff in the Early Training period. They will also receive project support.

Participants will complete their C-IV Migration Training to support users during the General Training period in their county.

What's Not Included

The Additional LMS Access Option is not an opportunity for counties to provide review on training material content.

Participants will not be enrolled in the structured Early Training Office Hours sessions. They will have a separate avenue of support.

Timeframe

Early Training: July 6 - August 27, 2021
Early Access: Two loads of Additional LMS Access Option participants
- 4 weeks prior to General Training (first load) - 8/2/21
- 2 weeks prior to General Training (second load) - 8/16/21

General Training: August 30 – September 24, 2021

Counties will be asked to split their Additional LMS Access Option Participants as evenly as possible over the two LMS loads.

This gradual approach aims to provide successful Project support to the participants. Training Team resources will be divided to support both the Additional LMS Access Option and Structured Early Training Sessions 3 and 4.

Additional LMS Access Option Participants

What type of staff should participate?

Suggested participants for the Additional LMS Access Option:
- Additional County Trainers
- Additional Supervisors
- Additional Super Users
  - Examples: lead workers, coaches, help desk staff
- County IPOCs
- County Program/Policy staff
- Change Network Champions

When do counties identify their staff for the Additional LMS Access Option?

Participants shall be identified through a **CRFI** to be issued between **May 31st** and **June 4th**, with information due by **June 30th**, to allow time to create the credentials in the Learning Management System (LMS).

Who identifies the participants?

Counties will identify their Additional LMS Access Option participants.

Participant Estimates

How many county staff can the Additional LMS Access Option accommodate?

The CalSAWS Project will support access to an additional 1,048 participants using an equitable percentage of 5% of each county's active users.

County	End-User Population	# of Additional Access Participants
Alpine	28	2
Amador	41	3
Butte	502	26
Calaveras	95	5
Colusa	59	3
Del Norte	96	5
El Dorado	224	12
Glenn	128	7
Humboldt	602	31
Imperial	434	22
Inyo	40	2
Kern	1735	87
Kings	437	22
Lake	163	9
Lassen	52	3
Madera	455	23
Marin	302	16
Mariposa	78	4
Mendocino	231	12
Merced	853	43

County	End-User Population	# of Additional Access Participants
Modoc	33	2
Mono	58	3
Monterey	938	47
Napa	174	9
Nevada	169	9
Plumas	51	3
Riverside	4929	247
San Benito	108	6
San Bernardino	3937	197
San Joaquin	1028	52
Shasta	680	34
Sierra	15	1
Siskiyou	146	8
Stanislaus	940	47
Sutter	224	12
Tehama	197	10
Trinity	81	5
Tuolumne	123	7
Yuba	223	12
TOTAL		**1048**

Note: The counts above are subject to change

Project Support During the Additional LMS Access Period

CalSAWS ServiceNow Process

- Counties currently have access to ServiceNow and will fill out the **Report an Issue** form in the Service Portal, following their County's process for ticket submission.

- LMS Tickets are automatically routed to the Accenture **Tier 3 App Support – Training** group where they will be monitored and assigned to the appropriate Migration Training SMEs

*Note – a CIT on ServiceNow instructions on how to submit a ticket for LMS-related defects/issues and questions regarding training material content will be distributed in June 2021

C-IV/CalSAWS Implementation Readiness Update

- County Prep Phase
- Implementation Readiness Dashboard
- Migration Toolbox

County Prep Phase Activities

What is the **County Prep Phase Packet**?

C-IV Counties will receive the **County Prep Phase Packet** to review and prepare for activities to take place during the County Prep Phase (August 30 – September 23, 2021).

Project Support for County Prep Phase

The project will be hosting meetings before the County Prep Phase to support counties in preparing for the County Prep Phase Activities, and hosting meetings during the County Prep Phase to provide support during execution of County Prep Phase Activities.

County Prep Phase Activities include:

Security Admins/Identified Staff

- County Click-through on Aug. 29
- Update County-maintained security roles
- Update Office and Unit information
- Update pages for new functionality that is now County Configurable, if County decides to use it

All C-IV Users

- Login to CalSAWS to validate their credentials

Impacted Stakeholders

Security Admins and County Decision Makers will review the packet to decide how to administer security for County-maintained roles.

County Prep Phase Activities

Security Matrix
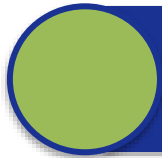
Purpose: to confirm that the rights or abilities for every Security Role are appropriately assigned within the correct County-maintained Group so that users will have the appropriate CalSAWS system access.

The Security Matrix will be distributed in June along with a CIT, which will demonstrate how to customize County-maintained Roles. Counties will be able to use project-maintained Roles as a guide on Role-to-Group associations.

The Security Matrix will be an Excel Spreadsheet with the following Tabs:
- **Roles to Groups –** A list of all County-maintained and Project-maintained Security Roles and how they map to the Security Groups
- **Group –** A list of all County-maintained Security Groups, their description, and whether they exist only in C-IV, only in CalSAWS, or in both systems

The Counties should use this matrix to determine how they would like to assign Security Rights and Groups to Roles within the County. In order to make that determination, Counties may consider working with their Reporting/Fiscal Staff and Policy/Procedure Staff on new the Groups and Rights associated to those functions.

CalSAWS Implementation Readiness Dashboard

CalSAWS and BenefitsCal Readiness Summary

Cal**SAWS**

Implementation Readiness Dashboard

May 2021

The **Implementation Readiness Dashboard** presents a **high-level view of Project Readiness** in the form of a stop light indicator for the previous and current reporting period. Readiness statuses are presented for each Readiness Area. The status of each Readiness Area is determined by timely Milestone completion (see Key below). Project Milestones are identified by project team leads and CalSAWS Project leadership. More detail on C-IV Migration and BenefitsCal progress can be found in the Implementation Readiness Packet. The information reflects data as of May 7, 2021.

*An Implementation Readiness Milestone is a critical-path activity for the C-IV Migration and BenefitsCal Go-Live in September 2021.

CalSAWS and BenefitsCal Readiness Summary

Area	Category	CalSAWS	BenefitsCal	Comments
Application	Design	C	C	
	Development	G	G	
	System Test	G	G	
	User Acceptance Test	G	G	
	Usability Test	N/A	G	
Integration	Design	C	C	
	Development	G	G	
	System Test	G	G	
	Interface Partner Test	G	G	
Technical	Infrastructure	G	NS	
	Security Testing	G	G	
	Performance Testing	G	G	
Conversion	Conversion Readiness	G	NS	
	Converted Data Test	G	G	
Training	Training Plan	C	G	
	Training Materials	G	G	
	Training Delivery	G	NS	
Implementation	Service Desk	C	NS	
	System Operations	G	G	
	Prod Deployment Plans	G	G	
Change	Communications	G	G	
	Partner Readiness (County, etc.)	N/A	NS	

NS	Not Started	G	On Schedule	Y	<14 Days Late	R	>=14 Days Late	C	Complete

CalSAWS Implementation Readiness Dashboard

Project Milestones/Tasks and Issues/Risks

Key Project Milestones/Tasks

Milestone/Task	Status	Target Start Date	Target End Date	Percent Complete
Application Development and System Test	Complete	3/14/2019	1/25/2021	100%
BenefitsCal Phase 1 Design Complete	Complete	12/1/2020	3/26/2021	100%
Converted Data Test	Complete	7/13/2020	4/30/2021	100%
CalSAWS and BenefitsCal UAT County Preparation Begins	In Progress	3/18/2021	5/21/2021	74%
Mock Conversions	In Progress	5/3/2021	8/27/2021	15%
Training – Install LMS, Load Courses, Test Reports	In Progress	9/3/2019	9/24/2021	54%
Implementation Readiness Preparation	In Progress	4/6/2020	9/27/2021	66%
State and C-IV County Interface Testing	Not Started	6/1/2021	7/30/2021	0%
Batch Performance Testing	Not Started	7/1/2021	7/30/2021	0%
User Acceptance Test (UAT)	Not Started	6/14/2021	9/3/2021	0%
Training Support	Not Started	7/5/2021	9/24/2021	0%
C-IV County Go-Live	Not Started	9/27/2021	9/27/2021	0%
Implementation Support	Not Started	9/28/2021	11/5/2021	0%
State Report County Support	Not Started	9/27/2021	10/31/2023	0%

Key Open Readiness Risks

Risk No. & Level	Risk Summary	Status
226 High	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. The SAWS will provide feedback on approach and timelines.
231 High	Delay of Web Browser compliance may impact users who do not use MS Internet Explorer	AEM meets the basic requirement of rendering forms in HTML5 and providing compatibility with Chrome and Edge browsers. Validation completed with all identified types of forms and threshold languages.
236 High	The scaling of Analytics Dashboards for 58 Counties may have an impact on system performance	Action Item #1: In Progress Action Item #2: Complete Action Item #3: In Progress Action Item #4: Not Started
237 High	The scaling of Batch for 58 Counties may have an impact on system performance	Continue to monitor the trend analysis of batch performance tuning efforts in CalSAWS.
208 Medium	CalHEERS release readiness delays may negatively impact CalSAWS delivery timelines, slowing critical updates to counties	Will continue to collaborate with the CalHEERS team as they transition to a new M&O vendor focusing on potential release impacts.
235 Medium	The BenefitsCal Project Release 1.0 may be delayed due to integration with the CalSAWS Interface	BenefitsCal phase 1 is split into two releases. Release 1 functionality equals/exceeds what is currently available in C4Yourself and deploying with the CalSAWS C-IV cutover in September 2021.
241 Medium	If production services/operations are not expanded to support 58 counties, CalSAWS may not be ready to support a multi-county and multi-vendor production environment	Assessed current processes & procedures to determine next steps for production operations to support multi-county, multi-vendor set of services and implement outcomes prior to the C-IV cutover.

Late Project Milestones/Tasks

There are no Late Project Milestones/Tasks as of April 2021.

CalSAWS Implementation Readiness Dashboard

County Readiness

County Readiness (vertical sidebar text)

County Readiness Summary

Area	Status	Counties
Application	G	39 of 39 counties
Technical	G	39 of 39 counties
Conversion	G	39 of 39 counties
Training	G	39 of 39 counties
Implementation	G	39 of 39 counties
Change	G	39 of 39 counties

NS	Not Started	G	On Schedule	Y	<14 Days Late	R	>=14 Days Late

Top County Readiness Issues and Risks

No.	Summary	Risk/Issue Level	Due Date	Remediation Plan
	None identified as of April 2021.			

Quick Links to County Checklists

Click the links below to view the detailed checklist for your county:

Alpine	Modoc
Amador	Mono
Butte	Monterey
Calaveras	Napa
Colusa	Nevada
Del Norte	Plumas
El Dorado	Riverside
Glenn	San Benito
Humboldt	San Bernardino
Imperial	San Joaquin
Inyo	Shasta
Kern	Sierra
Kings	Siskiyou
Lake	Stanislaus
Lassen	Sutter
Madera	Tehama
Marin	Trinity
Mariposa	Tuolumne
Mendocino	Yuba
Merced	

*Web Portal access is required

Questions?
Contact your Regional Manager, IPOC, or TPOC for more insight on each readiness area.

CalSAWS Implementation Readiness Dashboard

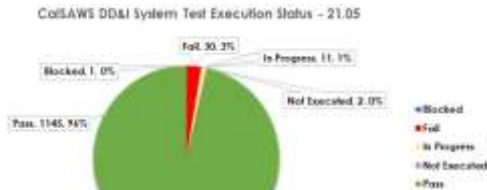## CalSAWS Readiness

CalSAWS Readiness

Application Readiness

Design					Complete

SCRs Ready for Design	SCRs in Design	SCRs in Build	SCRs in System Test	SCRs Test Complete	Total SCRs
0	0	0	18	30	48

Development	On Schedule

Status	Count	Petage
NOT STARTED	6	14%
IN PROGRESS	6	14%
COMPLETED	31	72%
Total	43	

System Test	On Schedule

CalSAWS DD&I System Test Execution Status – 21.05

- Fail, 30.3%
- In Progress, 11.1%
- Blocked, 1.0%
- Not Executed, 2.0%
- Pass, 1145, 96%

Legend: Blocked, Fail, In Progress, Not Executed, Pass

Release: 21.05
Start: 03/26/2021
End: 05/24/2021
Open Defects as of 05/07/2021: 142
Target Pass Rate: 75%
Actual Pass Rate: 96%

UAT	On Schedule

Key Dates:
Kickoff & Scenario Prep: 03/18/2021 – 04/16/2021
County Scenario Review: 4/19/21 – 5/21/21
UAT Orientation: 06/07/2021
CalSAWS UAT Execution Start: 06/14/2021
CalSAWS UAT Execution End: 09/03/2021

Conversion Readiness

Key Dates:
Mock Conversion #1 Part B: 05/10/2021 – 05/14/2021
Mock Conversion #2 Part A: 06/09/2021 – 06/10/2021
Mock Conversion #2 Part B: 06/13/2021 – 06/16/2021
Golden Data Set #4 Ready: 05/20/2021
Cutover 1A: 08/28/2021 – 08/29/2021
Cutover 1B: 09/23/2021 – 09/27/2021

Conversion Readiness	On Schedule

Status	Count	Percentage
IN PROGRESS	2	10%
NOT STARTED	3	15%
COMPLETED	15	75%
Total	20	

Converted Data Test	On Schedule

Start Date: 12/30/2020
End Date: 04/30/2021

Description	Status
100% of all test cases have been executed	100% Execution Rate 96% Pass Rate
No Open Severity 1 – High Severity defects	0 Open Severity 1 Defects
Severity 2 – Normal defects have been analyzed and categorized as either "go-live dependent" or "production deferral"	9 – To be resolved prior to UAT execution
Resolved defects have been documented	●
Test results and summary reports have been completed	●
Consortium Exit Criteria Approval	●

Technical Readiness

Security Test	On Schedule

Start Date: 11/05/2019
End Date: 09/24/2021

Performance Test	On Schedule

Start Date: 05/01/2019
End Date: 09/24/2021

Infrastructure	On Schedule

Status	Count	Percentage
IN PROGRESS	10	21%
NOT STARTED	2	4%
COMPLETED	36	75%
Total	48	

Extranet Enablement aims to build a future state of connectivity for all counties to access AWS hosted services. To date, 122 sites are complete (96%).

Status	Count	Percent
Completed	122	96%
In Progress	3	2%
On Hold	2	2%

SD-WAN is Software-Defined Wide Area Network and is essentially a virtual WAN architecture that supports organizations to **securely connect users to applications**. All 133 sites are complete (100%).

CalSAWS Implementation Readiness Dashboard

CalSAWS Readiness

CalSAWS Readiness

Integration Readiness

Design	Complete

Start Date: 01/27/2021
End Date: 03/10/2021

Status	Count	Percentage		
IN PROGRESS	7			100%
Total	7			

Development	On Schedule	System Test	On Schedule

Start Date: 02/25/2021
End Date: 06/11/2021

Start Date: 04/26/2021
Start Date: 07/16/2021

Interface Partner Test	On Schedule

Testing in progress with MEDS, EBT, Child Support Interface, CalWIN eICT, & CalHEERS.

Start Date: 03/01/2021
End Date: 08/27/2021

Implementation Readiness

Service Desk	Complete

Start Date: 01/01/2021
End Date: 04/30/2021

Prod Deployment Plans	On Schedule

Status	Count	Pertage	
NOT STARTED	1		14%
IN PROGRESS	2		29%
COMPLETED	4		57%
Total	7		

Sandbox usage:
- 25 counties in Apr 2021
- Avg of 20 counties/mo.

Systems Operations	On Schedule

Start Date: 12/01/2019
End Date: 08/27/2019

Training Readiness

Training Plan	Complete

Training Delivery	On Schedule

Status	Count	Percenta	
IN PROGRESS	4		29%
NOT STARTED	5		36%
COMPLETED	5		36%
Total	14		

Start Date: 09/03/2019
End Date: 09/17/2021

Training Materials	On Schedule

Training Material Type	Number of Training Materials	Design	Build	Test	Complete
Web-based Trainings (WBTs)	29	2	26	0	1
Quick/Reference Guides	69	12	9	0	48

Start Date: 01/01/2019
End Date: 08/01/2021

Change Readiness

Communications	On Schedule

Start Date: 05/04/2020
End Date: 09/06/2021

Status	Count	Percentage	
COMPLETED	5		100%
Total	5		
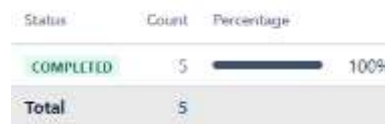
Type	Current Progress	Total Planned
Infographics	8	9+
News Blasts	3	4
Demo Videos	6	6+
Targeted Topics	10	10
CNC Meetings	6	11
Just-in-Time Demos	0	5

Partner Readiness	On Schedule

See County Readiness

CalSAWS Implementation Readiness Dashboard

BenefitsCal Readiness

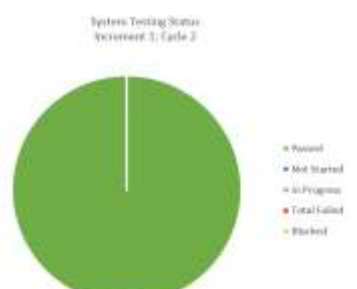**BenefitsCal Readiness**

Application Readiness

Design	Complete

End Date: 03/10/2021

Development	On Schedule

End Date: 06/11/2021

Status	Count	Percentage	
IN PROGRESS	6		27%
COMPLETED	7		32%
NOT STARTED	9		41%
Total	22		

System Test	On Schedule

System Testing Status
Increment 1: Cycle 2

- Passed
- Not Started
- In Progress
- Total Failed
- Blocked

Passed, 131, 100%

Release: 1
Start: 03/01/2021
End: 10/31/2021
Target Pass Rate: 90%
Actual Pass Rate: 100%

UAT	On Schedule

Key Dates:
Kickoff and Scenario Preparation: 03/18/2021 – 04/16/2021
County Scenario Review: 04/20/2021 – 05/02/2021
UAT Orientation: 06/07/2021
CalSAWS UAT Execution Start: 6/14/2021
CalSAWS UAT Execution End: 09/03/2021

Usability Test	On Schedule

End Date: 09/03/2021

Conversion Readiness

Conversion Readiness	Not Started

End Date: 09/27/2021

Converted Data Test	On Schedule

End Date: 07/16/2021

Status	Count	Percentage	
COMPLETED	1		7%
NOT STARTED	14		93%
Total	15		

Technical Readiness

Security Testing	On Schedule

Target End Date: 08/06/2021

Status	Count	Percentage	
COMPLETED	1		10%
IN PROGRESS	2		20%
NOT STARTED	7		70%
Total	10		

Performance Testing	On Schedule

End Date: 09/03/2021

Infrastructure	Not Started

End Date: 09/24/2021

CalSAWS Implementation Readiness Dashboard

BenefitsCal Readiness

BenefitsCal Readiness

Integration Readiness

Design	Complete

End Date: 03/10/2021

Development	On Schedule

End Date: 06/11/2021

Status	Count	Percentage	
NOT STARTED	5		42%
COMPLETED	7		58%
Total	13		

System Test	On Schedule

End Date: 07/16/2021

Interface Partner Test	On Schedule

End Date: 07/16/2021

Change Readiness

Communications	On Schedule

End Date: 09/20/2021

Status	Count	Percentage	
IN PROGRESS	2		33%
NOT STARTED	4		67%
Total	6		

Partner Readiness	Not Started

End Date: 09/20/2021

Implementation Readiness

Service Desk	Not Started

End Date: 09/10/2021

Prod Deployment Plans	On Schedule

End Date: 09/27/2021

System Operations	On Schedule

End Date: 09/03/2021

Status	Count	Percentage	
IN PROGRESS	2		6%
NOT STARTED	29		94%
Total	31		

Training Readiness

Training Plan	On Schedule

End Date: 05/28/2021

Training Delivery	Not Started

End Date: 09/17/2021

Training Materials	On Schedule

End Date: 07/30/2021

Status	Count	Percentage	
NOT STARTED	1		25%
COMPLETED	1		25%
IN PROGRESS	2		50%
Total	4		

Migration Toolbox

Tools For Your Journey to CalSAWS

Implementation Support

System Resources

Change Management

Training

Preparing to Go-Live: September 27, 2021

Migration, Tools and CalSAWS System Resources

Engage: Implementation Activities

Explore: System Updates and Resources

Expand: Change Management Materials

Dig In: Training Materials

ENGAGE → EXPLORE → EXPAND → DIG IN

Implementation Support

Implementation Points of Contact (IPOCS)

IPOCs serve as the CalSAWS Project's Implementation Points of Contact for Counties during the planning and preparation of C-IV Migration.

- **Implementation Readiness Checkpoint Meetings** – Provides updates on Implementation Milestones and Timelines, tracking and reporting on Implementation Readiness Checklists, and discusses escalation of high-impact risks or issues.

- **Quarterly Regional Touchpoints** – Video recorded presentations, including a PowerPoint deck, designed to facilitate County participation and Q&As.

- **Regional Meetings** – Region specific monthly meetings presented by Regional Managers

- **TOSS & IPOC Meetings** – Opportunity for the TOSS Team and a County IPOC's to discuss the impacts of updates from the latest Monthly Implementation Readiness Checkpoint, address any questions IPOCs may have encountered, clarify logistics of upcoming tasks, and review readiness activity progress.

Implementation Support
County Shared Communication on CalSAWS

- **IPOC Reference Material** – Collection of C-IV County created resources i.e., Flyers, Intranet Screenshots, Newsletters, etc.

- **County Documents** – County Shared Resources

- **CalSAWS FAQ Tracker** – Have a question? Take-a-look at the FAQ Tracker for frequently asked questions! Your question may have been previously asked and answered.

- **Implementation Inbox** – If your questions aren't answered or found in the FAQ Tracker, we have an implementation inbox that is checked frequently. Send your questions or concerns to: Implementation@CalSAWS.org

System Resources

Where to find key tools, documents and information.

CalSAWS The Journey to One Video – Unity, Strength, Teamwork and Collaboration

CalSAWS Migration SCRs – System Changes i.e., 8 Design Deliverables

Release Notes – Major Upcoming Changes which include new enhancements

CalSAWS Web Portal > CRFIs & CITs
County Information Transmittals (CIT) and County Request for Information (CRFI)

County-Specific Checklist – Implementation Readiness Tasks

JIRA – Global C-IV County Checklist Status * May need RM approval and requires VPN access

CalSAWS User Acceptance Testing (UAT) – UAT Splash Page

CalSAWS – **Web Portal**

Change Management

Targeted Topics

Recorded presentations focusing on specific CalSAWS system updates

2019	2020	2021
IEVS	Appointment Scheduling & Management	AAP-FC-KG
QA/QC	MAGI_eHIT	Lobby Management
Fiscal Summit	Resource Databank	Task Management
	Security Roles & Staff Management	
	Homeless Assistance	
	Non-Compliance Automation	
	Hearings	

Change Management

Change Network Champions (CNCs)

These champions are on the frontline of each county and they participate in the following activities:

Meetings – Monthly meetings of county staff sharing the message

Connect – Collaborate and prepare for Migration together

Communicate – Share new project ideas in a timely manner

Excite – Talk positively about the changes CalSAWS brings

| Meetings | Connect | Communicate | Excite! |
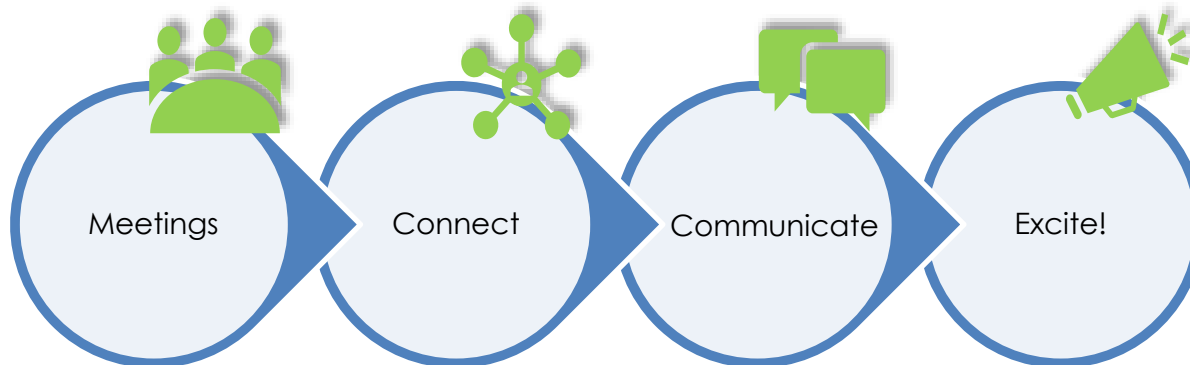
Change Management

Infographics & News Blasts

Infographics address C-IV User feedback in a succinct and engaging manner and are designed to be printed, posted and displayed virtually or in the office

CalSAWS Implementation News Blast - Number 1

- CalSAWS is Coming September 27, 2021

CalSAWS Implementation News Blast - Number 2

- The County Pulse -What C-IV Users are Saying About CalSAWS

AAP-ARC-KG

Non-Compliance

Task Management

Spotlight on CalSAWS Enhancements

What is CalSAWS

Imaging Overview

Imaging Software and Buttons

Imaging Scan Modes

Change Management

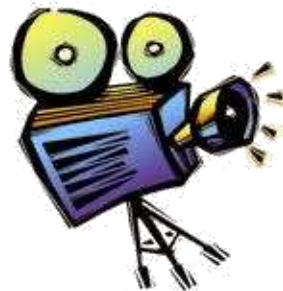## Demonstration Videos

AAP Automation

CalSAWS View History Functionality

Imaging Videos

- Demo
- Single Case
- Multi Case

Just-In-Time Demos (coming soon)

Multi-Month EDBC and Preview NOA

Change Management

Survey Results

Purpose: To access communication effectiveness and measure user awareness acceptance of the Migration to CalSAWS.

Readiness Assessment	Planned Distribution Time
Baseline Assessment Survey	June 9, 2020 – June 15, 2020
Assessment Survey T-12 Months	September 2020
Assessment Survey T-6 Months	March 2021
Assessment Survey T-3 Months	June 2021
Assessment Survey T-3 Weeks	September 2021
Assessment Survey T+6 Weeks	November 2021 End of post-deployment support

Training

Training is an integral part of our successful migration to CalSAWS.

CalSAWS training can be delivered in a variety of platforms

- **Learning Management System** (LMS)

- **Sandbox Environment**

- **CalSAWS.org** Website

Within all the platforms you will find several tools, tips and resources. Let's dig in and see what we can find!

Training

Learning Management System (LMS)

CalSAWS Migration Training Guide (MTG) will provide the end-user with a list of training materials, including WBTs and supplemental training guides by topic.

- CalSAWS Web Based Trainings (WBTs)
- CalSAWS Quick Guides
- CalSAWS Reference Guides
- CalSAWS Job Aids
- Other Training-related Materials

This page is currently **Under Construction**

Please check back soon

C-IV Migration Training Materials – WBTs

Web-Based Training (WBT):	Audience	Approximate Duration
BenefitsCal Portal (Videos)	Eligibility	TBD
C-IV Migration Training Introduction	All users	~20 min
Cal-Learn Non-Compliance	Cal-Learn Staff/Supervisors	~20 min
CAPI	Eligibility (CAPI specific) Staff/Supervisors	~45 min
Change Reason	Eligibility Staff/Supervisors, Employment Services and Child Care Staff/Supervisors	~10 min
Child Welfare Programs (AAP)	Eligibility (AAP specific) Staff/Supervisors	~20 min
Child Welfare Programs (ARC)	Eligibility (ARC specific) Staff/Supervisors	~15 min
Homeless Assistance 1	Eligibility (CalWORKs) Staff/Supervisors	~35 min
Homeless Assistance 2	Eligibility (CalWORKs) Staff/Supervisors	~15 min
Imaging – Navigation	All Imaging users	~20 min
Imaging – Overview	All Imaging users	~30 min
Imaging – Single Case Capture	All Imaging users	~30 min
Imaging – Multi-Case Capture	All Imaging users	~50 min
Imaging – Virtual Printer Capture and Import	All Imaging users	~35 min
Imaging – Return Mail Capture	All Imaging users	~45 min
Imaging – Document Retrieval	All Imaging users	~60 min
Imaging – County-Maintained Workflow Queues	All Imaging users	~70 min
Imaging – Specialty Scan Modes	SIU, RDB, and Hearings staff	~50 min
Managing Worker Assignment Designations	Eligibility Supervisors	~15 min

*The BenefitsCal Changes in CalSAWS WBT has been changed to a Quick Guide.

C-IV Migration Training Materials – WBTs

Web-Based Training (WBT):	Audience	Approximate Duration
Managing Worker Schedules	Eligibility Supervisors/Admin	~30 min
Multi Month EDBC	Eligibility Staff/Supervisors	~45 min
Non-Compliance	Eligibility (Cash, CF, MA, CAPI, GA/GR) Staff/Supervisors	~25 min
Task Management Overview	Eligibility Staff/Supervisors	~30 min
Task Management for Administrators	Administrators	~45 min
Qlik Sense Overview	Management and Supervisors	TBD
Qlik Sense Story-telling	Management and Supervisors	~25 min
Supervisor Authorization	Eligibility and Fiscal Supervisors	~35 min
WTW AU Summary	WTW Staff/Supervisors	~10 min
WTW Non-Compliance	WTW Staff/Supervisors	~45 min
Verifications	Eligibility and Clerical Staff/Supervisors	~30 min

WBTs will be accessible via the CalSAWS **Learning Management System** (LMS) during Early and General Training

The CalSAWS **Migration Training Guide** (MTG) will **provide details on WBT description**, **duration** and **intended audience**

*Additional Training Materials may be added as needed, depending on outcomes of ongoing impact analysis.

C-IV Migration Training Materials – Quick Guides

Quick Guides:	Audience
Application Registration	Clerical, Eligibility Staff/Supervisors
Appointments and Scheduling	Eligibility Staff/Supervisors
Auto Case Assignment	System Administrators, Eligibility Supervisors and Managers
BenefitsCal Changes in CalSAWS	Eligibility Staff
Cal-Learn Non-Compliance	Cal-Learn Staff/Supervisors
Child Welfare Programs- Kin-GAP	Kin-GAP Staff/Supervisors
Child Welfare Programs- Foster Care	Foster Care Staff/Supervisors
Child Welfare Programs- Foster Care- RDB	Foster Care Staff/Supervisors
Child Welfare Programs- Non-Minor Re-entry Authority Detail Page	Foster Care and Kin-GAP Staff/Supervisors
Child Welfare Programs- Home Approvals	ARC and Foster Care Staff/Supervisors
Client Correspondence: Use Office Address and Hold for Pickup	Eligibility and Clerical Staff
Employment Services Enrollment	Employment Services Staff/Supervisors
GA/GR- Root Questions and Guided Navigation	Eligibility (GA/GR) Staff/Supervisors
Homeless Assistance – Permanent – Data Collection	Eligibility (CalWORKs) Staff/Supervisors
Homeless Assistance – Permanent – EDBC	Eligibility (CalWORKs) Staff/Supervisors
Homeless Assistance – Temporary – Data Collection	Eligibility (CalWORKs) Staff/Supervisors

*Additional Training Materials may be added as needed, depending on outcomes of ongoing impact analysis.

C-IV Migration Training Materials – Quick Guides

Quick Guides:	Audience
Homeless Assistance – Temporary – EDBC	Eligibility (CalWORKs) Staff/Supervisors
Homeless Assistance – Voucher Vendor Payment	Eligibility (CalWORKs) Staff/Supervisors
Hunt v Kizer	Eligibility (Medi-Cal) Staff/Supervisors
Imaging - Confidentiality	All Imaging Users
Imaging – Kiosk, Mobile, Portal + e-Applications	All Imaging Users
Imaging – e-ICT Documents	All Imaging Users
MAGI	Eligibility (Medi-Cal) Staff/Supervisors
Multi Month EDBC	Eligibility Staff/Supervisors
Non-Compliance	Eligibility (Cash, CF, MA, CAPI, GA/GR) Staff/Supervisors
Notices of Action (NOAs) - Preview	Eligibility Staff/Supervisors
Potentially Available Income	Eligibility (CalWORKs and Medi-Cal) Staff/Supervisors
Pregnancy Special Need	Eligibility Staff/Supervisors
Reception Log	All Staff (Eligibility, Clerical, Supervisors)
Rescind Reason	Eligibility Staff/Supervisors
SAR7 Processing	Eligibility (CW, CF & RCA) Staff/Supervisors
Sponsorship/Deemed Income	Eligibility (CW, CF, GA/GR and CAPI) Staff/Supervisors

*Additional Training Materials may be added as needed, depending on outcomes of ongoing impact analysis.

C-IV Migration Training Materials – Quick Guides

Quick Guides:	Audience
Supervisor Authorization- Administrative User	Supervisor Authorization Administrators, Eligibility/Employment Services/Fiscal Supervisors
Supervisor Authorization- Worker View	Eligibility, Employment Services and Fiscal staff
Task Management – Appending Tasks	Administrators
Task Management – Documenting Routing Rules	Administrators
Task Management – Error Prone and High Risk Tasks	Administrators
Task Management – Task Images Buttons	Eligibility Staff/Supervisors
WTW Non-Compliance	WTW Staff/Supervisors
WTW Overpayment Automation	WTW Staff/Supervisors
Workload Reassignment	Supervisors

*Additional Training Materials may be added as needed, depending on outcomes of ongoing impact analysis.

C-IV Migration Training Materials – Job Aids

New Job Aids	Description	Target Audience
Imaging Drawers & Indexing Values	• Contains general guidelines for drawer, document properties and annotations in the CalSAWS Imaging Solution	All Imaging users
Imaging Queues & Exceptions	• Contains general guidelines for Imaging workflow queues and exception handling. • Provides instructions to transfer documents to another County's workflow	All Imaging users
Imaging Single Case Scanning and Virtual Printing	• Describes and provides instructions on the Single Case scanning and Virtual Printer functionality of the Imaging Solution	All Imaging users
Imaging Multi-Case Scanning	• Describes and provides instructions on the Multi-Case scanning functionality of the Imaging Solution	All Imaging users
Imaging Specialty Scan Modes	• Describes and provides instructions on the Special Investigation Unit (SIU), Hearings and Resource Data Bank (RDB) Scanning functionality of the Imaging Solution	SIU, RDB, and Hearings staff

Training

Sandbox Environment

A non-Production environment of the CalSAWS Application (6 Generic Accounts per County) – see your county PPOC or Regional Manager for access

This sandbox environment allows the user to:

- Practice with already built cases that contain a variety of household scenarios.
- Build new cases with specific or generic case scenarios
- Troubleshoot cases without fear of disrupting a live case
- Job Aids available through the Help link on the CalSAWS Main Homepage

Sandbox materials - (reference materials)

CalSAWS.org Website

This website is designed as the official location where the consortium, counties, stakeholders and general public can access CalSAWS information, find updates and follow changes.

- CalSAWS Buzz Newsletters
- Migration Videos

www.CalSAWS.org

Quick Reference Links

Engage: Implementation Activities

Monthly Regional Managers Meetings:
CalSAWS Web Portal > Meetings > Regions

Quarterly Regional Touchpoints:
CalSAWS Web Portal > CalSAWS Migration > Implementation > Meetings > Regional Touchpoints

IPOC/TOSS meetings:
CalSAWS Web Portal > Resources > CalSAWS Migration > Implementation > Meetings > TOSS & IPOC Meetings

IPOC Reference Materials:
CalSAWS Web Portal>Resources>CalSAWS Migration> Implementation>IPOC Reference Materials>County Shared Communications on CalSAWS

Implementation Readiness Tasks
CalSAWS Web Portal > Resources > CalSAWS Migration > Implementation > IPOC Reference Materials > County-Specific Checklists

County Shared Resources:
CalSAWS Web Portal > County Document > [County Share Resources]

Frequently Asked Questions (FAQ's):
CalSAWS Web Portal > Resources > CalSAWS Migration > Implementation > FAQ

Implementation Inbox: Implementation@CalSAWS.org

Explore: System Updates and Resources

CalSAWS – WEB PORTAL

Journey to One Video
CalSAWS The Journey to One Video

Eight Design Deliverables
CalSAWS Web Portal > CalSAWS Migration SCRs

Release Notes
http://www.calsaws.org/System-updates/

County Information Transmittals (CIT) and County Request for Information (CRFI)
CalSAWS Web Portal > CRFIs & CITs

JIRA:
May need RM to access
https://change.calsaws.net/secure/Dashboard.jspa

CalSAWS User Acceptance Testing (UAT)
CalSAWS Web Portal > CalSAWS UAT

Quick Reference Links

Expand: Change Management Materials

Targeted Topics - Highlight of changes impacting counties at migration
CalSAWS Web Portal > CalSAWS Migration > Change Management > Targeted Topics Sessions

Change Network Champions (CNC) resources
CalSAWS Web Portal > Resources > CalSAWS Migration > Change Management > 2) Change Network Champions

Infographics and News Blasts
CalSAWS Web Portal > CalSAWS Migration > Change Management > 3) Infographics & News Blasts

Demonstration Videos
CalSAWS Web Portal > Resources > CalSAWS Migration > Change Management > 4) Demonstration Videos

C-IV Readiness Surveys
CalSAWS Web Portal > Resources > CalSAWS Migration > Change Management > 5) C-IV User Change Readiness Assessment Survey Results

Dig In: Training Materials

Learning Management Systems
To access LMS click
www.LMS.CalSAWS.net

End User Training Materials
Cal SAWS Migration Training Guide (MTG)

Sandbox Environment
www.CalSAWS.net – (C-IV counties must be logged into VPN)

Sandbox Reference
CalSAWS Web Portal > County Documents > [County Share Resources] > Sandbox

FAQ documents
 CalSAWS Web Portal > Resources > CalSAWS Migration > Implementation > FAQ
CalSAWS Web Portal > Training

Application Development & Policy

Application Development

Upcoming activities

- DHCS PHE lift planning
  - MC RE move date expected as a 21.05 priority release (mid-June)
  - Participating in DHCS/County workgroup
- CDSS
  - Emergency Allotment guidance received 4/1/2021
    - May 15th run for CF EA will be split
      - Feb/Mar under the old guidance
      - April under new $95 guidance
  - Pandemic Assistance Benefit
    - ✦ Similar to Golden State Grant

Application Development

Current schedule

Date	Event
May 15, 2021	CF Emergency Allotments (Feb/Mar/Apr)
May 23, 2021	CalSAWS Release 21.05 ABAWD Phase III
21.05 priorities	MC RE Move date(completing mid-June)
June 12, 2021	CF Emergency Allotments (Mar/Apr/May)
July 10, 2021 tentative	Pandemic Assistance Benefit
July 17, 2021	CF Emergency Allotments (Apr/May/Jun) tentative
July 26, 2021	CalSAWS/CIV Release 21.07
August 2021 tentative	CW/CF/FC COLAs for 10/2021
August 16, 2021	CalWIN Release 66

Case Data Retention Processing Update

Data Retention

- *C-IV Case Data Retention Processing Kicked off on April 16, 2021*
  - *Completed Image Removal (4/26) and Document Removal (5/12)*
  - *Case Data Removal is 43% complete as of May 13, 2021 (approximately 1.7M Cases total to process)*
  - *Estimated completion is Mid June*
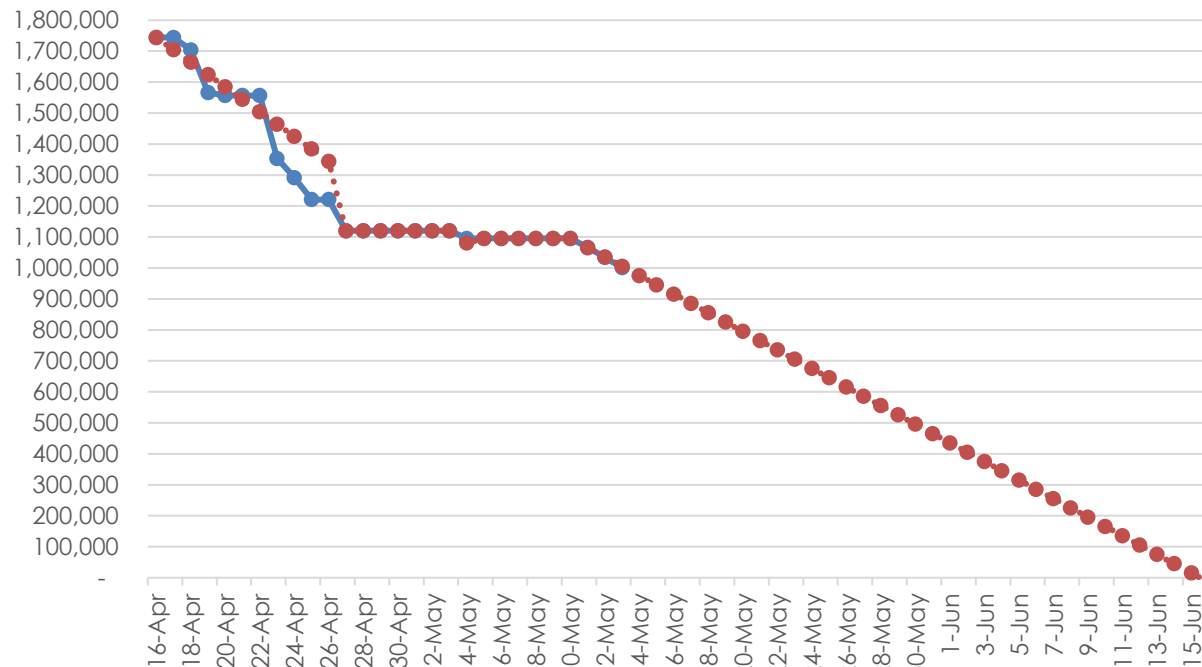
Data Retention

Issues Encountered during processing

- Issue related to image purge processing
  - Issue was identified on April 19, 2021. Some images were being erroneously purged if they were tied to people associated to both purgeable and non-purgeable cases.
  - While the issue was being researched/resolved, all purge processing was put on pause.
  - Restored access to all images on April 22, 2021
- Old IEVS Reports showing in New status (Defect CIV-108948).
  - These were IEVS records that should have been picked up by Purge processing but were not. This was corrected via DCR on April 29, 2021
- Counties opening programs on Cases that were already in an "In Progress" purge status (Defect CIV-108949)
  - One case in one County caused main payroll to break on April 26. This was resolved on April 27
  - Added "In Progress" to list of Cases checked in nightly Re-verification batch. This was put in Production on April 28, 2021
  - Updated display of "In Progress" to "DO NOT ACTION, CASE IN PROCESS" to minimize how many of these exist going forward. This was put in Production on April 27, 2021
- Performance concerns
  - Settled on processing 10 threads/night to minimize impacts to EDR.
  - Downstream impacts to C-IV priority release testing. Paused purge processing for a week. This has now been resolved.

Shell Cases

Shell Case Required Data Elements

- Once a Case has had data removed, it is referred to as a Shell Case.

- Shell Cases include the following:
  - Case Serial Number and Case Name
  - Basic information about what People were associated to the case (i.e., the All People Associated to the Case" section at bottom of Case Summary Page)
  - Time Limit information, which is retained in the System forever.
  - Case Confidentiality (if any)
  - Companion Case relationships (if any)
  - Images associated to the Case that have a Time Limits document type.
  - All Journal Entries for a Case
    - ✦ Journal Entries are saved to a PDF attached to the Shell Case
    - ✦ This PDF is accessible on the Case Data Removal Detail page
  - All Issuances for a Case
    - ✦ Issuance History are saved to a PDF attached to the Case
    - ✦ This is same information a user normally sees when navigating to the Issuance Search Page in the System, searching for all Issuances for a Case, and then viewing Detailed Results.
    - ✦ This PDF is accessible on the Case Data Removal Detail page
  - All correspondence related to Time Limits

CalWIN Data Retention

Progress and Implementation

- CalWIN identified initial cases to be marked as "Not Retained" on 02/15/2021.
    - CalWIN Data Retention process marked records to filter out during CalWIN extraction for CalSAWS Go-Live
    - Periodically CalWIN with re-assess records against the Data Retention Policy Requirements

Data Retention

What's Next?

- Completing processing of C-IV Data Retention Processing

- Starting development work to port to CalSAWS
  - *Plan is to eventually make this a recurring process in CalSAWS*
  - *First run in CalSAWS is TBD*
  - *Frequency in CalSAWS is TBD*

- Estimating work to load LDS data into CalSAWS
  - These Cases will follow Shell Case format

- CalWIN future Data Retention runs are in the planning stage

Conversion Update

Conversion

Overall C-IV, CalWIN, and Ancillary Delivery Progress

Phase	C-IV	CalWIN	CalWIN County Ancillary Systems
Mapping and Development	Complete	Complete *w/CalSAWS Functional Area Epics (in March)* ***In-Progress and On-Schedule*** *Cont'd Mapping, Development and Testing w/Data Model Updates between CalWIN and CalSAWS*	In-Progress and On-Schedule
EDBC Match *(Mapping, Development, and Analysis)*	In-Progress *Executing and Analyzing with each GDS*	In-Progress *Planning began in March 2021*	n/a
Conversion Validation/System Testing	In-Progress (w/GDS#4) *Per Converted Data Release Schedule*	In-Progress (March 2021 - March 2022) *Initial System Test Execution Planned by November 2021 (for CDT) Approx. 120 test scenarios (query for data, write the script, manually execute, then automate test)*	
Conversion Reports	In-Progress *Consolidated Case Review Report drafted*	In-Progress *Planning began in March 2021*	In-Progress *Automated Framework Exception Reporting/email (to Counties)*
Converted Data Release Schedule *(Delivery of Converted Data to Project teams)*	On-Schedule (w/C-IV GDS#4) *Planned Delivery to the Project on 5/20*	CalWIN GDS#2 Planned for November 2021	
Converted Data Test (CDT) Support	Complete	Planned Start November 2021 *w/CalWIN GDS#2*	
Mock Conversions	MC #1: May 2021 *(Complete)* MC #2: June 2021 MC #3: July 2021 *(County Validation)*	Wave 1 Mock Conversion Planned April 2022 *(with County Validation in Final Mock for Wave)*	
Cutover Schedule	1A – County Prep August 27 1B – Go-Live September 27	Wave 1, 1A – County Prep Late Summer 2022 Wave 1, 1B – Go-Live Fall 2022	

Duplicate Person Update
Progress Since July 2020

County to Review & Resolve (via Duplicate Report)
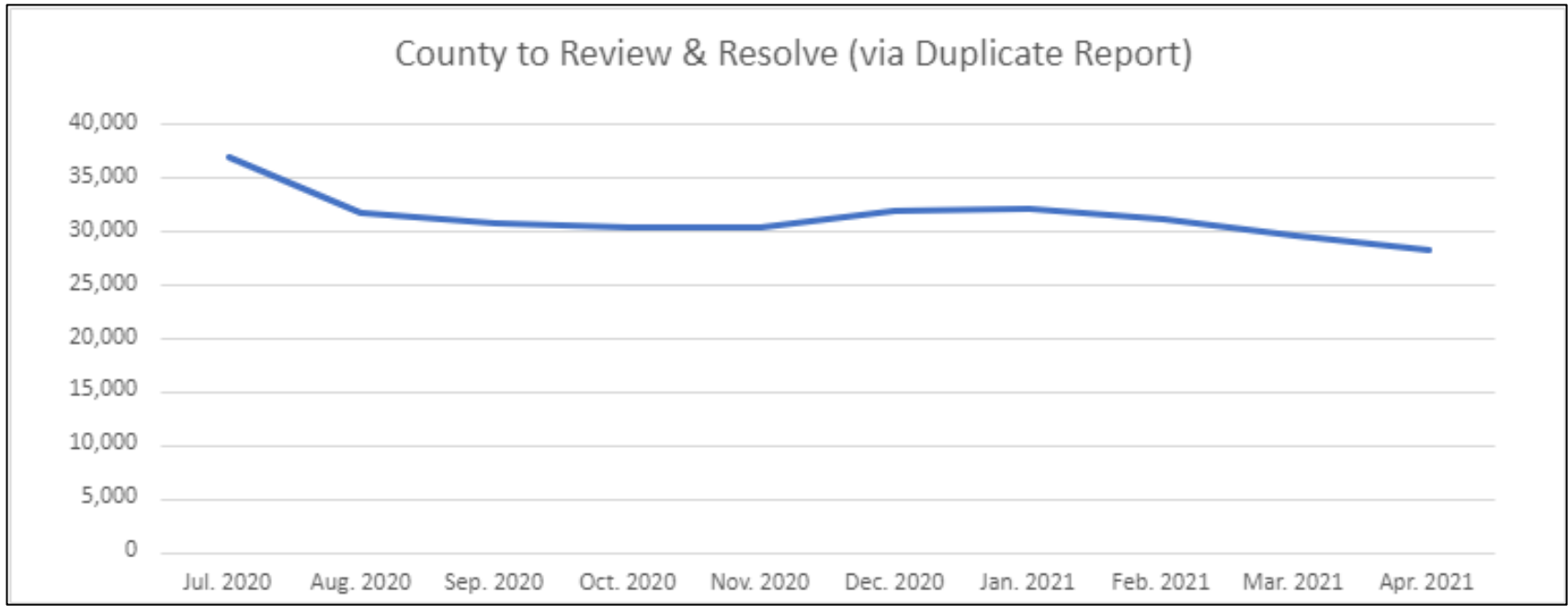
- Statewide counts
- **23%** reduction since July 2020 start
  - Last month reduction was **20%** since start
- Statewide duplicate counts 28,285
  - Cases and individuals work the same
  - Cross-county cases continue to work the same way as before

Procurement Update

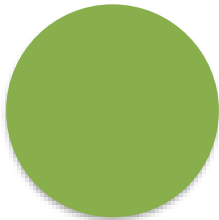# CalSAWS Procurements
Key Procurement Tasks

- CalSAWS M&O Procurement
  - Prepared Request for Information (RFI): March – April.
  - Released RFI: April 19.
  - RFI responses submitted from vendors: May 12.
  - Established M&O Procurement Advisory Work Group: April - May.
  - Analyze RFI responses: May 13 – 26.
  - Conduct internal briefings and finalize direction: May 27 – June 10.
  - Develop requirements: June – August.
  - Prepare Draft RFP(s): August – December.
  - State and Federal Approvals: December 2021 – April 2022.
  - Release RFP(s): April 2022.
- SOC 2 Procurement
  - RFP released on March 26 via San Bernardino County.
  - Proposals received: April 30.
  - Proposal evaluation in process.
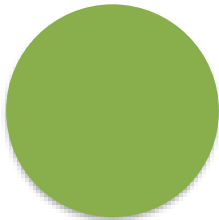 - Tentative contract award: May.

State Partners Updates

- OSI
- CDSS
- DHCS

Regional Updates

JPA Member Representatives & Conference Meeting Overview

CalSAWS Annual Conference

Thursday, June 24, 2021

- Virtual Meeting - Via Zoom
  - Timeline is being confirmed as agenda is developed
  - Invitation was sent to HOLD 8:30 a.m. – 4:30 p.m.
- Requires Quorum of the CalSAWS Member Representatives (58-County Welfare Directors)
  - Additional staff may attend sessions, as needed.
- Elections of the JPA Board and PSC Members
  - Regional calls to develop the election slates will be scheduled soon. Keep an eye out for scheduling request from Jennifer Smith, or Faleesha Andrews.
- Examples of demos to be provided:
  - BenefitsCal Portal
  - Hyland Imaging Solution
  - Analytics
  - Customer Service Center

THE POWER OF 58

Adjourn Meeting