3

Breakout Session 3

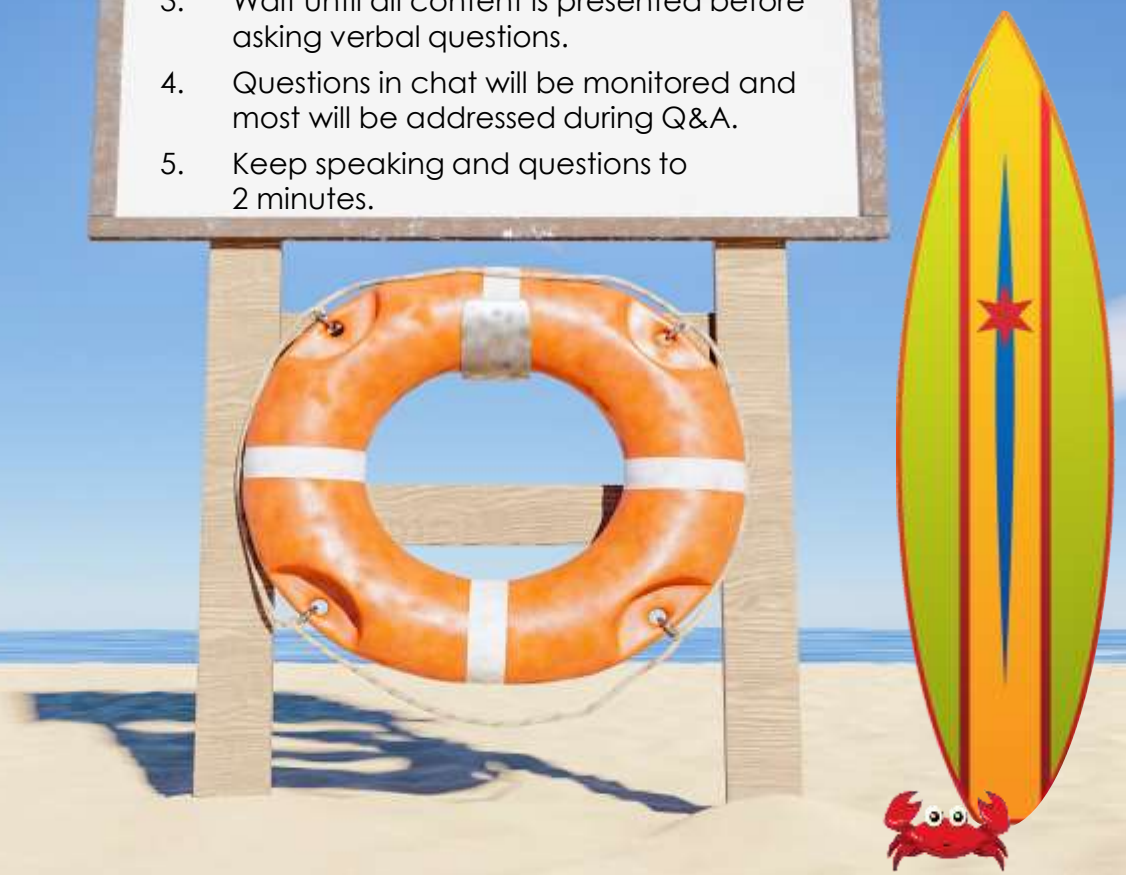
Getting Hands-on with System, Processes, and Data

Agenda

1. Welcome and Introductions
2. Session Overview
   A. **County Data Validation**, including what it is, when it is scheduled for each wave, how it works, who is involved, and what to expect
   B. **User Acceptance Testing (UAT)** for all 18 CalWIN counties status, including the key themes and upcoming activities
   C. **Process Simulation**, including what it is, when it is scheduled for each wave, how it works, who is involved, and what to expect
3. Panel Discussion and Q&A
4. Breakout Session Survey

Ground Rules

1. Mute audio/video unless speaking.
2. If you have a question, please raise your hand and wait to be acknowledged before coming off mute.
3. Wait until all content is presented before asking verbal questions.
4. Questions in chat will be monitored and most will be addressed during Q&A.
5. Keep speaking and questions to 2 minutes.



Introductions

Getting Hands-on with Systems, Processes, and Data – Presenters and Moderator

Kristin Pepper
ClearBest QA
Functional Manager

Rachel Hernandez
ClearBest QA
UAT Lead

Duncan Gilliam
Deloitte BPR
Manager

Wendy Battermann
ClearBest
Executive & Moderator

Getting Hands-on with System, Processes, and Data

Overview

County Data Validation (CDV)

Do My Cases Look Right?

- Review of converted data following a Mock Conversion; by Wave
- The Security Profiles gathered via the CRFIs prior to each Mock, by Wave, will be leveraged
- Participants will follow navigation scripts to validate that data converted correctly
- Any defects identified will be documented in Jira by the Consortium/QA Teams

User Acceptance Test (UAT)

One-Time Hands-On System End-to-End System Functionality Validation for All 18 Counties

- Does the functionality function per approved requirements and production functionality continue to function as expected
- 100% of UAT Test Cases have been executed
- No Open Priority 1-High/Non-Cosmetic DD&I Defect
- Open Priority 2-Normal/Medium DD&I Defects have been analyzed and categorized and dispositioned
- Test results and summary reports have been completed

Process Simulation

Validation of Steps, Handoffs and Associated Configuration to Validate Future (To-be) Business Processes

- Business scenarios are executed end-to-end with defined handoffs from different county staff
- Validate expectations of how CalSAWS will work to support Counties' business processes
- Document findings in the case that any processes and/or CalSAWS configuration should be updated before Go-Live

CalSAWS Project Green Light!

Getting Hands-on with System, Processes, and Data

Getting hands CDV, UAT, and Process Simulation

Area	Timing	County Effort	Skill Sets
County Data Validation	**Wave-by-Wave*** Wave 1 (plus Contra Costa): Jun 20 - Jul 1, 2022	• **Optional activity** • Counties can identify up to **20 participants**	• Eligibility and/or Employment Services case carrying staff and subject matter experts (SME) • Fiscal SME
UAT	**18 Counties Together** Jun 27 – Sep 2, 2022	• **4-Week** commitment per program/functional area • **2 UAT Security Administrators** (Max) • **15 Testers** per CalWIN County (Max) • **1 per 15** program/functional area	• Deep and/or broad program policy and functional knowledge SAWS and public portal applications • Ability to analyze and identify issues/concerns • Ability to communicate effectively succinctly, and self-directed
Process Simulation	**Wave-by-Wave*** Wave 1 (Yolo and Placer): Jul 25 - Aug 19, 2022	• **Part-time activity** • Counties can identify up to **20 participants**	• Configuration resources and roles supporting key county processes • UAT resources

** Timeframes for Waves 2-6 coming soon*

County Data Validation

What is County Data Validation?

County participants have an **optional** opportunity to see their converted cases

"Do my cases look right?"

Cal 58 WS

Waves of Change

County Data Validation

CDV Wave 1 (Placer, Yolo plus Contra Costa)

- **Participants**
  - 16 Contra Costa
  - 11 Placer
  - 13 Yolo
- **Twice Daily Calls**
  - Office Hours (9:00 – 10:30 AM)
  - End-of-Day Triage Call (4:00 – 5:00 PM)
- **Wave 1 Real Time Stats!!!**

County Data Validation

CDV Approach and Process Workflow

CDV Participant → **QA/ Consortium** → **Accenture Conversion/ AppDev**

Execute

Follow Navigation Scripts

Document Findings on the template provided and upload to Web Portal

Participate in Daily Calls

CDV Triage Level 1

Review Findings
Validate potential Finding Yes/No
If Yes document a defect in Jira

CDV Triage Level 2

Confirm & Review Findings
Determine next steps toward resolution

CalSAWS and CalWIN Vendors

Defect

Follow existing CalSAWS Defect Workflow

ISS Vendor

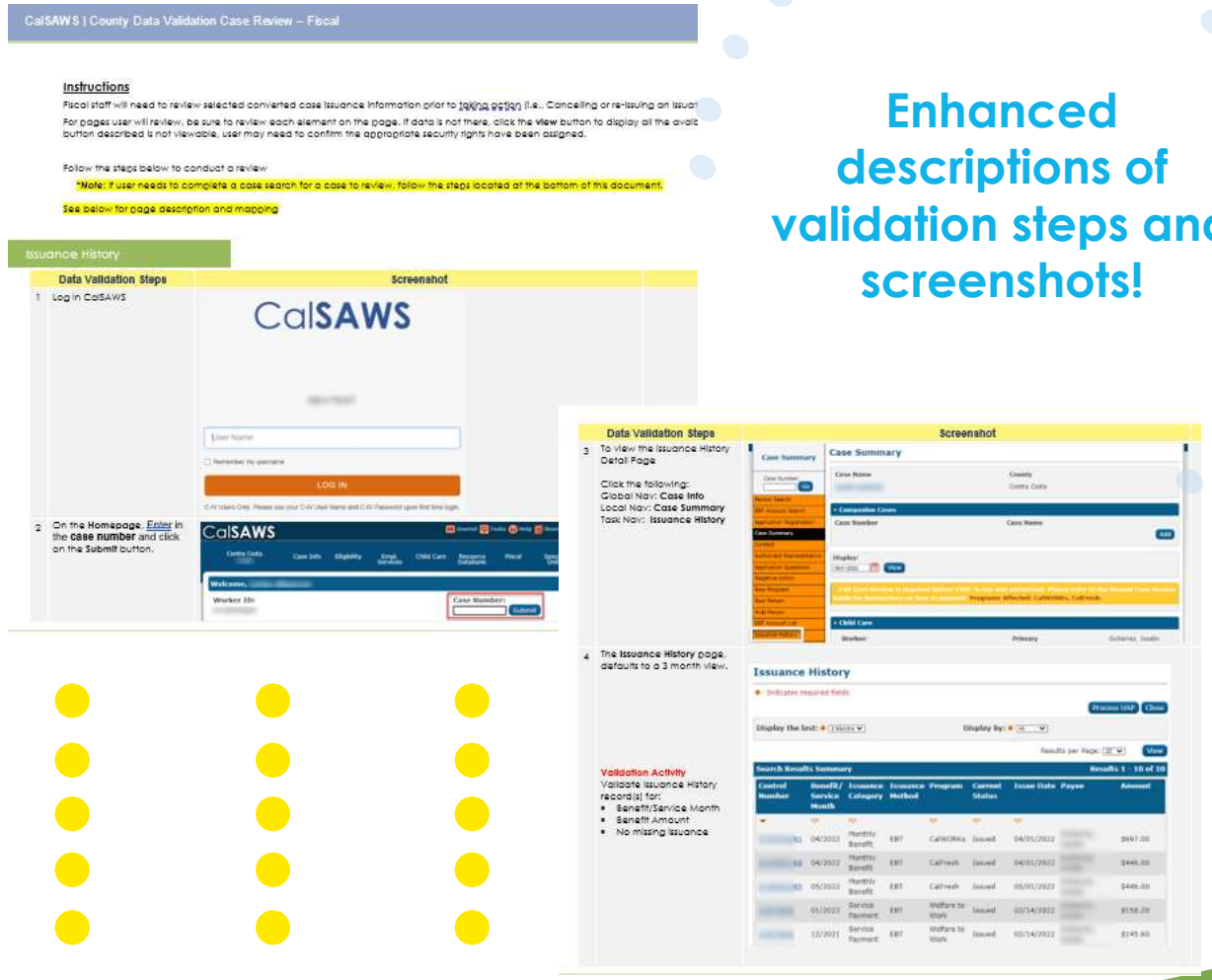
Works as Design

Communicate Findings to ISS Team so material can be included in GoLive materials as appropriate

County Data Validation

What to expect

- Navigation scripts
- Latest Golden (converted) Data Set with up-to-date defects resolutions
  - Converted GA/GR cases and programs
  - Converted CalWIN County Ancillary Systems data (Collections, Fraud, and Task Mgmt.)



Enhanced descriptions of validation steps and screenshots!

County Data Validation

Timelines for Waves 1 - 3

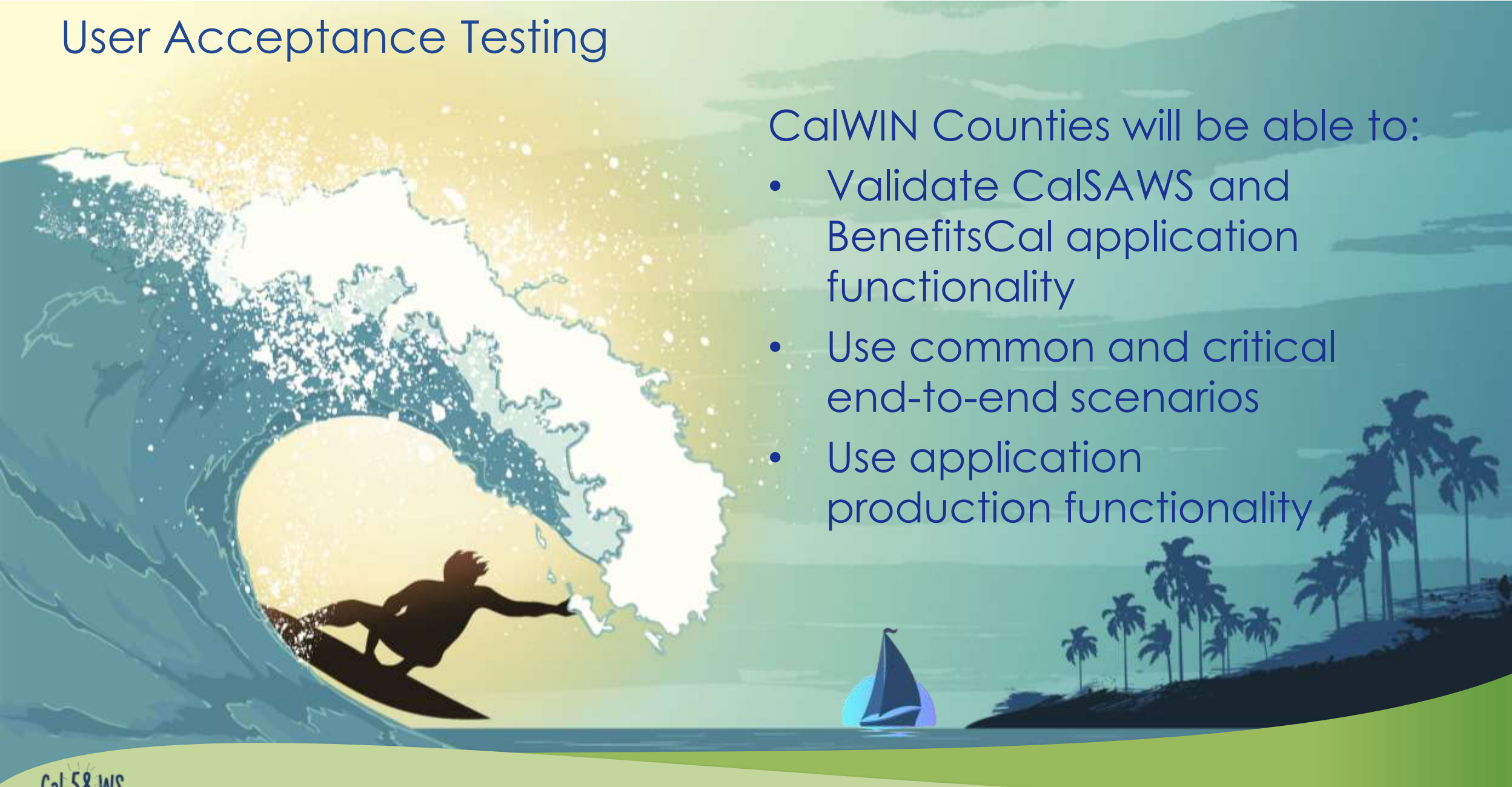
Task	Wave 1	Wave 2	Wave 3
	Timeframe	**Timeframe**	**Timeframe**
Consortium to Send CRFI Security Profile	✓ Complete	7/5/2022 - 7/19/2022	11/1/2022 - 11/15/2022
CDV Participant Training	✓ Complete	Sept 2022	Jan 2022
Connectivity to CDV Environment confirmed	✓ Complete	9/19/2022	1/16/2023
Counties to Attend CDV Kick Off Meeting	✓ Complete	9/26/2022	1/23/2023
CalSAWS to Execute/Support CDV	6/20/2022 - 7/1/2022	10/3/2022 - 10/14/2022	1/30/2023 - 2/10/2023

Timeframes for Waves 4 – 6 coming soon

Cal 58 WS

Waves of Change

User Acceptance Testing



CalWIN Counties will be able to:

- Validate CalSAWS and BenefitsCal application functionality
- Use common and critical end-to-end scenarios
- Use application production functionality

Cal 58 WS

Waves of Change

User Acceptance Testing

Validation

- **Validating CalSAWS and BenefitsCal Application Production Functionality:**
  - Intake and Ongoing
  - Journal entries
  - Task management
  - BenefitsCal e-apps
  - Imaging
  - EDBC
  - Correspondence
  - Reports are integrated in all applicable program areas

User Acceptance Testing

Validation

- **Specific Functionality for CalWIN, including GA/GR rules and CC and reports**
- **C-IV Migration Lessons Learned, such as:**
  - Fiscal Status Workflows
  - Journals
  - Tasks
  - Imaging
  - Correspondence
  - Reports
- **Unscripted testing can be conducted after all daily assignments are complete**

User Acceptance Testing

18 CalWIN Counties

300 participants

- **2 UAT Security Administrators** (max)
- **15 testers** per CalWIN County (max)
- **4-week commitment** (min)
- Program/Area SMEs

Two Groups

Group 1

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

Group 2

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

User Acceptance Testing

Key Tasks and Status

Task	Group 1	Group 2
CalSAWS UAT Plan Approved	✓ Completed	✓ Completed
Select and Confirm CalSAWS UAT Participants	✓ Completed	✓ Completed
UAT Users Loaded to ForgeRock/UAT Environments and Applications	✓ Completed	✓ Completed
UAT Test Script Development	✓ Completed	In progress (target end 7/1/2022)
UAT Environment setup	✓ Completed	✓ Completed
UAT Application Training	✓ Completed	In Progress (6/13/2022 -7/8/2022)
Execution Kick-Off Process Training	✓ Completed	7/20/2022 – 7/21/2022
UAT Execution	6/27/2022 – 7/22/2022	7/25/2022 – 8/19/2022
UAT Test Execution optional Retest	7/25/2022 – 8/12/2022	8/22/2022 – 9/2/2022
Evaluate and confirm Exit criteria	9/2/2022	9/2/2022

User Acceptance Testing

User Acceptance Functionality – Program/Functional

Targeted Functional Testing focuses on the CalSAWS Application Functionality

A Day-in-the-Life / End-to-End Scenarios cover a variety of common and critical conditions covering multiple program and functions for a single case using converted and new data

Cal 58 WS

Waves of Change

User Acceptance Testing

A Day in the Life

Daily Meetings

Monday Kickoff	1:00 – 1:30 pm
Daily Stand-up	9:00 – 9:30 am
Daily Triage	3:00 – 4:00 pm

Test Execution

Receive Assignments
Execute Scripts
Document Results
Log Findings
Re-test Defects

Support

- Zoom bridge line
- CalSAWS.UAT@calsaws.org
- CalSAWS UAT Web Portal

Security

Monitor and maintain county Security roles and rights

User Acceptance Testing

Finding-Defect Process Workflow

User Acceptance Tester → **County/ Consortium** → **QA/Consortium**

Finding
Finding Identified and logged

UAT Triage Level 1
Review Findings
Validate potential Finding Y/N

UAT Triage Level 2
Confirm & Review Findings
Determine next steps toward resolution

** Finding and Level 1-2 Triage occur on same day*

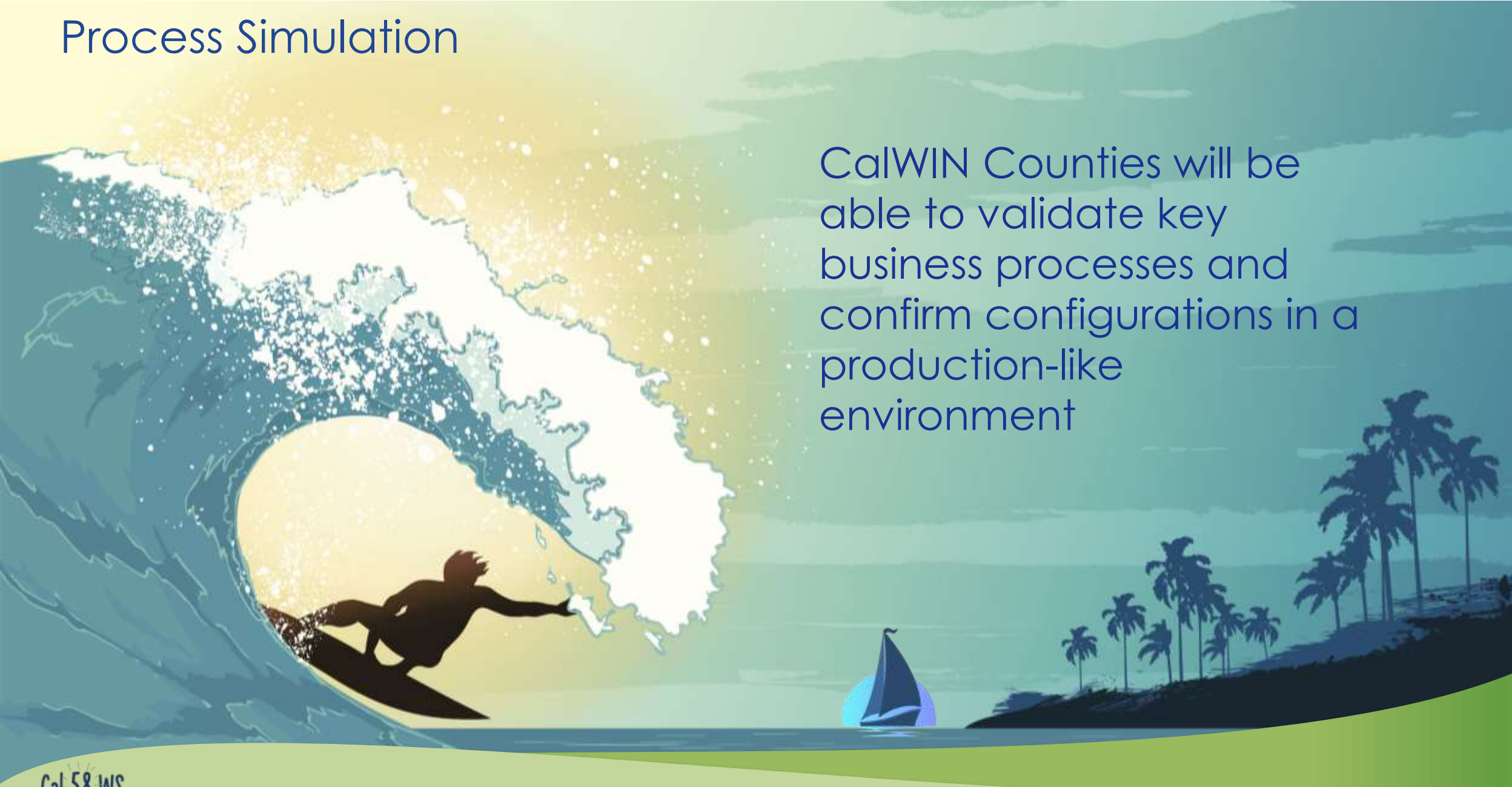
CalSAWS, BenefitsCal, Imaging, and CalWIN Vendors

Defect
Follow existing CalSAWS/CalWIN (Gainwell) Defect Workflow
Import BC defects to Xray

ISS Vendor

Works as Design
Weekly evaluations of Findings for Fact Sheet, CNC updates and communications

Process Simulation



CalWIN Counties will be able to validate key business processes and confirm configurations in a production-like environment

Process Simulation

Overview

What Process Simulation Is

- Simulation of ***To-Be processes*** in a production-like environment, that is ***as real as possible***
- ***Confirmation of county configuration*** for defined process simulation scenarios
- A chance to ***confirm that To-Be processes work in CalSAWS*** before Go-Live

What Process Simulation is NOT

- A validation of converted data (covered by County Data Validation (CDV))
- A functional test or performance test of CalSAWS (covered by User Acceptance Test (UAT))
- A test of participants' knowledge of CalSAWS (covered by Training)
- A test of all potential business scenarios (covered by Pre- and Post-Implementation Support for Counties)

Process Simulation
Overview

How does it work?

Inputs

Real people, process, technology:

- Scenarios documented and mapped to To-Be business processes
- Production-like environment is available
- County configurations are loaded into environment

Execution

Real scenarios:

- Defined…**not scripted**
- Executed with:
  - Real-Life Security Roles
  - Real-Life Configuration of CalSAWS

Outputs

Opportunities to adjust before go-live:

- Validate expectations of how county business processes will work with CalSAWS
- Document "Findings" related to business process and configuration to be addressed before Go-Live
- Gather additional OCM and/or Training input to be considered

Process Simulation

Overview

Entry Criteria

- No critical defects impacting Process Simulation scenarios
- County Configurations required for scenarios are loaded in the UAT environment

Exit Criteria

- 100% of planned scenarios are executed
- Findings are captured with mutually agreed-upon disposition, and necessary adjustments are made for Go-Live

Getting Hands-on with System, Process, and Data

Process Simulation – Sample Scenario

Scenario Information
Scenario #5
Primary Applicant: Joe Jones
Case: 2016724

County Participants

Role: Clerical
Actor/Participant: Megan

1. Conduct Person Search
2. Select Individual Known to CalSAWS
3. Select Program (CF/MC) & Re-Open
4. Assign Case

Role: Eligibility Worker
Actor/Participant: James

1. Review My Tasks
2. Select Intake Task
3. Conduct Data Collection
4. Run EDBC
5. Save and Accept EDBC Results
6. Review NOAs

Execution Complete

Update Scenario Sheet (on Web Portal):
Status: Completed
Findings (Yes/No): Yes
- Finding Type: Configuration (County Controlled)
- Finding Description: Modify Task Type from "Intake" to "Application"

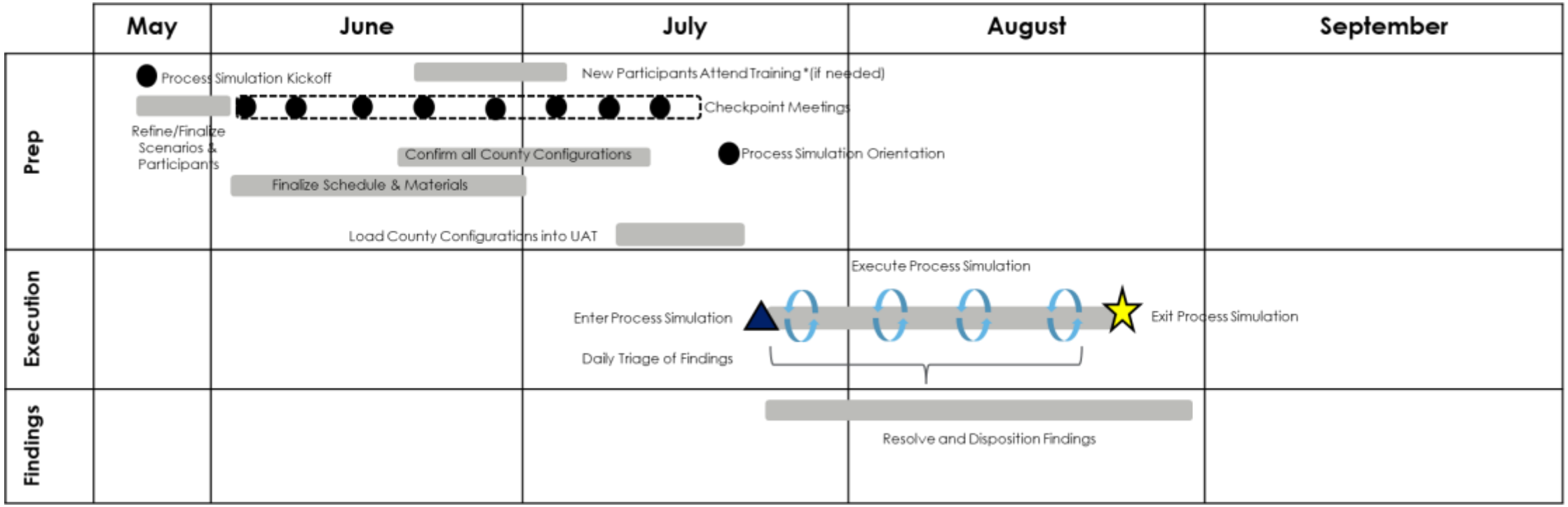
Project Support

Project Team Members are moderating and assisting County Participants throughout execution of each scenario

Update JIRA and Triage Finding
- Update JIRA Item for Scenario #5 w/Finding
- Discuss Finding at Daily Triage Meeting

Getting Hands-on with System, Process, and Data

Process Simulation – Timeline



Getting Hands-on with System, Process, and Data

Panel Discussion

Hear from our experts on important questions, gain insights from their perspectives, and learn from their experience with prior efforts.

Introductions

Getting Hands-on with Systems, Processes, and Data – Panelists

Peggy Macias
CalSAWS UAT Director

Surranjan Kumar
CalSAWS UAT Project Manager

Rachel Hernandez
ClearBest QA UAT Lead

Duncan Gilliam
Deloitte BPR Manager

Kristin Pepper
ClearBest QA Functional Manager

Roger Perez
Accenture Release Manager

Anthony Perez
Accenture Conversion Manager

Cristy Sharma
Consortium Conversion Lead

Wendy Battermann
ClearBest Executive & Moderator

Getting Hands-on with System, Process, and Data

Morning Breakout Session Survey

Mentimeter Code: **5239 0249**

[Menti Survey]

Go to www.menti.com and use the code 5239 0249

Getting Hands-on with System, Process, and Data

Afternoon Breakout Session Survey

Mentimeter Code: **1768 0726**

[Menti Survey]

Go to www.menti.com and use the code 1768 0726