CalSAWS | [Meeting Title]

Date:	September 26, 2024	Location:	Microsoft Teams Meeting
Time:	10:00 am – 12:00 pm	Meeting Called by:	Erick Arreola / Sowmya Coppisetty
Attendees:	R1: Francis Delgado, Judy Perez,		
	R2: Carlos Urbieta, Ilda Torrez, Theresa Agarenzo		
	R3: None		
	R4: Christina Mendoza Ruiz, Doris Sons, Jessica Lannin, Russell Pehrson		
	R5: Ed Williams, Rosa Vizcarra, Cindy Aguirre		
	R6: Christopher Estrada, Kelly Young, Richard Luscombe, Stephanie Hunter		
	RM: Justin Stephenson, Melissa Thomas, Yolanda Banuelos		

NEXT MEETING 10/24/24

Lead	Topic	Notes
Erik Arreola/Erika Kusnadi	**Lobby Management Modernization** • Current Status & Timeline Review • Design Input • Meeting Frequency	• CalSAWS currently supports 4 applications for Lobby Management; 2 C-IV migrated and 2 LRS migrated. • Current applications have different system requirements (Windows, Android, iOS) to be used. • Funding requested for a Technology Lifecycle Management update to modernize the 4 solutions into 1 was approved. The main goal is to modernize into a web-based solution. • A single application will be developed that is web-based and will incorporate current functionalities. • The use of peripherals may require continued development of IPA files for use on iOS devices. iOS devices not using peripherals should leverage web-based solution. • Part of this request is to ensure the device receipts pull the same data elements and add some configuring functionality to customize and control information on the receipts. • Any enhancements outside the scope of Lobby Modernization will be on hold until this project is completed. • Design and build for the app will be done concurrently while testing efforts follow typical release schedule. • Target release 25.03 for this effort. • Since this is a large effort, design will be broken up to pieces for easiness of review and will be presented to the committee. • Note: As the designs are being developed, they will be demonstrated to committee in a test environment.

- Sonya (Contra Costa) Have the counties that will test been chosen and if so how and when will validation be done?
    - County validation will be done prior to release and will follow current county validation process, which is two weeks prior to release.
    - A recruitment email will go out to the leads for each region to see who wants to be involved in this testing.
- Sergio Andrade – Region 6:
    - Are we saying we will start some of this effort in November? This will follow regular validation. There is an agile approach for this design and build.
    - Sergio A. (comment) Hyland should be tested extensively. (Response) Yes, Hyland functionality and process should be the same.
- **Timeline (Erika Kusnadi)**
    - Timeline will change as continuous feedback is received.
    - Phase 2 is currently the phase we are in (Design & Build).
    - Three phases: Determining framework for new lobby application, Design & Build, and Testing.
    - Next step for this phase will start Monday, 9/30/24, based on decisions made in today's meeting.
    - Next phase should be in November/December to wrap up final design review.
    - Phase 3 is when testing will start.
    - Kelly Young – Region 6:
      For each segment will the regions be asked to review those designs independently? Yes.

      How does this timeline being shared affect the existing prioritized SCR's?
      Current SCRs will not be changed. If they have a release date, they will continue to move forward.
    - Sergio A. – Region 6:
      Unsure of how the design and build will look like or what will be used to build on. Can the PPT be shared?

      PPT will be shared, it has 18 pages, mockups, and info. The Design document as a whole

won't be completed till December 2024 or January of 2025.

- o The new home screen consists of the header and 2 buttons on the top right-hand side of the screen (View my Email & Submit my Report) these 2 buttons only exist in the L.A. County Self Service application. The 2 buttons open Benefits Cal.

- o The Home screen also consist of the language selection which has been set as a drop down to support a pending SCR that will bring additional Threshold languages.

- o Currently the only other language option is Spanish.

- o 2 questions to the committee were addressed for feedback regarding the 2 buttons that open BenefitsCal.

  Do we want to keep them separate or combine them? and
  Do we want to keep that functionally to open BenefitsCal on a separate window if that selection is made?

- o Reminder that this is a single web-based solution but it's going to be a different look and feel just like it is today as far as the public - facing and the employee - facing. This mockup presented today is for the public.

- o For now, all the screens will also be available in Spanish when Spanish is selected.

- o Poll question – Make the BenefitsCal options configurable?

  Yes – 97%

  No – 2%

- o Based on responses most committee members are in favor in merging the 2 upper right buttons that are used by L.A. County.

- o If the 2 buttons are combined, the button name can be renamed so its purpose can be clearer.

- o Yesenia: (Comment) is in support as some stated on the chat to possibly make the font a bit larger since there is a lot of dead space on the screen.

- o For the language drop down the committee suggested another option which is to make it to individual language icons.

- The 2nd screen reviewed is the "How can we help you" screen which is laid out more like L.A. County's self-service.

- Also, the "My Case Information" section is an L.A. specific functionality. We are not sure how this function will look but L.A. will not lose that functionality.

- As a group we need to decide on two items. For the "My Case Information" function, will it be static or configurable? And for the "Upload Document" section, should it be configural?

- Poll Question – Currently, my case info. always displays. Should this be configurable?

  Yes – 95%

  No – 4%

- Poll Question- Should "Upload Document" be a separate header when enabled or sub action under "Check-In"?

  Separate Header – 93%

  Place under "Check In" – 7 %

- Sue May: Do all these functions go to BenefitsCal?

  No, these functions are specifically tied to the reception log.

- For the "Check In" section, counties can assign different actions and whether they are case validated or not. For validations, participants can enter their DOB, BenefitsCal email w/password, scan a barcode, or swipe their EBT/BIC card.

- Sergio A. – Region 6: Since other counties do not currently use the bar code will that functionality still be worked on?

  Yes, we are planning to incorporate that function.

- Kelly Y. – Region 6: Since the state will start using Tap EBT cards, will this functionality be used in the self-service format?

  For the initial Go Live, we will not be able to support that functionality. A CER must be submitted so we can later explore this functionality.

- Tom Dickey (Follow-Up to the previous answer) If the Tap is added to new EBT cards, the cards will still have the magnetic strip, Therefore, adding

the Tap function will not interfere with the current function.

- o In the screen image shared the "back" button will take you back to the previous screen.
- o Once in the screen to enter info. such as the Case Number & DOB, the "Submit" button will initially be grey since its blank, but it will turn blue once data is entered.
- o Kelly Y. – Region 6: Is there a validation message if the information entered is wrong?

  No, if the info. entered is incorrect it will return with a nothing found message.
- o There is a difference between the Kiosk and the L.A. self-service. L.A. self-service requires a 2nd validation to be entered, therefore the 57 counties need to decide how they will approach this functionality. Do they want to inherit L.A. validation process or keep as is unless L.A. County is able to reduce one of its validation steps.
- o Poll question – The 57-county case validation logic only validates the case # and DOB, should that logic stay?

  Yes, automatically include these options – 27%.

  No, we need to be able to choose which options to display – 27%.

  Keep only case # & DOB and remove other options – 47%.
- o Concern was addresses by Region 6 from Sergio A. regarding any possible security issues if only case # and DOB is sufficient.

  (Response) from Tom Dickey – All security teams including the project's security team will be reviewing these decisions to support the counties in ensuring all the security requirements will be met.
- o Counties will only have 1 week, to go back and further review the slides and provide more feedback.
- o For the screen where your BenefitsCal email and password are to be entered, the password will continue to be hidden when entered unless the user selects for it to be seen.
- o Currently on the "Appointment Categories" only certain categories are being returned. Therefore, the next poll question was asked…

Lead	Topic	Notes
		o Poll question – Should we limit appointment categories that are not to be displayed? Yes – 53% No – 46% Because the above results are close, a decision cannot be made in today's meeting, therefore this question must be taken back so everyone can submit a final decision. o Poll question – Should we hide appointment times that have already passed? Yes – 35% No – 64% o Sergio A. – Region 6: Can we get a listing of all the categories that currently appear to know what is missing? Yes, we can get you that list and a list of all available categories. o If we want to hide the appointment once the time has passed, we will have to add a threshold. However, that discussion, if necessary, will be completed later in the process of this build.
Tom Dickey	**Intune Pilot** • Update on rollout	o Intune is the management system that will be put in place. o Starting to bring all counties on board. All non-managed counties currently in process to be brought on the Intune solution. o About 15-20% of the process is complete.
[Name]	**24.07** • SCR CA-269150: Reception Log updates to allow refreshing and support multiple offices.	
[Name]	**24.09** • I Defect CA-279377: Lobby Tablet App - Exit Button Returns	

Lead	Topic	Notes
	User to Login Screen • Defect CA-279475: Kiosk App Screen Issue • Defect CA-276900: Multiple Reception Log entries for same ticket	
[Name]	**24.11** • SCR CA-222130: Lobby Device: Change wording on Kiosk screen • SCR CA-246496: Update Lobby pages to reset timer on main CalSAWS application.	

(Optional Items)

#	Action Item	Who	Due
1			
2			

#	Decision Made	Who	Date
1			
2			