

CalSAWS | Weekly Status Meeting

Date: September 6, 2023	Location: Microsoft Teams Meeting
Time: 9:00 a.m. – 11:00 a.m.	Meeting Called by: CalSAWS Management

Attendees: John Boule, Joel Acevedo, Diane Alexander, Henry Arcangel, Dawn Wilder, Ayana Alvarez, Lynn Bridwell, Laura Chavez, Cristina Contreras, Sharon Caldwell, Emmeil Davis, Luz Esparza, Alan Hernandez, Lulu Fou, Tom Hartman, Jennifer Hobbs, Arnold Malvick, Umair Khan, Ricardo Miranda, Peggy Macias, Joe Mendoza, Lenecia Miles, Lorena Montes, Holly Murphy, Nichole Nava, Michele Peterson, Deanna Rotert, Greg Postulka, Karen Rapponotti, Lesley Pevny, Lisa Salas, Jennifer Smith, Rodain Soto, Sean Swift, Sharon Teramura, Don Coffey, Matthew Vandereyck, Chris Van Vlack, Christine Hendren, Michael A. Johnson, Dan Dean, Wendy Battermann, Belinda Ramirez, Matt Coffin, Julie Conwell, Justin Stephenson, Daisy Villasenor, Veronica Lara, Yolanda Banuelos, Ashley Arnold, Mary Sabillo, Roger Perez, Jo Anne Osborne, Sreshta Wickramasinghe (CalWIN Implementation Support), Yong Vangbliayang, Chazny Nunes, Kevin Wilson (OCAT Project), Rachel Frey (BenefitsCal Project), Onur Senman (BenefitsCal Project), Cathryn VanNamen (CalWIN Implementation Support), Eric Capati (CalWIN Implementation Support), Duncan Gilliam (CalWIN Implementation Support)

State Partners: Brandon Hansard (OTSI), Neha Dhawan (OTSI), Manroop Mahal (OTSI), Stephen Zaretsky (OTSI), Lourdes Chang (OTSI), Caralee Mann (OTSI), Renee Mollow (DHCS), Mong Vang (CDSS), Sherice Sterling (CDSS), Cecilia Rolon (CDSS), William Laney (CDSS), Yingjia Huang (DHCS), David Lucio (DHCS), Katie Mead (DHCS), Nellie Abeleda (DHCS), Theresa Hasbrouck (DHCS), Param Bansal (IV&V), Brian Nagy (IV&V), Apoorva Kandya (IV&V), Aftab Mohammed (IV&V), Rob Trojan (DOF)

Topic	Lead
Commence Meeting	Arnold Malvick
Announcements	Arnold Malvick
CalSAWS DD&I Weekly Status	Arnold Malvick

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Imaging	Appendix E	<ul style="list-style-type: none"> Sacramento County: <ul style="list-style-type: none"> Sacramento identified around 11K duplicate documents from bulk migration and will discuss internally on next steps. Sacramento County will remain on Amber status as they finalize the timing for Delta 2.
Customer Service Center	Highlights of the Reporting Period	<ul style="list-style-type: none"> Prepared for Wave 5 Go-Live
Application Development	4.1.3 State and CalWIN Wave 6 County Interface Partner File Exchange Test (IPT)	<ul style="list-style-type: none"> Continued execution activities for Wave 6 IPT. 22 of 36 Consortium, State, and County interfaces have successfully passed validation
Conversion	5.1.1	<ul style="list-style-type: none"> Supported Wave 1, Wave 2, Wave 3, Wave 4,

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	CalWIN Conversion	<ul style="list-style-type: none"> Counties post Go-Live Completed Wave 5B Mock cutover Conversion ETL and DCR development and testing
	5.1.3 Gainwell Technologies	<ul style="list-style-type: none"> County Refactoring Overview Alameda County Refactoring Status Wave 6 Refactoring Update

CalSAWS BenefitsCal Portal/Mobile DD&I Weekly Status

Onur Senman

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	September Enhancements	<ul style="list-style-type: none"> One (1) enhancement will be delivered with the 23.09.24 Release (Aligned with CalSAWS Baseline Release 23.09): <ul style="list-style-type: none"> One (1) Partner Support Enhancement (CSPM-61588) Eight (8) enhancements will be delivered with the 23.09.28 Release (Regular BenefitsCal Release): <ul style="list-style-type: none"> Five (5) Production Priority Enhancements Two (2) Policy Enhancements One (1) Collaboration Model Enhancement
	CalWIN ISS Support	<p>Wave 5</p> <ul style="list-style-type: none"> CalWIN Wave 5 cutover completed successfully on 09/05/23. Community Based Organization (CBO) conversion completed for Wave 5 Counties: <ul style="list-style-type: none"> # of CBO organizations converted: 119 # of CBO users converted: 553 Email (4) campaign launch was completed on 09/05/23. Total emails delivered: 28,240 M&O service management is in progress. Health Metrics generation is in progress. <p>Wave 6</p> <ul style="list-style-type: none"> Wave 6 Process Simulation support is in progress. The CBO user conversion mock-run is complete, and the exception report has been generated. No exceptions identified.
	UCD Research Activities	<p>Customer Experience (CX) Measurements Data</p> <ul style="list-style-type: none"> Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability findings during the week of 08/28/23. Submitted the Monthly Cumulative

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		<p>Metrics Report due in August.</p> <p>User Engagement</p> <ul style="list-style-type: none"> • Collaboration Model prep meetings attended during the week of 08/29/23. • Began development of the usability testing protocol for Anonymous Doc Upload during the week of 08/28/23. • Collaborated with research on combining user research and usability testing for Anonymous Doc Uploads. • Began recruitment for the “take it to the lab” dropdown options <p>Enhancements</p> <ul style="list-style-type: none"> • Returned chatbot comment log responses to County Welfare Directors Association of California (CWDA) and the Advocates. • Finalized Chatbot copy after review of additional comments from CWDA. • Began the design for October enhancements to include Anonymous Doc Uploads. <p>Advocate Engagement</p> <ul style="list-style-type: none"> • Met with stakeholders to plan for the Collaboration Model (CM) – September session. • Returned the September enhancements comment log responses to Advocates. • Returned time clocks comment log responses to Advocates and CWDA.
	<p>Communication and Marketing Campaign Phase 2</p>	<ul style="list-style-type: none"> • The Final Work Products (FWP) were uploaded to the FWP folder. • Folders for final deliverables were updated to include the revised video and emails for both the BenefitsCal Advocate SharePoint and CalSAWS Marketing SharePoint site. • In all, 282 marketing assets have been made available to the counties and advocates to promote BenefitsCal. • Marketing site landing pages for translated emails are being tested. • The video was uploaded to the YouTube channel and a description written for it. • Email campaign lists segmentation is complete. • Communications were sent to the Advocate Co-Leads and the Stakeholder group to notify them that the Awareness Toolkits were available, and provided the email distribution schedule, along with instructions and key points for downloading documents.
	<p>Collaboration Model</p>	<ul style="list-style-type: none"> • New enhancement requests are being collected for the upcoming September Quarterly Meeting.



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		<ul style="list-style-type: none"> • The following CM Enhancements/Research Items will be delivered with the September 2023 Release (23.09): <ul style="list-style-type: none"> ○ CSPM-43163: Collaboration Model: Restrict the user to create multiple Redeterminations and Periodic reports associated with particular case number (Part 2) ○ CSPM-67105: Research for CM Enhancement: Doc Upload Type Assistance ○ CSPM-67149: Research for CM Enhancement: Application Status Tracker ○ CSPM-67189: Research for CM Enhancement: Display Primary Applicant Status on a Case

CalWIN Implementation Support Weekly Status

Duncan Gilliam

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Business Process Reengineering (BPR)	Business Process Reengineering (BPR)	<p>Wave 4</p> <ul style="list-style-type: none"> • Provided Configuration support for Go-live activities. <p>Wave 5</p> <ul style="list-style-type: none"> • Provided Configuration support for County Prep activities. <p>Wave 6</p> <ul style="list-style-type: none"> • Facilitated Configuration Setup for Process Simulation for San Francisco on 08/28/23. • Completed 50% Process Simulation preparation for the San Luis Obispo County on 09/01/23. • Completed 45% Process Simulation preparation for the Sacramento County on 09/01/23 • Execution scheduled for San Francisco finalized on 09/1/23.
Organizational Change Management (OCM)	Organizational Change Management (OCM)	<ul style="list-style-type: none"> • Continued to develop the September Wave 5 and 6 Change Network Champions (CNC) session materials. • Sent the Wave 4 T+6 Change Readiness Survey presentations to the Consortium for review the week of 08/28/23. • Conducted the Readiness Check-in with Sacramento County on 08/28/23. • Closed the Wave 6 T-3 Change Readiness Survey with San Francisco County on 09/01/23. • Continued to develop the September Wave 6 infographic packet. • Began to develop the Wave 6 Newsletter #4.

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Training	Training	<ul style="list-style-type: none"> • Completed the Wave 5 Counties' Web Based Training for all staff. • Completed Instructor-Led Training (ILTs) for all staff in the Wave 5 Counties. • Continued the Wave 6 Counties' Web Based Training for all staff. • Completed Instructor-Led Training (ILTs) for Early Training and Train the Trainer in the Wave 6 Counties. • Hosted Training Touchpoints with San Luis Obispo, Alameda, Sonoma, and Fresno Counties. • Completed classroom setup for ILTs for all Wave 6 Counties.
Implementation	Implementation	<p>Wave 4</p> <ul style="list-style-type: none"> • Completed the ninth week of Wave 4 post-Implementation support (onsite, virtual, and communications). • Conducted a Fact Sheet Working Group and developed new Fact Sheets. • Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center. • Continued to provide resource alignment communications weekly. • Continued to facilitate Post Implementation project meetings. • Organized and facilitated meeting with RMs to discuss transition to self-sufficiency when implementation support ends for Wave 4. • Hosted a Wave 4 County Jira dashboard review with the project team. <p>Wave 5</p> <ul style="list-style-type: none"> • Continued working with Alameda County for their ancillary applications and communications plan. • Continued working with the CalSAWS Counties for onsite and virtual support for Wave 5 Counties. • Conducted Wave 5 Post Implementation support activities, including the second Post Implementation Support Orientation Sessions on 08/17/23. • Modified the Post Implementation staff alignment based on County feedback and changes. • Conducted a Meet and Greet to brief the Wave 5 Counties on implementation support models. • Scheduled Alameda County Protocol meetings with project and county support.



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		<ul style="list-style-type: none"> • Communicated onsite support staff list to the Wave 5 Counties for badging and logistics. • Conducted a brief Meet and Greet for each W5 county on-site county volunteers and project staff and discussed office logistics, trip book, office contact information and virtually “meet” each other prior to Go-Live. • Distributed final resource assignment list to Primary Points of Contacts (PPOCs) of volunteer counties and RMs on 08/31/23. • Distributed CalSAWS books on 08/30/23. • Conducted the Wave 5 Green light meeting on 08/30/23. • Conducted final week of Wave 5 County Prep Phase Office Hours and Debriefs. <p>Go-Live Packet (GLP)</p> <ul style="list-style-type: none"> • Reviewed final GLP for distribution the week of 09/05/23. • Confirmed availability of teams and logistics for generation and distribution of post-Go-Live data cleanup reports. <p>Other Implementation Support</p> <ul style="list-style-type: none"> • Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists. • Continued updating and tracking checklist items to track each county’s approach to Lobby Management and Contact Center.

CalSAWS Central Print Weekly Status

Dawn Wilder

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	N/A	<ul style="list-style-type: none"> • Continued discussions with CalWIN Counties. • Continued discussions with CalWIN Counties. • Met with Lake and Solano to discuss return mail processing. • Began return mail task processing for San Diego County. • Began CW/CF COLA processing. • Completed Wave 5 Implementation activities.

Ocat Project Weekly Status

Kibby Stahl
Kevin Wilson



STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
OCAT		<ul style="list-style-type: none"> CalWIN Wave 5B migration tasks completed successfully on 8/31/23

CalSAWS QA Weekly Status

Dan Dean

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
QA PMO	N/A	<ul style="list-style-type: none"> Participated in Wave 4 and 5A Support calls Participated in CalSAWS Conversion Defect Status Review Participated in CalSAWS Green Light for Wave 5 Go-Live Initiate Wave 5 Retrospective planning activities Finalize and distribute Quarterly Collaboration Model meeting materials Participate in CalSAWS Conference Small Group Planning session Participate in LEAP kick off meeting
QA Technical	N/A	<ul style="list-style-type: none"> Participated in Wave 5B Cutover activities Participated in Contact Center County reviews and Model Office Continued monitoring of CalSAWS Production Operations Continued review of BenefitsCal Dashboards and technical changes
QA Conversion	N/A	<ul style="list-style-type: none"> Participated in the Wave 5B cutover activities Participated Wave 4 Support and Wave 5 County Preparation calls Triaged Wave 6 County Data Validation (CDV) Findings Monitored Wave 4 and 5 Defect priorities and status Monitored Wave 5 and 6 Migration SCRs priority and status
QA Functional/Test	N/A	<ul style="list-style-type: none"> Reviewed 81 designs in preparation for SCRB/CCB Continued QA Test Verification Activities for BenefitsCal Release 23.09.24 and 23.09.28 Continued CalSAWS Release 23.09 Test Execution with a 96% Execution Rate, 88% Pass Rate, and 8% Fail/Block Rate
QA Implementation	N/A	<ul style="list-style-type: none"> Reviewed CalWIN Implementation Complete Report for Wave 4 Prepared for Wave 5 Go-Live by participating in resource discussions, onsite support meetings, and health and safety discussions Completed the celebration video for Wave 5 Go-Live Validated resolutions of Web-Based Training (WBT) Enhancement Defects for the 23.09 release

CalSAWS DD&I IV&V Project Weekly StatusApoorva Kandya
Brian Nagy

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	IV&V Project Oversight	<ul style="list-style-type: none">• Participated in the Stage-Gate Reviews and monitored progress on the 5B Conversion Cutover through the weekend• Reviewed the final Wave 5 Go-Live Packet, participated in the Wave 5 Greenlight Meeting• Submitted the IV&V Go-Live readiness report for Wave 5

Risk Management

- Monthly RMG

Mandy Batt

(Optional Items)

#	Action Item	Who	Due	Status
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#	Decision Made	Who Made the Decision	Date
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