

CalSAWS | Bi-Weekly Status Meeting

Date: May 22, 2024	Location: Microsoft Teams Meeting
Time: 9:00 a.m. – 11:00 a.m.	Meeting Called by: CalSAWS Management

Attendees: Alan Hernandez, Ana White, Amanda Batt, Arin Shahgholi, Arnold Malvick, Ashley Arnold, Ashraf Elsalaymeh, Ayana Alvarez, Belinda Ramirez, Bobbi Wibbenhorst, Cathryn VanNamen (CalWIN Implementation Support), Chris Van Vlack, Christine Hendren, Cristina Contreras, Danielle Benoit, Daisy Villaseñor, Dawn Wilder, Deanna Rotert, Duncan Gilliam (CalWIN Implementation Support), Eric Capati (CalWIN Implementation Support), Geoff Cosner, Gopal Vedula, Greg Postulka, Haikaz (Mike) Tombakian, Henry Arcangel, Holly Murphy, Jennifer Hobbs, Jennifer Smith, Jerry Nielson, Jo Anne Osborne, Joe Mendoza, Joel Acevedo, John Dray, Julia Erdkamp, Julie Conwell, Justin Stephenson, Karen Rapponotti, Kevin Wilson (OCAT Project), Kibby Stahl (OCAT Project), Laura Chavez, Lenecia Miles, Lisa Salas, Lorena Montes, Lulu Fou, Luz Esparza, Lynn Bridwell, Mara Jennings, Matthew Vandereyck, Melissa Thomas, Michael A. Johnson, Michele Peterson, Nichole Nava, Onur Senman (BenefitsCal Project), Peggy Macias, Quinn Hawkinson, Rachel Frey (BenefitsCal Project), Raul Gonzalez, Ricardo Miranda, Rodain Soto, Roger Perez, Sean Swift, Sharon Caldwell, Sharon Teramura, Sreshta Wickramasinghe (CalWIN Implementation Support), Timothy Hopson, Tom Hartman, Umair Khan, Veronica Lara, Yolanda Banuelos, Yong Vangbliayang, Yvonne Medina

QA: Dan Dean, Wendy Battermann, Don Coffey, Emmeil Davis, Matt Coffin, Gretchen Williams, Rachel Hernandez

State Partners: Brandon Hansard (OTSI), Caralee Mann (OTSI), Neha Dhawan (OTSI), Manroop Mahal (OTSI), Melissa Owens (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), Martha Esparza (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	<ul style="list-style-type: none">CalSAWS System Incident highlights
Maintenance and Operations	3.1.2 CalSAWS Help Desk Metrics	<ul style="list-style-type: none">The current compliance for May Month to Date (MTD) is 99.2%
Application Development and Test	4.4.1 Release Test Summary	<ul style="list-style-type: none">Deployed the 24.05 baseline release to production on May 19, 2024Continued test preparation for the 24.07 baseline release with a test execution start date of May 27, 2024
	4.6 Reports	<ul style="list-style-type: none">Bi-Weekly State and Fiscal Reports meetingMet with San Diego in 1:1 Session to discuss Stat 47 ReportTarget Reports Session on All Active Cases, Persons, and Expenditure DashboardProvided ad hoc data to all Counties for April 2024 CalFresh EBT Replacements

CalSAWS BenefitsCal Portal/Mobile M&O Bi-Weekly Status

Jerry Nielson

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Maintenance and Operations	3.5.1 Release Communications	<ul style="list-style-type: none">BenefitsCal Monthly Release 24.05.19 on 05/19/24
Application Development	4.2 Monthly Release Summary	<ul style="list-style-type: none">Upcoming BenefitsCal Monthly Release 24.05.30 on 05/30/24

CalSAWS BenefitsCal Portal/Mobile DD&I Bi-Weekly Status

Onur Senman

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	May Enhancements (Release 24.05.30)	<ul style="list-style-type: none">Eight (8) enhancements will be deployed to production across multiple releases in May 2024 including:<ul style="list-style-type: none">One (1) Collaboration Model Enhancement<ul style="list-style-type: none">CSPM-68111: Collaboration Model: Display Help Text for Customers when Case does NOT link automaticallyTwo (2) Security Enhancements

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		<ul style="list-style-type: none"> ▪ CSPM-71920: Additional improvements for Case Linking functionality. ▪ CSPM-71734: Change FR Integration Points. ○ Three (3) Policy Enhancements <ul style="list-style-type: none"> ▪ CSPM-67651: Implementation of SSA Assisted Apps in BenefitsCal. - Delivered with 5/19/2024 Release with the flag turned off. ▪ CSPM-73247: Add SSA User Guide for SSA Applications flow. <i>Delivered to SSA.</i> ▪ CSPM-73689: SSA Web Page for SSA Metrics. ○ Two (2) Testing Only Enhancements <ul style="list-style-type: none"> ▪ CSPM-71667: Add the Special Circumstance Icon to the e-Application Summary page. ▪ CSPM-73696: Configurable Task Categories for Task Management.
	June Enhancements (Release 24.06.27)	<ul style="list-style-type: none"> • Seven (7) enhancements will be delivered to Production in June 2024 across multiple releases: <ul style="list-style-type: none"> ○ One (1) Security Enhancement: <ul style="list-style-type: none"> ▪ CSPM-71734: Change Integration Points for all ForgeRock APIs – Will be delivered with a Priority Release on 6/13/24. ○ One (1) Collaboration Model Enhancement: <ul style="list-style-type: none"> ▪ CSPM-68269: Collaboration Model: Display Race Options in Alphabetical Order. ○ One (1) Partner Support Enhancement: <ul style="list-style-type: none"> ▪ CSPM-73249: Technical: Update Person Level Flag for Highlighted Documents to “No.” ○ Two (2) Policy Enhancements: <ul style="list-style-type: none"> ▪ CSPM-71517: Add the CF 385 (Application for Disaster CalFresh) to Forms API. ▪ CSPM-72205: Allow customers to submit SAR7 in BenefitsCal as soon as it's generated instead of first of the next month. ○ Two (2) Production Priority Enhancements:

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		<ul style="list-style-type: none"> ▪ CSPM-69823: Chatbot – Reenable See IF I qualify. ▪ CSPM-73717: Update the YouTube MCRE How To video to remove Asset section.
	May 2024 - OCM Activities to Enable Case Linking via Text functionality	<ul style="list-style-type: none"> • Training sessions with Counties and CBOs. <ul style="list-style-type: none"> ○ Case link MFA – County Staff Training (05/20/24). ○ Case link MFA – CBO Awareness Webinar (05/21/24). • Targeting the following items for the 05/30/24 implementation: <ul style="list-style-type: none"> ○ Website updates to support customer communication. <ul style="list-style-type: none"> ▪ FAQs for Case link MFA feature – (BenefitsCal.com) ▪ New YouTube Video – (BenefitsCal YT Channel) ▪ Announcement (BenefitsCal.com) ○ Communication tools for Counties, CBOs, and Customers <ul style="list-style-type: none"> ▪ Informational Flyer (CalSAWS.org/BenefitsCal) ▪ FACT Sheet ▪ Quick Reference Guide (CalSAWS.org/BenefitsCal). ▪ Job Aid ○ Twitter Message <ul style="list-style-type: none"> ▪ (CalSAWS.org/BenefitsCal) • Hypercare Support Daily Calls with Counties after implementation (5/31/24 - 06/06/24)
	User Centered Design (UCD) Activities	<ul style="list-style-type: none"> • Customer Experience (CX) Measurements Data <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 issues. • User Engagement <ul style="list-style-type: none"> ○ Conducted generative research sessions with County Staff Members for ABAWD ACL [CSPM-73600]. ○ Conducted usability testing sessions with customers for Case Link Verification II [CSPM-71920]. ○ Recruited CBOs for ABAWD ACL [CSPM-73600]. • Enhancements <ul style="list-style-type: none"> ○ Conducted usability testing sessions for Case Link Verification II [CSPM-71920].

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		<ul style="list-style-type: none"> Conducted generative research for ABAWD ACL [CSPM-73600]. Finalize Case Link Verification Phase II [CSPM-71920]. Finalize CM enhancement - YT videos [CSPM-68266]. Finalize Language updates for SAR7 due month [CSPM-72205]. Designed CSPM-72078 [Add confirmation code to document upload receipts]. Advocate Engagement <ul style="list-style-type: none"> Facilitated May UCDM Monthly meeting
	GetCalFresh (GCF) Parity List	<ul style="list-style-type: none"> The most recent session was conducted on 05/01/24 with the CDSS, Consortium, and CWDA on Premise funding and open items. CDSS confirmed funding will be provided for items #22, #34, #44, #52. For item #55, CDSS will confirm whether the pre-populated SAR 7 funds can be utilized or not. Discussions will continue for the closure of remaining (3) parity items #24, #46, and #51. Parity items #9, #19, and #63 implemented and deployed to production with the 24.01 release. Item #31 (CF-303) is delivered with the March 24.03 baseline release. Item #20 (SSA Assisted Apps) is delivered with the May 24.05.19 release on the 05/19.

CalSAWS DD&I Bi-Weekly Status

Arnold Malvick

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Project Management		<ul style="list-style-type: none"> Received DEL #96 CalSAWS Migration Final Acceptance on May 10, 2024

CalSAWS Central Print Bi-Weekly StatusGeoff Cosner
Dawn Wilder

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
1.1	N/A	<ul style="list-style-type: none">Continued processing of print for all 58 CalSAWS counties.Continued Return Mail processing for 7 counties.

OCAT Project Bi-Weekly StatusKibby Stahl
Kevin Wilson

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	N/A	<ul style="list-style-type: none">None to note for the reporting period

CalSAWS QA Bi-Weekly Status

Dan Dean

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	QA PMO	<ul style="list-style-type: none">Participated in CalSAWS Project Control Document Update ReviewFacilitated CalSAWS Release 24.05 Readiness and Green LightParticipated in Hyland Monthly Imaging SLA ReviewParticipated in OCAT Monthly SLA reviewParticipated in OCAT Ops and Release Management reviewPresented Quality Assurance update for Final Acceptance of CalSAWS System Migration and CalWIN ISS for JPA Board and Project Steering CommitteeContinued updates for CalSAWS Post Implementation Evaluation Report (PIER)
	QA Technical	<ul style="list-style-type: none">Participated in CalSAWS Contact Center meetingsParticipated in Fresno Generative AI Call Summary meetingParticipated in Production Operations reviewsParticipated in CalSAWS Architecture reviewsContinued review of CalSAWS Change Advisory Board (CAB) tickets

STATUS REPORT SECTION	STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
		<ul style="list-style-type: none"> Continued reviews of Partner System Security Plans (SSPs)
	QA Functional/Test	<ul style="list-style-type: none"> Completed CalSAWS Release 24.05 Job Aid/Online Help validation Completed CalSAWS Release 24.05 Test Execution with 100% Passed rate Completed CalSAWS Release 24.05.17 Web Based Training (WBT) validation Completed BenefitsCal Release 24.05.19 Test Execution Continued CalSAWS Client Correspondence Test activities Participated in CalSAWS State/Fiscal Report Support activities Monitored FCED Integrated Test Execution and defects. Assisted in the coordination of in person orientation meetings Participated in WDTIP Planning and Sprint review activities Completed CalWIN ISS/OCM review of reports support documentation

State Policy Updates

Sherice Sterling (CDSS)

Cecilia Rolon (CDSS)

- CDSS has a meeting conflict and will not be in attendance after 9:30 a.m. No updates to share

Katie Mead (DHCS)

Robin Grandpre (DHCS)

Caralee Mann (OTSI)

Manroop Mahal (OTSI)

Risk Management Group

Mandy Batt

- To align with Bi-Weekly Status, the RMG will now take place on the first Wednesday Bi-Weekly Status of the month. Current schedule is as follows:
 - Rescheduled May 22, 2024
 - June 5, 2024
 - July 3, 2024
 - August 14, 2024
 - September 11, 2024
 - October 9, 2024
 - November 6, 2024
 - December 4, 2024

(Optional Items)

#	Action Item	Who	Due	Status
1	<p>CalSAWS M&O on-hold tickets in the 60-90 days category shows a large spike (Chart 3.1.2.7; pg. 16). What makes up that? Additionally, the category chart (Figure 3.1.2-14 pie chart) shows a large percentage of "other" can we get that broken down?</p> <ul style="list-style-type: none">- Confirmed the spike on 3.1.2.7 was due contact center telephonic signature- New categories for Chart 3.1.2-14 are in progress. Target to have the updated chart in the next bi-weekly status on 5/22/2024	Tech (Jeremy G.)	5/22/2024	Completed
2	<p>For closing out Risk 298, Customer Engagement team and RMs to confirm with counties they are in agreement with retiring the risk. Dray to add RMs to discussions with counties on turning bots back on.</p> <ul style="list-style-type: none">- Request from R4 to keep it open until the end of the month	John Dray	6/5/2024	In Progress
3	<p>Add RMs to the security management process on county managed workstations/laptops when security scans identify a concern. This will help close the loop on county response (example. Riverside workstation)</p> <ul style="list-style-type: none">- Security worked with Ricardo on the process. Documentation in process and on target to be reviewed by RMs next week.	Belinda R., Ricardo M., Alex H.	5/22/2024	Completed
4	<p>Discuss if Status Materials could be sent out earlier</p> <ul style="list-style-type: none">- Starting next bi-weekly status (5/22) PMO will be sending the status package by Tuesday at Noon	All Vendor PMO teams, CPMO	5/22/2024	Completed
5	<p>Provide a broader communication to counties regarding VA updates so that counties can pass that info along with to their staff. The release had some great new additions, so can we add these someplace else to ensure we increase use and adoption? Lisa noted they can talk to Amy and make sure these are a part of the Release Readiness sessions.</p> <ul style="list-style-type: none">- An update will be in the 24.07 newsletter and other ideas may come from the release discovery sessions	Lisa Salas	5/22/2024	Completed

#	Action Item	Who	Due	Status
6	<p>In response to - How did we let the counties know the BC new functionality fliers were there for customers/CBOs?</p> <p>Last time we did it as a broadcast notification and we had it on the SS portal and the CalSAWS.org site. The materials will get posted today and the counties will get notified today. BenefitsCal team to confirm their process steps adhere to standard release notification processes and explore how else to share info.</p> <ul style="list-style-type: none"> - The supplemental OCM materials below for the Case Link MFA shared via following channels: - Updates on materials preparation shared with Counties during Tuesday/Thursday Security call. RMs were part of the material review cycle. Once translations of the final versions of the English content is complete, materials are shared before the deployment, as planned. <ul style="list-style-type: none"> o BCAL FACT Sheet: CIT 0065-24 BenefitsCal Fact Sheet for Case Linking and MFA Case Linking Verification (Sent on 4/25/2024) o Job Aid: CIT 0063-24 CA-276107 Update JA - Self-Service Portal (SSP) - Case Link Requests Due to CA-261398 (Sent on 4/22/2024) o Information flyer: Broadcast message (Sent on 4/24/2024). o Announcements: Posted on the BenefitsCal website (With go-live on 4/25/2024) o Twitter: Posted on calsaws.org. o QRG: Posted on calsaws.org. o YouTube video: Available on the channel and BenefitsCal website - Standard release notes/notification process was followed for all other items being delivered with the Release 24.04 	BenefitsCal (Onur)	5/22/2024	Completed
7	Add to Contact Center section of M&O bi-weekly status report the defect resolution dates, counts, etc.	Akira Moriguchi	5/22/2024	Completed

#	Decision Made	Who Made the Decision	Date
1			

