

# Survey Results - Overall

## Overall Question Responses

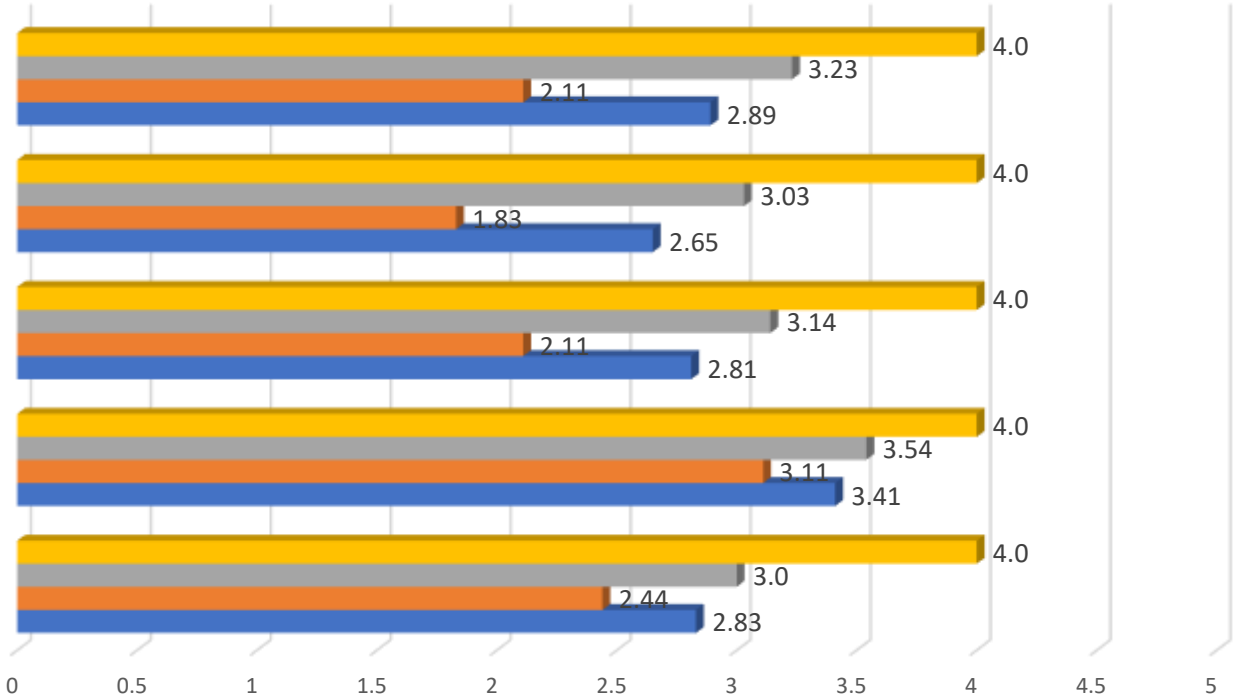
CalSAWS reports adequately meet the county's Management reporting needs.

CalSAWS reports adequately meet the county's State reporting needs.

CalSAWS reports adequately meet the county's Fiscal reporting needs.

The more time we spend in CalSAWS, the more comfortable we are with CalSAWS reports.

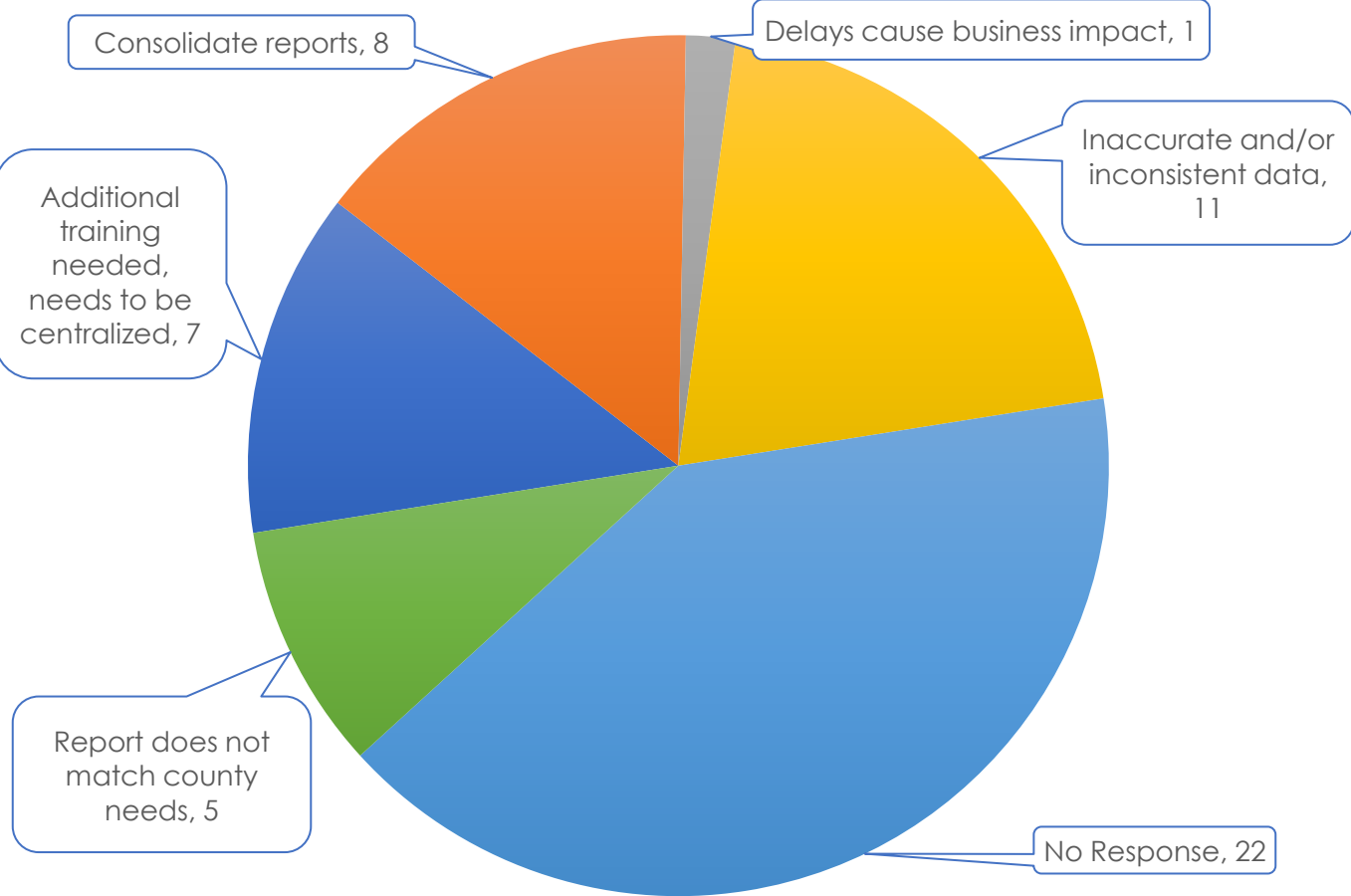
We are satisfied with the level of support available to assist with reports.



	We are satisfied with the level of support available to assist with reports.	The more time we spend in CalSAWS, the more comfortable we are with CalSAWS reports.	CalSAWS reports adequately meet the county's Fiscal reporting needs.	CalSAWS reports adequately meet the county's State reporting needs.	CalSAWS reports adequately meet the county's Management reporting needs.
■ LA	4.0	4.0	4.0	4.0	4.0
■ C-IV	3.0	3.54	3.14	3.03	3.23
■ CalWIN	2.44	3.11	2.11	1.83	2.11
■ Overall	2.83	3.41	2.81	2.65	2.89

# Survey Results - Overall

## Disagree/Strongly Disagree Comments



## GenAI Comment Summary:

The survey responses indicate several common issues with CalSAWS reports not meeting counties' needs. These include:

Reports are disorganized, hard to navigate, lack needed detail, and don't align with business processes. Finding data takes significant time.

Many reports contain inaccurate or incomplete data, lack crucial information, or don't match other reports trying to pull the same data. This impacts data validation and trust.

There is inadequate support and slow response times in resolving urgent reporting issues. Tickets remain unresolved for months in some cases.

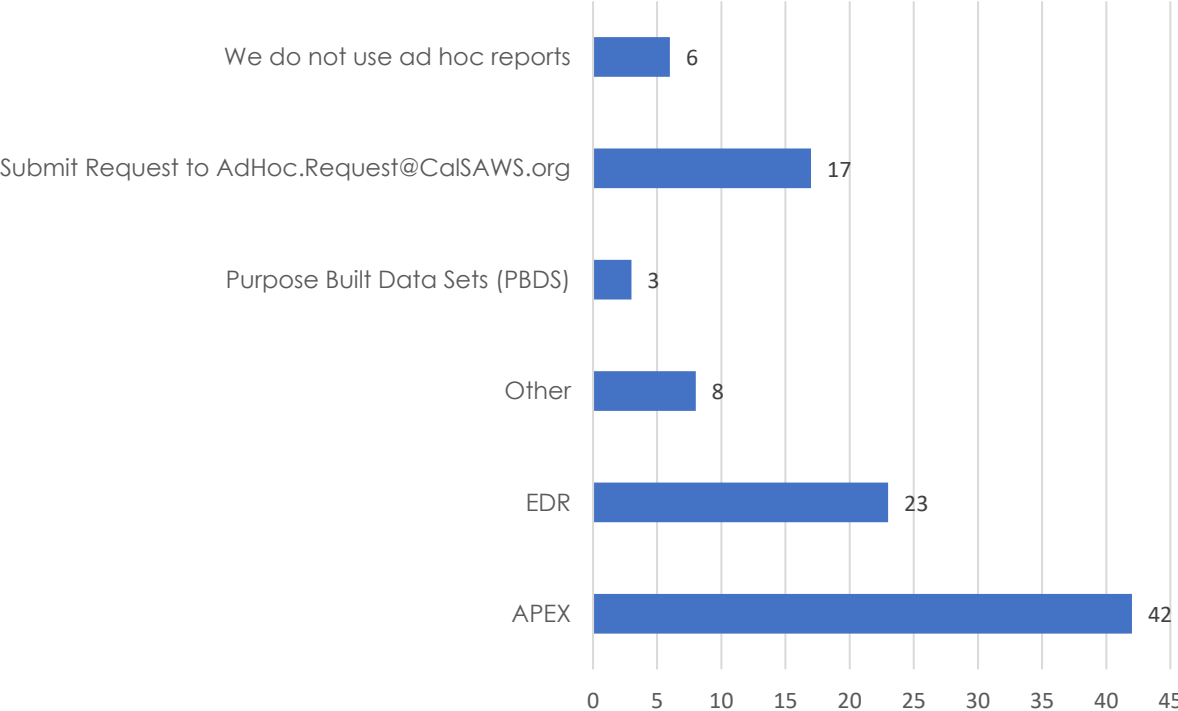
State reporting is impacted by conversion issues, missing reports, incorrect reports, lack of transparency into report logic, and delays fixing identified problems. This has led to extensions, manual workarounds, and frustration.

Training on reports has been insufficient, both pre- and post-migration. Spending more time in the system doesn't adequately teach people how to use reports well.

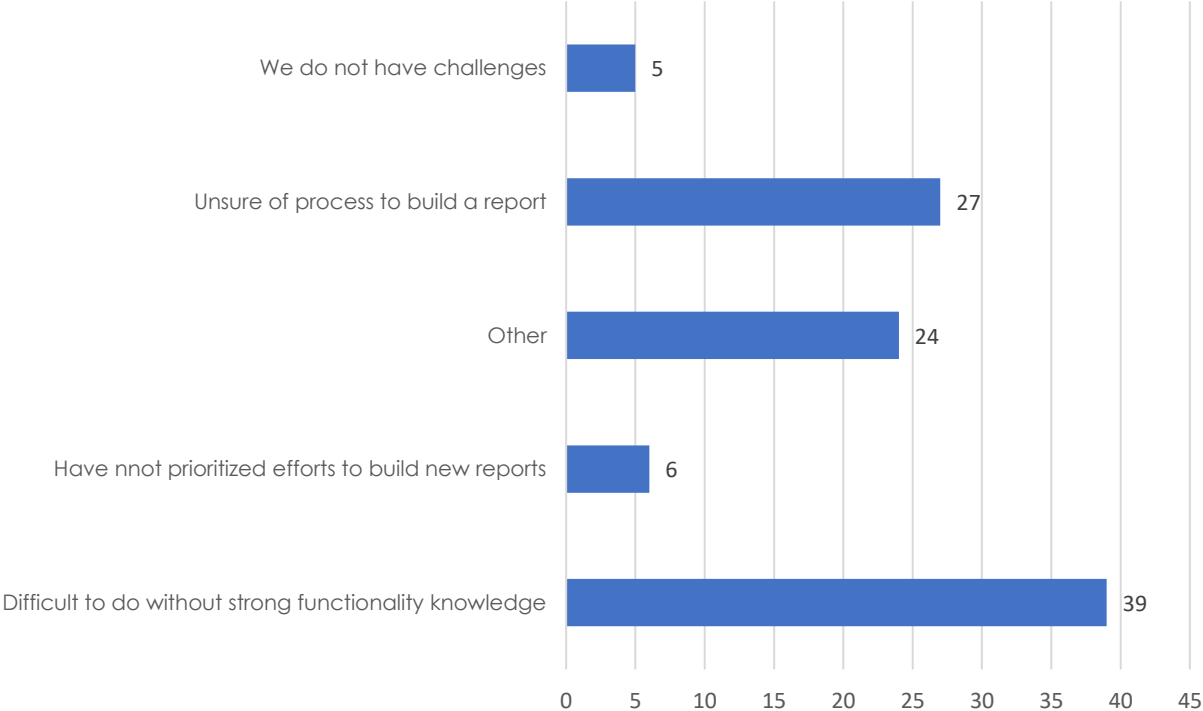
Customization is lacking compared to legacy systems. Key reports counties relied on previously are now unavailable, resulting in more ad hoc reports or third-party solutions.

# Survey Results – Ad Hoc

Select the options that your county has utilized to support ad hoc reporting needs. Check all that apply.

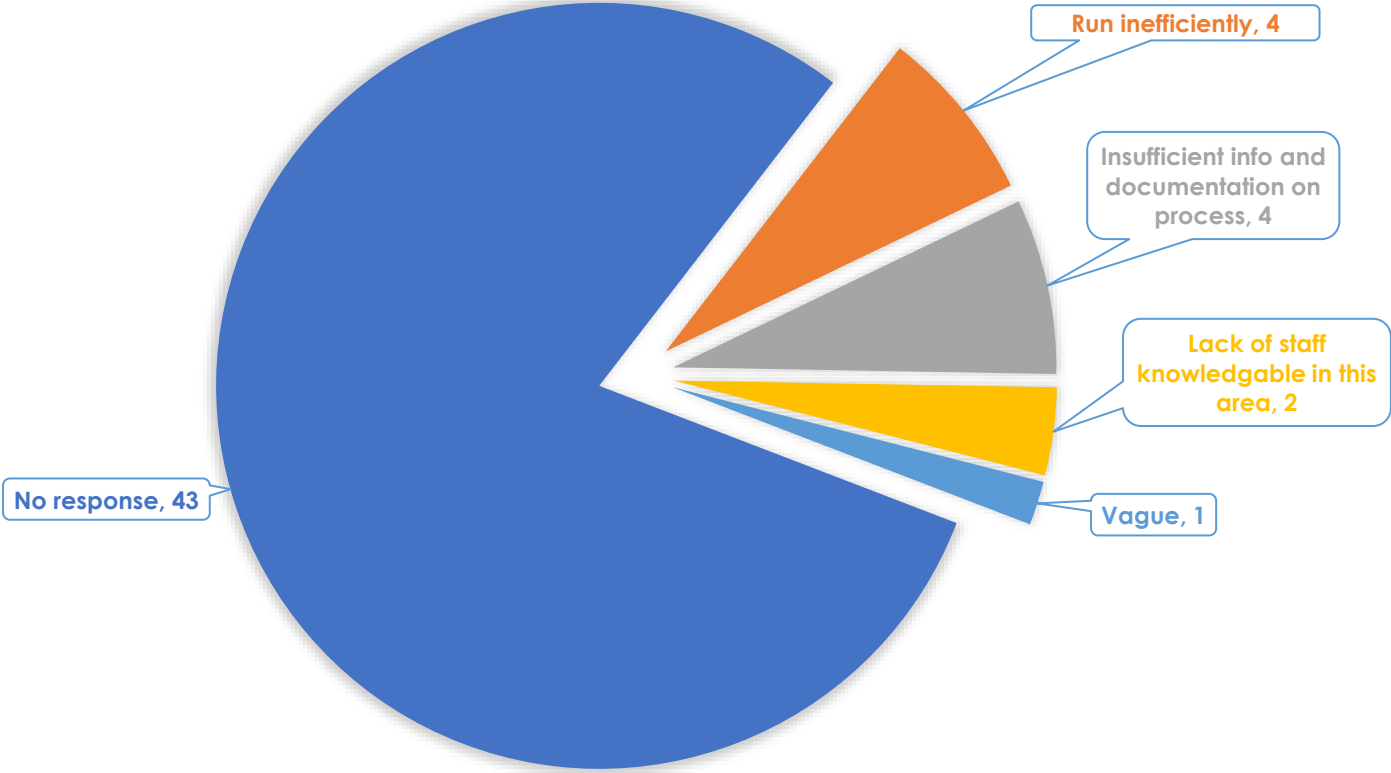


What are your greatest challenges to building ad hoc reports? Check all that apply.



# Survey Results – Ad Hoc

PLEASE EXPLAIN WHY AD HOC REPORTS ARE NOT USED (IF APPLICABLE).

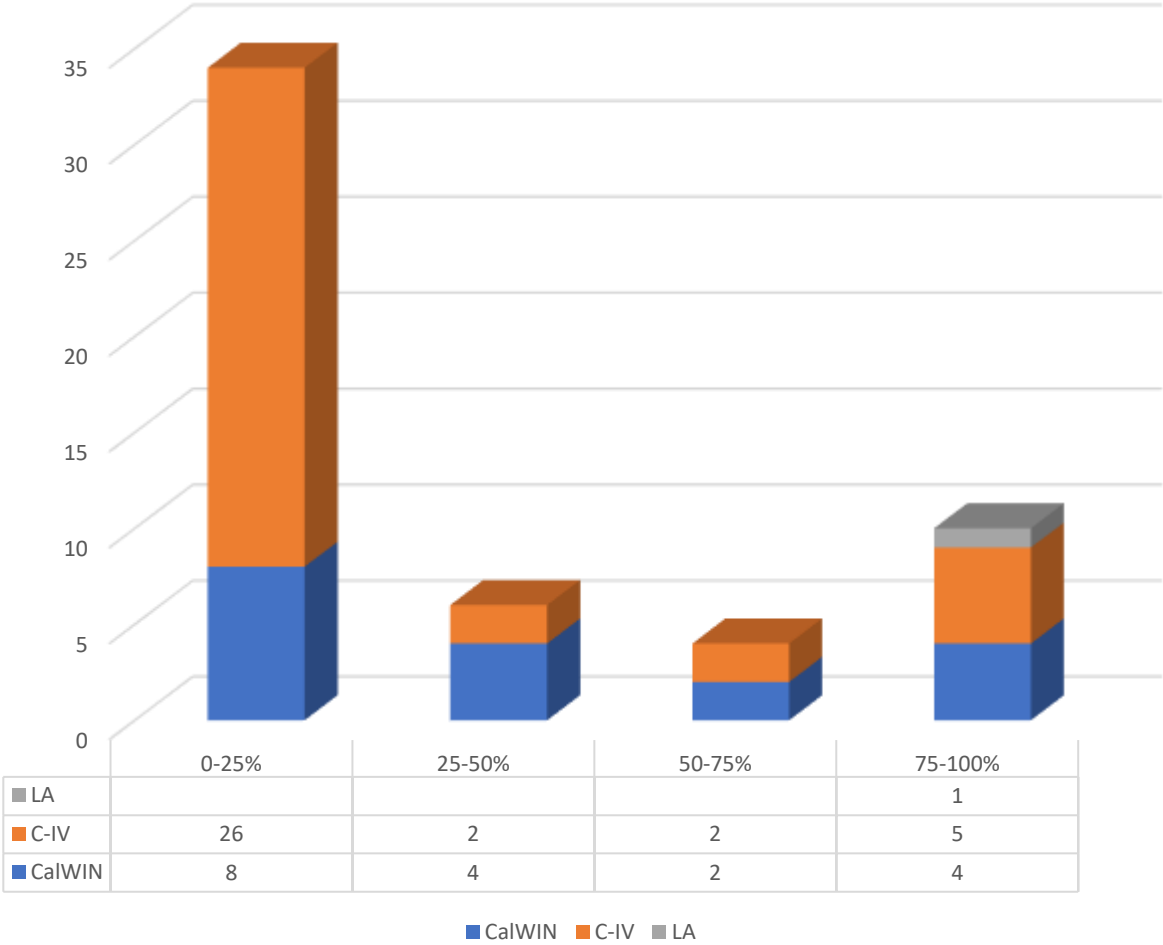


**GenAI Comment Summary:**

The most common reasons cited for not using ad hoc reports are lack of expertise in creating them, long wait times to receive them, lack of access to necessary data, and inadequacy of existing reports to meet needs. Many respondents indicated they rely on pre-built reports or have to piece together data from multiple sources because they lack skills or tools to create custom reports themselves.

# Survey Results – Service Desk (Tickets)

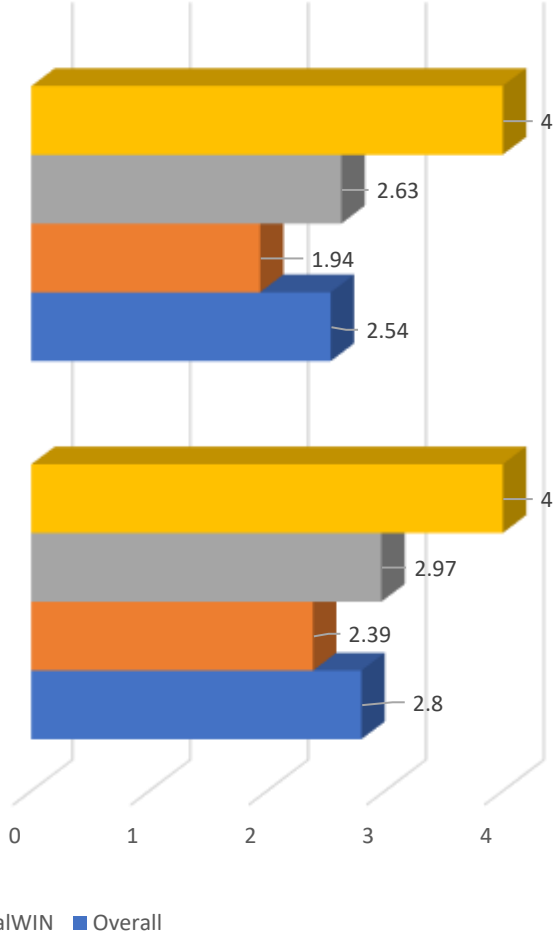
Approximately what percentage of reports-related issues do you create a CalSAWS ServiceNow ticket for?



## Service Now (Ticket) Questions

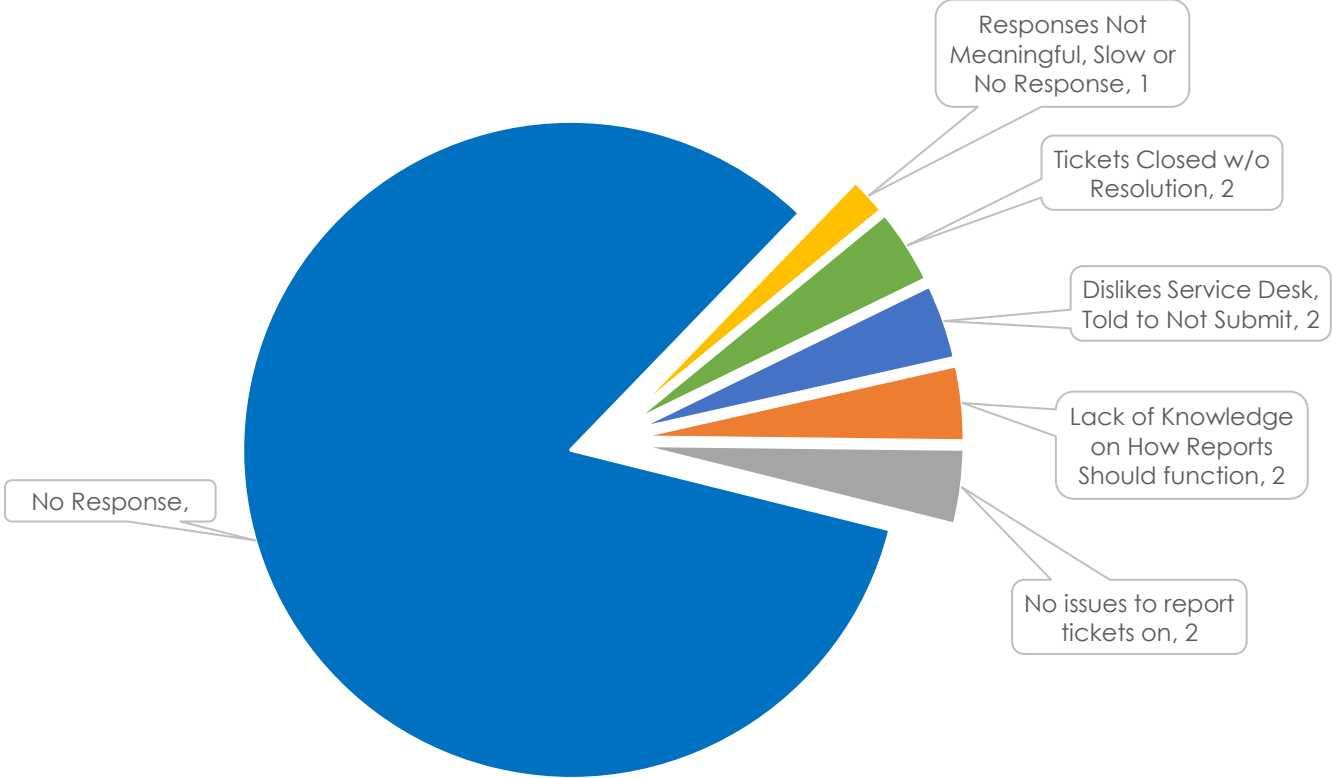
Reporting-related tickets are resolved in a timely manner.

Submitting a ServiceNow ticket is adequate for resolving reports issues.



# Survey Results – Service Desk (Tickets)

Does your county submit tickets to the CalSAWS Service Desk for reporting issues? If not, why not?

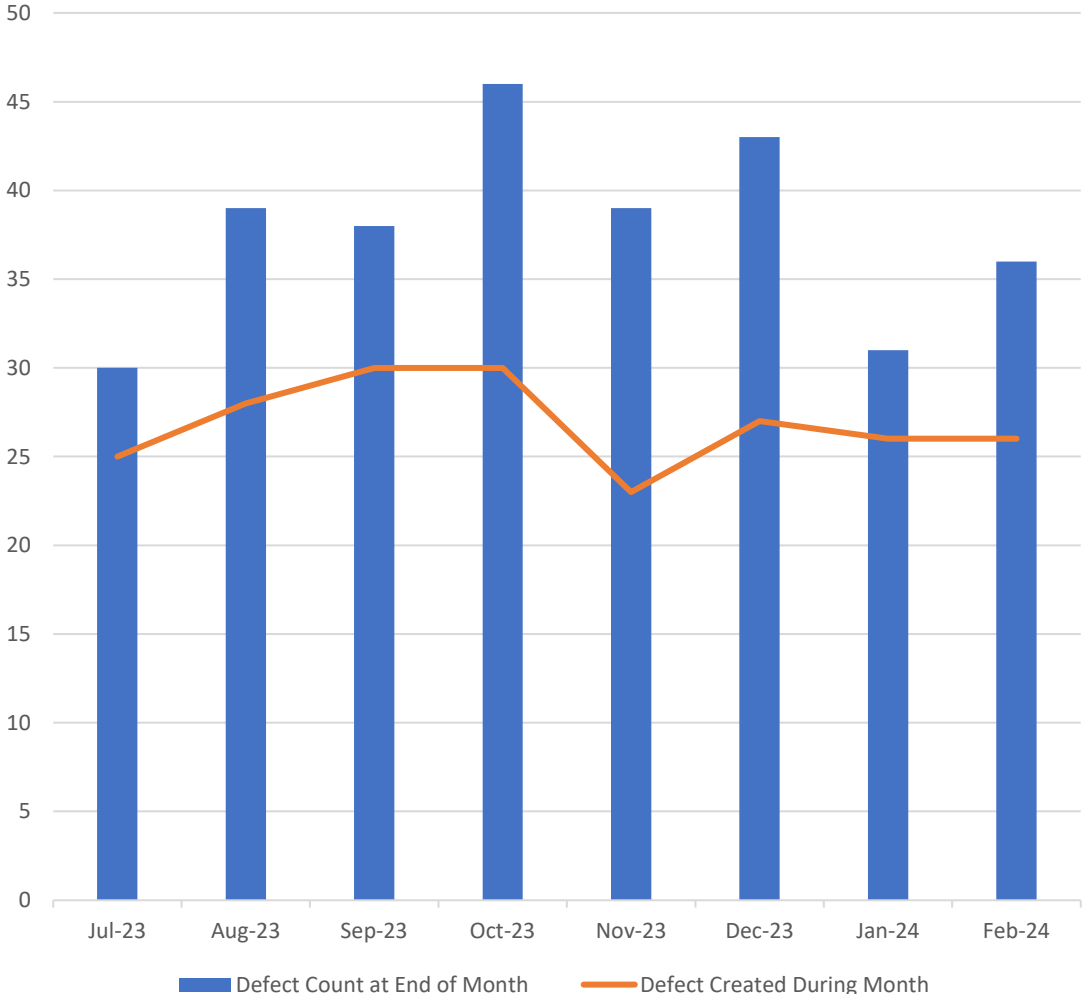


**GenAI Comment Summary:**

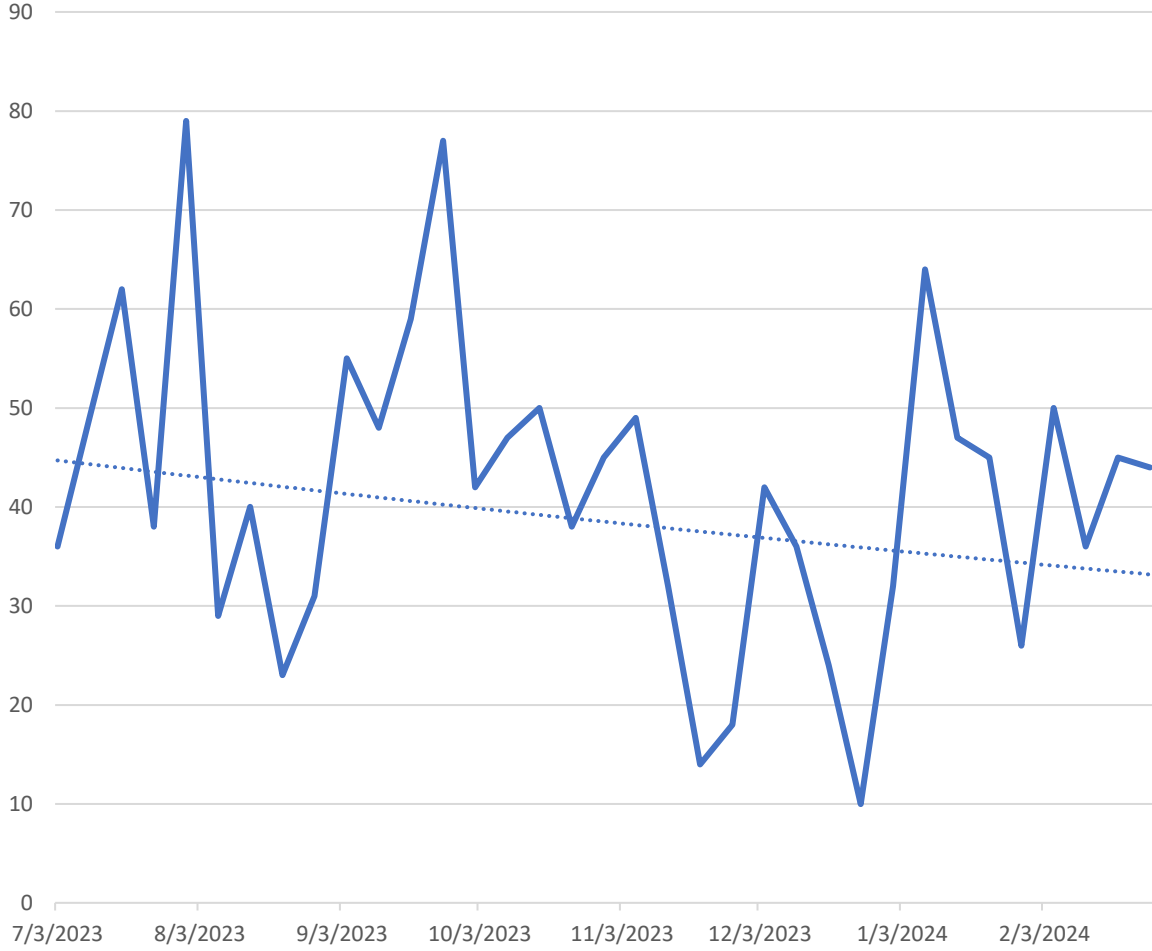
Many counties do not regularly submit tickets to the CalSAWS Service Desk for reporting issues. The most common reasons cited for not submitting tickets were: frustration with the response time and resolution from the Service Desk, feeling that issues were not actually resolved but rather explained as "working as designed", a lack of clear documentation around report design leading to an inability to clearly define the issue, and a sense that submitting tickets was ultimately a waste of time. Some counties do submit tickets but often end up building their own workaround reports rather than waiting for resolution.

# Ticket / Defect Volumes

### Reports / Analytics Defects by Month



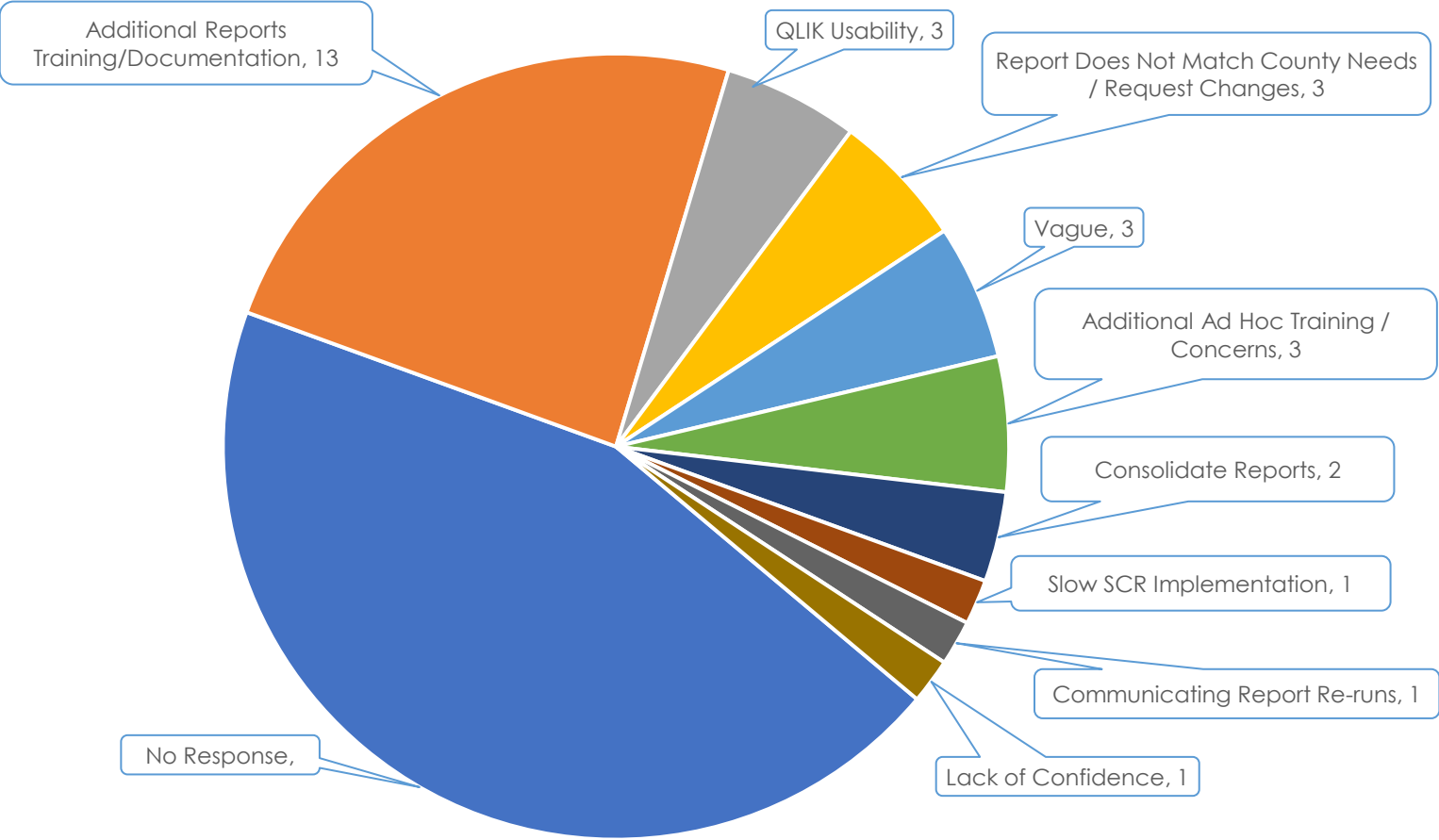
### Reports/Analytics Tickets by Week



Note: This is inclusive of all ticket types not just system errors.

# Survey Results – Additional Feedback

Please provide any additional comments or suggestions on how we can improve your experience with CalSAWS reports if the information has not been captured in your responses.



### **GenAI Comment Summary:**

The key themes in the additional comments and suggestions for improving the CalSAWS reporting experience focused on the need for more training, especially hands-on and role-based training, on using and customizing reports. Many respondents also called for more detailed documentation on report definitions, calculations, data sources, etc. to aid in interpreting results. Enhancing support was another common request, whether through more knowledgeable help desk staff, facilitator assistance, or direct communication from the CalSAWS team on known issues.

From a technical perspective, respondents want more customization in platforms like Qlik and Apex, the ability to integrate data across systems, scheduled delivery of reports, simplified filters, historical transparency, and overall more intuitive system design.



\* Did not submit CalSAWS Reports Survey  
*County* did not participate in Session

# Reports Listening Session Groups

## Group 1

1/29/24, 10am-12pm

**Participants:**

- Alpine
- Amador
- Calaveras\*
- Colusa
- Inyo
- Lassen
- Mariposa
- Napa
- Nevada
- San Benito
- Siskiyou\*
- Tehama
- Trinity
- Tuolumne

*Del Norte, Glenn, Modoc, Mono, Plumas, Sierra\**

## Group 2

1/31/24, 1pm-3pm

**Participants:**

- El Dorado
- Lake
- Sutter
- Yolo
- Yuba\*

*Mendocino*

## Group 3

2/2/24, 10am-12pm

**Participants:**

- Humboldt
- Kings
- Marin
- Placer
- San Luis Obispo
- Shasta

## Group 4

2/5/24, 10am-12pm

**Participants:**

- Merced
- Monterey
- Santa Cruz
- Solano
- Sonoma

## Group 5

2/7/24, 10am-12pm

**Participants:**

- Butte
- Imperial
- Madera
- San Mateo
- Santa Barbara

## Group 6

2/9/24, 10am-12pm

**Participants:**

- Contra Costa
- San Joaquin
- Tulare

*San Diego, Santa Clara*

## Group 7

2/14/24, 10am-12pm

**Participants:**

- Alameda
- Fresno
- Stanislaus
- Ventura

## Group 8

2/16/24, 10am-12pm

**Participants:**

- Kern
- Orange
- San Francisco

## Group 9

2/21/24, 10am-12pm

**Participants:**

- Los Angeles
- Riverside
- Sacramento
- San Bernardino

# Example Agenda

- 1 Welcome & Roll Call
- 2 Session Goals
- 3 County Feedback Summary
- 4 Priority Topics to discuss
- 5 Information Sharing
- 6 Action Plan

## Priority Topics

<span style="color: green;">■</span>	Strength area
<span style="color: red;">■</span>	Priority growth area
<span style="color: white;">■</span>	Possible growth area

Topic	Score/Comments
General Reports Experience	59-65% positive
CalSAWS Service Desk	6% submit more than 50% of tickets
Reports Resources	Address training needs
Ad Hoc Reports	Address ad hoc needs
General Reports	71-82% comfortable
Scheduled Reports	88% comfortable
On Request Reports	24-82% comfortable
BI Dashboards	88% report usability of Qlik
State Reports	WINS 2, CA 1037, SOC 808
Fiscal Reports	Claim Grant Totals, Collections Receipt, Integrated Foster Care, Direct Deposit Production Reconciliation, Main Payroll Reports, Valuable Inventory
Management Reports	RE Date, Customer Reporting Progress, Pending Applications

[Return to Reports Listening Session Process](#)

# Recurring Themes



## **Lack of detailed reports documentation & report-specific training materials:**

- Documentation is focused only on what has changed with each SCR since implementation
- Existing training materials only cover how to utilize Qlik software

## **Ad hoc training and usability gaps:**

- Lack of functional support
- Lack of clarity on available technical solutions
- Lack of low-tech ad hoc solution
- Unclear long-term ad hoc solution

## **Low utilization of CalSAWS Service Desk:**

- Ticket responses are too focused on defect/not defect
- Time-consuming to document and resolve reported issue
- Some county staff are unaware of how to utilize Service Desk
- Difficult to determine if ticket is needed without reports education & documentation
- Often email project directly

## **Usability concerns:**

- Reports access is unclear and confusing
- Unable to identify report reruns
- Limited search criteria and confusing separations
- Tedious to set parameters/filters for each report
- Ability to extract search results is limited
- Qlik filtering and usability is clunky

## **LA County-only reports for all:**

- Was not in scope for CalSAWS migration

## **Project process concerns:**

- Requested SCRs not being prioritized
- Slowness responding to CERs and Information Request tickets
- Lack of State/Fiscal Committee Meetings

## **Insufficient communication reach within the county:**

- New learnings are not distributed among county staff

[Return to Recurring Themes](#)

# Qlik Usability Issues

- ❑ Filters which have a parent/child relationship between select filters prohibit selections where there may be no relationship (if a child is chosen which is not within the parent the parent filter is removed automatically).
- ❑ Filters are restricted to data available to report, can't run valid scenarios if data doesn't exist (doesn't apply to reports that display real-time data)
- ❑ Columns expand to length of data not length of column header making headers un-readable if longer than data length and user must expand each column manually
- ❑ Select reports only allow for a user to select single day to be generated meaning the user has to run the report multiple times.
- ❑ Select reports do not finish before the system time out occurs.
- ❑ User can only have one instead of a specific report run at one time.
- ❑ Unable to share sheets between users and counties.
- ❑ Bookmarks are displayed in a screen with everyone's bookmarks across the state making it very difficult to find your own.

# Qlik Bookmarks

- Bookmarks was originally identified as an alternative to the C-IV Reports Subscription and CalWIN BI functionality. Below are the findings:

Qlik	Subscriptions
<input type="checkbox"/> Bookmark Repository is shared for all counties making it difficult to find desired item	<input type="checkbox"/> Subscription is unique to the individual
<input type="checkbox"/> Report isn't generated when bookmark is accessed causing the user to wait for generation	<input type="checkbox"/> Report is generated at the selected interval
<input type="checkbox"/> Bookmarks must use specific dates	<input type="checkbox"/> Reports can use parameters like in the last X number of days, last week, etc.
<input type="checkbox"/> User must log into the application to retrieve data	<input type="checkbox"/> User is sent email with link to report at desired frequency, proactively communicating to the user
<input type="checkbox"/> Concerns with Qlik filters prohibit establishing accurate reports.	<input type="checkbox"/> Reports filters are independent and multi-functional