CalSAWS | Weekly Status Meeting

Date:	September 20, 2023	Location:	Microsoft Teams Meeting
Time:	**9:00 a.m. – 10:20 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	- Fresno County: - Fresno County identified a defect in their FileNet Export tool that resulted in the export of "multi-Page TIFs" only exporting the first page. Fresno County and Hyland are working on resolving the issue by September 25, 2023 - Sacramento County: - Hyland is going to correct the metadata and regenerate manifest for records from partial ID list (56,231 records). - Sacramento County has decided to keep duplicates and inform staff/Help Desk about the duplicate issue. No service tickets will be generated after go-live.
Customer Service	Highlights of the Reporting Period	Completed second week of onsite support

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Center		
Application Development	4.1.3 State and CalWIN Wave 6 County Interface Partner File Exchange Test (IPT)	• Continued execution activities for Wave 6 IPT. 35 of 36 Consortium, State, and County interfaces have successfully passed validation. • Outstanding interface file is pending San Luis Obispo's bank processing and has an ETA of September 21, 2023
Conversion	5.1.1 CalWIN Conversion	• Supported Wave 1, Wave 2, Wave 3, Wave 4, and Wave 5 Counties post Go-Live • Completed Wave 5C/6A Cutover activities • Conversion ETL and DCR development and testing
	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) • Six (6) enhancements will be delivered with the 23.09.28 Release (Regular BenefitsCal Release): o Four (4) Production Priority Enhancements o Two (2) Policy Enhancements Model Enhancement

	CalWIN ISS Support	Wave 5
		• M&O service management is in progress.
		• Health Metrics generation is in progress.
		Wave 6
		• Process Simulation support is complete.
		• Customer Communication Plan review is complete.
		• Email-1 campaign distribution preparation is in progress.
		• Tier-1 staff, and Community Based Organization (CBO) awareness training are scheduled.
		 o Tier-1 Training:
		  ▪ Sacramento + 55 supported counties: 09/19/23
		  ▪ San Francisco + 55 supported counties: 09/21/23
		  ▪ San Luis Obispo + 55 supported counties: 09/26/23
		 o CBO awareness training scheduled:

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		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 09/11/23. • Modified bimonthly report template to enhance spacing and visual appeal. • Created repository of monthly and quarterly data sources from latest report values. • Updated master data tracker with new file naming convention, slide mapping, data pull owners, etc. • Created an index of data reports and data sources required for the bimonthly report creation. User Engagement • Participated in the Collaboration Model meetings during the week of 09/11/23 to include conversations regarding the September Quarterly Meetings. • Facilitated (3) generative/usability testing sessions for Anonymous Doc Upload during the week of 09/11/23. • Finalized development of the prototype and usability testing protocol for Anonymous Doc Upload during the week of 09/11/23. • Began development of the research and usability testing protocol as well as the prototype for the RE/SAR7 application status tracker during the week of 09/11/23. • Began recruitment for the RE/SAR7 application status tracker usability test sessions during the week of 09/11/23. • Visited the county of Alameda in providing on-site support to customers during Wave 5 implementation Enhancements • Completed designs for Anonymous Doc Uploads during the week of 09/11/23. • Completed design updates to the Renewals and Periodic Reports (RE/SAR 7) trackers. • Updated screen designs to include the enablement of TNB4 on BenefitsCal. Advocate Engagement • Prepared and facilitated the County Welfare Directors Association of California (CWDA) weekly check-in meeting on 09/18/23. • Presented and facilitated at the UCD Monthly

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		• Prep and UCD Monthly Meeting on 09/18/23 and 09/20/23. • Sent out the Anonymous Document Upload materials for Advocate review on 09/20/23.

	Communication and Marketing Campaign Phase 2	• Metrics reporting has begun and will continue:
		  o # of customers emailed: 577K
		  o # of click-throughs to the BenefitsCal site from emails: 29K
		  o # of views of the BenefitsCal video since 08/30/23 launch: 700+
		  o Over time, additional trends will be shown, such as actions taken, because of the campaigns.
		  o Met with the Consortium on 09/20/23 to review results and agreed to meet again next Wednesday for follow-up on results.
		• Per a request from the Advocate Co-Leads, we are preparing ZIP files for brochures, letter, and promo card for them and will communicate with them when completed next week.

	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:
		  o CSPM-43163: Collaboration Model: Restrict the user to create multiple Redeterminations and Periodic reports associated with particular case number (Part 2)
		  o CSPM-67105: Research for CM Enhancement: Doc Upload Type Assistance
		  o CSPM-67149: Research for CM Enhancement: Application Status Tracker
		  o CSPM-67189: Research for CM Enhancement: Display Primary Applicant Status on a Case

CalWIN Implementation Support Weekly Status Duncan Gilliam

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Business Process Reengineering (BPR)	Business Process Reengineering (BPR)	Wave 5 • Provided Configuration support for County Prep activities. Wave 6 • Provided Configuration support for Process Simulation activities. • Finalized Max Caseload Split decisions with

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		San Francisco and Sacramento Counties. • Completed 50% Process Simulation preparation for San Francisco County on 09/15/23. • Provided added support to San Francisco County for requested configurations and scenarios.
Organizational Change Management (OCM)	Organizational Change Management (OCM)	• Sent the September Wave 5 and 6 Change Network Champions (CNC) session materials to the Consortium for review the week of 09/11/23. • Conducted the Wave 4 T+6 Change Readiness Survey presentations with the Wave 4 Counties on 09/13/23 and 09/14/23. • Developed the Wave 6 T-3 Change Readiness Survey presentations the week of 09/11/23. • Sent the September Wave 6 infographic packet to the Consortium for review the week of 09/11/23.
Training	Training	• Continued the Wave 6 Counties' Web Based Training for all staff. • Continued Instructor-Led Training (ILTs) for all staff in the Wave 6 Counties. • Hosted Training Touchpoints Sacramento, San Francisco, and San Luis Obispo Counties.
Implementation	Implementation	Wave 5 • Completed the second week of Wave 5 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. • Continued working with the CalSAWS Counties for onsite and virtual support for Wave 5 Counties. • Continued collecting and reporting on Virtual Support business metrics to Wave 5 Counties and Regional Managers. Wave 6 • Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists. • Working through County Adult Assistance Program (CAAP) payment process with all stakeholders. • Conducted the Wave 6A Green Light meeting on 09/13/23. • Created and updated Wave 6 Master Tracker

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		to begin resource assignments. • Scheduled meeting with Regional Managers to discuss preliminary resource information for the Wave 6 Counties and office assignments. Go-Live Packet (GLP) • GLP Strike team meetings will restart on 09/19/23. • GLP Orientation meetings scheduled. Other Implementation Support • 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	• Continued discussions with CalWIN Counties. • Met with Butte to discuss return mail processing.

OCAT Project Weekly Status   Kibby Stahl
Kevin Wilson

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
OCAT		• 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 Wave 6A/5C Green-Light and weekend cutover reviews • Participated in Monthly SLA Reviews for OCAT and Imaging • Participated in 23.09 Project Integrated Readiness for T-2 • Participated in CalSAWS Conversion Defect Status Review • Participated in CalSAWS JPA Board Meeting
QA Technical	N/A	• Reviewed Release 23.09 performance testing • Participated in CalSAWS Architecture reviews • Monitored Production Operations • Participated in Wave 6A/5C Cutover activities

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		• Continued review of BenefitsCal Dashboards and technical changes
QA Conversion	N/A	• Participated in the Wave 6A/5C cutover activities • Monitored Wave 6 County Data Validation (CDV) Findings and Migration defects • Monitored status of Migration Defect priorities and Wave 5 and 6 SCRs • Prepared for the Conversion retrospective
QA Functional/Test	N/A	• Reviewed 136 designs in preparation for SCRB/CCB • Participated in ROI Workgroup Discussions • Completed QA Test Verification Activities for BenefitsCal Release 23.09.24 • Completed CalSAWS Release 23.09 Test Execution with a 100% Execution Rate and 100% Pass Rate • Continued QA Test Verification Activities for BenefitsCal Release 23.09.28
QA Implementation	N/A	• Provided onsite support for Alameda, Fresno, and Sonoma Counties • Participated in Wave 6 Post-Implementation Support Coordination with Regional Managers • Completed celebration video for Wave 6A Green Light Meeting • Submitted comments for Wave 4 Implementation Completion Report • Prepared for the 23.09 T-2 Integrated Readiness Status Meeting

CalSAWS DD&I IV&V Project Weekly Status   Apoorva Kandya
                                                                              Brian Nagy

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	IV&V Project Oversight	• Tracked progress on the 6A/5C Conversion cutover, Process Simulation for Wave 6 – San Francisco • Participated in the Wave 6 County Prep phase • Attended the BenefitsCal UCD Meeting, ROI Workgroup session • Reviewed the BenefitsCal Monthly Status Reports, CalWIN OCM County Implementation Completion Report - Wave 4

Risk Management   Mandy Batt

(Optional Items)

#	Action Item	Who	Due	Status
1	•			

#	Decision Made	Who Made the Decision	Date