

# CALSAWS M&O BI-WEEKLY STATUS REPORT

**Reporting Period: June 17, 2024 – June 30, 2024**

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
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## 1.0 Executive Summary

### 1.1 CalSAWS Project Status Dashboard

**Table 1.1-1 – Status Dashboard**

Topic	CalSAWS System	Highlights for the Reporting Period
Availability		<ul style="list-style-type: none"> <li>▶ The CalSAWS System did not experience any unplanned outages during this reporting period.</li> </ul>
Defects		<ul style="list-style-type: none"> <li>▶ There are 130 active Production defects</li> </ul>
Incidents		<ul style="list-style-type: none"> <li>▶ CALSAWS BROADCAST: Starting at 1:18 p.m. on June 17, 2024, customers were experiencing an error entering an address in BenefitsCal when creating applications, redeterminations or SAR7s. As of 5:10 p.m. on June 17, 2024, this issue was resolved. Customers are now able to enter an address in BenefitsCal without an error when creating applications, redeterminations or SAR7s. PRB0049421</li> <li>▶ CALSAWS BROADCAST: Starting at 10:02 a.m. on June 27, 2024, some users were experiencing intermittent errors while performing transactions in the CalSAWS imaging solution (Hyland), such as capturing or updating images. As of 12:48 p.m. on June 27, 2024, this issue was resolved by Hyland. All backlogged images have been processed and the team continues to monitor imaging system performance. PRB0049488</li> <li>▶ CALSAWS BROADCAST: Starting at 4:00 p.m. on June 28, 2024, users were experiencing intermittent errors performing transactions in the CalSAWS Policy, Review, and Training (PRT) environment. Additionally, the CalSAWS “Case Copy job” has been paused until the issue is resolved. This will prevent Case Copy functionality in the PRT, Training Staging and Training Production environments. The project team created defect CA-279912 to fix the issue. PRB0049509</li> </ul>

Legend	
	On Track
	At Risk
	Not on track/Monitor

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**1.2 Highlights from the Reporting Period**

- ▶ The CalSAWS team successfully deployed the following priority releases since the last reporting period
  - Ten priority releases that included 22 System Change Requests (SCRs) and 125 defects, a total of 147 items

**Table 1.2-1 Priority Releases**

Minor version (Release date)	Issue Type	SCR	Grand Total
Team Responsible	Defect		
<b>24.06.18 (June 18, 2024)</b>	<b>9</b>	<b>1</b>	<b>10</b>
Batch/Interfaces	2	0	2
CalHEERS	2	0	2
Online	5	0	5
Training	0	1	1
<b>24.06.19 (June 19, 2024)</b>	<b>38</b>	<b>4</b>	<b>42</b>
Batch/Interfaces	2	0	2
Client Correspondence	21	2	23
Contact Center	1	0	1
Eligibility	5	0	5
Fiscal	2	0	2
Online	4	2	6
Performance	1	0	1
Task Management	2	0	2
<b>24.06.20 (June 20, 2024)</b>	<b>38</b>	<b>3</b>	<b>41</b>
Analytics	2	0	2
Batch/Interfaces	1	0	1
CalHEERS	2	1	3
Client Correspondence	2	2	4
Contact Center	10	0	10
Eligibility	2	0	2
Fiscal	3	0	3
Online	6	0	6
Reports	9	0	9
Technical Architecture	1	0	1
<b>24.06.21 (June 21, 2024)</b>	<b>1</b>	<b>0</b>	<b>1</b>
Batch/Interfaces	1	0	1
<b>24.06.22 (June 22, 2024)</b>	<b>0</b>	<b>2</b>	<b>2</b>
Technical Operations	0	2	2
<b>24.06.24 (June 24, 2024)</b>	<b>4</b>	<b>0</b>	<b>4</b>
Contact Center	4	0	4
<b>24.06.25 (June 25, 2024)</b>	<b>5</b>	<b>0</b>	<b>5</b>

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Minor version (Release date)	Issue Type	SCR	Grand Total
Team Responsible	Defect		
CalHEERS	1	0	1
Fiscal	3	0	3
Online	1	0	1
<b>24.06.26 (June 26, 2024)</b>	<b>1</b>	<b>0</b>	<b>1</b>
Batch/Interfaces	1	0	1
<b>24.06.27 (June 27, 2024)</b>	<b>29</b>	<b>11</b>	<b>40</b>
Batch Operations	0	1	1
Batch/Interfaces	3	1	4
BenefitsCal	8	1	9
CalHEERS	1	0	1
Client Correspondence	0	2	2
Contact Center	1	2	3
Eligibility	1	2	3
Fiscal	1	1	2
Online	7	0	7
Performance	1	0	1
Reports	4	0	4
Virtual Assistant	2	1	3
<b>24.06.30 (June 30, 2024)</b>	<b>0</b>	<b>1</b>	<b>1</b>
POD-Data Growth	0	1	1
<b>Grand Total</b>	<b>125</b>	<b>22</b>	<b>147</b>

► Planned Outages:

○ Scheduled CalSAWS Outages:

▪ CalSAWS Production Maintenance:

- From 10:00 p.m. on June 28, 2024, until 2:00 a.m. on June 29, 2024, Users were unable to login to the CalSAWS, BenefitsCal and OCAT applications. "Read Only" version of the CalSAWS application were not available

▪ BenefitsCal Maintenance/Limited Access:







- On June 27, 2024, from 8:00 p.m. to 9:30 p.m. the BenefitsCal application was unavailable



## 2.0 Project Management

### 2.1 Project Deliverables Summary

Table 2.1-1 – Overall Summary of Deliverable Status for Current Reporting Period

DEL #	DELIVERABLE NAME	TEAM	STATUS [1]	STATUS
N/A	M&E Services Plan	PMO		<ul style="list-style-type: none"> <li>Draft Deliverable Review Phase targeted to end on July 1, 2024</li> <li>Final Deliverable Response Phase is from July 2, 2024 through July 16, 2024</li> </ul>
0.0	CalSAWS M&O Services Plan Executive Summary	PMO		<ul style="list-style-type: none"> <li>Draft Deliverable Review Phase targeted to end on July 1, 2024</li> <li>Final Deliverable Response Phase is from July 2, 2024 through July 16, 2024</li> </ul>
1.0	Business Continuity & Disaster Recovery Plan	Technical		<ul style="list-style-type: none"> <li>Draft Deliverable Review Phase targeted to end on July 1, 2024</li> <li>Final Deliverable Response Phase is from July 2, 2024 through July 16, 2024</li> </ul>
4.0	Configuration Management Plan	Technical		<ul style="list-style-type: none"> <li>Draft Deliverable Review Phase targeted to end on July 1, 2024</li> <li>Final Deliverable Response Phase is from July 2, 2024 through July 16, 2024</li> </ul>
5.0	Helpdesk Services Plan	Technical		<ul style="list-style-type: none"> <li>Draft Deliverable Review Phase targeted to end on July 1, 2024</li> <li>Final Deliverable Response Phase is from July 2, 2024 through July 16, 2024</li> </ul>
11.0	Remote Maintenance Operations Plan	Technical		<ul style="list-style-type: none"> <li>Draft Deliverable Review Phase targeted to end on July 1, 2024</li> <li>Final Deliverable Response Phase is from July 2, 2024 through July 16, 2024</li> </ul>

[1] Status: **Green:** On schedule, performing as planned; **Amber:** Potential delay/monitor with no material schedule impact; **Red:** Behind schedule and requires escalation.

### 2.2 Highlights from the Reporting Period

Table 2.2-1 – Project Management Status Agenda Topic

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

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- ▶ Continued Project administration, office management support, and financial management tasks
- ▶ Continued CalSAWS Risks and Issues Management Group (RMG) activities, including:
  - Continued to work with risk and issue owners to monitor risks and update risk mitigation plans for CalSAWS Project risks and issues
  - Began preparations for Monthly Risks and Issues Management Group (RMG) meeting to be held on July 3, 2024
- ▶ Continue activities to support Project staff working remotely
  - Continued developing Project communications, as needed
  - Began working on materials for Bi-Monthly CalSAWS Connect to be distributed on July 3, 2024
  - Began preparations for monthly All Staff meeting to be held on July 10, 2024
- ▶ Participated in the CalSAWS Joint Powers Authorities (JPA) Member Representatives and Board of Directors Meetings held on June 27, 2024
- ▶ Began preparing materials for Joint Powers Authorities (JPA) Meeting to be held on July 12, 2024
- ▶ Continued performing contract management activities:
  - Change Notice 33 (July JPA) has been submitted to the Consortium and includes:
    - Premise Items:
      - California Automated Response and Engagement System (CARES)
      - Welfare Data Tracking Implementation Project Upgrades (WDTIP)
      - Able-Bodied Adults Without Dependents (ABAWADs) Fiscal Responsibility Act of 2023
      - CalFresh Notice of Provider Determination
      - Family Reunification AB 135
      - Transitional Housing Supplement (THS)
      - CalWORKS Overpayments (SB 726)
      - House Assistance Payments (HAP) Eviction (SB 1083)
      - Work Registration CalFresh Disqualification Notice Update
      - CalWORKS Work Requirements (AB 2300)
      - Telephone Consumer Protection Act - Text Messaging Consent
    - County Purchase Orders (CPOs)
    - Administrative contract updates
  - Change Notice 34 (August JPA) preparations have begun.

### 2.3 Communications Management

- ▶ CalSAWS Communications Management activities including:
  - Continued to gather key communication milestones from the Project teams
- ▶ CalSAWS Enhanced Communications Strategy
  - Continued oversight and management of Power of 58 materials
- ▶ CalSAWS External Website ([www.calsaws.org](http://www.calsaws.org))
  - Continued the administration and support of the CalSAWS external website
    - See Table 2.3-1 for details on website support activities

**Table 2.3-1 – Website Support Activities**

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TASK	DATE	TASK TYPE
Updating plugins/themes	June 27, 2024	Website Maintenance

**Table 2.3-2 – CalSAWS.org Subscription Service Statistics**

WEBPAGE	PERCENT OF SUBSCRIBERS
Latest News – CalSAWS Buzz Newsletter	17%
Latest News – News	13%
Other Updates – System Updates	14%
Other Updates – Careers	13%
CalSAWS Committees – CalWORKs/CalFresh	13%

**Note:** Due to the unavailability of Google Analytics, the 'CalSAWS.org Usage Statistics' table and the 'Overall CalSAWS.org Usage Trend' graph have been removed

**2.4 CRFI/CIT Communication Status**

- The following table outlines CalSAWS Information Transmittals (CITs) for the reporting period ending on June 30, 2024

**Table 2.4-1 – CITs**

CIT ID	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
0097-24	CA-277703 Run Batch EDBC to apply new Child Support Income Exemptions Lists	Informational	June 17, 2024	Sarah Rich	CalWORKs_Cal Fresh Committee Facilitator
0098-24	Policy Review and Training (PRT) Environment for General Assistance /General Relief (GA/GR) Automate Solution Administrative Eligibility Rule Configuration Usage	Informational	June 17, 2024	Adelaide Mendoza, and Grady Howe	Dena DeLapp, and Pete Quijada
0099-24	Family Reunification Instructions	Informational	June 18, 2024	Norma Meza	CalWORKs_Cal Fresh Committee Facilitator
0100-24	Fact Sheet – Utilizing Reports to Manage Skipped Issuances	Informational	June 21, 2024	Bobbi Wibbenhorst	Jeric Huang
0101-24	Scheduled Downtime Notification – 7/14/2024	Informational	June 24, 2024	Anand Kulkarni	Pete Quijada

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CIT ID	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
0102-24	Skipped Issuances Job Aid	Informational	June 24, 2024	Jennifer Hahner	Janet Mitri
0103-24	Process for requesting CalSAWS Contact Center Changes	Informational	June 24, 2024	Yogesh Patel	Logan Pratt
0104-24	CA- 278483 - Extension of Eligibility for Ukrainian Humanitarian Parolees – List of Impacted Cases	Informational	June 28, 2024	Norma Meza, Caroline Bui, and Adelaide Mendoza	Dennis Kong, Dena DeLapp, and CalWORKs_Cal Fresh Committee Facilitator

- ▶ The following table outlines CalSAWS Requests for Information (CRFIs) for the reporting period ending on June 30, 2024

**Table 2.4-2 – CRFIs**

CRFI ID	Subject	Distribution Date	Status	Response Due Date	CalSAWS Contact
24-018	Central Print Bank Information Change	May 7, 2024	Open	July 31, 2024	Julie Holmes
24-022	County Welcome Bot Enablement	May 13, 2024	Closed	June 7, 2024	Inez Finnigan
24-023	CalSAWS Release Readiness & County Validation Virtual M&E Roadshow - Participant Request	June 10, 2024	Open	June 21, 2024	Justin Stephenson

- ▶ The following table outlines overdue CalSAWS Requests for Information (CRFIs) for the reporting period ending June 30, 2024

**Table 2.4-3 – Overdue CRFI**

CRFI ID	Subject	Region 1	Region 2	Region 3	Region 4	Region 5	Region 6
24-023	CalSAWS Release Readiness & County Validation Virtual M&E Roadshow - Participant Request	Marin County	Calaveras, Mono, Sierra, and Tuolumne Counties	Mendocino, Siskiyou, and Trinity Counties			

**2.5 SIRFRA/SCERFRA Information**

- ▶ The following tables outline current Statewide Automated Welfare System (SAWS) Cost Estimation Request for Research and Analysis (SCERFRA) and SAWS Information Request for Research and Analysis (SIRFRA)

**Table 2.5-1 – Summary of SIRFRA/SCERFRA Requests**

Status	Total
New	0
Assigned	21
Completed	1195
Duplicate	20
In review	3
Withdrawn	45
Rejected	7
Pending clarification	2
<b>Total</b>	<b>1293</b>

**Note:** SIRFRA/SCERFRA requests from November 2018 through the end of the reporting period

**Table 2.5-2 – Details of SIRFRA/SCERFRA Data Received**

ID	Description	Status	Due Date	Response Received Date	Notes
SCERFRA 24-500	SCERFRA 24-500- National Accuracy Clearinghouse (NAC)	Assigned	June 6, 2024	No response	
SIRFRA 3980	SIRFRA 3980 - Automated Generating of CCP 2145	Assigned	June 25, 2024	No response	
SCERFRA 24-515	SCERFRA 24-515 - AB 305 – Veteran Services Notice	Assigned	June 26, 2024	No response	
SIRFRA 1336	SIRFRA 1336 - Alternate Formats In SAWS	Pending clarification	June 26, 2024	No response	
SIRFRA 1388	Recurring SIRFRA 1388 - Monthly Failure to Complete Data	Assigned	July 1, 2024	No response	
SCERFRA 24-519	Expedite: SCERFRA 24-519 - BenefitsCal Requirements for CalFresh	Assigned	July 3, 2024	No response	
SIRFRA 1392	SIRFRA 1392-Elimination of Assets and Updates to Share of Cost (LTC/PETI) NOA forms and Notices	Assigned	July 3, 2024	No response	
SIRFRA 1386	Recurring SIRFRA 1386 - Renewal and Demographics Data Request	Assigned	July 4, 2024	No response	
SIRFRA 3979	SIRFRA 3979 - Standard Medical Deduction Cost Neutrality Report	Assigned	July 5, 2024	No response	
SIRFRA 1383	CLONE - SIRFRA 1383 - CMS PI Reports for Counties	Assigned	July 5, 2024	No response	
SIRFRA 1384	SIRFRA 1384 - RMR Report for Counties	Assigned	July 5, 2024	No response	
SIRFRA 1380	CLONE - SIRFRA 1380 MEDS Alert Monitoring - recurring SIRFRA	Assigned	July 7, 2024	No response	

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ID	Description	Status	Due Date	Response Received Date	Notes
Other	CalSAWS Enhancement of Appointments   Lobby Mgmt.	Pending clarification	August 18, 2024	No response	

### 2.6 Culture Transformation

- ▶ Culture Ambassadors Network (CAN)
  - Completed activities
    - Distributed content for June Wellness Wednesday
      - National Employee Wellness Month covered physical and mental employee wellness, Juneteenth, and Pride Month celebration
    - Coordinated Pop-up wellness calendar events
    - Planned for poetry winner judging and announcements
  - Current Activities
    - Wellness Wednesday Pop-up workout events
    - Preparing for upcoming CalSAWS Connect
  - Upcoming activities and events
    - Best vacation 2024
    - SAWS memorabilia
    - Annual Art Tour

### 2.7 Inclusion, Diversity and Equity Advancement (IDEA)

- ▶ Co-Create Phase
  - CalSAWS "We Are One" SharePoint Site
    - Continued to update the "We Are One" website tab
  - Pulse Survey
    - Created PowerPoint slides detailing new pulse survey assessment constructs and definitions for knowledge transfer documents
  - CalSAWS Table Talks
  - Buddy Program
    - Continued supporting buddy pairs
  - Employee Resource Group (ERG) Council
  - Great Place to Work
    - Announced upcoming activities during the CalSAWS All-Staff meeting; July virtual game hour, CalSAWS Annual Backpack Drive, and Mother's/Father's Day photos
- ▶ General
  - Created several knowledge transfer documents to assist in transition of IDEA program to CalSAWS ownership
  - Continued efforts to increase prioritization, knowledge transfer and capacity building to enable CalSAWS to sustain IDEA
  - Continued working with CalSAWS staff to create and present Inspiration Stations during monthly virtual CalSAWS Project All Staff Meetings
  - Continued to partner with the CalSAWS Connect team to provide content for the

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CalSAWS monthly newsletter

- o Continued to engage the Employee Resource Groups (ERGs) to assist with events or ideas to represent their members across the CalSAWS Project

**2.8 Deviation from Plan/Adjustments**

- ▶ None for the reporting period

**3.0 Maintenance and Operations**

**3.1 Highlights from the Reporting Period**

**Table 3.1-1 – Maintenance and Operations Status Agenda Topic**

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
3.1.2 CalSAWS Help Desk Metrics	<ul style="list-style-type: none"><li>• The final compliance for June was 98.8%</li></ul>

**3.1.1 Service Management Overview**

- ▶ Scheduled CHG0048091 for the ForgeRock ServiceNow Account Synchronization Integration on July 26, 2024
- ▶ Implemented CHG0048629 for Category, Group, and Request Area Updates for GenAI and Virtual Assistant Issues on June 28, 2024
- ▶ Implemented CHG0048676 on June 27, 2024 to fix defects and make improvements in ServiceNow such as: San Luis Obispo County Submitter Dashboard, updating the catalog item for contact center roll on and roll off, and a new role to allow submitters with a specific role to see all cases for their county

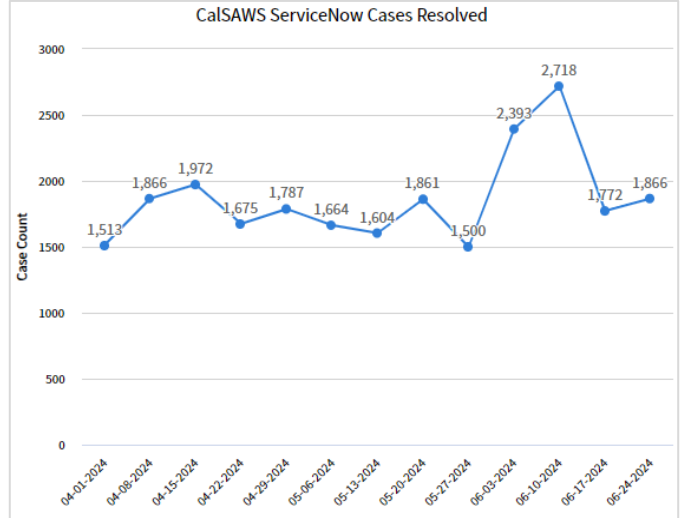
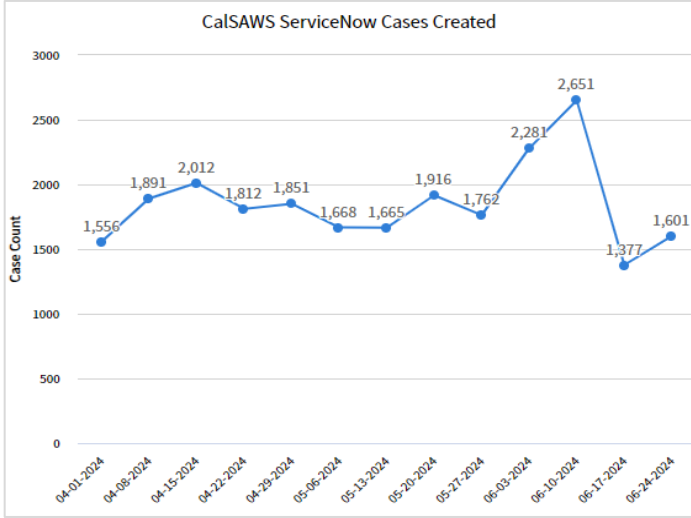
**CalSAWS – California Statewide Automated Welfare System**

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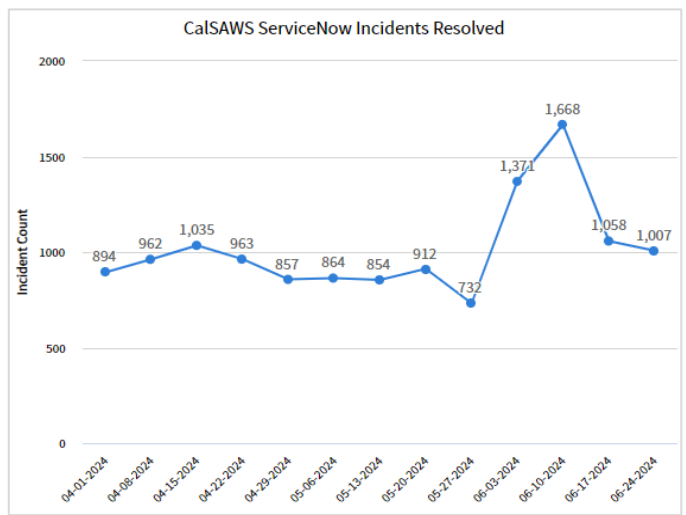
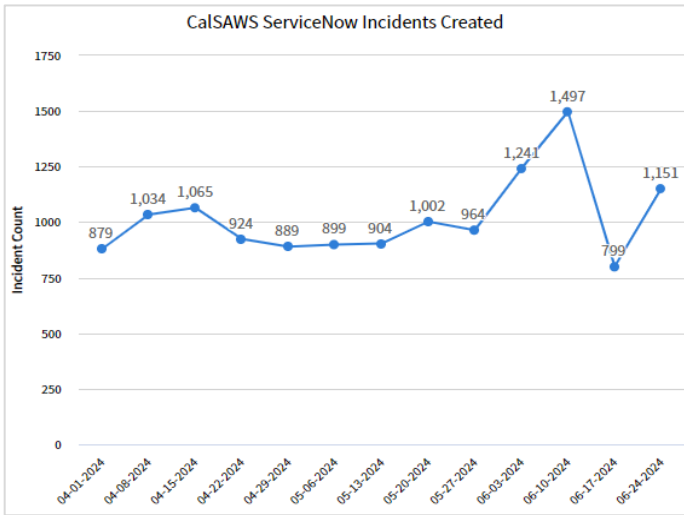
**3.1.2 CalSAWS Help Desk Metrics**

**Figures 3.1.2-1 and 3.1.2-2 – CalSAWS ServiceNow Cases per Week**



**Note:** The graphs represent the ServiceNow cases associated to all 58 Counties. Cases represent the first level of ticketing that enters the ServiceNow system. The dates in x-axis represent the start of a week but the data is inclusive of the entire week.

**Figures 3.1.2-3 and 3.1.2-4 – CalSAWS ServiceNow Incidents**



**Note:** The graphs represent the ServiceNow Incidents associated to all 58 Counties. Incidents are escalations derived from case attempts to triage the issue. The dates in x-axis represent the start of a week but the data is inclusive of the entire week.

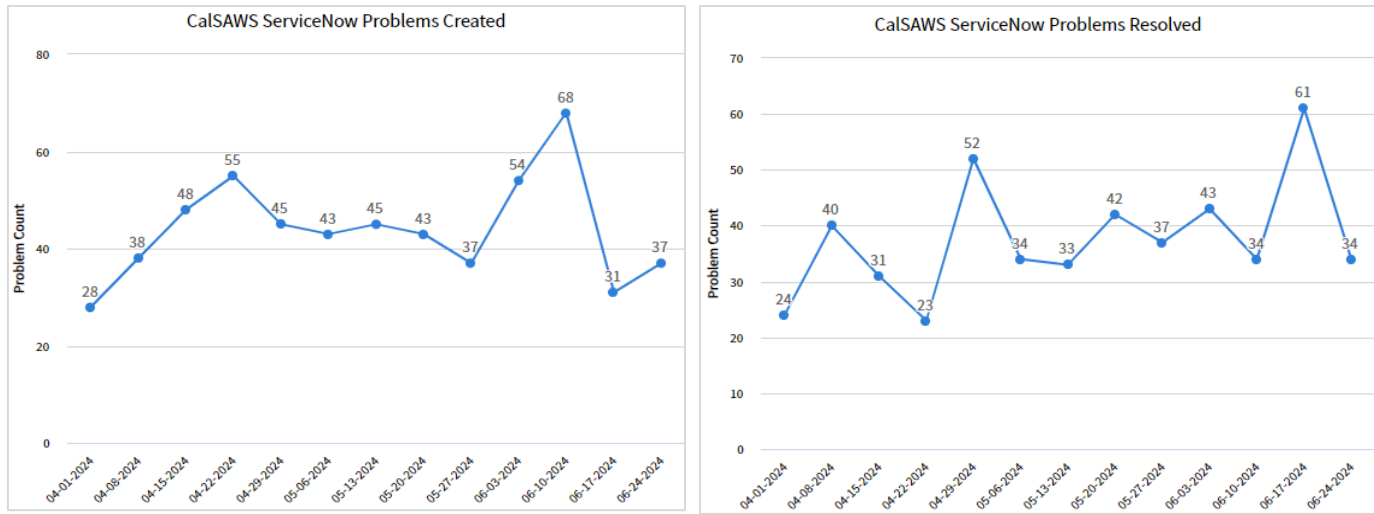


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**Figures 3.1.2-5 and 3.1.2-6 – CalSAWS ServiceNow Problems**



**Note:** The graph represents the ServiceNow problems associated to 58 Counties. Problems represent issues that can have a many to one relationship with incidents and the final step in escalation. The dates in x-axis represent the start of a week but the data is inclusive of the entire week

**Table 3.1.2-7 – CalSAWS ServiceNow Incidents by State and Age**

	<1 Day	1-5 Days	6-10 Days	11-15 Days	16-30 Days	30-60 Days	60-180 Days	>180 Days	Total
New	0	133	3	3	10	10	2	2	<b>163</b>
In progress	0	215	15	7	43	27	44	13	<b>364</b>
On hold	0	183	46	68	207	257	794	67	<b>1,622</b>
Resolved	0	579	396	546	464	149	165	24	<b>2,323</b>
Closed	13	2	3	32,010	70,721	14,150	9,272	2,711	<b>128,882</b>
Problem in Diagnosis	0	14	0	0	2	0	0	1	<b>17</b>
<b>Total</b>	<b>13</b>	<b>1,126</b>	<b>463</b>	<b>32,634</b>	<b>71,447</b>	<b>14,593</b>	<b>10,277</b>	<b>2,818</b>	<b>133,371</b>

- ▶ New: State of an incident when assigned to field is empty
- ▶ In progress: State of an incident once the "Assigned to" is working on the incident
- ▶ On hold
  - Pending Problem Fix: State of an incident that is linked to a problem record that is in fix in progress
  - Pending Additional Information: State of an incident that requires additional information to resolve the issue (e.g., information from Affected End User or Tier 1)
  - Pending Change Request: State of an incident that is associated to a technical ServiceNow change request
  - Pending Consortium Review: State of an incident that requires information/action from a Consortium group to resolve the issue. If the Consortium group cannot be selected in the assigned to field, update the state to On Hold/Pending Consortium Review

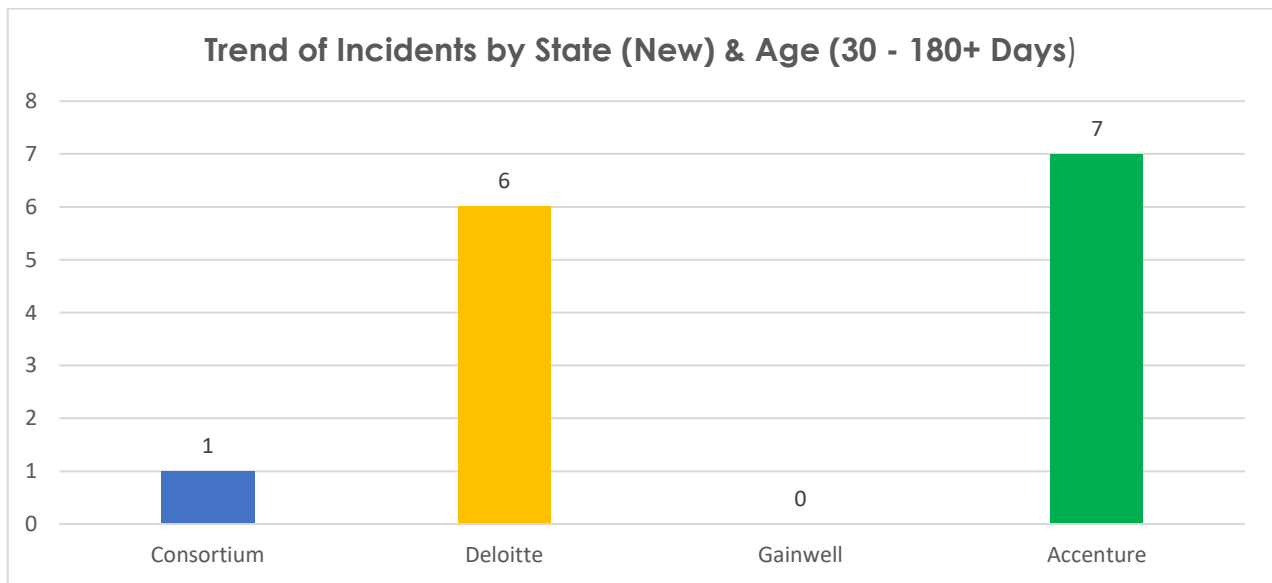
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- Pending External Partner Action: State of an incident that requires information/action from an external partner (e.g., CalHEERS, Electronic Benefit Transfer (EBT vendor) to resolve issue)
- ▶ Problem in Diagnosis: State of an incident that is linked to a problem record that is still being investigated (problem state is one of the following: New Assess, Root Cause Analysis)
- ▶ Resolved: State of an incident once the issue has been resolved. Linked case will be automatically set to resolved
- ▶ Closed: State of an incident that has been resolved for 15 calendar days and has not been reopened. ServiceNow automatically updates state from Resolved to Closed

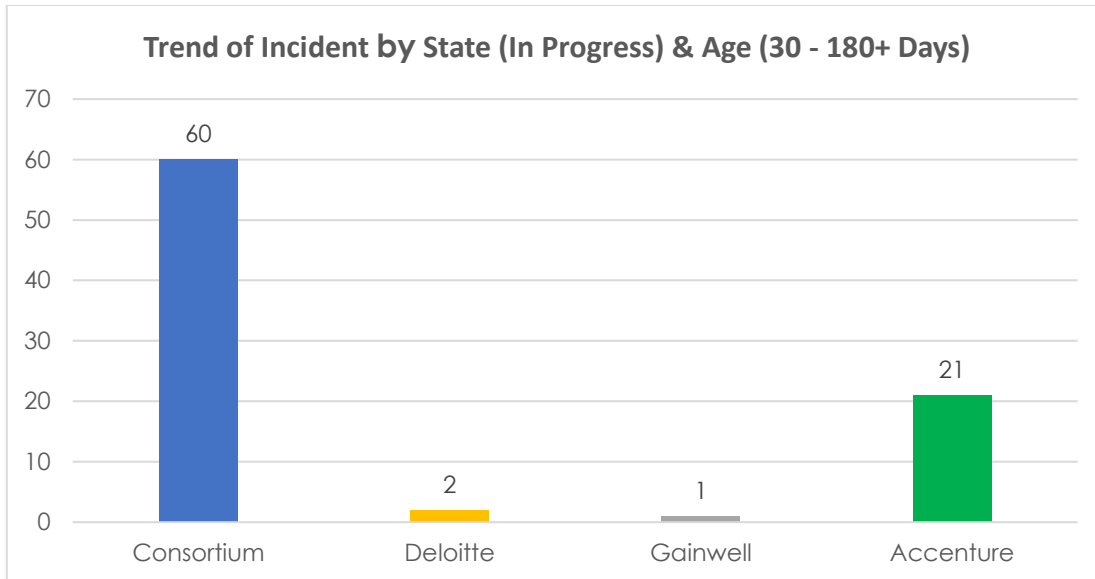
**Table 3.1.2-8 – CalSAWS ServiceNow Incidents by State (New) and Age (30 – 180+ Days)**



**Table 3.1.2-9 – CalSAWS ServiceNow Incidents by State (New) and Category**

Organization	Helpdesk Incidents	Infrastructure Incidents	Total Incidents
Consortium	1	0	1
Deloitte	6	0	6
Gainwell Technologies	0	0	0
Accenture	7	0	7
<b>Total</b>	<b>14</b>	<b>0</b>	<b>14</b>

**Table 3.1.2-10 – CalSAWS ServiceNow Incidents by State (In progress) and Age (30 – 180+ Days)**



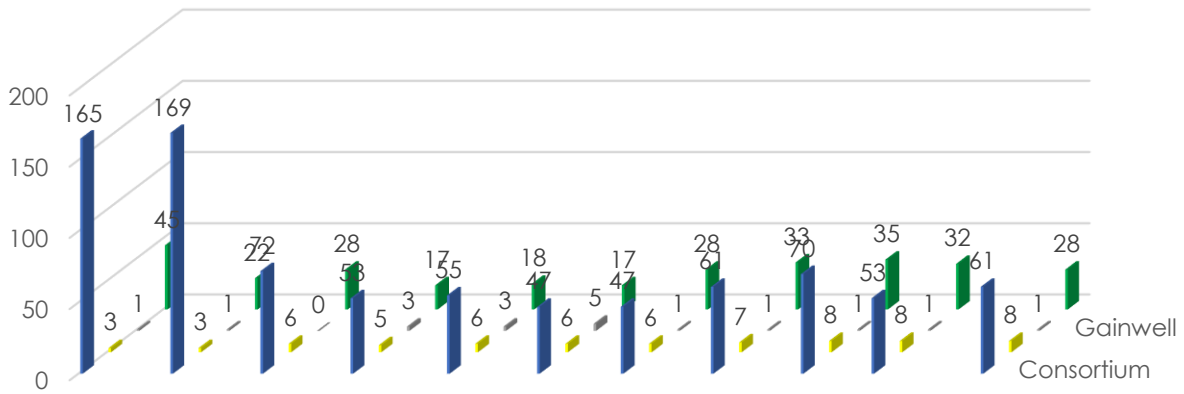
**Table 3.1.2-11 – CalSAWS ServiceNow Incidents by State (In progress) and Category**

Organization	Helpdesk Incidents	Infrastructure Incidents	Total
Consortium	60	0	60
Deloitte	2	0	2
Gainwell Technologies	1	0	1
Accenture	14	7	21
<b>Total</b>	<b>57</b>	<b>7</b>	<b>84</b>

- ▶ Plan of Action for Aging Incidents
  - The Service Management and Consortium Helpdesk teams are working collectively with Project teams to burndown the backlog of aging incidents that are not linked to a Defect or Change Request. Weekly reports are sent with aging tickets to action along with ticket handling guidance. The chart below shows bi-weekly stats per vendor for incidents in a New or In Progress state with aging category of 30+ days

**Table - 3.1.2-12 – Aging Incident Backlog**

**Trend of Aging Incident Backlog (New & In Progress State for 30+ Days)**

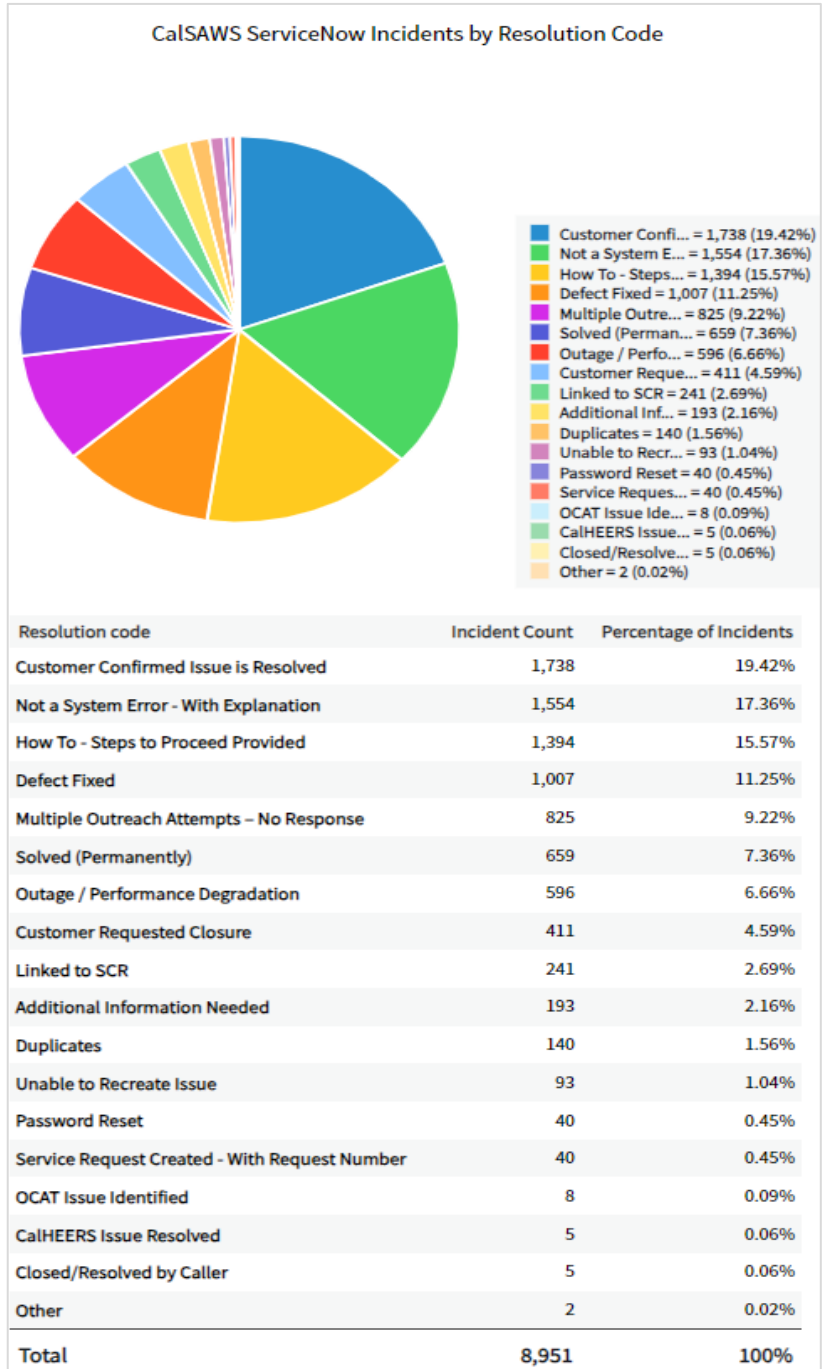


	11-Feb	25-Feb	10-Mar	24-Mar	8-Apr	22-Apr	5-May	19-May	2-Jun	13-Jun	30-Jun
■ Consortium	165	169	72	53	55	47	47	61	70	53	61
■ Deloitte	3	3	6	5	6	6	6	7	8	8	8
■ Gainwell	1	1	0	3	3	5	1	1	1	1	1
■ Accenture	45	22	28	17	18	17	28	33	35	32	28

■ Consortium   ■ Deloitte   ■ Gainwell   ■ Accenture

**Figure 3.1.2-13 – CalSAWS ServiceNow Incidents by Resolution Code**

**Note:** The pie chart below represents Incidents resolved within the past two months



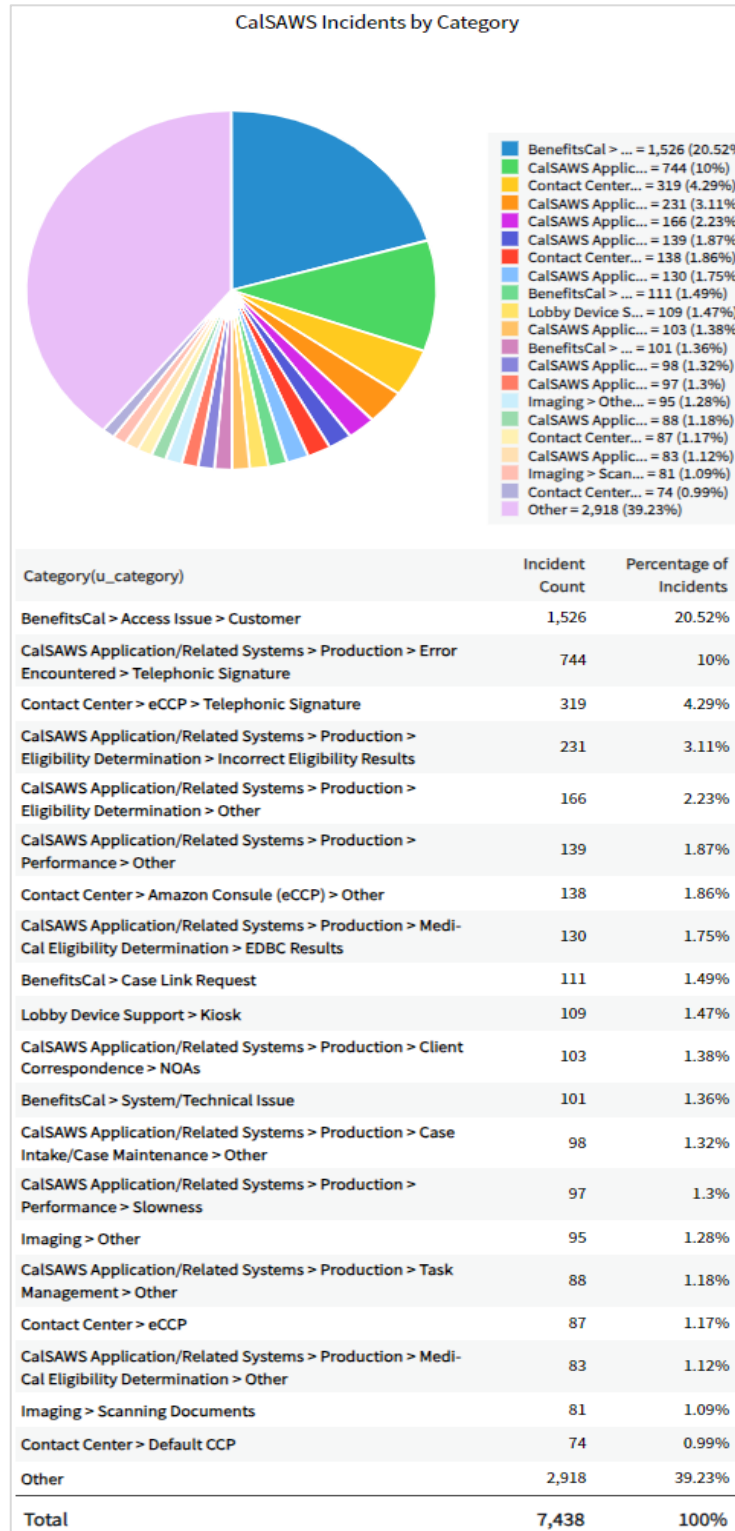
# CalSAWS – California Statewide Automated Welfare System

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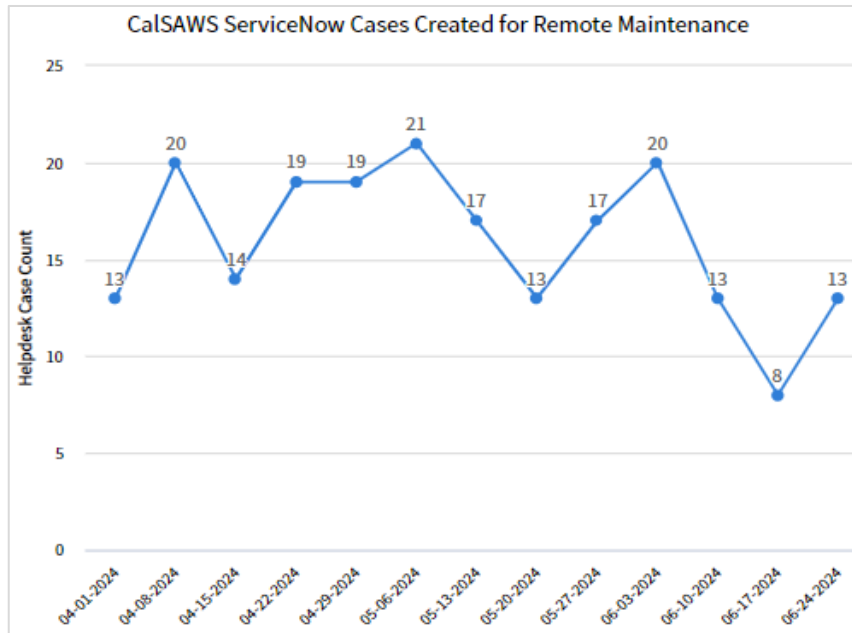
Contractor Project Executive: Arnold Malvick

### Figure 3.1.2-14 – CalSAWS ServiceNow Incidents Created by Category

**Note:** The pie chart below represents Incidents by Category created within the past two months. The 2,918 listed as **Other** are for selected categories that had less than 74 incidents. Please view the [CalSAWS Incidents by Category Breakdown](#) report to see a complete list of all categories selected for the 7,438 incidents

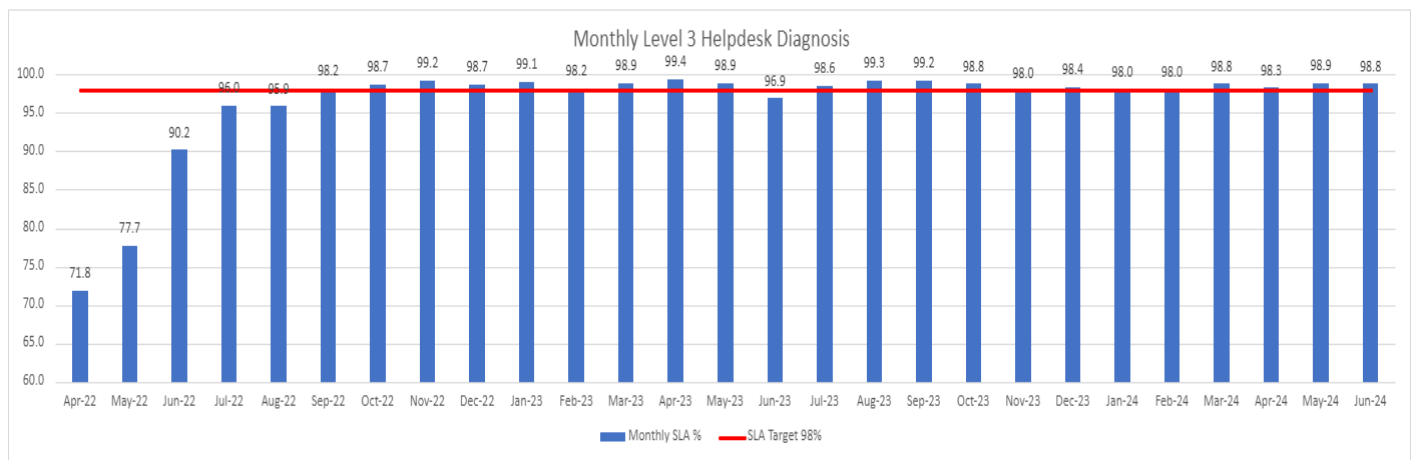


**Figure 3.1.2-15 – CalSAWS ServiceNow Cases Created for Remote Maintenance**



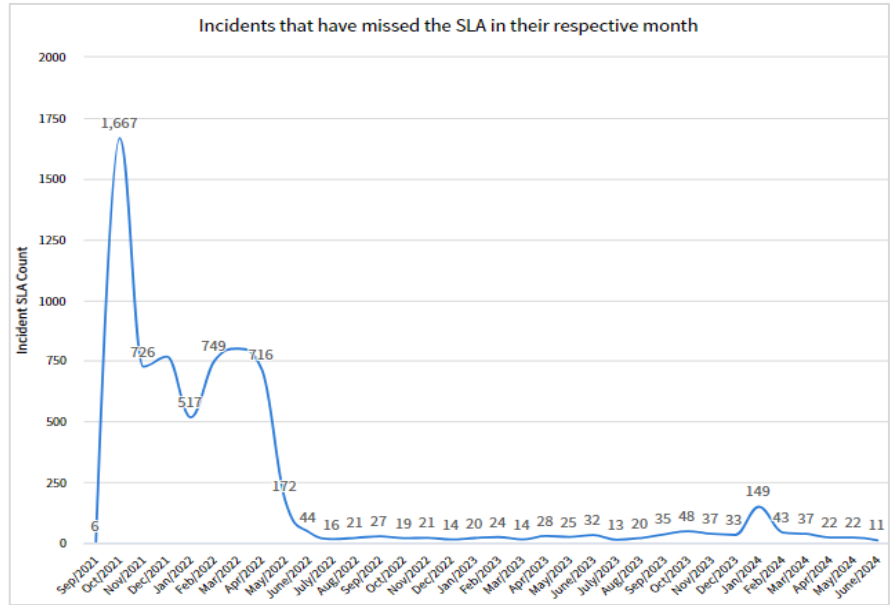
- ▶ The Monthly Level 3 Helpdesk Diagnosis Service Level Agreement (SLA) graph below represents the Level 3 Helpdesk compliance metric for closed incidents. The final compliance for June was 98.8%

**Figure 3.1.2-16 – CalSAWS Accenture Monthly Level 3 Helpdesk Diagnosis Service Level Agreement (SLA) Compliance**



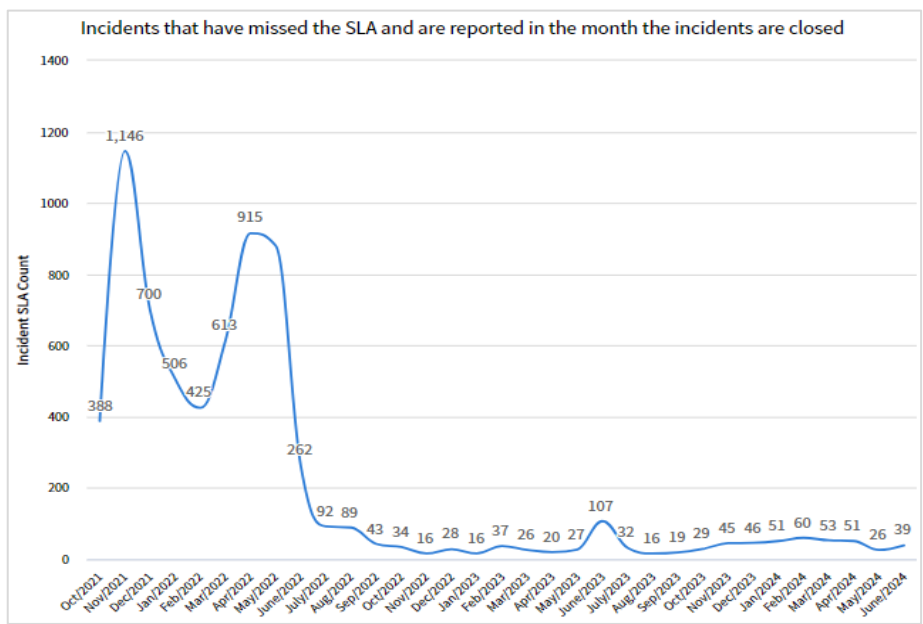
- ▶ The graph below represents the number of incidents that missed the Service Level Agreement (SLA) in each month. Eleven (11) incidents missed the SLA in June

**Figure 3.1.2-17 – Incidents that have missed the Service Level Agreement (SLA) in their respective month**



- ▶ The graph below represents the number of closed incidents that missed the Service Level Agreement (SLA) in each month. When an incident is resolved, the SLA is paused, which allows Users to reopen if needed. After 15 calendar days, an incident will automatically close, and the SLA is completed. Thirty-nine (39) closed incidents missed the SLA in June

**Figure 3.1.2-18 – Incidents that have missed the SLA and reported in the month incidents are closed**






## 3.2 Technology Operations

- ▶ The CalSAWS Technology team provides technical infrastructure support for the deployment of system changes and system maintenance activities in accordance with the CalSAWS Change Control Process (CCP). Technical infrastructure support activities include configuration and setup of development and non-Production environments for work items, infrastructure (middleware and database)/architecture changes, promotion of application builds through the development stages, and deployment of application builds into the CalSAWS Production environments

### 3.2.1 CalSAWS Management and Operations

- ▶ Enhancing County Design Documentation
  - Continued County physical audits to capture rack layout and power distribution of devices per site
  - Began new exercise to update internal documentation
- ▶ TPx Adtran Switch Replacement
  - Continued communications with Counties to seek approval on dates and timeline
  - Completed eleven sites and scheduled five sites for coming days

- 
- ▶ Site redundancy build
    - Completed core redundancy build across fifteen additional sites to improve resiliency and reduce user disruptions
    - Installing secondary core devices at the sites to make the site fully redundant
    - Additional sites are being discussed with the Counties to align Technical Point of Contact (TPOC) on time and resources
  - ▶ Circuit Upgradation for County sites
    - Began site survey for the sites with higher link utilization identified on the annual circuit capacity planning assessment
    - Total number of sites – 36
    - Completed 26 circuit upgrades
    - Ten circuit upgrades have been postponed
  - ▶ County Site Migrations (County Purchase Orders (CPOs))
    - San Joaquin County – Network model change from Managed to Point of Presence (“PoP”)
      - Continued developing County Purchase documentation
    - Other County Purchases in development:
      - Kings County network model change from Managed to Point of Presence (“PoP”)
      - Mono County network model change from Managed to Point of Presence (“PoP”)
      - Riverside County site decommission
  - ▶ Implementation Advance Planning Document Update (IAPDU)
    - Virtual Private Network (VPN) replacement (TLM-11 CA-274965) is discussed and agreed on the product and technology

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- Next step – Purchase of license
- Build of Virtual Network Lab-Sandbox01 (IM41)
  - Technical Budget Change Request (TBCR) approved
  - Roseville physical lab installation in progress
  - Next step – Building EC2 in the Network sandbox account
- Vendor analysis in progress for CSAC-10 (New / Replace Virtual BigIP F5) and CSAC-5 (Replace Physical Equinix hosted BigIP F5)
- CA-274976 - TLM-06 [Major Upgrades – Network O/S]
  - Completed meeting with Consortium Operations to align the steps and dates for the LA3 and SV1 Firewall migrations to Firewall Management Center (FMC)

**Table 3.2.1-1 – CalSAWS Upcoming Maintenance**

Scheduled Date	Activity Description
June 30, 2024	Rotate application credentials - Production environments - coreapp-production – June
June 30, 2024	ForgeRock Security Disaster Recovery (DR) Production Release 24.06.30
June 30, 2024	Production Database Monthly Linux Operating System (OS) Patching - June
June 30 – July 1, 2024	Update the Virtual Internet Protocol (VIP) (67.21.40.161) to forward the traffic to new apex Red Hat Linux 8 (RHEL8) servers
June 30 – July 1, 2024	Migrate Production Apex Application from Red Hat Linux 7 (RHEL7) to Red Hat Linux 8 (RHEL8): coreapp-production
July 1 – 5, 2024	Migrating County Access Points to AWS Wireless LAN Controller (WLC) (Planned Change)
July 11 – 12, 2024	California Department of Technology Firewall Hardening

**Table 3.2.1-2 – CalSAWS Incident Follow-up Summary**

Ticket ID	Description	Impact Date / Time	Impact	Resolution
None				

**3.2.2 Service Level Agreement (SLA) Outcomes (Met/Missed) (CalSAWS)**

- ▶ The CalSAWS System met the Service Level Agreement (SLA)'s within the reporting period

**3.2.3 CalSAWS Production Planned Outages Calendar**

- ▶ The CalSAWS Production Planned Outages Calendar provided in Table 3.2.3-1 (CalSAWS Production Planned Outage Calendar) below, notifies Counties of upcoming scheduled downtimes for CalSAWS Production in 2024 due to Releases and planned maintenance windows. The calendar is available on the CalSAWS Web Portal under the

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following path including additional details on legends used:

- o Resources\Calendar\CalSAWS Production Planned Outages Calendar\2024 folder

**Table 3.2.3-1 – CalSAWS Production Planned Outages Calendar**

Legend		CalSAWS and BenefitsCal Production Planned Maintenance																
Unavailable	Reduced Availability	Available																
Activity Description	Start Date	Start Time	End Date	End Time	CalSAWS Core	BenefitsCal	Imaging	Contact Center	ADHOC / APEX	ForgeRock	CallHeers	OCAAT	Central Print	Communication Method	Communication Sent Date			
ForgeRock Maintenance	06/28/24	10:00 PM	06/29/24	2:00 AM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT 0094-24	6/13/2024			
					Broadcast Email	6/17/2024												
Production Maintenance	06/30/24	2:00 PM	06/30/24	6:30 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT 0095-24	6/13/2024			
					Broadcast Email	6/13/2024												
CalSAWS Adhoc Reporting Database Maintenance	06/30/24	12:00 PM	06/30/24	4:00 PM	Available	Available	Available	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	Broadcast Email	6/13/2024			
Production Maintenance	07/14/24	2:00 PM	07/14/24	6:30 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT 101-24	6/24/2024			
					Broadcast Email	TBD												
CalSAWS Adhoc Reporting Database Maintenance	07/14/24	12:00 PM	07/14/24	4:00 PM	Available	Available	Available	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	Broadcast Email	TBD			
CalSAWS Release 24.07	07/21/24	6:00 AM	07/21/24	1:00 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
														Broadcast Email				
BenefitsCal Release 24.07.25	07/25/24	8:00 PM	07/25/24	9:30 PM	Available	Reduced Availability	Available	Available	Available	Available	Available	Available	Available	Broadcast Email				
ForgeRock Maintenance	07/26/24	10:00 PM	07/27/24	1:00 AM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
					Broadcast Email													
Production Maintenance	08/18/24	2:00 PM	08/18/24	6:30 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
					Broadcast Email													
CalSAWS Adhoc Reporting Database Maintenance	08/18/24	12:00 PM	08/18/24	4:00 PM	Available	Available	Available	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	Broadcast Email				
BenefitsCal Release 24.08.29	08/29/24	8:00 PM	08/29/24	9:30 PM	Available	Reduced Availability	Available	Available	Available	Available	Available	Available	Available	Broadcast Email				
ForgeRock Maintenance	08/30/24	10:00 PM	08/31/24	1:00 AM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
					Broadcast Email													
Production Maintenance	09/08/24	8:00 AM	09/08/24	2:00 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
					Broadcast Email													
CalSAWS Adhoc Reporting Database Maintenance	09/08/24	2:00 PM	09/08/24	6:00 PM	Available	Available	Available	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	Broadcast Email				
CalSAWS Release 24.09	09/22/24	6:00 AM	09/22/24	1:00 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
														Broadcast Email				
BenefitsCal Release 24.09.26	09/26/24	8:00 PM	09/26/24	9:30 PM	Available	Reduced Availability	Available	Available	Available	Available	Available	Available	Available	Broadcast Email				
ForgeRock Maintenance	09/27/24	10:00 PM	09/28/24	1:00 AM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
					Broadcast Email													
Production Maintenance	09/29/24	2:00 PM	09/29/24	6:30 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Available	CIT				
														Broadcast Email				

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CalSAWS and BenefitsCal Production Planned Maintenance															
Legend															
Unavailable															
Reduced Availability															
Available															
Activity Description	Start Date	Start Time	End Date	End Time	CalSAWS Core	BenefitsCal	Imaging	Contact Center	ADHOC / APEX	ForgeRock	CalHeers	OCAAT	Central Print	Communication Method	Communication Sent Date
Production Maintenance	10/06/24	6:00 AM	10/06/24	10:00 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Available	Available	Available	Available	CIT	
														Broadcast Email	
CalSAWS Adhoc Reporting Database Maintenance	10/06/24	6:00 AM	10/06/24	10:00 PM	Available	Available	Available	Available	Reduced Availability	Available	Available	Available	Available	Broadcast Email	
Production Maintenance	10/20/24	2:00 PM	10/20/24	6:30 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Available	Available	Available	Available	CIT	
														Broadcast Email	
CalSAWS Adhoc Reporting Database Maintenance	10/20/24	12:00 PM	10/20/24	4:00 PM	Available	Available	Available	Available	Unavailable	Available	Available	Available	Available	Broadcast Email	
ForgeRock Maintenance	10/25/24	10:00 PM	10/26/24	1:00 AM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Unavailable	Available	Unavailable	Available	CIT	
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BenefitsCal Release 24.10.31	10/31/24	8:00 PM	10/31/24	9:30 PM	Available	Reduced Availability	Available	Available	Available	Available	Available	Available	Available	Broadcast Email	
BenefitsCal Release 24.11.20	11/20/24	8:00 PM	11/20/24	9:30 PM	Available	Reduced Availability	Available	Available	Available	Available	Available	Available	Available	Broadcast Email	
CalSAWS Release 24.11	11/24/24	6:00 AM	11/24/24	1:00 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Available	Available	Available	Available	CIT	
														Broadcast Email	
ForgeRock Maintenance	12/06/24	10:00 PM	12/07/24	1:00 AM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Available	Available	Unavailable	Available	CIT	
														Broadcast Email	
Production Maintenance	12/08/24	2:00 PM	12/08/24	6:30 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Available	Available	Available	Available	CIT	
														Broadcast Email	
CalSAWS Adhoc Reporting Database Maintenance	12/08/24	12:00 PM	12/08/24	4:00 PM	Available	Available	Available	Available	Unavailable	Available	Available	Available	Available	Broadcast Email	
Production Maintenance	12/15/24	8:00 AM	12/15/24	2:00 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Available	Available	Available	Available	CIT	
														Broadcast Email	
CalSAWS Adhoc Reporting Database Maintenance	12/15/24	2:00 PM	12/15/24	6:00 PM	Available	Available	Available	Available	Unavailable	Available	Available	Available	Available	Broadcast Email	
BenefitsCal Release 24.12.19	12/19/24	8:00 PM	12/19/24	9:30 PM	Available	Unavailable	Available	Available	Available	Available	Available	Available	Available	Broadcast Email	
CalSAWS Release 25.01	01/26/25	6:00 AM	01/26/25	1:00 PM	Unavailable	Reduced Availability	Unavailable	Unavailable	Unavailable	Available	Available	Available	Available	CIT	
														Broadcast Email	
BenefitsCal Release 25.01.30	01/30/25	8:00 PM	01/30/25	9:30 PM	Available	Unavailable	Available	Available	Available	Available	Available	Available	Available	Broadcast Email	

**Notes:**

1. The above table contains the known planned dates and timing is subject to change
2. Additional maintenance windows may be added to address emergent events

### 3.3 Production Defect Backlog

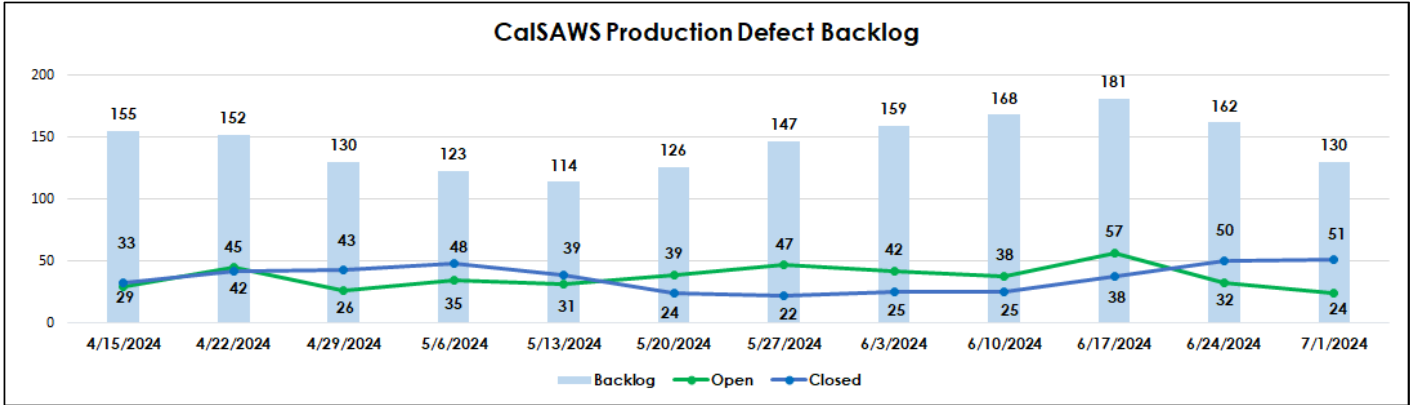
- The Production defect backlog bar-chart depicts the balance of open (unresolved Production defects) and closed defects, week-over-week. Defects are closed upon system test validation and release deployment to Production

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**Figure 3.3-1 – Production Defects Backlog Weekly Trend**



**3.3.1 Release Schedule Production Defect Fix**

- ▶ The Production Defect fix – Release Schedule reflects the number of defects planned in alignment to each monthly release (24.01, 24.02, etc.). The status of the defect in the fix and re-test pipeline is also reflected for each of the defect severity categories to establish the number of defects remaining to be fixed, re-tested, and closed for each of the releases.

**Table 3.3.1-1– CalSAWS Production Defect Count by Release**

CalSAWS Production Defect Count by Release					
Count of Defects	Release				Grand Total
Severity	24.06	24.07	24.09	TBD	
<b>2-Normal/Medium</b>	<b>10</b>	<b>22</b>	<b>3</b>	<b>1</b>	<b>36</b>
New	1	1	0	0	2
In Progress	2	12	3	1	18
Closed	7	9	0	0	16
<b>3-Normal/Low</b>	<b>71</b>	<b>82</b>	<b>27</b>	<b>18</b>	<b>198</b>
New	3	7	4	10	24
In Progress	12	39	23	8	82
Closed	56	36	0	0	92
<b>4-Cosmetic</b>	<b>4</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>8</b>
New	0	2	0	0	2
In Progress	1	1	0	0	2
Closed	3	1	0	0	4
<b>Grand Total</b>	<b>85</b>	<b>108</b>	<b>30</b>	<b>19</b>	<b>242</b>

**Note:** Data Change Requests (DCRs) have been excluded from the above reporting because they follow a separate deployment process

### 3.4 Production Operations

#### 3.4.1 Release Communications

- ▶ CalSAWS Release 24.07 Communications:
  - See table 3.4.1-1 CalSAWS Release 24.07 Communication Activities for details

**Table 3.4.1-1 – CalSAWS Release 24.07 Communication Activities**

TASK	DATE (S)	OWNER
Send draft Release Notes file to Consortium for review	June 10, 2024	Production Operations
Send draft Release Notes file to select County Staff and Consortium for review	June 24, 2024	Production Operations
Send draft Release Notes file to select County Staff and Consortium for final review	July 8, 2024	Production Operations
Webcast on CalSAWS Release 24.07	July 9, 2024	Production Operations / Consortium Policy and Design
Send summary of changes in CalSAWS Release 24.07 in CalSAWS Health Report	July 15, 2024	Production Operations
24.07 CalSAWS Application Development and Training Release Notes Broadcast	July 16, 2024	Production Operations
CalSAWS Release 24.07 Greenlight Meeting	July 17, 2024	Release Management/Quality Assurance
CalSAWS 24.07 Post-Release Checkpoint Call	July 22 – 24, 2024, 4:00 p.m. to 4:30 p.m.	Production Operations

#### 3.4.2 Root Cause Analysis (RCA)

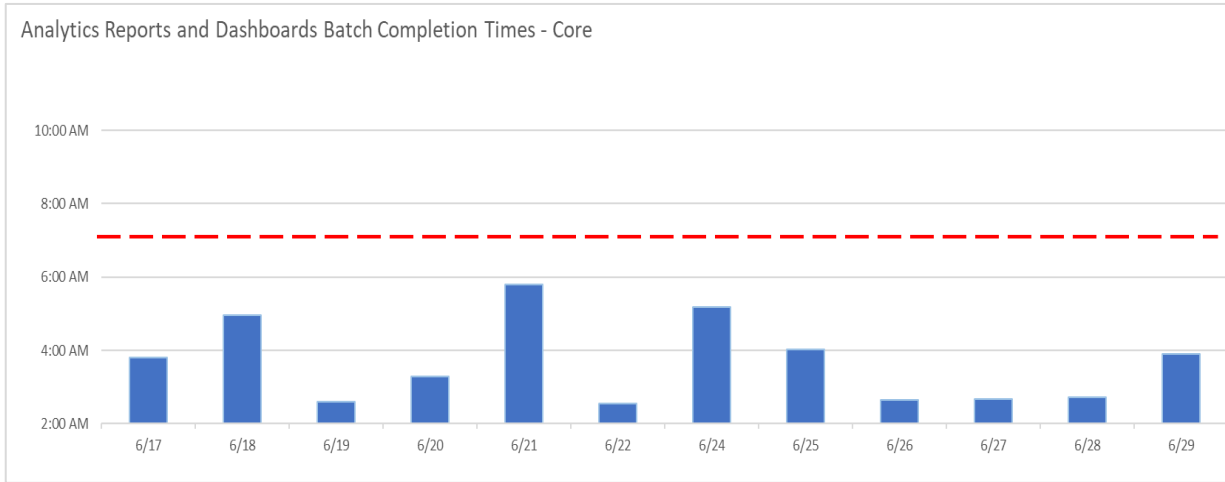
- ▶ Root Cause Analysis (RCA) – 318 – Lobby Tablet Access Issue – PRB00049267
  - On May 31, 2024, at 10:50 a.m., ForgeRock team was notified by the CalSAWS Online and Lobby teams that several County Lobby Team Users were unable to access CalSAWS application on lobby tablets (iOS and Android applications). The Project team was engaged on a bridge call to troubleshoot the issue. Teams reviewed relevant changes performed the past day (May 30, 2024) and identified failover of the ForgeRock Production environment to the Disaster Recovery (DR) region on May 30, 2024 afternoon. The ForgeRock team determined that the lobby tablet authentication tree (login flow configuration in ForgeRock) contained incorrect ForgeRock Directory Server (DS) hostnames in Disaster Recovery (DR) environment resulting in authentication failing on lobby tablets. Root Cause: The new lobby tablet login authentication tree was initially planned to be implemented with the monthly ForgeRock Production Deployment on April 26, 2024. Due to instability observed in the non-Production ForgeRock environments,

the deployment was postponed indefinitely. However, CA275712 (New Lobby Tablet Login) was planned to be released on May 9, 2024, requiring the ForgeRock team to implement (CHG0047687 and CHG0047691) the new lobby login authentication through Amster import, instead of full code deployment on May 10, 2024. Amster import process requires the removal of tokenized variables, which are set based on each environment during full deployment. During the removal of the tokenized variables in lobby login authentication tree files, the ForgeRock team has incorrectly replaced the DR region node files with Primary region DS hostnames. Resolution Steps: The ForgeRock team has taken below actions to resolve the issue. 1. Failback from DR to the Primary Region on May 31, 2024 at 9:00 p.m. PST (CHG0048273) 2. Implemented an Emergency Change Request (CHG0048270) to update the Lobby Tablet Login authentication tree in ForgeRock Disaster Recovery region with appropriate Directory Services hostnames. After taking these steps, the Lobby Management team validated access to CalSAWS using lobby tablets.

### **3.4.3 Batch Operations**

- ▶ Completed execution of monthly payroll batch runs for the 58 Counties
- ▶ 1.05 million cases have been purged successfully on June 14, 2024
- ▶ The Red Hat Enterprise Linux (RHEL) 8 upgrade of scheduler database server implemented on June 30, 2024. The Sunday Batch ran successfully on new servers with no issues
- ▶ Continued to live-support batch monitoring and work directly with Counties on file submission and transfers
- ▶ Continued Batch Weekly Roundup session with Quality Assurance (QA) and Consortium team members
- ▶ Continued to review and utilize the Batch Operations dashboards for generation of the daily Batch Summary emails
- ▶ Supported nightly batch operations and coordinated with the Application Development, Database Administration (DBA), and Technical Teams to resolve issues and performance tune Batch jobs
- ▶ Supported execution of cyclic/high frequency/event streaming jobs
- ▶ Implemented and validated Production Batch System Change Requests (BSCRs)
- ▶ Updated Batch scheduler to include additional core/core-off prime/non-core categorization

**Figure 3.4.3-1 - Analytics Reports and Dashboards – Monday – Saturday Nightly Batch Runs for the Status Reporting Period**



**Table 3.4.3.2 - Details of Days When Analytics Reports and Dashboards Completed after 7:00 a.m.**

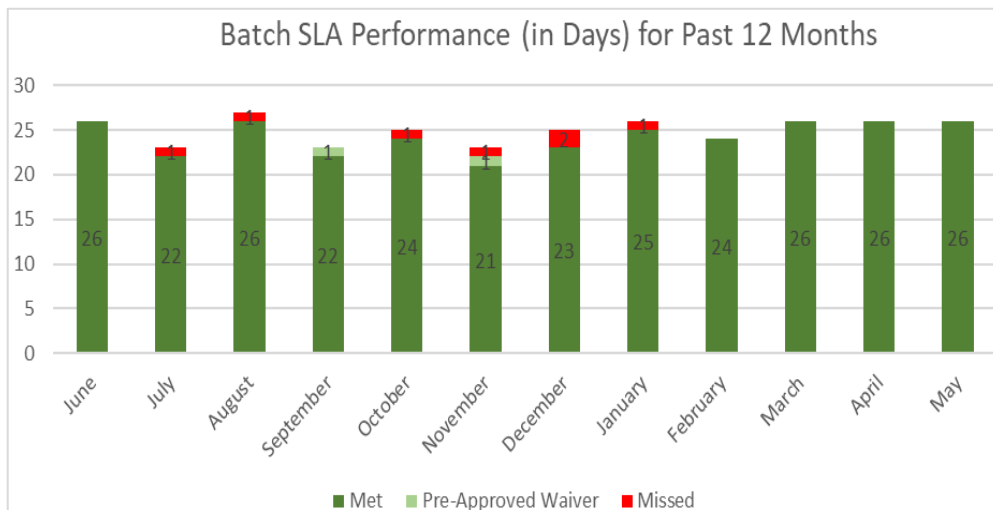
Batch Date	Issue	Communication	Status	Resolution
N/A	All analytics jobs competed before 7:00 a.m. daily during the reporting period	N/A		

**3.4.4 Production Performance**

► Batch

- Batch Service Level Agreement (SLA) Performance (99% of core and core-off prime jobs completed on time every day)

**Table 3.4.4-1 – Batch Service Level Agreement (SLA) Performance**





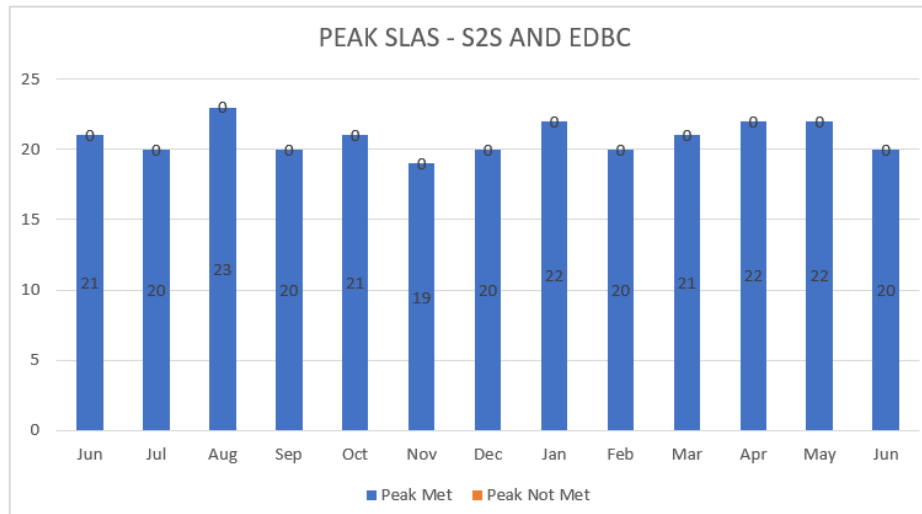
**CalSAWS – California Statewide Automated Welfare System**

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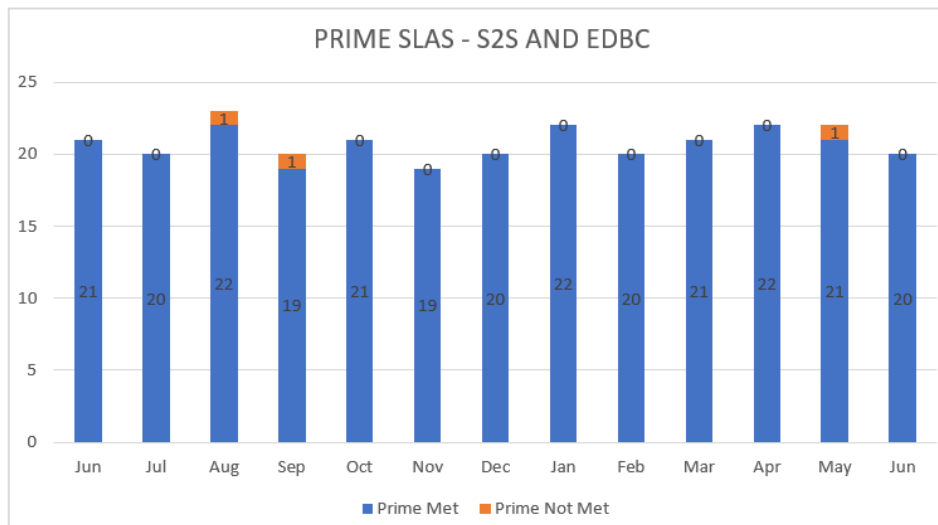
Contractor Project Executive: Arnold Malvick

- ▶ Imaging
  - None for the reporting period
- ▶ Contact Center
  - None for the reporting period
- ▶ ForgeRock
  - Scheduled Production Build on June 28, 2024
- ▶ Core Online
  - Online Service Level Agreement (SLA) Performance. Peak SLAs for screen to screen and Eligibility Determination Benefit Calculation (EDBC) met every day for the last 12 months

**Table 3.4.4-2 – Peak Service Level Agreement (SLA) - S2S and Eligibility Determination Benefit Calculation (EDBC)**



**Table 3.4.4-3 – Prime Service Level Agreement (SLA) -S2S and Eligibility Determination Benefit Calculation (EDBC)**



### 3.5 ForgeRock

#### 3.5.1 Highlights

- ▶ Submitted Root Cause Analysis (RCA) 318 to Consortium in June
- ▶ Confirmed upcoming June 28, 2024 Production build
- ▶ ForgeRock team members were in Roseville, California from June 25, 2024 to June 27, 2024 to continue work on the development for the Evolution Architecture
- ▶ ForgeRock is working with BenefitsCal and the Technical Operations team to deploy the OAuth2 Clients for BenefitsCal Network Protection
- ▶ ForgeRock team has met with Consortium Helpdesk, Quality Assurance (QA) and Production operations stakeholders for the bi-weekly Operations Sync on June 26, 2024
- ▶ ForgeRock team received Technical Business Change Request (TBCR) extension (#1166.4) for Sandbox Development Evolution Environment until September 30, 2024
- ▶ ForgeRock team has begun work for the Childcare Portal new user type, which is required for the ServiceNow Integration, with Consortium team. Work has been deployed to Development and will begin testing of the user case and determining next steps
- ▶ ForgeRock team working on determining the root cause and internal review for Root Cause Analysis (RCA) 317 (ForgeRock Identity Gateway Production). Further conversations and investigations are ongoing with the vendor
- ▶ ForgeRock team working with Application Owners on getting the patterns that were being used for session management. ForgeRock ticket has been created to work with the vendor to review the patterns. (Tentative date will be for mid July 2024)
- ▶ ForgeRock working with the Dynatrace team to review alerting and monitoring reports that can be adjusted and improved
- ▶ ForgeRock team has begun the development work for the Evolution Architecture Work. Tentative date for sandbox deployment is scheduled for mid-August

**Table 3.5.1-1 – ForgeRock Milestones**

MILESTONES	PRODUCTION DEPLOYMENT DATE	STATUS
Rebuild Jenkins Servers from AL1 to AL2	June 28, 2024	In progress
ForgeRock-ServiceNow integration	July 26, 2024	In progress
Platform Architecture Enhancements – Design	July 2024	In progress

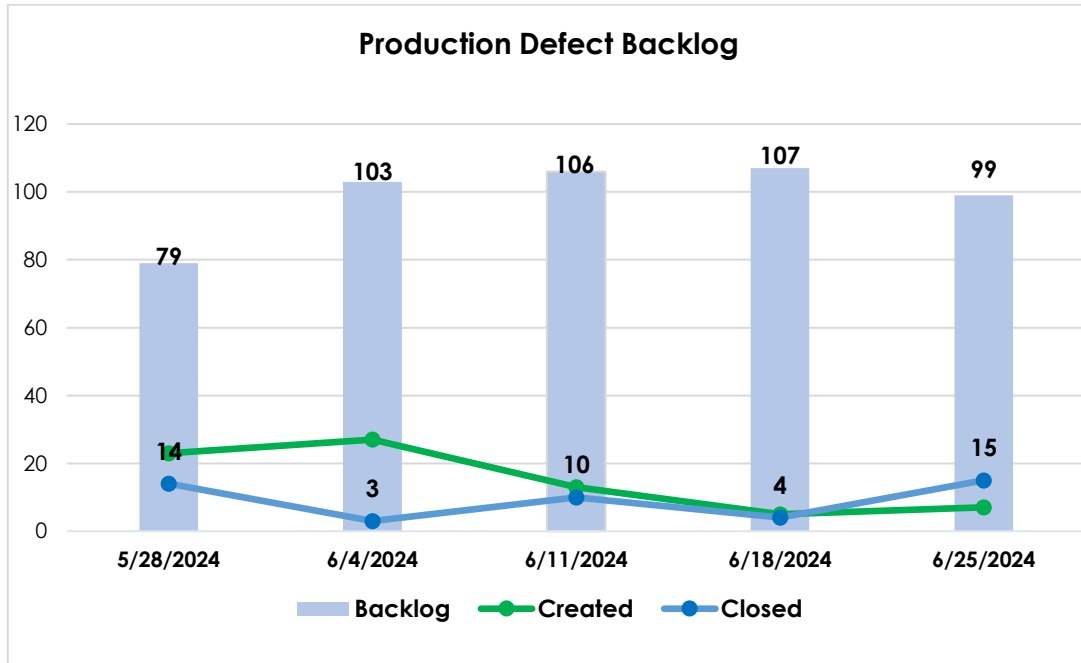
### 3.6 Imaging

- ▶ Completed Defects
  - No updates for the reporting period
- ▶ Completed System Change Requests (SCRs)
  - No updates for the reporting period

### 3.7 Customer Service Center (CSC)

- ▶ Production Defect Backlog Highlights
  - Continued to address Production defects exclusively using a priority release schedule to address defects sooner. There are 28 defects targeted to be resolved with the 24.07.11 release

**Table 3.8-1 – Contact Center Defect Burndown**



- ▶ Contact Center Recently Deployed Enhancements
  - The below table shows all recently deployed Contact Center Enhancements over the past two weeks

**Table 3.8-2 – Contact Center Recently Deployed Enhancements**

TYPE	JIRA ID	ENHANCEMENTS	Deployment Date	STATUS
SCR	CA-275518	Phase 1: Fresno GenAI Call Summary Assist	24.06.27	Contact Center
SCR	CA-279414	Force Mute while on hold in eCCP	24.06.27	Contact Center

- ▶ Contact Center Enhancements
  - The Contact Center Team will be working on System Change Requests (SCRs) prioritized by the committee and the Consortium team in the order in the table below. The team has limited allocated M&E hours to complete Global enhancements

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- Note: The Deployment dates are not finalized and can change based on the scope defined at the time the SCR Design is approved

**Table 3.8-3 – Contact Center Upcoming Enhancements**

TYPE	JIRA ID	ENHANCEMENTS	Deployment Date	STATUS
SCR	CA-239498	DDID 2268 FDS CSC: Update to Text Help Line IVR, and Outbound Campaign caller ID	24.07.11	Development completed
SCR	CA-262445	Voice Bots Statewide Rollout: Non-CSC	24.07.11	Test completed
SCR	CA-262430	RPA - Automated EBT Replacement Implementation: Non-CSC	24.07.11	Test completed
SCR	CA-245360	Telephonic Signature Update Rights and Responsibilities for Medi-Cal	24.08.08	Approved
SCR	CA-252858	Add Live Monitoring and Change Agent Status to the Supervisor panel in eCCP	24.08.08	Approved
SCR	CA-273724	Telephonic Signature - Update CalSAWS Telephonic Signature Capture Code Generation/Removal Logic	24.08.xx	Ready for Committee
SCR	CA-260329	Telephonic Signature - Add Outbound Call Option on Electronic Signature Page	24.09.xx	Design in Progress
SCR	CA-270154	Outbound IVR: Add new calling campaign for AB 79 Personal Contact	24.09.xx	Design in Progress
SCR	CA-270820	Update and Add Contact Center Security in CalSAWS	24.12.xx	Design in Progress
SCR	CA-260730	Contact Center eCCP - Admin Page Enable Courtesy Call Back Configuration by Queue	25.01.xx	New
SCR	CA-270574	Replace two-digit Language Code with Language Name	25.01.xx	New
SCR	CA-270818	Add a Static Dial Pad on eCCP	25.02.xx	New
SCR	CA-245926	Add Field in ECCP for Customer Info that Initiates a Batch to Send E Notices to Customer	25.04.xx	New
SCR	CA-270833	Update the IVR Call Flow to Spell Out BenefitsCal	25.04.xx	New
SCR	CA-269867	Update Journal Entries for Telephonic Signatures to List All Forms	25.05.xx	Approved
SCR	CA-250838	Create Call Result Record for Each Outbound IVR Attempt	25.05.xx	New
SCR	CA-265391	Modify eCCP Security rights	25.xx.xx	Design in progress

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### 3.7.1 Operata Pilot for Contact Center agent monitoring (CA-276030)

- ▶ Received change order approval for commencing the pilot
- ▶ Operata successfully installed in Kern's County development and Production contact centers
- ▶ Scheduled training sessions with Operata and CalSAWS Interactive Voice Response (IVR) Contact Center Team

## 3.8 Lobby Management

### 3.8.1 Region 1 Counties

(Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma Counties)

- ▶ Alameda County
  - No updates for the reporting period
- ▶ Contra Costa County
  - No updates for the reporting period
- ▶ Marin County
  - No updates for the reporting period
- ▶ Monterey County
  - No updates for the reporting period
- ▶ Napa County
  - No updates for the reporting period
- ▶ San Benito County
  - No updates for the reporting period
- ▶ San Francisco County
  - No updates for the reporting period
- ▶ San Mateo County
  - No updates for the reporting period
- ▶ Santa Clara County
  - County Purchase SC-02-2023 (three kiosks, three tablets)
    - Working with County on milestones, tablets have been connected to printers and are functional at this time. County to go-live with kiosk at 1919 Senter Road in San Jose location on July 16, 2024.
- ▶ Santa Cruz County
  - County has gone live with kiosks and tablets. Lobby team is working with the County to schedule separate onsite training session.
- ▶ Solano County
  - No updates for the reporting period
- ▶ Sonoma County
  - No updates for the reporting period

### **3.8.2 Region 2 Counties**

(Alpine, Amador, Calaveras, El Dorado, Mono, Nevada, Placer, Sacramento, Sierra, Sutter, Tuolumne, Yolo, Yuba Counties)

- ▶ Alpine County
  - No updates for the reporting period
- ▶ Amador County
  - No updates for the reporting period
- ▶ Calaveras County
  - No updates for the reporting period
- ▶ El Dorado County
  - No updates for the reporting period
- ▶ Mono County
  - No updates for the reporting period
- ▶ Nevada County
  - Completed kiosk go-live successfully on March 11, 2024. County removed devices from Production to work on imaging rules. Will contact Lobby team once completed.
- ▶ Placer County
  - No updates for the reporting period
- ▶ Sacramento County
  - No updates for the reporting period
- ▶ Sierra County
  - No updates for the reporting period
- ▶ Sutter County
  - No updates for the reporting period
- ▶ Tuolumne County
  - No updates for the reporting period
- ▶ Yolo County
  - No updates for the reporting period
- ▶ Yuba County
  - No updates for the reporting period

### **3.8.3 Region 3 Counties**

(Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Siskiyou, Tehama, Trinity Counties)

- ▶ Butte County
  - No updates for the reporting period
- ▶ Colusa County
  - No updates for the reporting period
- ▶ Del Norte County
  - No updates for the reporting period
- ▶ Glenn County
  - No updates for the reporting period
- ▶ Humboldt County
  - No updates for the reporting period

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- ▶ Lake County
  - No updates for the reporting period
- ▶ Lassen County
  - Kiosk was delivered on January 8, 2024
  - County completing physical installation and flows
- ▶ Mendocino County
  - No updates for the reporting period
- ▶ Modoc County
  - No updates for the reporting period
- ▶ Plumas County
  - No updates for the reporting period
- ▶ Shasta County
  - No updates for the reporting period
- ▶ Siskiyou County
  - Kiosk delivered on January 30, 2024
  - Kiosk has been confirmed fully functional
  - County working on milestones for go-live
- ▶ Tehama County
  - Kiosk was delivered on January 11, 2024
  - County working on milestones for go-live
- ▶ Trinity County
  - No updates for the reporting period

### 3.8.4 Region 4 Counties

(Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, San Joaquin, San Luis Obispo, Stanislaus, Tulare Counties)

- ▶ Fresno County
  - All devices have been delivered. Working with County to restructure CalSAWS configuration and draft strategy to deploy CalSAWS Reception Log and kiosks.
  - County reports that CalSAWS reconfiguration effort is in Testing phase
  - County continues to work on networking requirements
- ▶ Inyo County
  - No updates for the reporting period
- ▶ Kern County
  - County is in the process of ordering new batteries for the tablets. County has deployed all but one kiosk. Other than battery issue, tablets have been confirmed to function. Lobby team will work with the County once the replacement batteries are received to finalize deployment to Production.
- ▶ Kings County
  - No updates for the reporting period
- ▶ Madera County
  - No updates for the reporting period
- ▶ Mariposa County
  - No updates for the reporting period
- ▶ Merced County
  - No updates for the reporting period

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- ▶ San Joaquin County
  - No updates for the reporting period
- ▶ San Luis Obispo County
  - No updates for the reporting period
- ▶ Stanislaus County
  - No updates for the reporting period
- ▶ Tulare County
  - County Purchase TL-01-2023
    - Tablets have been successfully deployed
  - County Purchase TL-02-2023
    - County Purchase documentation with County for approval for kiosk purchase

### 3.8.5 Region 5 Counties

(Imperial, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura Counties)

- ▶ Imperial County
  - No updates for the reporting period
- ▶ Orange County
  - No updates for the reporting period
- ▶ Riverside County
  - No updates for the reporting period
- ▶ Santa Barbara County
  - No updates for the reporting period
- ▶ San Bernardino County
  - No updates for the reporting period
- ▶ San Diego County
  - No updates for the reporting period
- ▶ Ventura County
  - No updates for the reporting period

### 3.8.6 Region 6 County

- ▶ Los Angeles County
  - County began the County Purchase process for pilot office kiosk deployment

### 3.8.7 Lobby Management Modernization (TLM-39)

- ▶ Held kick-off meeting on June 18, 2024
- ▶ Schedule is being developed
- ▶ Teams to meet week of July 1, 2024 to decide best architectural path forward

## 3.9 Additional Projects

### 3.9.1 California Department of Social Services (CDSS) Report Support

- ▶ California Department of Social Services (CDSS) Glossary:
  - AAP – Adoption Assistance Program
  - ABAWD – Aabled Bodied Adults Without Dependents
  - CAPI – Cash Assistance Program for Immigrants
  - CIDR – CDSS Internal Data Request



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- ESAP – Elderly Simplified Application Process
- E&T – Employment and Training
- FC – Foster Care
- SIRFRA – SAWS Information Request for Research and Analysis
- WTW – Welfare to Work
- ▶ Completed Work:
  - CIDR 9024 - CalWORKs Domestic Abuse Waivers Data
- ▶ Continued Work:
  - CIDR 9017 - Medi-Cal Client Detail Snapshot
  - CIDR 9021 – Employment and Training Metrics
- ▶ Started Work:
  - Revised CIDR 9022 - LOC and ISFC Information
  - SIRFRA 3979 - Standard Medical Deduction Cost Neutrality Report
  - CIDR 9025 - WTW Sanctions

### 3.9.2 Department of Health Care Services (DHCS) Report Support

- ▶ Department of Health Care Services (DHCS) Glossary
  - CCU – Continuing Care Unwinding
  - MEDS – Medi-Cal Eligibility Data System
  - PHE – Public Health Emergency
  - RE - Redetermination
- ▶ Completed Work:
  - No updates for the reporting period
- ▶ Continued Work:
  - SIRFRA 1351 - Data Pull for Spousal Impoverishment Case Flag and Task
  - SIRFRA 1385 - End of CCR Renewal Data Request August 2024
  - SIRFRA 1380 - MEDS Alert Monitoring June 2024
  - SIRFRA 1387 - Total No. of Apps Pending and Total No. of REs Pending June 2024
- ▶ Started Work:
  - No updates for the reporting period

### 3.9.3 Endpoint Detection and Response (EDR)

- ▶ Completed Qualys Endpoint Detection and Response (EDR) deployment
- ▶ Finalize the cleanup deployments of the systems with Sophos Anti-Virus (AV)
- ▶ ForgeRock servers – Encountering errors when attempting to install, but they are still protected with Sophos AV. Working to rearchitect ForgeRock servers and add in Qualys EDR and Antimalware modules
- ▶ Testing and validating the changes that allow Qualys to function properly

### 3.9.4 Replace Physical Equinix hosted BigIP F5 with NextGen Hardware (CSAC-05)

- ▶ Completed discussions with vendors (Cisco, Palo Alto) to determine suitable products and models to replace the F5
- ▶ Completed meetings with Technical Operations, Amazon Web Services (AWS) architect and Network to finalize the future design

**3.9.5 New / Replace Virtual BigIP F5 with NGFW at Partner Exchange (US-West and US-East) and Network Production Account (US-West and US-East) (CSAC-10)**

- ▶ Completed discussions with vendors (Cisco, Palo Alto) to determine suitable products and models to replace the F5
- ▶ Completed meetings with Technical Operations, Amazon Web Services (AWS) architect and Network to finalize the future design

**3.9.6 Integrate CloudFront / Web Application Firewall (WAF) for CalSAWS Application Program Interfaces (API)s Existing HTTP APIs (CSAC-19)**

- ▶ Completed the internal code review and accommodated the additional code changes in Application Development environment
- ▶ Verified that CloudFront does not support Transport Layer Security (TLS) 1.3 yet. The team will continue with TLS 1.2 option
- ▶ Change Request CHG0048084 for core-app-dev account is under Consortium Security review

**3.9.7 Enhanced E-mail Message Examination (CSAC-26)**

- ▶ Scheduled kick-off meeting for the week of July 8, 2024
- ▶ Design document draft in progress

**3.9.8 Intune Mobile and Modern Device Management (CSAC-29)**

- ▶ Received licenses
- ▶ Preparing pilot user list

**3.9.9 Static Application Security Testing (SAST)/DAST/Software Composition Analysis (SCA)/IAST - DevSecOPs (CSAC-36)**

- ▶ Static Application Security Testing (SAST) and Software Composition Analysis (SCA):
  - o Phase 2: Configured accounts for the Development Operations Lead, Security Team, Technical Architect, and Application Team, and conduct 31 meetings with Snyk to ensure proper implementation and alignment with our security objectives – Completed
  - o Phase 2 Sub-tasks:
    - Role-based Access Setup: Technical Support team is engaged to continue to configure all roles and Single Sign-On (SSO) authentication to access Snyk for role-based to applications – Completed
    - Organization Setup: Technical Support, Application Development, and Security will support the setup of the organization structure within Snyk, dependency on having Role Based Access (RBA) and SSO complete – Completed
  - o Phase 3: Gain Visibility: Import projects into Snyk and gain visibility, Add Project Tags or Project Attributes- Completed
  - o Phase 4: Create a fix strategy
  - o Phase 4 Sub-tasks:
    - Group issues and decide prioritization method – In progress
    - Scan Applications in Repo for 24.09 release – In progress
    - CI/CD pipeline setup - In progress
    - IDE installation in development machines – In progress

- ▶ Dynamic Application Security Testing (DAST) and Interactive Application Security Testing (IAST)
  - Selection of DAST tool decision – Completed
  - Invicti Software requirements analysis – In progress
  - Invicti Proof of Concept – Not started

### **3.9.10 Partitioning Next Phases with Database (DB) Compression (DMDP-01)**

- ▶ Continued Design phase activities
- ▶ Continued staffing initiatives

### **3.9.11 Purview with Data Loss Prevention (DLP) (DMDP-21)**

- ▶ Prepared Kick-Off documentation
- ▶ Staff onboarding target July 8, 2024
- ▶ Define license deployment process

### **3.9.12 Amazon Web Services (AWS) Macie (DMDP-23)**

- ▶ Began Phase 1 on June 20, 2024, and Macie was enabled on coreapp-sandbox and coreapp-dev
- ▶ As expected, team is seeing false positives, and a masking strategy change is needed so that Macie can identify masked data
- ▶ Working with CalSAWS Online teams to assess impacts
- ▶ Getting confirmation from Accenture Security and Consortium Security on which Personal Identifiable Information (PII) fields need to be scanned
- ▶ Project status is overall Yellow due to the discovery of needing significant Masking strategy changes which involves multiple teams and can impact many different business processes

### **3.9.13 Network Test Lab / Lower Environment (IM-41)**

- ▶ Technical Budge Change Request (TBCR) 1665 approved in FinOps required to build Amazon Web Services (AWS) lab
- ▶ Completed racking of the five physical devices at the CalSAWS Roseville Project location
- ▶ Approved change request for AWS lab build CHG0048152

### **3.9.14 Migrate Production accounts to TFC managed account (ISA-20)**

- ▶ System Change Request (SCR) CA-274944 - ISA-20 - coreapp-production environments migration to TFC managed AWS accounts – Approved
  - Design discussion with Consortium – Completed
  - Design Approval from Consortium Security – Completed
  - Change ticket for implementation - In progress

### **3.9.15 Office 365 Services Backup Solution (ISA-21)**

- ▶ Synchronization with final Teams data
- ▶ Add Operational Working Document (OWD) M&O service plan group 2 to review
- ▶ Meet with vendor for additional tuning
- ▶ Moved to maintenance and operations

### 3.9.16 Microsoft (MS) Tenant Configuration Settings Backup and Monitoring Process Development (ISA-23)

- ▶ Add Operational Working Document (OWD) M&O service plan group 2 to review
- ▶ Moved to maintenance and operations
- ▶ Reviewing error conditions and script updates as result of Microsoft updates

### 3.9.17 Major Upgrade - Analytics stack (TLM-03)

- ▶ Microsoft Software center has been updated with new Python version for developers
- ▶ Automation Level 3 (AL3) standards and updated Elastic Map Reduce (EMR) version will be available in the development environment by July 9, 2024

### 3.9.18 Network Operating System (OS) Upgrade (TLM-06)

- ▶ Ongoing effort to develop the migration strategy and roadmap from Adaptive Security Appliance (ASA) to Firepower Threat Defense (FTD)
- ▶ Ongoing vendor review sessions with Cisco
- ▶ Completed meeting with Consortium Operations to align the steps and dates for the LA3 and SV1 Firewall migrations to Firewall Management Center (FMC)

### 3.9.19 Network Replace TPX SD-WAN (TLM-07)

- ▶ Completed 11 of 49 of sites (Alameda, Alpine, Butte, and Colusa Counties)
- ▶ Scheduled five sites for the week of the June 17, 2024
- ▶ Re-baselined project timelines to accommodate delays in hardware availability due to supply chain issues

### 3.9.20 Split Tunneling and VPN Replacement (TLM-11)

- ▶ Completed VPN replacement vendor
- ▶ High Level Design completed, working on the low-level design document
- ▶ Technical Budget Change Request (TBCR) 1708 approved

### 3.9.21 ServiceNow IT Operations Management (ITOM) Discovery / Hardware Asset Management (HAM) / Software Asset Management (SAM) (TLM-13, TLM-14, TLM-15)

- ▶ ITOM (IT Operations Management)
  - Partnering with Configuration Item (CI) data owners to finalize and configure the CI attributes
    - Began implementing attribute updates for servers, PC workstations and network gear devices with data owners in ServiceNow Dev environment
    - Continued defining attributes for Amazon Web Services (AWS) classes with data owner
  - Received SSH credential, which is currently setup for one Linux host
  - Completed onboarding process for IT Operations Management (ITOM) discovery engineer
- ▶ HAM (Hardware Asset Management)
  - Drafting design document

**3.9.22 Texting - Upgrade Nodejs Lambdas (TLM-16)**

- ▶ Received approval for emergency System Change Request (SCR CA-274985) to begin build
- ▶ Received acceptance from Consortium on upgrading the Nodejs version to v20

**3.9.23 Upgrade Spring Version in CalSAWS Core (TLM-21)**

- ▶ System Change Request (SCR) CA-274989 is drafted for this effort
- ▶ Work for this SCR cannot begin till compatible WebLogic version and ODM version is available to support JDK 17
- ▶ SCR will be on hold, and this has been approved by Consortium

**3.9.24 Upgrade Spring and SpringBoot (TLM-22)**

- ▶ Drafted System Change Request (SCR) CA-274990 for this effort
- ▶ Received emergency approval to begin the build

**3.9.25 Upgrade CalSAWS Libraries to be N-1 Compliant (TLM-23)**

- ▶ Drafted System Change Request (SCR) CA-274526 for this effort
- ▶ Received emergency approval to begin the build

**3.9.26 Upgrade Authorizer Lambda for CalSAWS APIs and Operational Lambdas to latest Nodejs version (TLM-19)**

- ▶ Drafted System Change Request (SCR) CA-274983 for this effort
- ▶ Received emergency approval to begin the build and currently in development

**3.9.27 Analyze and implement application changes to support phasing out third party cookies (CSAC-31)**

- ▶ Drafted System Change Request (SCR) CA-274779 for this effort
- ▶ Received emergency approval to begin the build and currently in development

**3.9.28 CSAC-46 Strong Authentication for internal APIs (CSAC-46)**

- ▶ Drafted System Change Request (SCR) CA-274778 for this effort
- ▶ Architecture and Security approval received, and SIA completed
- ▶ Received emergency approval to begin the build and currently in development

**3.9.29 Migrate Spectrum UAM Loqate to Global Addressing Module (GAM) (TLM-67)**

- ▶ Drafted System Change Request (SCR) CA-269035 for this effort
- ▶ Received emergency approval to begin the build and currently in development

**3.9.30 Redhat Enterprise Linux (RHEL) Operating System (OS) Upgrade (TLM-30)**

- ▶ System Change Request (SCR) CA-266317 - Design and Proof of Concept (POC) - RedHat OS Upgrade - Implementation completed
- ▶ System Change Request (SCR) CA-271223 - Major OS (RedHat8) Upgrade - Application/System test – Implementation completed
- ▶ System Change Request (SCR) CA-277706 - TLM-30 - Major OS (Red Hat8) Upgrade - Technical Operations / Database Administrator (DBA) – Approved
  - o Implementation in progress

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### 3.9.31 DevSecOps tools upgrade (TLM-31)

- ▶ System Change Request (SCR) CA-275008 - TLM-31 - CalSAWS Tools Upgrade – Approved
  - Milestone 2 - Upgrade to latest version for: Jenkins and SonarQube (June 30, 2024)
    - Implementation in progress
  - Milestone 3 - Upgrade to latest version for: Artifactory, AgitarOne and Jenkins (September 30, 2024)
  - Milestone 4 - Upgrade to latest version for: JIRA, Bitbucket Jenkins (December 30, 2024)

### 3.9.32 Upgrade to Windows 11 (TLM-34)

- ▶ Reviewed kick-off documentation with Accenture stakeholders
- ▶ Completed design for WorkSpaces account
- ▶ Kick-Off meeting to be conducted by July 10, 2024

### 3.9.33 Upgrade Windows 2016/2019 Servers (TLM-36)

- ▶ Reviewed kick-off documentation with Accenture stakeholders
- ▶ Kick-Off meeting to be conducted by July 3, 2024

### 3.9.34 Upgrade ODM to version 8.12 (TLM-68)

- ▶ Drafted System Change Request (SCR) CA-17499 for this effort
- ▶ Received emergency approval to begin the build
- ▶ SCR will be targeted to be deployed as 25.01 priority release in early March

### 3.9.35 Identity - Password Authentication (WIAM-18)

- ▶ Scheduled kickoff meeting has been moved to July 8, 2024 with Consortium

## 3.10 Deviation from Plan/Adjustments

- ▶ None to note for the reporting period

## 4.0 Application Development

### 4.1 Highlights from the Reporting Period

**Table 4.1-1 – Application Development Status Agenda Topic**

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
4.4.1 Release Test Summary	<ul style="list-style-type: none"> <li>Continued test execution for the 24.07 baseline release. Week 5 of 8 completed. Team is on schedule with a 93% pass rate against a target of 63%</li> </ul>
4.6 Reports	<ul style="list-style-type: none"> <li>Target Report Session on Management Report – Expedited CalFresh Management Report</li> <li>Bi-Weekly State and Fiscal Reports meeting</li> <li>CalSAWS/State Fiscal Reports Committee Meeting</li> <li>Target Report Session on State Report – CA 237 FC</li> </ul>
4.10	<ul style="list-style-type: none"> <li>Foster Care Eligibility Determination (FCED)/California Automated Response and Engagement System (CARES) Updates</li> </ul>

### 4.2 Priority Release Summary

- ▶ This section outlines the scope of future defect fixes targeted for future priority releases

**Table 4.2-1 – CalSAWS Upcoming Releases**

Release	Summary
24.07.01	▶ Update Yuba County Financial System to Tyler Munis effective July 1, 2024
24.07.02	<ul style="list-style-type: none"> <li>▶ Setup a batch process for SLO (San Louis Obispo) Income Eligibility and Verification System (IEVS) Data Match File</li> <li>▶ Update 2024 Holiday Calendar for Colusa County</li> <li>▶ Update IP (Internet Protocol) Address for Colusa County</li> </ul>
24.07.03	▶ ACL (All County letter) 24-37 - Batch EDBC - Cost of Living Adjustment (COLA) for Income In-Kind (IIK) for 2024-2025
24.07.05	▶ Training: Migrate Contact Center Storyline WBTs (Web Based Trainings) to Captivate WBTs (Web Based Trainings) plus updates
24.07.10	▶ Configure access to General Assistance / General Relief (GAGR) Service from AT2 environment
24.07.11	<ul style="list-style-type: none"> <li>▶ ACL (All County letter) 22-49/49E - Revisions to the CA-812 Quarterly Report form</li> <li>▶ ACL (All County letter) 22-49/49E Fiscal Updates to Support CA-812 Quarterly Report Changes</li> <li>▶ ACL (All County letter) 24-36 - Changes to Vehicle Value Limit for CW(CalWORKs)</li> <li>▶ Update - Turn on Santa Clara State Date batch</li> <li>▶ Update the Uncollectible Recovery Account Batch to run Monthly</li> </ul>
24.07	▶ Total System Change Requests (SCRs): 68 approved

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Release	Summary
	▶ Release Webcast date: To be determined
24.09	▶ Total System Change Requests (SCRs): 62 approved ▶ Release Webcast date: To be determined
24.11	▶ Total System Change Requests (SCRs): 17 approved ▶ Release Webcast date: To be determined

### 4.3 Application Development Status

- ▶ Continued design on:
  - CA-213363 - TLM-39: Lobby Management Modernization
  - CA-233160 - ACL 23-94 - Family Reunification Funding
  - CA-275844 - IAPDU CSAC-36 DevSecOps
  - CA-275845 - IAPDU DMDP-21: Microsoft Purview Data Security
  - CA-202054 - ACL-18-07 Suspend/Discontinue/Reinstate for CAPI case
  - CA-268378 - Automate SOC 452A for CAPI
  - CA-275163 - Re-Design CalSAWS Case Purge Components
  - CA-274988 - TLM-34: Upgrade to Windows 11 (Project Machines)
  - CA-276364 - CalHEERS eHIT: Verification Documents sent to CalHEERS from CalSAWS
  - CA-254391 - Add/Update Postpartum NOA snippets in English and Threshold languages
  - CA-274996 - TLM-40: Lobby Monitor Updates
  - CA-253124 - Validate E-mail Addresses Added into CalSAWS
  - CA-279576 - Add Pregnancy and the Pregnancy special Needs (PSN) Payment NOAs to Template Repository
  - CA-229838 - Add new Foster Care Reasons to NOAs Phase 5
  - CA-271130 - ACL 24-07 - Update CW 2186A and CW 2184 to include PFL and WTW pregnancy exemptions
  - CA-251613 - BREfS #5 High Impact Business Validations
  - CA-273900 - Automate Internal Monthly MAGI Renewal Monitoring Queries
  - CA-242103 - Update PUB 388 to Current Version in Template Repository
  - CA-240094 - Refactor: CalFresh NOA Regulations
  - CA-272698 - ACL 18-43 - Add M40-107C1 and M40-107D Time Limit NOAs in Threshold Languages
  - CA-272652 - Create County Duplicate Impact List pages
  - CA-271101 - Support SCR to provide responses to Consortia queries
  - CA-220233 - FFY Medi-Cal Updates Phase II
  - CA-265301 - Cal-OAR File County Preview
  - CA-274977 - IAPDU - TLM-07 Replace TPX SD-WAN (Routers & Virtual Firewall) and TPX Adtran EOL Switches with new models from TPX
  - CA-264616 - ACL 22-67 - STAT 47 updates to match CalFresh E&T rule (Reports Component)
  - CA-265742 - Update existing Denial NOA "On Aid Another Case" to generate for "Gets Duplicate Aid"



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- CA-253843 - Additional Section Codes for Humanitarian Parolees from Afghanistan
- CA-209344 - Apply SSP Only OPA for Specific Programs
- CA-258479 - ACL 22-104 and ACL 18-07: Update ABCD 350 and CA 1037
- CA-229087 - Medi-Cal Add new NOAs for Reapplication and Rescind Functionality
- CA-275549 - Update EBT 2259 Transactions Section to be Dynamic - Phase 2
- CA-268774 - Update the DHCS Renewals Master Request Report to V2.5
- CA-277974 - Children's Presumptive Eligibility & The Newborn Gateway
- CA-264983 - Add Date to CalWIN Interface File Names and Sending/Receiving notifications
- CA-274986 - (TLM-17) Childcare Portal - Upgrade Nodejs lambdas to latest version
- ▶ Continued build on:
  - Priority releases and Release 24.09 approved System Change Requests (SCRs)

### 4.4 Release Management

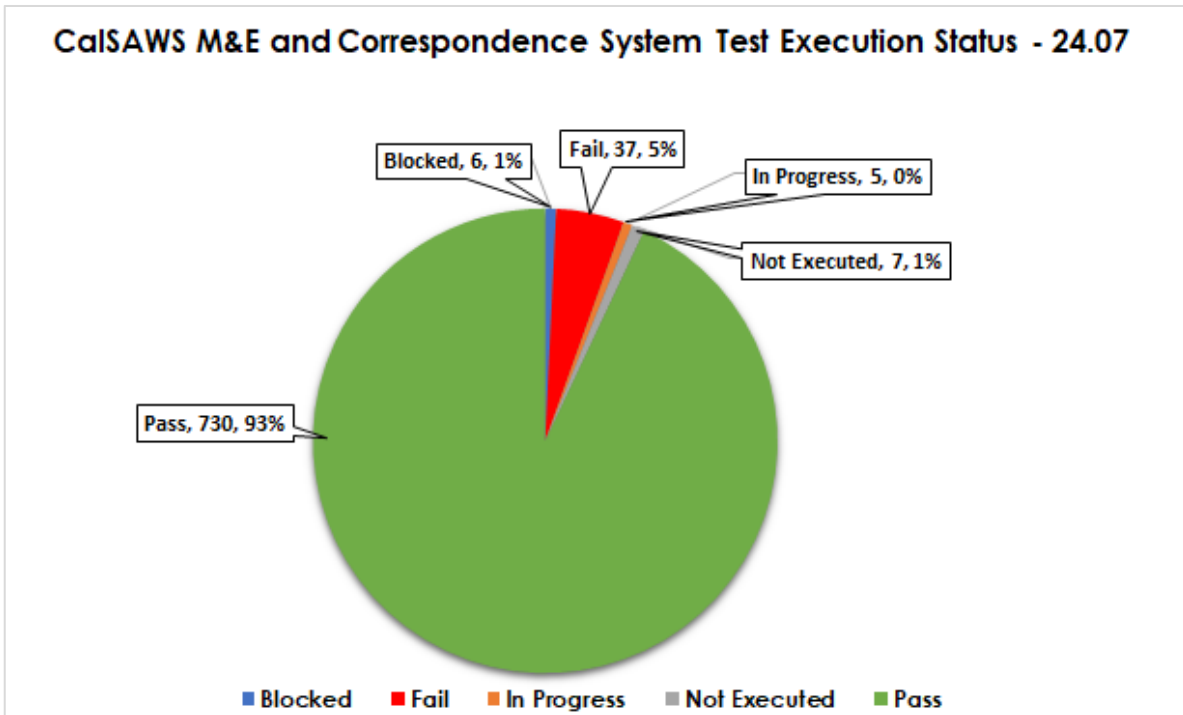
#### 4.4.1 Release Test Summary

- ▶ Continued test execution for 24.07 System Change Requests (SCRs)

**Table 4.4.1-1 – CalSAWS System Change Request (SCR) Test Status**

Pass Rate Target as of June 28, 2024	<b>63%</b>
Pass Rate Actual as of June 28, 2024	<b>93%</b>
System Test completed Date: July 17, 2024	

**Figure 4.4.1-2 – CalSAWS M&E and Correspondence System Test Execution Status – 24.07**



**Note:**

Test Script counts are subject to change as test scripts are added or removed throughout the execution phase. Includes testing execution for all CalSAWS Test Scripts in the Release

**4.4.2 Automated Regression Test (ART) Coverage**

**Table 4.4.2-1 – CalSAWS Automated Regression Test (ART) Coverage**

Production Transactions				ART Coverage by Production Volume	
Tier	Distinct	Volume	Percent Volume	Distinct	Percent Coverage
1	15	207,080,502	46.29%	15	100%
2	102	150,379,560	33.61%	102	100%
3	123	45,108,162	10.08%	121	98.75%
4	727	41,263,470	9.22%	596	90.82%
5	2801	3,536,823	0.79%	819	46.21%

**Note:** Transaction volume and coverage metrics are based on CalSAWS monthly Production performance data and Automated Regression Test (ART) coverage data as of May 31, 2024. Each tier is distinct from prior tier(s). For example, tier 2 includes all transactions that make up the top 80% of production volume except for the fifteen tier 1 transactions. Production statistics are updated each month, and coverage statistics are updated with each major release as new automated regression tests are developed. To date, there are 1,270 end-to-end Automated Regression Test (ART) scripts:

- ▶ 1020 targeting the core CalSAWS application
- ▶ 78 targeting the inbound BenefitsCal Application Processing Interface (API) service (Portal Service)
- ▶ 172 targeting the other external CalSAWS API services (e.g., Activities, Appointment, CalSAWS, Imaging, Journal, Task Service)
- ▶ The following ongoing efforts target increasing coverage by functional area, including

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all outstanding Tier 3 transactions and those at the top of Tier 4:

- o CA-272899: Automated Regression Test - Execution and Maintenance - 24.05 Release Cycle
- o CA-275638: Automated Regression Test - Execution and Maintenance - 24.07 Release Cycle
- o CA-275838: Automated Regression Test: Task Management Configurable Task Categories
- o CA-278032: Automated Regression Test - Execution and Maintenance - 24.09 Release Cycle

### 4.5 Virtual Assistant (VA)

- ▶ Worker-Facing Virtual Assistant (VA)
  - o Release 21 - successfully deployed on June 27, 2024
    - Added 23 new use cases
    - Removed the CCU sub-menu
  - o Release 22 – target to deploy July 25, 2024
    - Design is completed
    - System Change Request (SCR) going through System Change Request Board / Change Control Board (SCRB/CCB) approvals
  - o Release 23 – target to deploy August 22, 2024
    - Begin design on July 2, 2024, target to complete design on July 25, 2024

### 4.6 Reports

- ▶ Met one-one with San Diego on Monday, June 17, 2024, to discuss Call Log dashboard
- ▶ Held Target Report Session for Management Report – Expedited Service CalFresh Management Report on June 18, 2024
- ▶ CalSAWS State and Fiscal Reports Bi-Weekly meeting (held on June 20, 2024)
- ▶ Met one-one with Santa Clara County on June 25, 2024, to discuss CA 1037 State Report
- ▶ CalSAWS/State Fiscal Reports Committee Meeting was held on June 26, 2024, to discuss upcoming targeted State and Fiscal System Change Requests (SCRs)
- ▶ Held Target Report Session for State Report CA 237 FC on June 27, 2024

**Table 4.6-1 – Total Open Incidents by reporting period**

Reporting Period End Date	Number Open Tickets
May 3, 2024	16
May 17, 2024	14
May 31, 2024	11
June 14, 2024	11
June 28, 2024	14

**Note:** Total open incidents as of the current reporting period

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**Table 4.6-2 – Open Defects by Status and Functional Area**

Open Defects Status	State Reports	Fiscal Reports	Management Reports	Business Intelligence	Total
New	0	0	0	0	0
Reopened	0	0	0	0	0
Assigned	1	0	0	0	1
In development	6	3	1	1	11
Development completed	0	0	0	1	1
In Assembly Test	0	0	0	0	0
System Test	2	4	1	2	9
Test completed	2	1	1	1	5
<b>Total Open Defects</b>	<b>11</b>	<b>8</b>	<b>3</b>	<b>5</b>	<b>27</b>

Note: Data is as of current reporting period

**Table 4.6-3 – Open Defects by Priority and Functional Area**

Open Defects by Priority	State Reports	Fiscal Reports	Management Reports	Business Intelligence	Total
1-High/non-cosmetic	0	0	0	0	0
2-Normal/Medium	6	3	0	0	9
3-Normal/Low	5	5	3	4	17
4-Cosmetic	0	0	0	1	1
<b>Total Open Defects</b>	<b>11</b>	<b>8</b>	<b>3</b>	<b>5</b>	<b>27</b>

Note: Data is as of current reporting period

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**Table 4.6-4 – State/Fiscal Reports Open Defects and SCRs**

State/Claiming Reports	Total	Defects as Prioritized	SCRs - Targeted Release				
			24.05	24.06	24.07	24.09	24.11
ABCD 350	1	0	0	0	0	0	1
CA 1037	2	1	0	0	0	0	1
CA 237 CW	1	1	0	0	0	0	0
CA 237 CW Line 8	1	0	0	0	0	1	0
CA 812	1	0	0	1	0	0	0
CF 256	3	3	0	0	0	0	0
CF 296	1	0	0	0	0	0	1
CMSP 237	1	1	0	0	0	0	0
FNS 209	1	1	0	0	0	0	0
GR 237	1	1	0	0	0	0	0
Integrated Claiming	2	1	0	0	1	0	0
RS 50	1	0	0	0	0	1	0
RS 51	2	1	0	0	0	1	0
STAT 47	1	0	0	0	0	1	0
TEMP 2035	1	1	0	0	0	0	0
TEMP 2313	1	1	0	0	0	0	0

**Note:** This table provides information on total number of defects and total SCRs by Fix Version on State Reports, Fiscal Integrated and Fiscal Main Payroll Reports

1. This table may not reconcile with defect table as one defect can impact multiple reports
2. If SCR is impacting more than one report, it will be counted more than one against each report impacted
3. This table will list only those reports where we have open defects and open SCRs
4. Details can be found in CalSAWS Reports Bi-Weekly Enhanced Communication

**4.7 General Assistance/ General Relief (GA/GR)**

- ▶ General:
  - Discussed the General Assistance/General Relief (GA/GR) Correspondence web service design and web service clarifications on June 18, 2024, and June 25, 2024
  - System Change Requests (SCRs) in Design Phase
    - CA-213225 - Elimination of ABP 4038, 6-Month Reminder Notice Pending T and U Visa for General Relief Participants
    - CA-227572 – Los Angeles County - GR Timelimit
    - CA-241184 - Update GAGR Pregnant Person Only (PPO) to Align with the New CalWORKs PPO Policy Changes
    - CA-258931 - Add admin checks to additional locations where GA/GR can be failed due a CW sanction
    - CA-261174 - Allow GA/GR Automated Solution Client to be approved on a new application if a depleted time limit exists that ends earlier in the same month
    - CA-262705 - Remove need to follow GA/GR Redetermination process for Ventura County
    - CA-262706 - Interim updates for Ventura County to reduce workload associated

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- to GA/GR Redetermination process
- CA-264995 - Update GA/GR Administration to include an additional link for Consortia correspondence administration
- CA-268676 - GAGR AS; SON - Denial NOA 125-0 (01/98) and Denial NOA 1122 (08/98)
- CA-268679 - GAGR AS; SAC Change NOA CDS 232-0 (01/01)/Reason Code XAN339
- CA-270204 - GA/GR Automated Solution COLA change NOA is printing incorrect benefit amt
- CA-272432 - CSF 45 should only be available to print locally. Currently it is available to print both locally and centrally.
- CA-273349 - SF- Turn Off Auto Discontinuance Functionality for GA/GR Appointment No Shows
- CA-273651 - GAGR System Triggered Correspondence Reason Codes Required
- CA-274396 - Configure Client Correspondence to allow the option to display Worker Names - NOA for GAGR Program
- CA-274665 - GAGR NOA's field populating wrong amount from the GR\_Budget table
- CA-274856 - Remove automation to generate CDS 525 and CSF 167 when rescinding cases for Aid Paid Pending.
- CA-275295 - Add a new Work Registration type of Conditionally Unemployable
- CA-275594 - Update GA/GR In-Kind Income Logic
- CA-276128 - Update the Property Limits for the Automated Solution Counties
- CA-276189 - Return Mail Service Address Whitelist Request
- CA-277446 - San Diego - GR COLA October 2024
- CA-277816 - LA County - Update ABP 4023-C NOAs to Reflect Verbiage Related to Telephonic Appointment Details
- o System Change Requests (SCRs) in Development Phase
  - CA-254559 - LA-GROW Activity Numbers
  - CA-267005 - Add GA/GR In-Kind Chart Amounts for Requesting Counties
  - CA-268072 - Solano County - General Assistance - Update Periodic Reporting Form
  - CA-276201 - LA County - Update START(GROW) Hearing Office Phone
  - CA-278309 - San Diego - GAGR Grant Amounts for Shared Housing
  - CA-279427 - Configure access to GAGR Service from AT2 environment
  - CA-279597 - Update Placer's In-Kind Income Values for GR
- o System Change Requests (SCRs) in System Test Phase
  - CA-266985 - Add Fresno GA/GR grant amounts for households larger than 3 persons
  - CA-267452 - GAGR AS - Alameda Co. - Add XAN 534
  - CA-268072 - Solano County - General Assistance - Update Periodic Reporting Form
  - CA-273351 - Orange -Update to GR Approval NOA (CalSAWS 1)
  - CA-274448 - Alameda County -Update the system to default GR benefits to be available on 1st of the month
  - CA-274557 - Add New Line Items in Manual EDBC Aid Payment Section for GR Managed Program

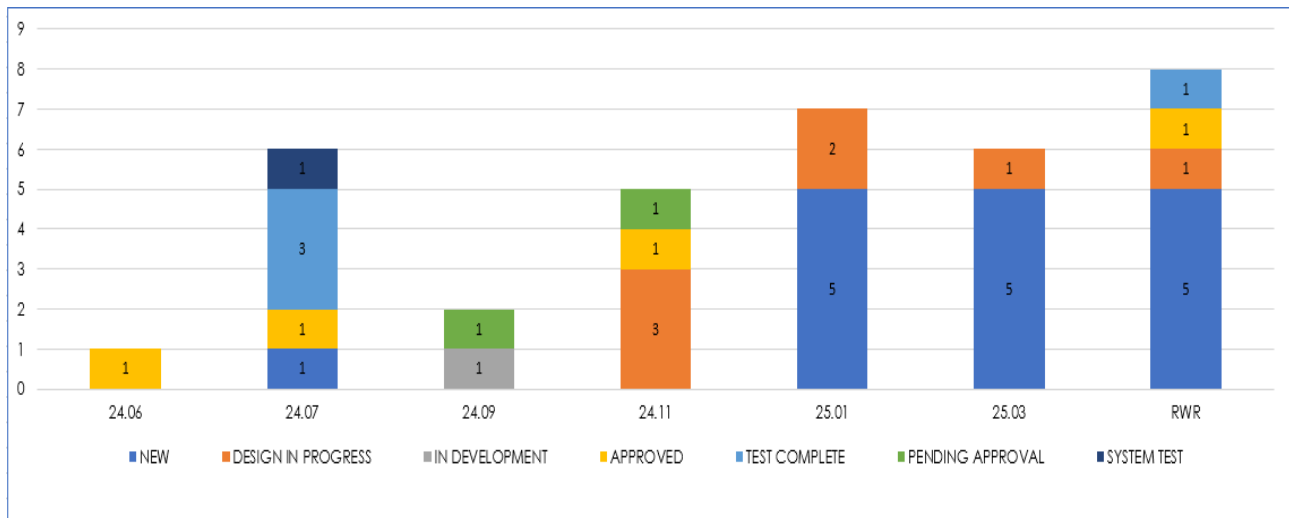
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- CA-278309 - San Diego - GAGR Grant Amounts for Shared Housing
- Priority System Change Requests (SCRs) deployed to Production
  - None to note for the reporting period
- Defects released to Production
  - None to note for the reporting period

**Figure 4.7-1 – General Assistance/General Relief (GA/GR) System Change Requests (SCRs)**



### 4.8 Training Materials Update

- ▶ 24.07 Online Help (OLH) System Change Requests (SCRs):
  - System Test
    - CA-275496 - Online Help: Update JA Self-Service Portal (SSP) - e-Notifications
  - Test Completed
    - CA-275044 - Online Help: Update the OLH Glossary page
    - CA-270662 - Online Help: Update Interfaces Overview to Include CalWIN Counties
    - CA-267552 - Online Help: Update JA Medi-Cal Renewal Packets CA-264555
    - CA-265296 - Online Help: Update JA Skipped Issuances
    - CA-264053 - Online Help: Update JA Journals and Reminders CA-245274
    - CA-289240 - Online Help: Update the 2024 Reports Calendar Schedule for the 24.07 Baseline Release
    - CA-278143 - Online Help: Update the Forms Overview for the 24.07 Baseline Release
    - CA-277675 - Online Help: Update the JA Staff - Manage SCR CA-274396
    - CA-277338 - Online Help: Create new Task Category OLH pages CA-253667
    - CA-276355 - Online Help: Sunset Worklist pages and update Work Order pages CA-257327
    - CA-274733 - Online Help: Update the Reports Overview for the 24.07 Baseline Release
    - CA-273886 - Online Help: Update JA - Replacement Cash EBT Benefits and JA Issuance - Replace CalFresh Benefits with Changes from CA-253426 & CA-

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- 236332
  - CA-270866 - Online Help: Update the Disaster Services List and Detail pages CA-260472
  - CA-260890 - Online Help: Create Job Aid for GAGR Automated Solution Admin Rules
  - CA-260888 - Online Help: Create Job Aid for GAGR Automated Solution Immediate Need
  - CA-250562 - Online Help: Create new JA - Aid Paid Pending (APP)
  - CA-247893 - Online Help: Update JA-Semi-Annual Report (SAR7) Process CA-240558
- ▶ 24.06.18 Priority Release Web Based Training (WBT) and CalSAWS Functional Presentation (CFP) SCRs:
  - In Production:
    - CA-277685 - Training: Create CFP for GEN AI CA-27551
- ▶ 24.07.05 Priority Release Web Based Training (WBT) and CalSAWS Functional Presentation (CFP) SCRs:
  - System Test
    - CA-274953 - Training: Migrate Contact Center Storyline WBTs to Captivate WBTs plus updates
- ▶ 24.07.19 Priority Release Web Based Training (WBT) and CalSAWS Functional Presentation (CFP) SCRs:
  - Approved
    - CA-279321 - Training: Update 008 - Eligibility Medi-Cal WBTs for 24.06 Updates
    - CA-279249 - Training: Maintenance of the 026 - Child Care APP WBTs for 24.07
    - CA-279150 - Training: Maintenance of the 022 - Simulation: 01 - Simulation WBT for 24.07
    - CA-277279 - Training: Update the 034 - Task Management Overview WBT for CA-263040
    - CA-275888 - Training: Create CFP for Disaster CalFresh CA-256387
    - CA-270356 - Training: Remove LA County Specific information from the Childcare WBTs CA-267179
  - In Development
    - CA-271038 - Training: Maintenance of 006 Eligibility CalFresh WBTs based on CA-270479
    - CA-278182 - Training: Update 010 - Employment Services-WTW WBTs for 24.05
    - CA-277253 - Training: Update the 014 - CAPI WBTs for 24.07
    - CA-274872 - Training: Update 021 Security Admin WBTs for 24.05 changes based on CA-274084
  - System Test
    - CA-271133 - Training: Maintenance of 008 Eligibility Medi-Cal WBTs based on CA-270479
  - Test completed
    - CA-273039 - Training: Update Security Administration WBTs for 24.03 App Dev Changes
- ▶ Training Environments
  - Continued to work cross-team to troubleshoot CalSAWS Training Staging and Training Production environment tickets



**Table 4.8-1 – Upcoming Training Activities**

Training Activity	Date	Status
No activities for the period		

**4.9 Upcoming Performance Tests**

- ▶ Planned upcoming Performance tests for Core Online

**Table 4.9-1 – Core Online Upcoming Performance Cycle**

Performance Cycle	Start Date	End Date	Status
24.07.02 CalHEERs Testing	June 25, 2024	July 15, 2024	In Progress
24.07 Performance Testing	June 27, 2024	July 17, 2024	In Progress

**4.10 Foster Care Eligibility Determination (FCED)/California Automated Response and Engagement System (CARES)**

- ▶ Completed Tasks
  - Completed the development of “Document and Imaging Application Programming Interface (API)” and “Income Assets API”
  - Developed the e-data for “Placement API” Qualified Residential Treatment Programs (QRTPs) and Child Placement online pages
  - Partnered with the California Automated Response and Engagement System (CARES) team to finalize the data elements of “Issuance API” and “Eligibility Results API – iteration 2” and “Incidental API”
- ▶ In Progress Tasks
  - Working with CARES team to finalize the data elements required for creating the design document(s) to include the CalSAWS design for “Issuance API”, “Incidental API” and “Eligibility Results API – iteration 2”
  - Adding the CARES integration design to the API design document(s) for “Issuance API”, “Incidental API” and “Eligibility Results API – iteration 2”
  - Updating inbound and outbound “Court Information API” and “Placement Authority API” based on CARES data elements updates.
  - Assembly testing “Income Assets API”
  - Resolving the system test defects for “RFI Communications API”
  - Performing End-to-End CAREs Assembly testing for “Document and Imaging API”
  - Developing the e-data for “Placement API” Home Approval online page
  - Partnering with the CARES team to finalize the approach and the data elements of “Placement API” and “Home Removal API”
- ▶ Upcoming Tasks
  - Develop inbound and outbound “Extended Foster Care API”
  - System Test “Income Assets API”
  - Review and obtain the Business Analysts (BA) approvals for the CalSAWS design in the design document(s) for “KinGAP API”, “Issuance API”, “Incidental API” and “Eligibility Results API – iteration 2”
- ▶ Interface Partner Integration

- o Continue coordination with California Automated Response and Engagement System (CARES) team for schedule alignment and interface element alignment

**Figure 4.10-1 Foster Care Eligibility Determination (FCED)/California Automated Response and Engagement System (CARES) Application Programming Interface (API) Completion Status**

Interface Type	Total	New	Design	Build	Integration Test	System Test
CalSAWS Hosted	17	4	7	0	6	0
CARES Hosted	17	4	8	0	5	0

**4.11 Welfare Data Tracking Implementation Project (WDTIP) Replacement System (WRS)**

- ▶ Completed Tasks
  - o Create Person Search Application Programming Interface (API) endpoint for search by Unique Identifier
  - o Define Functional Requirements for Person Summary Page
  - o Generate duplicate person list by Client Index Numbers (CIN)
  - o Update Cash Aid Section of Time Limit Summary Page to be read-only
  - o Create Analytics and Ad hoc reporting architecture for the new WDTIP solution
  - o Perform CalSAWS Super Trigger Analysis
  - o Create Person Search Application Programming Interface (API) endpoint for search by address
  - o Perform Impact Analysis on Existing Client Correspondence
  - o Analyze the Lambda necessary for adding records into Add Individual (ADD\_INDV)
  - o Add Alien Number to Person API Unique Identifier and Address endpoints
- ▶ In Progress Tasks
  - o Create Person Search Lambda in Node.js
  - o Perform login research and implementation for WDTIP User interface
  - o Create Person API endpoint for search by Phonetic Person
  - o Create new WDTIP screen page designs/mockups
    - Tracking Recipients Across California (TRAC) Add Individual (AIND)
    - TRAC Time Clock Exception/Extension Detail (EDET)
  - o Create scripts for storing WDTIP data into staging database
  - o Create Person Search User Interface in React
  - o Create Add Individual Lambda in Node.js
  - o Add batch properties to connect to WDTIP Postgres Relational Database Service (RDS)
  - o Refine story backlog
- ▶ Upcoming Tasks
  - o Build infrastructure needed for System Testing environment – SYS7
  - o Create new WDTIP screen page designs/mockups
    - TRAC Child Support Reimbursement Update
    - TRAC Time Clock Exception/Extension Summary (ESUM)
    - TRAC CalWORKs 60-Month Calendar (KCAL)
    - TRAC Child Support Reimbursement Update
  - o Create CIN Summary User Interface in React
  - o Create Time Limit Summary Lambda in Node.js

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- Compare CalSAWS time limit data and WDTIP data from full dump to identify discrepancies
- Integrate Cash-Aid section of Time Limit Summary page with WDTIP Lambda
- Create Time Limit Summary Lambda in Node.js
- Add new tables to store time limit program participation rules and exception rules in RDS database
- Create Batch scheduling change requests to decommission WDTIP interface jobs
- ▶ Interface Partner Integration
  - Continue coordination with Employment Development Department (EDD) team for schedule alignment and interface element alignment

### 4.12 Additional Projects

#### 4.13.1 Data Growth – Archive Phase 1

- ▶ Completed Tasks
  - Continue running archival in ad-hoc report environment
  - Various performance tuning fixes for archival batch job
- ▶ In Progress Tasks
  - Update wiki, including Change Request impact analysis and development guide
- ▶ Upcoming Tasks
  - Draft archival Production plan

#### 4.13.2 Data Growth – Test Data Slicer (TDS)

- ▶ Completed Tasks
  - Test Data Slicer (TDS) jobs to slice the data
- ▶ In Progress Tasks
  - Database activities to reenable constraint, rebuild indexes
  - Update database configuration files to handle multiple connections for multi/single case copy
  - Post-TDS activities (i.e. cleanup scripts, masking, etc.)
- ▶ Upcoming Tasks
  - Document test data slicer on wiki

#### 4.13.3 Data Growth – Archive Phase 2

- ▶ Completed Tasks
  - Continued system test and defect fix
  - Journal and meds alert copy jobs tested
- ▶ In Progress Tasks
  - Continued system test and defect fix
  - Running the journal and meds alert copy jobs in ad hoc report environment
- ▶ Upcoming Tasks
  - Continued system test and defect fix
  - Contact center changes aligned to separate 24.08.08 SCR











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**4.13.4 Premise Items**

**Table 4.13.4-1 – Premise Items**

Premise Name	Status	Phase	Progress/Updates
<b>Multiple SFY</b>			
California Automated Response and Engagement System (CARES)		Development	Please refer to section 4.9 for detailed updates on FCED / CARES
Welfare Data Tracking Implementation Project (WDTIP) Upgrades		Development	Please refer to section 4.10 for detailed updates on WDTIP
CF Discontinuance of Gambling Wins		Not yet Started	SFY24-25 Pending State translations
CW Overpayments (SB 726)		System Test	CA-246946 planned for 24.07.11 priority release
Work Registration CalFresh Disqualification Notice Update		Not yet started	CA-240701 planned for 24.11 Pending State translations
CalFresh Reinstatement Approval & Denial Notice Revisions		Not yet started	CA-265360 planned for 24.11 Pending State translations
CF Simplification		Not yet started	SFY24-25 Pending State translations
HAP Eviction (SB 1083)		Development	CA-277308, CA-277307 planned for 24.07.x1 and other System Change Requests (SCRs) pending for State translations
Family Reunification AB 135		Not yet started	CA-233160 planned for 24.11
CW Work Requirements (AB 2300)		CA-253759 In Production	CA-253759 planned for 24.05. Other SCRs planned for next State Fiscal Year due to pending State translations

Legend	
	On Track
	At Risk
	Not on track/Monitor

**4.13.5 Case Purge**

- ▶ Completed tasks
  - None for the reporting period

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- ▶ In progress tasks
  - Begin analysis and design
- ▶ Upcoming tasks
  - Continue analysis and design

### 4.14 Deviation from Plan/Adjustments

- ▶ None for the reporting period

## 5.0 Regional Updates

### 5.1 Region 1 (Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma Counties)

- ▶ Alameda County
  - None to note for the reporting period
- ▶ Contra Costa County
  - None to note for the reporting period
- ▶ Marin County
  - None to note for the reporting period
- ▶ Monterey County
  - None to note for the reporting period
- ▶ Napa County
  - None to note for the reporting period
- ▶ San Benito County
  - None to note for the reporting period
- ▶ San Francisco County
  - None to note for the reporting period
- ▶ San Mateo County
  - San Mateo County – Human Services Agency welcomed new Chief Financial Officer on May 28, 2024
  - Prepare for the California Electronic Benefits Transfer (EBT) Chip EMV/Tap Enabled Cards implementation
  - Completed the CalSAWS Contact Center Team Onsite Visit to San Mateo County
  - Operations implemented the append functionality to a small number of their task types into their business process and may further expand on leveraging the functionality
  - Continued making progress and working with CalSAWS on State and Fiscal Reports' challenges
- ▶ Santa Clara County
  - None to note for the reporting period
- ▶ Santa Cruz County
  - Completed South County move. County combined 3 different locations with several departments into a new building
  - Santa Cruz is live with our first kiosk in the new building and plan to go live with a second kiosk around June 21, 2024
  - Continued training for reception, tablets, and kiosk
  - Continued communications to staff/management

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- Continue to adjust business processes to newly learned CalSAWS functionality
- Planning for two CalSAWS visits to County offices
- We are in the procurement process to purchase additional eCCP licenses
- CalSAWS eGain reports training is planned for June 27, 2024
- Preparing internally for the CalWIN Read-Only Decommission on October 31, 2024
- ▶ Solano County
  - Researching and developing processes to begin using the Calabrio scheduling and forecasting functionality for Contact Center staff
  - Finalized procedures for processing return mail using the Return Mail Report procured through CalSAWS
  - Continuing preparation and planning for a new business model in our Intake and Contact Center bureaus to better utilize CalSAWS functionality including task banks and Get Next
  - Ongoing effort to clean up our Welfare to Work (WTW) CalSAWS entries prior to the upcoming re-run of the WTW 25/25A report as directed in CalSAWS Request for Information (CRFI)
  - New induction class of Eligibility Workers (EWs) started May 13, 2024, and are currently in Medi-Cal training
  - Continuing our ongoing efforts to utilize Eligibility Determination Request (EDR) process to build our own ad-hoc reports
  - Researching and testing eGain reporting functionality to obtain global and customized call center KPIs

### 5.2 Region 2 (Alpine, Amador, Calaveras, El Dorado, Mono, Nevada, Placer, Sacramento, Sierra, Sutter, Tuolumne, Yolo, and Yuba Counties)

- ▶ Alpine County
  - None to note for the reporting period
- ▶ Amador County
  - None to note for the reporting period
- ▶ Calaveras County
  - Holding interviews for a new Director
- ▶ El Dorado County
  - None to note for the reporting period
- ▶ Mono County
  - None to note for the reporting period
- ▶ Nevada County
  - None to note for the reporting period
- ▶ Placer County
  - Held onsite Contact Center meeting
  - Making internal improvements to tasks for performance improvement
- ▶ Sacramento County
  - Held a new class graduation
  - Working on internal changes to the Contact Center
- ▶ Sierra County
  - None to note for the reporting period
- ▶ Sutter County
  - Began utilizing Workday for time keeping for staff

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- ▶ Tuolumne County
  - Deputy Director is retiring in July
- ▶ Yolo County
  - None to note for the reporting period
- ▶ Yuba County
  - Redesigning County office structure
  - Has a new class starting in July
  - Prepare for their July ME
  - Working on a new business model for task-based work

### 5.3 Region 3 (Butte, Colusa, Del Norte, Glenn, Humboldt, Lake, Lassen, Mendocino, Modoc, Plumas, Shasta, Siskiyou, Tehama, and Trinity Counties)

- ▶ Butte County
  - New training class started with 17 and is now down to 9
  - Interviewing for Eligibility staff the week of July 8, 2024
  - Going to be recruiting training staff in the coming weeks
- ▶ Colusa County
  - New training group of 5 will come on board mid-July
- ▶ Del Norte
  - 4 trainees in various status
  - Finished their IEVS audit – went well and looking forward to getting tools that will assist them moving forward
  - Recruitment staff open positions
- ▶ Glenn County
  - Budget revision has allowed Glenn County to recoup some of the vacancies which were lost
- ▶ Humboldt County
  - Completed their IEVS and SIU audit. Awaiting results but feel confident it went well
  - Class of 6 recently began their CF/CW/MC training
  - County has implemented a few strategies for staff retention:
    - In the last 18 months, the County has given staff bonuses which they found to be successful
    - They also built an Eligibility Worker only website
    - They changed where they were recruiting to be more inclusive
    - County is focused on efficiencies now. Looking at new tools and/or existing tools to maximize their use and gain more efficiencies
  - County began a roofing project and are excited about no more leaks
  - Sun Valley Floral Farms is closing and so the County is expecting an influx of applications coming in
  - PSC member and Deputy Director along with Managers are working together on an alignment and prioritization project to identify all the tasks they do and all the programs they run to strategically prioritize them with the end goal of gaining efficiencies. As an example, using the return mail service can save the County 2 Full Time Employees
- ▶ Lake County
  - Welcomes new Director
  - Completed their CF ME which went extremely well. They only had 2 findings

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- ▶ Lassen County
  - Interested in the Gainwell Return Mail service and is looking forward to meeting with the team to get more information
- ▶ Mendocino County
  - Added 8 new Eligibility workers to their team
- ▶ Modoc County
  - Focusing on recruitment and retention department wide
- ▶ Plumas County
  - County Director retired in June currently has an acting Director until the position can be filled
  - Actively recruiting for various positions
- ▶ Shasta County
  - Return Mail service meeting with Gainwell will be taking place in July
  - Completed training an Eligibility class and starting another in mid-July
  - County is trying to get more salary for staff to help with recruitment and retention
  - Completed their CF ME this month and are reporting it went really well with just a couple of findings
  - Getting ready for their IEVS audit
  - Due to budget, 17 positions were deleted and so the County is looking to streamline processes and gain efficiencies where possible
  - County shut down their regional office downtown and have absorbed the staff in other buildings
- ▶ Siskiyou County
  - Completed their ME in May
  - County is now considered a Medium CalFresh County
  - 11 vacancies for Eligibility Worker positions
  - Discussing strategies to retain staff using incentives
  - Completed their Kiosk flows and will be moving forward with a go Live date for their Kiosk
  - County has created a standby list for managers effective July 1, 2024 to respond quickly to emergency needs such as fires
  - The budget is top of mind as it impacts the County
- ▶ Tehama County
  - New eligibility class of 5 to begin mid-July
  - Completed interviews for new Eligibility Trainee position and were able to make offers to 3 candidates
  - Kiosk is tentatively going live July 22, 2024
- ▶ Trinity County
  - Appreciative of the support received from Shasta County when an issue of the Verizon line being cut and Trinity County did not have access to EBT printing or MEDS. With the assistance of Shasta County, Trinity was able to print EBT cards in Shasta County and had one of our managers transport them back here
  - Continued recruitment for 2 Eligibility Specialists
  - 4-5 of our existing staff will be starting CW training in the next few weeks so we can have most of our staff cross trained in all programs
  - New Deputy Direct started effective on June 1, 2024
  - Our office did some restructuring, so we now have a new Branch Director over



Social Services

**5.4 Region 4 (Fresno, Inyo, Kern, Kings, Madera, Mariposa, Merced, San Joaquin, San Luis Obispo, Stanislaus, and Tulare Counties)**

- ▶ Fresno County
  - Fresno is excited to announce Alimat “Ali” Adebisi will be joining the DSS Executive team as a Deputy Director in the Eligibility Branch. In 2023, Ali started working at the County of Fresno as the Division Manager of Community Health in the Department of Public Health. Ali has held various roles with the Public Health Alliance, Public Health Institute, and the State of California in the Department of Correctional Health Care Services. We are confident she will contribute to the ongoing success of our department
- ▶ Inyo County
  - None to note for the reporting period
- ▶ Kern County
  - None to note for the reporting period
- ▶ Kings County
  - None to note for the reporting period
- ▶ Madera County
  - None to note for the reporting period
- ▶ Mariposa County
  - The Mariposa County Board of Supervisors appointment Joe Lynch to the County CAO position, vacating their HHS Director position. They then named Dr. Kristina Keheley as Interim Director
  - Prior to that occurring, Joe had named Rebecca Maietto as the Mariposa County CalSAWS Member Representative. Rebecca is the Deputy Director over Public Assistance. She oversees the majority of Mariposa’s CalSAWS users
- ▶ Merced County
  - 27 new Family Service Representatives (FSR’s) started training on May 20, 2024
  - In July CalWORKs will move to a task-based work model
- ▶ San Joaquin County
  - None to note for the reporting period
- ▶ San Luis Obispo County
  - None to note for the reporting period
- ▶ Stanislaus County
  - Effective May 24, 2024, County closed the Downtown Service Center which provided a location for homeless individual to pick-up their EBT cards issued through the mail. Until another location has been identified, EBT cards for homeless individuals are being mailed out to the Access Center location
  - We are experiencing positive results from our County Operational Resign Effort (CORE) Project implemented on May 6, 2024 as we continue to improve our intake appointment timeliness. With the CORE project we pivoted intake operations from case management to task based utilizing the CalSAWS Get Next function to conduct interviews and process cases
  - In honor of Family Services Specialist week, on June 12, 2024, the management team provided bagels and coffee for all Family Services Specialist staff in appreciation for their dedication and hard work serving our community

- ▶ Tulare County
  - None to note for the reporting period

### **5.5 Region 5 (Imperial, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, and Ventura Counties)**

- ▶ Imperial County
  - None to note for the reporting period
- ▶ Orange County
  - None to note for the reporting period
- ▶ Riverside County
  - None to note for the reporting period
- ▶ San Bernardino County
  - None to note for the reporting period
- ▶ San Diego County
  - None to note for the reporting period
- ▶ Santa Barbara County
  - None to note for the reporting period
- ▶ Ventura County
  - None to note for the reporting period

### **5.6 Region 6 (Los Angeles County)**

- ▶ The Region 6 Regional Managers held the Quarterly Forum for all RCM, SMEs and PPOC on June 25, 2024. The purpose of the forum is to share with RCMs, SMEs, PPOCs information they will need to be successful in their role and provide CalSAWS updates. The forum was attended by the RCM, SME, and PPOCs from DPSS and DCFS
- ▶ Los Angeles County Release team is finishing County Validation for release 24.07. Orientation for testers was held on June 6, 2024. County Validation was executed from June 10, 2024 through June 24, 2024. The Release Team is currently working with the Project to address defects and findings prior to Greenlight meeting
- ▶ Los Angeles County Liaisons Meeting for Release 24.07 is schedule for July 16, 2024, and the CalSAWS Guide is scheduled to be published on July 17, 2024
- ▶ Los Angeles County executives visited Orange County on June 25, 2024, to observe the kiosk functionality in the lobby
- ▶ Region 6 held their monthly Executive Regional meeting on June 20, 2024. During the meeting, the Project provided information about the recent login issues that occurred in May and June. The issues with Contact Center and eGain Reports were also discussed
- ▶ From June through August, Los Angeles County - DPSS is conducting a backpack and school supply drive to benefit low-income children and families to help them be well prepared for the fall school start. For more information on how to donate, email [toyloan@dpss.lacounty.gov](mailto:toyloan@dpss.lacounty.gov)

## **6.0 Appendices**

Appendix A – M&E Requests and SCR Status

Appendix B – County Purchases Status Report

Appendix C – CalSAWS System IVR Report

Appendix D – CalSAWS Project Risks and Issues Report

Appendix E – CalSAWS Project Gantt Chart