Cal**SAWS** | Weekly Status Meeting

Date:	September 13, 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, Jeremy Grecian, Alan Hernandez, Lulu Fou, Monica Gonzalez, Tom Hartman, Jennifer Hobbs, Arnold Malvick, Ricardo Miranda, Peggy Macias, Joe Mendoza, Lenecia Miles, Lorena Montes, Holly Murphy, Nichole Nava, Amanda Batt, Michele Peterson, Greg Postulka, Karen Rapponotti, Lisa Salas, Jennifer Smith, Rodain Soto, Sean Swift, Sharon Teramura, Matthew Vandereyck, Chris Van Vlack, Christine Hendren, Michael A. Johnson, Dan Dean, Wendy Battermann, Belinda Ramirez, Matt Coffin, Julie Conwell, Justin Stephenson, Mara Jennings, Raul Gonzalez, Daisy Villasenor, Veronica Lara, Yolanda Banuelos, Ashley Arnold, Mary Sabillo, Roger Perez, Sreshta Wickramasinghe (CalWIN Implementation Support, Yong Vangbliayang, Chazny Nunes, Kevin Wilson (OCAT Project), Rachel Frey (BenefitsCal Project), Onur Senman (BenefitsCal Project), Surranjan Kumar (BenefitsCal Project), Cathryn Van Maren (CalWIN Implementation Support), Eric Capati (CalWIN Implementation Support)

State Partners: Brandon Hansard (OTSI), Neha Dhawan (OTSI), Manroop Mahal (OTSI), Stephen Zaretsky (OSI), 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 M&O Bi-Weekly Status	Arnold Malvick

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
CalSAWS Project Status Dashboard	Status Dashboard	• CalSAWS System Incident highlights
Maintenance and Operations	3.1.3 CalSAWS Help Desk Metrics	• The current compliance for September Month to Date (MTD) is 98.6%
	3.2.3 CalSAWS Production Planned Outages calendar	• CalSAWS Production Planned Outages calendar notifies Counties of upcoming scheduled downtimes for CalSAWS Production in 2023 due to Releases, Cutovers, and planned maintenance windows • CalSAWS Information Transmittal (CIT) 0263-23 Scheduled CalSAWS Maintenance – System Outage Windows – Year 2023 has been

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		distributed to Counties providing a link to access the calendar on the Web Portal
Application Development and Test	4.4.1 Release Test Summary	• Continued 23.09 system testing. Week 6 of 8, 23.09 System Testing completed. 98% pass rate on a 75% target

CalSAWS BenefitsCal Portal/Mobile M&O Weekly Status   Jerry Nielson

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Maintenance and Operations	3.5.1 Release Communications	• BenefitsCal Priority Release 23.09.04 on 09/05/23
Application Development	4.2 Monthly Release Summary	• Upcoming BenefitsCal Priority Release 23.09.24 on 09/24/23 • Upcoming BenefitsCal Monthly Release 23.09.28 on 09/28/23

CalSAWS Central Print Weekly Status   Geoff Cosner
Dawn Wilder

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
1.1	N/A	• Continued discussions with CalWIN Counties. • Completed CW/CF COLA processing. • Met with Los Angeles and San Francisco to discuss return mail processing

CalSAWS DD&I Weekly Status   Arnold Malvick

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Imaging	Appendix E	• Fresno County: o Fresno County identified a defect in their FileNet Export tool that resulted in the export of "multi-Page TIFs" only exporting the first page. o County has indicated that around 40 million files fall into this scenario. o Project team is working with county in investigating different viable solutions. • Sacramento County: o Sacramento County identified around 11,000 duplicate documents from bulk migration and will discuss internally on next steps.

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		o Sacramento County provided Delta 2 timings, 41 hours, that fell out of the 36-hour window
Customer Service Center (CSC)	Highlights of the Reporting Period	• Completed first week of onsite support
Application Development and Test	4.1.3 State and CalWIN Wave 6 County Interface Partner File Exchange Test (IPT)	• Continued execution activities for Wave 6 IPT. 31 of 36 Consortium, State, and County interfaces have successfully passed validation.
Conversion	5.1.1 CalWIN Conversion	• Supported Wave 1, Wave 2, Wave 3, Wave 4, and Wave 5 Counties post Go-Live • Completed Wave 5B Cutover activities • Conversion ETL and DCR development and testing • Began Preparation activities for 6A/5C Cutover
	5.1.3 Gainwell Technologies	• County Refactoring Overview • Alameda County Refactoring Status • Wave 6 Refactoring Update

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CalSAWS BenefitsCal Portal/Mobile DD&I Weekly Status   Onur Senman

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC

	September Enhancements	• One (1) enhancement will be delivered with the 23.09.24 Release (Aligned with CalSAWS Baseline Release 23.09):
		  o One (1) Partner Support Enhancement (CSPM-61588)
		• Eight (8) enhancements will be delivered with the 23.09.28 Release (Regular BenefitsCal Release):
		  o Five (5) Production Priority Enhancements
		  o Two (2) Policy Enhancements
		• One (1) Collaboration Model Enhancement

	CalWIN ISS Support	Wave 5 • Community Based Organization (CBO) ad-hoc load for the California Department of Social Services (CDSS) users completed on 09/07/23. • # of CBO organizations converted for Wave 5: 146 • # of CBO users/accounts converted for Wave 5: 609 • Maintenance & Operations (M&O) service management is in progress.

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC

		• Health Metrics generation is in progress. Wave 6
		• Process Simulation support is in progress.
		• Customer Communication Plan review is complete.
		• Tier-1 staff, and CBO awareness training are scheduled.
		    ○ Tier-1 Training:
		        ▪ Sacramento: 09/19/23
		        ▪ San Francisco: 09/21/23
		        ▪ San Luis Obispo: 09/26/23
		    ○ CBO awareness training: 09/28/23
		• The CBO user conversion mock-run is complete, and the exception report has been generated. No exceptions were identified.

	UCD Research Activities	Customer Experience (CX) Measurements Data • Monitored the CX Measurements data from Medallia, Amplitude, and BenefitsCal on a day-to-day basis to identify and address potential usability issues during the week of 09/04/23. User Engagement • Participated in the Collaboration Model meetings during the week of 08/29/23 to include conversations regarding the September Quarterly Meetings. • Began development of the focus group research protocol for the "take it to the lab" dropdown options and for the application status tracker during the week of 09/04/23. • Finalized recruitment as well as the research protocol for the "take it to the lab" dropdown options. • Facilitated a focus group session for the "take it to the lab" dropdown options. • Began recruitment for the "take it to the lab" dropdown options during the week of 09/04/23. • Completed development of the usability testing protocol for Anonymous Doc Upload during the week of 09/04/23. Enhancements

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		• Complete designs for the Anonymous Doc Upload enhancement during the week of 09/04/23. • Began the design for October enhancements to include Anonymous Doc Uploads during the week of 09/04/23. Advocate Engagement • Prepared and facilitated the County Welfare Directors Association of California (CWDA) weekly check-in meeting on 09/11/23. • Met with stakeholders to prepare for the CM September Quarterly meeting. • Prepared the deck for the User Centered Design (UCD) Monthly Prep Meeting on 09/11/23.

	Communication and Marketing Campaign Phase 2	• Uploaded the Final Work Products (FWP) to the FWP folder.
		• Completed the email campaigns for four (4) campaigns.
		• Setting up the email campaigns for two (2) additional campaigns for the week of 09/11/23.
		• Metrics reporting has begun and will continue:
		    ○ # of customers emailed: 450k
		    ○ # of click-throughs to the BenefitsCal site from emails: 16k
		    ○ # of views of the BenefitsCal video since 08/30/23 launch: 618
		• Over time, additional trends will show, such as actions taken, because of the campaigns.

	Collaboration Model	• Participated in the preparation activities for the upcoming September Quarterly Meeting.
		• The following CM Enhancements/Research activities will be performed in the month of September:
		    ○ 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

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		o 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)	Wave 5 • Provided Configuration support for Go-Live activities. Wave 6 • Facilitated meetings with Sacramento and San Francisco Counties regarding Max Caseload Split requirements. • Provided Configuration support for Process Simulation activities. • Completed 100% Process Simulation preparation for San Luis Obispo County on 09/08/23. • Completed 100% Process Simulation preparation for Sacramento County on 09/08/23. • Finalized the Process Simulation Execution schedule for San Francisco County on 09/07/23.
	Organizational Change Management (OCM)	• Continued to develop the September Wave 5 and 6 CNC session materials. • Finalized the Wave 4 T+6 Change Readiness Survey presentations. • Began to develop the Wave 6 T-3 Change Readiness Survey presentations. • Sent the September Wave 6 infographic packet to the Consortium for review the week of 09/04/23. • Continued to develop the Wave 6 newsletter #4.
	Training	• Completed classroom deinstallation in the Wave 5 Counties. • Continued the Wave 6 Counties' Web Based Training for all staff. • Started Instructor-Let Training (ILTs) for all staff in the Wave 6 Counties. • Hosted Training Touchpoints Sacramento, San Francisco, and San Luis Obispo Counties.
	Implementation	Wave 5 • Completed the first week of Wave 5 post-Implementation support (onsite, virtual, and communications). • Conducted a Fact Sheet Working Group and developed new Fact Sheets.

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		• 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. • Continued working with the CalSAWS Counties for onsite and virtual support for Wave 5 Counties. • Distributed Wave 5 post-Go-Live clean reports – Yellow Banner, CRG, and discrepant data reports to all Wave-5 counties on 09/05/23. • Support counties with post-Go-Live activities and questions Wave 6 • Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists. • Conducted the Wave 6A Pre-Green Light meeting on 09/07/23. • Created and updated Wave 6 Master Tracker to begin resource assignments. • Scheduled meeting with Regional Managers to discuss preliminary resource information for the Wave 6 Counties and office assignments. • Reviewed Wave 6 County profiles and contact sheets for additional updates needed to begin resource alignments. • Continued to facilitate post-Implementation project meetings. • Facilitated daily executive post-Implementation calls Go-Live Packet (GLP) • Updated and distributed updated Wave-5 Go-Live Packet (GLP) on 09/05/23. Other Implementation Support • Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.

OCAT Project Weekly Status

Kibby Stahl
Kevin Wilson

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	N/A	• None to note for the reporting period

CalSAWS QA Weekly Status   Dan Dean

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
QA PMO	N/A	• Participated in Wave 5B Support calls • Participated in CalSAWS Conversion Defect Status Review • Prepared for Wave 6A and 5C Pre Green-Light meeting • Finalized draft Wave 4 Retrospective JPA slides for September meeting • Participated in JPA Conference planning session
QA Technical	N/A	• Provided onsite county support for Sonoma and Alameda for imaging, Contact Center, Lobby Management, and BenefitsCal • Participated in Wave 5 Cutover activities • Continued monitoring of CalSAWS Production Operations • Continued review of BenefitsCal Dashboards and technical changes
QA Conversion	N/A	• Participated in the Wave 5B cutover activities and retrospective • Prepare for Wave 6A/5C cutover • Disposition final Wave 6 County Data Validation (CDV) Findings • Monitored status of Migration Defect priorities and Wave 5 and 6 SCRs
QA Functional/Test	N/A	• Continued QA Test Verification Activities for BenefitsCal Release 23.09.24 and 23.09.28 • Continued CalSAWS Release 23.09 Test Execution with a 99% Execution Rate, 97% Pass Rate, and 2% Fail/Block Rate
QA Implementation	N/A	• Provided onsite support for Alameda, Fresno, and Sonoma Counties • Prepared for Wave 6A and 5C Pre Green-Light meeting • Participated in LEAP Kickoff meeting • Completed System Change Request Board (SCRB) Packet review

CalSAWS DD&I IV&V Project Weekly Status

Apoorva Kandya
Brian Nagy

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
IV&V Project Oversight	IV&V Project Oversight	• Tracked progress on the Wave 5 Post Implementation activities and Wave 6 Process Simulation Effort • Participated in the Pre-Green Light meeting for Wave 6- County Prep Phase • Met with OTSI, CDSS, and DHCS – Bi-Weekly Check In meetings

State Policy Updates

Sherice Sterling (CDSS)
Cecilia Rolon (CDSS)
Katie Mead (DHCS)
Sherry Chen (DHCS)
Neha Dhawan (OTSI)
Patrice Yang (OTSI)

CalWIN M&O Bi-Weekly Status

Michael Johnson
Ashraf Elsalaymeh

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
2.0 Recent Activities	2.0-1	• On August 31st 2023, CalWIN began Wave 5-B cutover activities • On September 3rd, 2023, CalWIN extracted Wave 5-C and delivered to the conversion team
	2.0-2	• On September 9th, 2023, CalWIN ran SFO CAAP GA/GR COLA • On September 10th, 2023, CalWIN conducted the Nimble Migration for Tuxedo App Servers

Risk Management Group

Mandy Batt

• Risk 269.5 approved for retirement

(Optional Items)

#	Action Item	Who	Due	Status
1				

#	Decision Made	Who Made the Decision	Date