CalSAWS
California Statewide Automated Welfare System

THE POWER OF 58

Bi-Weekly Status Report
CalSAWS M&E

Reporting Period: May 5, 2025 – May 18, 2025

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1 EXECUTIVE SUMMARY

As we conclude Weeks 14 and 15 of the project, progress has been made on Transition-in and M&E activities. Key accomplishments this week include confirmation that the M&E transition for OCAT is complete and Deloitte will fully assume the OCAT M&E responsibilities. We also came to an agreement on high-level activities to complete shared responsibilities and timeline for Milestone 0 of Analytics Modernization. We submitted an SCR to refresh the AT-7 database to align with the AT-1 environment. We submitted impact analyses and estimates on two May Revise items: Enrollment Freeze for Full-Scope (State funded) Medi-Cal Expansion, Adults 19 and Older, and Medi-Cal Asset Test Limits. In addition, the team successfully completed 5 Knowledge Transfer (KT) sessions, 8 Job Shadowing (JS) and 6 Reverse Job Shadowing (RS) sessions. We actively monitored the Tier 3 – M&E OCAT ServiceNow queue, which received 5 pre-existing on-hold tickets.

We submitted the ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL to the Consortium on May 13, 2025. We received feedback from the Consortium on ME-D05 Project Control Document Group 1 and Group 2 on May 15, 2025 and submitted the latest resolutions to the Consortium on May 16, 2025. Additionally, we received feedback from the Consortium for ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL on May 16, 2025.

Looking ahead to next week, the team will focus on receiving the signed ME-D05 Project Control Document FDEL: Group 1 and Group 2 WAC from the Consortium on May 20, 2025. The team will attend the CalSAWS M&E reverse job shadow post-meet session to present Deloitte's design document for CA-216284. Additionally, the team will continue working with Gainwell and Accenture teams to finalize access for various tools and applications. The team will also submit the draft SSP control document for the 'Response Group A' Planning family control (PL-2) response to the Consortium Security review. During the week of May 19, 2025, we will continue May Budget Revise activities with the Consortium and Accenture to enable the collaborative development of impact analyses and estimates on items in the May Revision to the SFY25/26 budget.

2 TRANSITION-IN WORKPLAN STATUS (5/5/2025 TO 5/11/2025)

The following sections provide a summary of tasks completed in this reporting period, upcoming tasks for the next reporting period, and tasks behind schedule.

2.1 Tasks Completed from the Prior Week

Highlights include:

During the prior week, several key deliverables were achieved. Feedback was received from the Consortium on ME-D02 M&E Services Plan and Operational Working

Documents (Overview) DDEL on May 8, 2025. The signed ME-D16 System Application Recovery Plan FDED WAC was received from the Consortium on May 5, 2025.

- **PMO**
  - **Transition-In**
    - **Conducted Weekly Deloitte/Accenture Transition Meeting:** On May 6, 2025, discussed and agreed upon CA-249669 - SF - Update to GA/GR Automated Solution Catastrophically Ill functionality as a replacement for Release 25.09 SCR CA-55143, which is targeted for retraction, coordinated Knowledge Transfer, Job Shadowing, and Reverse Job Shadowing Session logistics, Document request fulfillment, and action item resolutions.
  - **Participated in CalSAWS PMO Status Meeting:** On May 6, 2025, engaged with the Consortium PMO during the weekly meeting to strengthen project management oversight and alignment.
  - **Participated in CalSAWS Bi-Weekly Status Meeting:** On May 7, 2025, presented updates and participated in the meeting to provide critical project updates and facilitated stakeholder engagement.
  - **Developed Deloitte - CalSAWS M&E Weekly Status Report - 2025-05-11:** Created a detailed weekly status report with a clear overview of project progress, identified potential risks, and outlined next steps for continued alignment and successful project execution.
  - **Deliverables**
    - **Received signed ME-D16 FDED WAC:** On May 5, 2025, received signed ME-D16 System Application Recovery Plan FDED WAC from the Consortium.
    - **Received feedback on ME-D02 DDEL:** On May 8, 2025, received feedback from the Consortium on ME-D02 M&E Services Plan and Operational Working Documents (Overview) DDEL.
    - **ME-D05 Project Control Document Group 1 FDEL:** On May 9, 2025, submitted FDEL edits to the Consortium.
    - **ME-D05 Project Control Document Group 2 FDEL:** On May 9, 2025, submitted FDEL edits to the Consortium.
- **OCAT**
  - **Actively Monitored Tier 3 – M&E OCAT ServiceNow Queue**: Engaged in monitoring Tier 3 – M&E OCAT ServiceNow queue and received 0 tickets.
- **SCR**
  - **Attended the CalHEERS-SAWS Integration Weekly Meeting:** On May 6, 2025, attended the meeting to continue integration planning and coordination between CalHEERS and SAWS for upcoming releases and JADs.
  - **Attended the CalSAWS Release Coordination Weekly Meeting:** On May 6, 2025, attended the meeting to review and discuss the upcoming SCRs.
  - **Attended the CalSAWS-CH 26.02 JAD Session for CA-289071/CR 273150:** On May 6, 2025, attended the meeting to discuss the design for CA-289071/CR 273150 - Enhancements for Addressing Downstream Impacts of Disposition Transactions.

- **Attended the CalSAWS M&E touchpoint session for CA-216284 CalHeers eHIT MAGI Medi-Cal income budget periods:** On May 6, 2025, attended the design JS/RS touchpoint for MAGI Medi-Cal income budget periods.
- **Attended the CalSAWS M&E Technical KT session for Correspondence:** On May 7, 2025, attended the KT session for correspondences to understand the technical implementation of correspondences.
- **Attended the CalSAWS M&E Test Tools and Process Walkthrough KT session:** On May 7, 2025, attended the Test tools and process walkthrough session to understand system test process.
- **Attended the CalSAWS M&E Analytics and Reports KT session:** On May 8, 2025, attended the Analytics and Reports KT session to understand system reports.
- **Attended the CalSAWS M&E KT session for Lobby Management:** On May 8, 2025, attended the KT session for Lobby Management applications to understand the overall Lobby management applications and process.

- **Support Services**
  - **Scheduled May Revise/Budget Drills JS:** Scheduled the JS session for the May Revise/Budget Drills. The purpose of the session is to observe the process and analysis of inputs to May Revise.
  - **Met with Consortium on County Purchasing Orders (CPO):** On May 8, 2025, met with CPMO Fiscal Contract Analyst to understand CPO process and monitoring procedures.
  - **Submitted SCERFRAs and SIRFRAs for Review:** On May 9, 2025, submitted estimates for SIRFRA 1426 – State Only Aid Code for Immigrants and SIRFRA 1433 – Authorized Representatives MEDS Screen.

- **Architecture/Innovation/Evolution**
  - **Continued Amazon Q Proof of Concept (POC) Development:** Validated Amazon Q Developer Pro VSCode Extension works on CalSAWS laptops. Resolved offshore access issues identified in AWS Workspace VDI.
  - **County Feedback on Analytics Modernization:** On May 6, 2025, held multiple discovery calls with stakeholders from LA County and Riverside County facilitated by Chief Technology Officer and Consortium Data & Reporting lead. Shared our roadmap and highlighted new features for proposed Analytics Modernization. Received feedback that will help to inform high-level requirements and future county migration considerations.
  - **Attended Databricks POC Discovery Meeting:** On May 8, 2025, attended a meeting coordinated by Databricks and the Consortium to discuss the possibility of a Databricks POC for Analytics Modernization. Discussion included overview of current state challenges and possible POC key focus areas and considerations with Chief Technology Officer and Consortium Data & Reporting Team in attendance.

- **Production Operations**
  - **Attended the 25.05 Project Integrated Readiness Status T-2 meeting:** On May 5, 2025, attended the 25.05 Project Integrated Readiness Status T-2 meeting with the different project stakeholders and Consortium Release Team. The focus of the meeting is to understand the release status from the other projects that pertain to CalSAWS.

- **Completed Logging Framework Session:** On May 6, 2025, completed logging Framework session, which provided key insights into the processes involved in ingesting application logs into Splunk and CloudWatch based the application component. This session deepened the understanding of the methodologies used in CalSAWS for log aggregation.
- **Began Tools and Software Access for Release 25.9 JS/RS Readiness:** Collaborated closely with Gainwell and Accenture teams to finalize access for various tools and applications. This strategic alignment will facilitate the Deloitte team in executing a seamless Release 25.9 Job Shadow and Reverse Job Shadow experience. This week the team focused on identifying the solution for Bitbucket. Daily Recurring meetings were scheduled and started on May 6, 2025.
- **Defect CA – 290361 Working Session:** On May 6, 2025, conducted a working session to understand the process for addressing defects that are late in the release cycle.

- **Technology Recovery**
  - **Continued Working on ME-D16:** Continued working on ME-D16 System Recovery Plan DDEL.
  - **Continued Document Review**: Continued review of all the associated OWDs for the Technology Recovery process, such as "Business Continuity & Disaster Recovery Plan."

- **Security**
  - **Attended CalSAWS M&E Prod Ops KT: Logging Framework KT:** On May 6, 2025, attended the CalSAWS M&E Prod Ops KT: Logging Framework to form a better understanding of the logging framework, tools, and metrics.
  - **Attended CalSAWS Application Security Findings Meeting:** On May 7, 2025, attended CalSAWS Application Security Findings meeting for a better understanding of current state of the application security posture and findings remediation efforts.
  - **Attended M&E Security/QA Team Weekly Meeting:** On May 7, 2025, attended the M&E Security/QA Team Weekly meeting to receive/provide feedback on M&E Security teamwork related to SSP development, POA&M remediation, and OCAT backlog.
  - **Attended Weekly Compliance and CalSAWS M&E / Security Team Weekly Sync Meetings:** On May 8, 2025, attended the Weekly Sync meeting with Consortium Security and Compliance teams to discuss ongoing M&E Security activities related to SSP development and submission timelines, POA&M entries/resolution, access issues, and upcoming KT/JS sessions.
  - **Attended CalSAWS M&E SCR KT In-Flight - Lobby Application Modernization:** On May 8, 2025, attended CalSAWS M&E SCR KT In-Flight - Lobby Application Modernization session to better understand the effort to update the four lobby applications into a single Web application and the impact these changes will have on security.
  - **Continued SSP Control Development:** Continued development of 'Response Group A' Planning family control (PL-2) response and prepare draft submission for Consortium Security review on May 16, 2025.

2.2 Tasks Due for the Coming Week

Highlights include:

- **Submit the LA GA/GR County Purchase Orders:** The week of May 15, 2025, submit the County Purchase ME-LA-01-2025 – GA/GR Self-Employment Expense Calculations and County Purchase ME-LA-02-2025-GROW New Non-Compliance Reason Code.
- **Gen AI Tools Initial Findings/Results:** On May 14, 2025, share the initial findings of Gen AI tools for three use cases (Source to Document Generation, Code Generation, Test Case Generation) with the CTO for feedback.
- **Submit feedback on Draft All County Letter (ACL):** By May 15, 2025, submit any feedback on Draft ACL on the Clarification Regarding Funding for the Transitional Housing Placement Program (THPP-M).
- **Continue SSP Control Development:** On May 16, 2025, continue development of 'Response Group A' Planning family control (PL-2) response and prepare draft submission for Consortium Security review.
- **Deliverables:** Looking ahead to next week, the team will focus on submitting ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL to the Consortium on May 13, 2025 and receiving feedback from the Consortium on ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL on May 16, 2025.

- **PMO**
  - **Transition-In**
    - **Conduct Weekly Deloitte/Accenture Transition Meeting:** Coordinate Knowledge Transfer, Job Shadowing, and Reverse Job Shadowing Session logistics, Document request fulfillment, and action item resolutions.
  - **Participate in CalSAWS PMO Status Meeting:** On May 13, 2025, engage with the Consortium PMO during the weekly meeting to strengthen project management oversight and alignment.
  - **Participate in CalSAWS Section Director's Meeting:** On May 14, 2025, present updates and participate in the meeting to provide critical project updates and facilitated stakeholder engagement.
  - **Participate in CalSAWS Project Steering Committee (PSC) Meeting:** On May 15, 2025, present updates and participate in the meeting to provide a detailed overview of transition-in progress.
  - **Develop Deloitte - CalSAWS M&E Weekly Status Report - 2025-05-18:** Create a detailed weekly status report with a clear overview of project progress, identify potential risks, and outline next steps for continued alignment and successful project execution.
  - **Deliverables**
    - **Submit ME-D02 FDEL:** On May 13, 2025, submit ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL to the Consortium.
    - **Receive feedback on ME-D02 FDEL:** On May 16, 2025, receive feedback from the Consortium on ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL.
- **OCAT**

- **Continue Monitoring Tier 3 – M&E OCAT ServiceNow Queue:** Engage in monitoring activities and resolve any tickets that come into queue.
- **SCR**
  - **Attend the CA-266908 LA – Update TTC Interface to not send 'Potential IPV' cause code weekly touchpoint session:** On May 12, 2025, attend the CalSAWS M&E job shadow weekly touchpoint session to receive updates with regards to design decisions and requirements for CA-266908.
  - **Attend the CA-249669 Update to GA/GR Automated Solution Catastrophically ill functionality pre-meet session:** On May 12, 2025, attend the CalSAWS M&E job shadow pre-meet session to receive updates on context and requirements for CA-249669.
  - **Attend the CA-216284 CalHEERS EHIT: MAGI Medi-Cal Income Budget Periods weekly touchpoint session:** The week of May 12, 2025, attend the CalSAWS M&E job shadow weekly touchpoint session to receive updates with regards to design decisions and requirements for CA-216284.
  - **Attend the CalHEERS-SAWS Integration Weekly Meeting:** On May 13, 2025, attend the meeting to continue integration planning and coordination between CalHEERS and SAWS for upcoming releases and JADs.
  - **Attend the CalSAWS Release Coordination Weekly Meeting:** On May 13, 2025, attend the meeting to review and discuss the upcoming SCRs.
  - **Attend the Analytics and Reports Part – 2 KT session:** On May 13, 2025, attend the CalSAWS M&E Analytics and Reports Part –2 KT session to complete our understanding of application reports and analytics functionality.
  - **Attend the General Assistance/General Relief KT session:** On May 13, 2025, attend the CalSAWS M&E General Assistance/General Relief (GA/GR) KT session to understand the system GA/GR functionality.
  - **Attend the DHCS CalSAWS Touchpoint Meeting:** On May 14, 2025, attend the meeting to review and discuss the upcoming DHCS priority items.
  - **Attend the Automation framework walkthrough KT session:** On May 14, 2025, attend the CalSAWS M&E Automation framework walkthrough KT session to understand the details about automation framework currently implemented in the system.
  - **Attend the CA-246797 Update Direct Deposit Status Report to Extract Program Level RDB weekly touchpoint session:** On May 14, 2025, attend the CalSAWS M&E job shadow weekly touchpoint session to receive updates with regards to design decisions and requirements for CA-246797.
- **Support Services**
  - **Submit the LA GA/GR County Purchase Orders:** The week of May 12, 2025, submit the County Purchase ME-LA-01-2025 – GA/GR Self-Employment Expense Calculations and County Purchase ME-LA-02-2025-GROW New Non-Compliance Reason Code.
  - **Participate in weekly SCERFRA/SIRFRA Requirements Review Meeting:** On May 14, 2025, participate in weekly meeting with Consortium Policy and Design managers, SMEs, and business analysts to review issued SCERFRAs/SIRFRAs collectively to gather mutual understanding and improve business efficiency.

- **Participate in the Bi-weekly DHCS CalSAWS Touchpoint Meeting:** On May 14, 2025, participate in the bi-weekly DHCS touchpoint meeting to discuss policy and SIRFRA inquiries and estimates.
- **Participate in the Weekly SCERFRA/SIRFRA Weekly Review Meeting:** On May 15, 2025, participate in the weekly SCERFRA/SIRFRA review meeting with the Consortium, Gainwell, and Accenture.
- **Submit feedback on Draft All County Letter (ACL):** By May 15, 2025, submit any feedback on Draft ACL on the Clarification Regarding Funding for the Transitional Housing Placement Program (THPP-M).

- **Architecture/Innovation/Evolution**
  - **Lead Analytics and Reporting KT:** On May 15, 2025, present our understanding and identify knowledge gaps during upcoming KT Session: Analytics and Reports (Part 2).
  - **Gen AI Tools Initial Findings/Results:** On May 14, 2025, share the initial findings of Gen AI tools for three use cases (Source to Document Generation, Code Generation, Test Case Generation) with the CTO for feedback.

- **Production Operations**
  - **Tools and Software access for Release 25.9 JS/RS Readiness:** Continue working with Gainwell and Accenture teams to finalize the access for various tools and applications. This strategic alignment will facilitate the Deloitte team in executing a seamless Release 25.9 Job Shadow and Reverse Job Shadow experience.

- **Technology Recovery**
  - **Continue Document Review**: Continue review of all the associated OWDs for the Technology Recovery process, such as "Business Continuity & Disaster Recovery Plan."

- **Security**
  - **Participate in Enterprise Implementation Weekly Calls:** On May 14, 2025, attend these calls to better understand current or potential risks/issues we are facing with each of these application security testing tools.
  - **Attend M&E Security/QA Team Weekly Meeting:** On May 14, 2025, attend the M&E Security/QA Team Weekly meeting to receive/provide feedback on M&E Security teamwork related to SSP development, POA&M remediation, and OCAT backlog.
  - **Attend Weekly Compliance and CalSAWS M&E / Security Team Weekly Sync Meetings:** On May 15, 2025, attend Weekly Sync meeting with Consortium Security and Compliance teams to discuss ongoing M&E Security activities related to SSP development and submission timelines, POA&M entries/resolution, access issues, and upcoming KT/JS sessions.
  - **Continue SSP Control Development:** On May 16, 2025, submit the draft SSP control document for the 'Response Group A' Planning family control (PL-2) response to the Consortium Security review.

2.3 Areas in the work plan which require attention (behind schedule)

- Nine (9) KT sessions are currently delayed. Deloitte is working with stakeholders to reschedule accordingly.

- KT Session: Ticket Management
- KT Session: Performance Monitoring and Alerting
- KT Session: DevSecOps Pipeline-3
- KT Session: Application Architecture Follow-Up 1
- KT Session: Application Architecture - Follow-Up Session 2
- KT Session: Account Creation and Management (for clients, workers, agents, third party etc.)
- KT Session: Technical EDBC Follow-Up
- KT Session: Test Tools and Process Walkthrough (Part 4)
- KT Session: Part 2: Recurring SIRFRAs, Query SIRFRAs (often require production access)
- Twelve (12) JS sessions are currently delayed. Deloitte is working with stakeholders to reschedule accordingly.
  - JS Session: DBA Incident Management
  - JS Session: DBCR New Table DDL Change Request Process
  - JS Session: Delphix Masking Process
  - JS Session: Pipeline and Deployment
  - JS Session: Prod-Ops Environment and Code Management
  - JS Session: Delphix VDB Refresh Process
  - JS Session: User Account Provisioning and Role Management
  - JS Session: CA-274303: Task Detail Automated Action field Enhancements Design JS/RS Post Meeting
  - JS Session: Recurring SIRFRAs, Query SIRFAs (often require production access) Part 1
  - JS Session: CalSAWS Functional Presentations (CFP)
  - JS Session: Release Management meetings
  - JS Session: CalSAWS training committee meeting

2.4 Critical Path Analysis

Critical path analysis has been divided into cutover groups, which contain the workstreams shown in the following table.

Table 1: Critical Path Analysis: 5/5/2025 to 5/11/2025

GROUP	WORKSTREAMS INCLUDED	CRITICAL PATH STATUS
1	OCAT	Complete
2	Production Operations	No expected change to the cutover date
2	Security	No expected change to the cutover date
2	Technology Recovery	No expected change to the cutover date
3	System Change Request	No expected change to the cutover date
3	Support Services	No expected change to the cutover date
4	Project Management	No expected change to the cutover date
4	Organizational Change Management	No expected change to the cutover date

GROUP	WORKSTREAMS INCLUDED	CRITICAL PATH STATUS
4	Architecture Evolution and Innovation	No expected change to the cutover date

2.5 Suggested Changes to Maintain Schedule Timelines

This section includes any changes suggested to the work plan for the purpose of remaining on schedule.

- None.

2.6 Issues

This section includes enterprise-level issues that may affect the schedule.

- None for the reporting period.

2.7 Risks

This section includes enterprise-level risks, including those that may affect the schedule.

Table 2: Risks: 5/5/2025 to 5/11/2025

RISK #	PROJECT PHASE	RISK NAME	RISK DESCRIPTION
313	Transition	Failure to provide M&E team timely access may impact M&E transition	Deloitte staff may be unable to perform certain reverse shadowing activities without access to CalSAWS environment and tools.
314	Transition	Limited Availability of Accenture Staff May Impact the M&E Transition Schedule	Limited availability of Accenture Knowledge Transfer (KT) providers to support the timely transition of M&E Services to Deloitte while also supporting ongoing M&E Releases, Premise and other critical projects (e.g., CARES, WDTIP, etc.). The impact would be during KT (3/3-5/30) and Reverse Shadow (5/5-10/3/2025). Deloitte's Reverse Shadow transition activities include overlap on top of the Accenture team Design/Build/Test for Release 25.09 (April-Sept). Examples of additional transition activities where Accenture may have limited staffing capacity (e.g., provide review of updated documentations, troubleshooting outcome differences from Deloitte's RS, provide data integrity for batch jobs/maintenance/ad-hoc queries, data fixes, L3 ticket triage/resolution, etc.).

2.8 Other areas requiring discussion

- None for the reporting period.

2.8.1 Deliverable Status

The following table outlines the due dates for deliverables from the Transition-In Work Plan. Items shaded in light blue are completed.

Table 3: Transition-In Deliverable Due Dates: 5/5/2025 to 5/11/2025

DELIVERABLE	DDED SUBMITTED	DDED REVIEW COMPLETE	FDED SUBMITTED	FDED REVIEW COMPLETE	DDEL SUBMITTED	DDEL REVIEW COMPLETE	FDEL SUBMITTED	FDEL REVIEW COMPLETE	NOTES
ME-D01 M&E Transition-In Master Plan	8/28/24	9/13/24	9/20/24	1/29/25	2/14/25	3/3/25	3/10/25	4/8/25	FDED/FDEL WAC Signed!
ME-D03 M&E Transition-In Work Schedule	9/18/24	9/25/24	9/30/24	1/29/25	2/14/25	3/3/25	3/10/25	3/25/25	FDED/FDEL WAC Signed!
ME-D04 M&E Transition-In Test and Validation Plan	2/3/25	2/11/25	2/14/25	2/27/25	3/3/25	3/10/25	3/13/25	3/25/25	FDED/FDEL WAC Signed!
ME-D05 M&E Project Control Document – Group 1	2/19/25	2/26/25	3/3/25	3/6/25	4/1/25	4/8/25	4/11/25	5/16/25	FDED/FDEL WAC Signed!
ME-D05 M&E Project Control Document – Group 2	N/A	N/A	N/A	N/A	4/11/25	4/18/25	4/23/25	5/16/25	FDED/FDEL WAC Signed!
ME-D06 M&E Work Schedule	2/24/25	3/3/25	3/6/25	3/12/25	4/1/25	4/8/25	4/11/25	4/16/25	FDED/FDEL WAC Signed!
ME-D02 M&E Services Plan and Operational Working Documents (Overview)	3/19/25	3/26/25	4/1/25	4/11/25	4/30/25	5/8/25	5/13/25	5/16/25	FDED WAC Signed!

Deliverable	DDED Submitted	DDED Review Complete	FDED Submitted	FDED Review Complete	DDEL Submitted	DDEL Review Complete	FDEL Submitted	FDEL Review Complete	Notes
ME-D02 M&E Services Plan and Operational Working Documents – Group 1	N/A	N/A	N/A	N/A	6/4/25	6/11/25	6/16/25	6/20/25	
ME-D02 M&E Services Plan and Operational Working Documents – Group 2	N/A	N/A	N/A	N/A	7/9/25	7/16/25	7/21/25	7/24/25	
ME-D02 M&E Services Plan and Operational Working Documents – Group 3	N/A	N/A	N/A	N/A	8/6/25	8/13/25	8/18/25	8/21/25	
ME-D16 System Application Recovery Plan	4/16/25	4/23/25	4/28/25	5/1/25	6/2/25	6/9/25	6/12/25	6/17/25	FDED WAC Signed!
ME-D07 CalSAWS Annual Strategic Plan	6/18/25	6/26/25	7/1/25	7/7/25	8/1/25	8/8/25	8/13/25	8/18/25	
ME-D17 M&E System Security Plan	11/5/25*	11/13/25*	11/18/25*	11/21/25*	12/18/25*	1/7/26*	1/14/26*	1/22/26*	*Proposed dates

2.8.2 Knowledge Transfer/Job Shadowing/Reverse Shadowing Status

As of 5/9/2025

Figure 1: Knowledge Transfer/Job Shadowing/Reverse Shadowing Status

2.8.3 Knowledge Transfer Status

Total KT Sessions Completed this week: 17
Total KT Sessions Completed to date: 188

- Twelve (12) sessions were closed this week due to additional knowledge obtained by analyzing the code in the Sandbox, process efficiencies, and the onboarding of CalSAWS-experienced team members.

2.8.4 Job Shadowing Status

Total JS Sessions Completed this week: 5
Total JS Sessions Completed to date: 64

- The team participated in the Training Production refresh job shadowing session on Sunday, May 4, 2025.
- We held our first weekly SCRs for Release 25.09 Deloitte/Accenture Job Shadowing meeting.

2.8.5 Reverse Job Shadowing Status

Total RS Sessions Completed this week: 1
Total RS Sessions Completed to date: 17
- We held our first weekly SCRs for Release 25.09 Deloitte/Accenture Reverse Job Shadowing meeting.

3 TRANSITION-IN WORKPLAN STATUS (5/12/2025 TO 5/18/2025)

The following sections provide a summary of tasks completed in this reporting period, upcoming tasks for the next reporting period, and tasks behind schedule.

3.1 Tasks Completed from the Prior Week

Highlights include:

During the prior week, several key deliverables were achieved. The ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL was submitted to the Consortium on May 13, 2025 the ME-D05 Project Control Document Group 1 and Group 2 FDEL edits were submitted May 16, 2025. Feedback was received from the Consortium on ME-D05 Project Control Document Group 1 and Group 2 on May 15, 2025 and on ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL on May 16, 2025.

- **PMO**
  - **Transition-In**
    - **Conducted Weekly Deloitte/Accenture Transition Meeting:** On May 13, 2025, discussed and coordinated Knowledge Transfer, Job Shadowing, and Reverse Job Shadowing Session logistics, Document request fulfillment, and action item resolutions.
  - **Conducted OCAT Final Review:** On May 13, 2025, reached agreement with the Consortium, Gainwell, and ClearBest to conclude the transition phase for OCAT.
  - **Participated in CalSAWS PMO Status Meeting:** On May 13, 2025, engaged with the Consortium PMO during the weekly meeting to strengthen project management oversight and alignment.
  - **Participated in CalSAWS Section Director's Meeting:** On May 14, 2025, presented updates and participated in the meeting to provide critical project updates and facilitated stakeholder engagement.
  - **Participated in CalSAWS Project Steering Committee (PSC) Meeting:** On May 15, 2025, present updates and participate in the meeting to provide a detailed overview of transition-in progress.
  - **Developed Deloitte - CalSAWS M&E Weekly Status Report - 2025-05-18:** Created a detailed weekly status report with a clear overview of project progress, identified potential risks, and outlined next steps for continued alignment and successful project execution.

- **Deliverables**
  - *✗* **Submitted ME-D02 FDEL:** On May 13, 2025, submitted ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL to the Consortium.
  - *✗* **Received feedback on ME-D05 FDEL:** On May 14, 2025, received feedback from the Consortium on ME-D05 Project Control Document FDEL: Group 2.
  - *✗* **Received feedback on ME-D02 FDEL:** On May 16, 2025, received feedback from the Consortium on ME-D02 M&E Services Plan and Operational Working Documents (Overview) FDEL.
- **OCAT**
  - **Successful M&E Transition – OCAT Final Review Meeting**: On May 13, 2025, held final review meeting with the Consortium, QA, and Gainwell. Received confirmation that transition is complete and Deloitte will fully assume the OCAT M&E responsibilities.
  - **Actively Monitored Tier 3 – M&E OCAT ServiceNow Queue**: Engaged in monitoring Tier 3 – M&E OCAT ServiceNow queue and received 5 pre-existing On-Hold tickets.
- **SCR**
  - **Attended the CA-266908 LA – Update TTC Interface to not send 'Potential IPV' cause code weekly touchpoint session:** On May 12, 2025, attended the CalSAWS M&E job shadow weekly touchpoint session to receive updates with regards to design decisions and requirements for CA-266908.
  - **Attended the CA-249669 Update to GA/GR Automated Solution Catastrophically ill functionality pre-meet session:** On May 12, 2025, attended the CalSAWS M&E job shadow pre-meet session to receive updates on context and requirements for CA-249669.
  - **Attended the CA-216284 CalHEERS EHIT: MAGI Medi-Cal Income Budget Periods weekly touchpoint session:** The week of May 12, 2025, attended the CalSAWS M&E job shadow weekly touchpoint session to receive updates with regards to design decisions and requirements for CA-216284.
  - **Attended the CalHEERS-SAWS Integration Weekly Meeting:** On May 13, 2025, attended the meeting to continue integration planning and coordination between CalHEERS and SAWS for upcoming releases and JADs.
  - **Attended the CalSAWS Release Coordination Weekly Meeting:** On May 13, 2025, attended the meeting to review and discuss the upcoming SCRs.
  - **Attended the Analytics and Reports Part 2 KT session:** On May 13, 2025, attended the CalSAWS M&E Analytics and Reports Part 2 KT session to complete our understanding of application reports and analytics functionality.
  - **Attended the General Assistance/General Relief KT session:** On May 13, 2025, attended the CalSAWS M&E General Assistance/General Relief (GA/GR) KT session to understand the system GA/GR functionality.
  - **Attended the DHCS CalSAWS Touchpoint Meeting:** On May 14, 2025, attended the meeting to review and discuss the upcoming DHCS priority items.
  - **Attended the Automation framework walkthrough KT session:** On May 14, 2025, attended the CalSAWS M&E Automation framework walkthrough KT session to understand the details about automation framework currently implemented in the system.

- **Attended the CA-246797 Update Direct Deposit Status Report to Extract Program Level RDB weekly touchpoint session:** On May 14, 2025, attended the CalSAWS M&E job shadow weekly touchpoint session to receive updates with regards to design decisions and requirements for CA-246797.

- **Support Services**
  - **Initiated May Revise JS/RS/BS:** On May 14, 2025, initiated May Revise JS/RS/BS activities with the Consortium and Accenture to enable the collaborative development of impact analyses and estimates on items in the May Revision to the budget.
  - **Participated in the Bi-weekly DHCS CalSAWS Touchpoint Meeting:** On May 14, 2025, participate in the bi-weekly DHCS touchpoint meeting to discuss policy and SIRFRA inquiries and estimates.
  - **Reviewed Draft All County Letter (ACL):** By May 15, 2025, reviewed Draft ACL on the Clarification Regarding Funding for the Transitional Housing Placement Program (THPP-M).
  - **Participated in May Revise Medi-Cal Meetings:** On May 14-16, 2025, participated in discussions with the Consortium, CWDA, DHCS, and Accenture on two May Revise items: Enrollment Freeze for Full-Scope (State funded) Medi-Cal Expansion, Adults 19 and Older, and Medi-Cal Asset Test Limits.
  - **Submitted impact analysis and estimates on May Revise items:** On May 16, 2025, submitted the impact analyses and estimates on two May Revise items: Enrollment Freeze for Full-Scope (State funded) Medi-Cal Expansion, Adults 19 and Older, and Medi-Cal Asset Test Limits.
  - **Participated in CFAP Expansion Postponement Meeting:** On May 16, 2025, participated in meeting with the Consortium, CWDA, CDSS, and Accenture to discuss considerations related to potential future CFAP expansion implementation.

- **Architecture/Innovation/Evolution**
  - **Analytics Modernization Milestone 0 Refinement:** On May 15, 2025, met with Chief Technology Officer and Consortium Data & Reporting Lead to discuss analysis and assessment planning to be included in Milestone 0 of Analytics Modernization. The outcome of the meeting is an agreement on high-level activities to complete, shared responsibilities, and timeline.
  - **Analytics and Reports KT:** On May 15, 2025, the team presented our understanding and identified knowledge gaps during scheduled KT Session: Analytics and Reports (Part 2).

- **Production Operations**
  - **AT-7 Data Discrepancy Working Session:** On May 13, 2025, a working session was conducted with Accenture to triage data discrepancy issues for NOAs generation.
  - **AT-7 environment Data refresh and environment Extension:** On May 14, 2025, a meeting was convened to address data discrepancies in the AT-7 environment with Gainwell, Accenture, and Deloitte. It was decided to refresh the AT-7 database to align it with the AT-1 environment, and an SCR was submitted for this purpose. Additionally, Gainwell submitted a Change Advisory Board (CAB)

and Technical Board Change Request (TBCR) to extend the AT-7 environment until October.

- **Attended CalSAWS Virtual GreenLight Release 25.05:** On May 18, 2025, attended the Consortium-lead Greenlight meeting for 25.05 release. The focus of the meeting is to obtain approval from all the counties for the production release of 25.05.

- **Technology Recovery**
  - **Continued Working on ME-D16:** Continued working on ME-D16 System Recovery Plan DDEL.
  - **Continued Document Review:** Continued review of all the associated OWDs for the Technology Recovery process, such as "Business Continuity & Disaster Recovery Plan."

- **Security**
  - **Participated in Weekly Call:** On May 14, 2025, attended the call to better understand current or potential risks/issues we are facing with the static application security testing tool.
  - **Attended KPI Reporting Discussion:** On May 14, 2025, attended a meeting with Accenture to better understand the application security KPI reporting requirements and process.
  - **Attended Weekly Compliance and CalSAWS M&E / Security Team Weekly Sync Meetings:** On May 14, 2025, and May 15, 2025, attended Weekly Sync meeting with Consortium Security and Compliance teams to discuss ongoing M&E Security activities related to SSP development and submission timelines, POA&M entries/resolution, access issues, and upcoming KT/JS sessions.
  - **Attended M&E Security/QA Team Weekly Meeting:** On May 15, 2025, attended the M&E Security/QA Team Weekly meeting to receive/provide feedback on M&E Security teamwork related to SSP development, POA&M remediation, and OCAT backlog.
  - **Attended Sandbox Integration:** On May 15, 2025, attended a meeting to discuss the integration of application security testing tools.

3.2 Tasks Due for the Coming Week

Highlights include:

- **Attend the CA-277820 CalHEERS EHIT: MAGI Medi-Cal Income Budget Periods Design Review Session:** The week of May 19, 2025, attend the CalSAWS M&E reverse job shadow post-meet session to present Deloitte's design document for CA-216284.
- **Facilitate Tools and Software access for Release 25.9 JS/RS Readiness**: Continue working with Gainwell and Accenture teams to finalize the access for various tools and applications. This strategic alignment will facilitate the Deloitte team in executing a seamless Release 25.9 Job Shadow and Reverse Job Shadow experience.
- **Continue SSP Control Development:** On May 20, 2025, submit the draft SSP control document for the 'Response Group A' Planning family control (PL-2) response to the Consortium Security review.
- **Continue CalSAWS Release 25.11 Planning:** Continue detailed planning efforts for the upcoming Release 25.11.

- **Deliverables:** Looking ahead to next week, the team will focus on receiving the signed ME-D05 Project Control Document FDEL: Group 2 WAC from the Consortium on May 20, 2025.

- **PMO**
  - **Transition-In**
    - **Conduct Weekly Deloitte/Accenture Transition Meeting:** Coordinate Knowledge Transfer, Job Shadowing, and Reverse Job Shadowing Session logistics, Document request fulfillment, and action item resolutions.
  - **Participate in CalSAWS PMO Status Meeting:** On May 20, 2025, engage with the Consortium PMO during the weekly meeting to strengthen project management oversight and alignment.
  - **Participate in CalSAWS Bi-Weekly Status Meeting:** On May 21, 2025, present updates and participate in the meeting to provide critical project updates and facilitated stakeholder engagement.
  - **Develop Deloitte - CalSAWS M&E Weekly Status Report - 2025-05-25:** Create a detailed weekly status report with a clear overview of project progress, identify potential risks, and outline next steps for continued alignment and successful project execution.
  - **Deliverables**
    - **Receive signed ME-D05 FDED WAC:** On May 20, 2025, receive signed ME-D05 Project Control Document FDEL WAC from the Consortium.
- **OCAT**
  - **April OCAT SLA Meeting**: On May 19, 2025, host April OCAT SLA Meeting with the Consortium and QA to review the OCAT Monthly SLA Report.
  - **Continue Monitoring Tier 3 – M&E OCAT ServiceNow Queue:** Engage in monitoring activities and resolve any tickets that come into queue.
- **SCR**
  - **Attend the CalHEERS-SAWS Integration Weekly Meeting:** On May 22, 2025, attend the meeting to continue integration planning and coordination between CalHEERS and SAWS for upcoming releases and JADs.
  - **Attend the CalSAWS Release Coordination Weekly Meeting:** On May 20, 2025, attend the Release management meeting to review and discuss the upcoming SCRs.
  - **Attend the SCRB Bi-Weekly Meeting:** On May 20, 2025, attend the SCRB Meeting management review SCRB status for SCRs.
  - **Attend the CA-277820 CalHEERS EHIT: MAGI Medi-Cal Income Budget Periods Design Review Session:** The week of May 19, 2025, attend the CalSAWS M&E reverse job shadow post-meet session to present Deloitte's design document for CA-216284.
- **Support Services**
  - **Submit the LA GA/GR County Purchase Orders:** The week of May 19, 2025, submit the County Purchase ME-LA-01-2025 – GA/GR Self-Employment Expense Calculations and County Purchase ME-LA-02-2025-GROW New Non-Compliance Reason Code.

- **Continue CalSAWS Release 25.11 Planning:** Continue detailed planning efforts for the upcoming Release 25.11.
- **Continue May Budget Revise:** During the week of May 19, 2025, continue May Budget Revise activities with the Consortium and Accenture to enable the collaborative development of impact analyses and estimates on items in the May Revision to the SFY25/26 budget.
- **Schedule Part 2: SIRFRAs (recurring, query) KT Sessions:** On May 19, 2025, schedule KT sessions for Part 2: SIRFRAs (recurring query) with Consortium, Accenture, Gainwell, and ClearBest to initiate transition and enable business continuity.
- **Submit feedback on Draft All County Letter (ACL):** By May 19, 2025, submit any feedback on Draft ACL – CFAP New Overissuance Claims Policy and Noticing Requirements Errata.
- **Participate in May Revise Planning Meeting:** On May 19, 2025, participate in a meeting with the Consortium, CWDA, CalHEERS, and Accenture to discuss Medi-Cal items included in the May Revise.
- **Participate in weekly SCERFRA/SIRFRA Requirements Review Meeting:** On May 21, 2025, participate in weekly meeting with Consortium Policy and Design managers, SMEs, and business analysts to review issued SCERFRAs/SIRFRAs collectively to gather mutual understanding and improve business efficiency.
- **Participate in the Weekly SCERFRA/SIRFRA Weekly Review Meeting:** On May 22, 2025, participate in the weekly SCERFRA/SIRFRA review meeting with the Consortium, Gainwell, and Accenture.
- **Submit SCERFRA for Review:** On May 23, 2025, submit estimates for SCERFRA 25-933 – SB 420 -Automated Decision Systems.

- **Architecture/Innovation/Evolution**
  - **Databricks POC Vendor Follow-Up Meeting**: On May 20, 2025, attend follow up meeting with Consortium CTO, Data & Reporting Lead, and vendor to address vendor action items from previous meeting and have clearer definition of possible POC requirements and outcomes.

- **Production Operations**
  - **Attend the 25.05 Post-Release Checkpoint Call:** From May 19, 2025 to May 21, 2025, attend the Consortium-lead 25.05 post-release checkpoint call. The focus is to understand how support is coordinated between the M&E vendor, the counties, and the Consortium when a potential issue is raised.
  - **Tools and Software access for Release 25.9 JS/RS Readiness:** Continue working with Gainwell and Accenture teams to finalize the access for various tools and applications. This strategic alignment will facilitate the Deloitte team in executing a seamless Release 25.9 Job Shadow and Reverse Job Shadow experience.
  - **Attend Ticket Management KT session:** On May 21, 2025, attend the ticket management KT session scheduled.
  - **Attend Code & Configuration Management JS session:** On May 22, 2025, attend the JS session scheduled for code and configuration management.

- **Technology Recovery**
  - **Tools and Software access for Release 25.9 JS/RS Readiness:** Continue working with Gainwell and Accenture teams to finalize the access for various tools and

applications. This strategic alignment will facilitate the Deloitte team in executing a seamless Release 25.9 Job Shadow and Reverse Job Shadow experience.

- **Attending Ticket Management KT session:** On May 21, 2025, attend the ticket management KT session.
- **Attend Code & Configuration Management JS session:** On May 22, 2025, attend the JS session on code and configuration management.

- **Security**
    - **Participate in Enterprise Implementation Weekly Calls:** On May 21, 2025, attend these calls to better understand current or potential risks/issues we are facing with each of these application security testing tools.
    - **Application Security Findings Meeting:** On May 21, 2025, attend the bi-weekly meeting to review status of application security testing vulnerabilities and associated remediation efforts.
    - **Attend M&E Security/QA Team Weekly Meeting:** On May 21, 2025, attend the M&E Security/QA Team Weekly meeting to receive/provide feedback on M&E Security teamwork related to SSP development, POA&M remediation, and OCAT backlog.
    - **Attend Weekly Compliance and CalSAWS M&E / Security Team Weekly Sync Meetings:** On May 21, 2025 and May 22, 2025, attend Weekly Sync meeting with Consortium Security and Compliance teams to discuss ongoing M&E Security activities related to SSP development and submission timelines, POA&M entries/resolution, access issues, and upcoming KT/JS sessions.
    - **Continue SSP Control Development:** On May 20, 2025, submit the draft SSP control document for the 'Response Group A' Planning family control (PL-2) response to the Consortium Security review.

3.3 Areas in the work plan which require attention (behind schedule)

- Deloitte is awaiting Consortium approval for ME-D05 M&E Project Control Document: Consortium feedback was received on May 15, 2025.
    - Deloitte is working with the Consortium on an upcoming change order to be finalized to reschedule the ME-D17 M&E System Security Plan.
- Thirteen (13) KT sessions are currently delayed. Deloitte is working with stakeholders to reschedule accordingly.
    - KT Session: Ticket Management
    - KT Session: Analytics and Reports (Part 2)
    - KT Session: DevSecOps Pipeline-3
    - KT Session: Application Architecture Follow-Up 1
    - KT Session: Application Architecture - Follow-Up Session 2
    - KT Session: Account Creation and Management (for clients, workers, agents, third party etc.)
    - KT Session: Technical KT - Worker Portal (Part 3)
    - KT Session: Technical KT - EDBC (Part 3) - Third party Integrations & Timely Reporting
    - KT Session: Technical KT - Worker Portal (Part 2)
    - KT Session: Technical Session - Benefits Management (Part 2)
    - KT Session: Technical EDBC Follow-Up

- KT Session: Test Tools and Process Walkthrough (Part 4)
- KT Session: Part 2: Recurring SIRFRAs, Query SIRFRAs (often require production access)
  - Eight (8) JS sessions are currently delayed. Deloitte is working with stakeholders to reschedule accordingly.
    - JS Session: DBA Incident Management
    - JS Session: Pipeline and Deployment
    - JS Session: Prod-Ops Environment and Code Management
    - JS Session: User Account Provisioning and Role Management
    - JS Session: Recurring SIRFRAs, Query SIRFRAs (often require production access) Part 1
    - JS Session: CalSAWS Functional Presentations (CFP)
    - JS Session: Release Management meetings
    - JS Session: CalSAWS training committee meeting

3.4 Critical Path Analysis

Critical path analysis has been divided into cutover groups, which contain the workstreams shown in the following table.

Table 4: Critical Path Analysis: 5/12/2025 to 5/18/2025

GROUP	WORKSTREAMS INCLUDED	CRITICAL PATH STATUS
1	OCAT	None – Cutover complete
2	Production Operations	No expected change to the cutover date
2	Security	No expected change to the cutover date
2	Technology Recovery	No expected change to the cutover date
3	System Change Request	No expected change to the cutover date
3	Support Services	No expected change to the cutover date
4	Project Management	No expected change to the cutover date
4	Organizational Change Management	No expected change to the cutover date
4	Architecture Evolution and Innovation	No expected change to the cutover date

3.5 Suggested Changes to Maintain Schedule Timelines

This section includes any changes suggested to the work plan for the purpose of remaining on schedule.

- ME-D17 M&E System Security Plan deliverable timeline will shift due to change order updates pending approval of proposed deliverable dates.

3.6 Issues

This section includes enterprise-level issues that may affect the schedule.

- None for the reporting period.

3.7 Risks

This section includes enterprise-level risks, including those that may affect the schedule.

Table 5: Risks: 5/12/2025 to 5/18/2025

RISK #	PROJECT PHASE	RISK NAME	RISK DESCRIPTION
313	Transition	Failure to provide M&E team timely access may impact M&E transition	Deloitte staff may be unable to perform certain reverse shadowing activities without access to CalSAWS environment and tools.
314	Transition	Limited Availability of Accenture Staff May Impact the M&E Transition Schedule	Limited availability of Accenture Knowledge Transfer (KT) providers to support the timely transition of M&E Services to Deloitte while also supporting ongoing M&E Releases, Premise and other critical projects (e.g., CARES, WDTIP, etc.). The impact would be during KT (3/3-5/30) and Reverse Shadow (5/5-10/3/2025). Deloitte's Reverse Shadow transition activities include overlap on top of the Accenture team Design/Build/Test for Release 25.09 (April-Sept). Examples of additional transition activities where Accenture may have limited staffing capacity (e.g., provide review of updated documentations, troubleshooting outcome differences from Deloitte's RS, provide data integrity for batch jobs/maintenance/ad-hoc queries, data fixes, L3 ticket triage/resolution, etc.).

3.8 Other areas requiring discussion

- None for the reporting period.

3.8.1 Deliverable Status

The following table outlines the due dates for deliverables from the Transition-In Work Plan. Items shaded in light blue are completed.

Table 6: Transition-In Deliverable Due Dates: 5/12/2025 to 5/18/2025

Deliverable	DDED Submitted	DDED Review Complete	FDED Submitted	FDED Review Complete	DDEL Submitted	DDEL Review Complete	FDEL Submitted	FDEL Review Complete	Notes
ME-D01 M&E Transition-In Master Plan	8/28/24	9/13/24	9/20/24	1/29/25	2/14/25	3/3/25	3/10/25	4/8/25	FDED/FDEL WAC Signed!
ME-D03 M&E Transition-In Work Schedule	9/18/24	9/25/24	9/30/24	1/29/25	2/14/25	3/3/25	3/10/25	3/25/25	FDED/FDEL WAC Signed!
ME-D04 M&E Transition-In Test and Validation Plan	2/3/25	2/11/25	2/14/25	2/27/25	3/3/25	3/10/25	3/13/25	3/25/25	FDED/FDEL WAC Signed!
ME-D05 M&E Project Control Document – Group 1	2/19/25	2/26/25	3/3/25	3/6/25	4/1/25	4/8/25	4/11/25	5/16/25	FDED/FDEL WAC Signed!
ME-D05 M&E Project Control Document – Group 2	N/A	N/A	N/A	N/A	4/11/25	4/18/25	4/23/25	5/16/25	FDED/FDEL WAC Signed!
ME-D06 M&E Work Schedule	2/24/25	3/3/25	3/6/25	3/12/25	4/1/25	4/8/25	4/11/25	4/16/25	FDED/FDEL WAC Signed!
ME-D02 M&E Services Plan and Operational Working Documents (Overview)	3/19/25	3/26/25	4/1/25	4/11/25	4/30/25	5/8/25	5/13/25	5/19/25	FDED WAC Signed!
ME-D02 M&E Services Plan and Operational Working Documents – Group 1	N/A	N/A	N/A	N/A	6/4/25	6/11/25	6/16/25	6/20/25	

DELIVERABLE	DDED SUBMITTED	DDED REVIEW COMPLETE	FDED SUBMITTED	FDED REVIEW COMPLETE	DDEL SUBMITTED	DDEL REVIEW COMPLETE	FDEL SUBMITTED	FDEL REVIEW COMPLETE	NOTES
ME-D02 M&E Services Plan and Operational Working Documents – Group 2	N/A	N/A	N/A	N/A	7/9/25	7/16/25	7/21/25	7/24/25	
ME-D02 M&E Services Plan and Operational Working Documents – Group 3	N/A	N/A	N/A	N/A	8/6/25	8/13/25	8/18/25	8/21/25	
ME-D16 System Application Recovery Plan	4/16/25	4/23/25	4/28/25	5/1/25	6/2/25	6/9/25	6/12/25	6/17/25	FDED WAC Signed!
ME-D07 CalSAWS Annual Strategic Plan	6/18/25	6/26/25	7/1/25	7/7/25	8/1/25	8/8/25	8/13/25	8/18/25	

3.8.2 Knowledge Transfer/Job Shadowing/Reverse Shadowing Status

As of 5/16/2025

Figure 2: Knowledge Transfer/Job Shadowing/Reverse Shadowing Status

3.8.3 Knowledge Transfer Status

Total KT Sessions Completed this week: 5
Total KT Sessions Completed to date: 193

3.8.4 Job Shadowing Status

Total JS Sessions Completed this week: 8
Total JS Sessions Completed to date: 84
- Completed weekly JS/RS touchpoints for 5 SCRs this week and set up post-meets for those 5 SCRs.

3.8.5 Reverse Job Shadowing Status

Total RS Sessions Completed this week: 6
Total RS Sessions Completed to date: 37
- Completed weekly JS/RS touchpoints for 5 SCRs this week and set up post-meets for those 5 SCRs.

4 CALSAWS M&E (5/5/2025 TO 5/18/2025)

4.1 Tasks Completed from the Prior Week

Highlights include:

During the prior weeks, several key deliverables were achieved. We submitted ME-D06 M&E Work Schedule FDEL Monthly Update to the Consortium on May 7, 2025. Feedback was received from the Consortium on ME-D06.01 M&E Work Schedule FDEL Monthly Update on May 14, 2025. We responded to feedback from the Consortium on ME-D06.01 M&E Work Schedule FDEL Monthly Update on May 15, 2025.

- **PMO**
  - **Deliverables**
    - **Submitted ME-D06.01 FDEL Monthly Update:** Submitted ME-D06 M&E Work Schedule FDEL Monthly Update to the Consortium on May 7, 2025.
    - **Received feedback on ME-D06.01 FDEL Monthly Update:** Received feedback from the Consortium on ME-D06.01 M&E Work Schedule FDEL Monthly Update on May 14, 2025.
    - **Responded to feedback on ME-D06.01 FDEL Monthly Update:** Responded to feedback from the Consortium on ME-D06.01 M&E Work Schedule FDEL Monthly Update on May 15, 2025.

4.2 Other areas requiring discussion

- None for the reporting period.

4.2.1 Deliverable Status

The following table outlines the due dates for deliverables from the M&E Work Schedule. Items shaded in light blue are completed.

Table 7: M&E Deliverable Due Dates: 5/5/2025 to 5/18/2025

DELIVERABLE	DDED SUBMITTED	DDED REVIEW COMPLETE	FDED SUBMITTED	FDED REVIEW COMPLETE	DDEL SUBMITTED	DDEL REVIEW COMPLETE	FDEL SUBMITTED	FDEL REVIEW COMPLETE	NOTES
ME-D06.01 M&E Work Schedule April 2025	N/A	N/A	N/A	N/A	N/A	N/A	5/7/25	5/19/25	
ME-D06.02 M&E Work Schedule May 2025	N/A	N/A	N/A	N/A	N/A	N/A	6/6/25	6/13/25	

DELIVERABLE	DDED SUBMITTED	DDED REVIEW COMPLETE	FDED SUBMITTED	FDED REVIEW COMPLETE	DDEL SUBMITTED	DDEL REVIEW COMPLETE	FDEL SUBMITTED	FDEL REVIEW COMPLETE	NOTES
ME-D06.03 M&E Work Schedule June 2025	N/A	N/A	N/A	N/A	N/A	N/A	7/8/25	7/15/25	
ME-D06.04 M&E Work Schedule July 2025	N/A	N/A	N/A	N/A	N/A	N/A	8/7/25	8/14/25	
ME-D06.05 M&E Work Schedule August 2025	N/A	N/A	N/A	N/A	N/A	N/A	9/8/25	9/15/25	
ME-D06.06 M&E Work Schedule September 2025	N/A	N/A	N/A	N/A	N/A	N/A	10/7/25	10/15/25	
ME-D17 M&E System Security Plan	11/5/25*	11/13/25*	11/18/25*	11/21/25*	12/18/25*	1/7/26*	1/14/26*	1/22/26*	*Proposed dates
ME-D06.07 M&E Work Schedule October 2025	N/A	N/A	N/A	N/A	N/A	N/A	11/7/25	11/17/25	
ME-D16.01 System Application Recovery Plan	N/A	N/A	N/A	N/A	12/1/25	12/8/25	12/11/25	12/16/25	
ME-D14 Approach to Application and Architecture Evolution	12/3/25	12/10/25	12/15/25	12/18/25	2/2/26	2/9/26	2/12/26	2/18/26	
ME-D06.08 M&E Work Schedule November 2025	N/A	N/A	N/A	N/A	N/A	N/A	12/5/25	12/12/25	

DELIVERABLE	DDED SUBMITTED	DDED REVIEW COMPLETE	FDED SUBMITTED	FDED REVIEW COMPLETE	DDEL SUBMITTED	DDEL REVIEW COMPLETE	FDEL SUBMITTED	FDEL REVIEW COMPLETE	NOTES
ME-D15 M&E Approach to Automation, Artificial Intelligence and Machine Learning	1/7/26	1/14/26	1/20/26	1/23/26	3/2/26	3/9/26	3/12/26	3/17/26	
ME-D06.09 M&E Work Schedule December 2025	N/A	N/A	N/A	N/A	N/A	N/A	1/8/26	1/15/26	

4.3 CalSAWS OCAT Highlights of the Reporting Period (5/5/25 To 5/18/25)

4.3.1 Production Usage

- Zero (0) unplanned outages to report in the reporting period
- The table below provides OCAT production usage statistics
- OCAT Initiated Interviews for the reporting period shown below

Table 8: User Logins

ACTIVITY	TOTAL
User Logins	4,319

Table 9: Interviews

ACTIVITY	TOTAL
Interviews Completed (SAWS Initiated)	4,134
Interviews Completed (OCAT Initiated)	11
TOTAL	**4,145**

4.3.2 Help Desk Inquiries

The table below summarizes Tier 3 help desk contact through CalSAWS Service Now during this reporting period.

- Provided Help Desk support for zero (0) OCAT users.

Table 10: Help Desk Inquiries

Request Type	Pending	Waiting for Customer	Closed/Resolved
Administrative Issue	-	-	-
Application Issue	-	-	-
Infrastructure Issue	-	-	-
Access Issue	-	-	-
Report a System Problem	-	-	-
Requests	-	-	-
Database Request	-	-	-
TOTAL	0	0	0

4.3.3   Defect Summary

Table 11: Defect Summary

#	Defect #	Defect Severity	Defect Summary	Defect Type	Status	Log Date	Impact	Alt. Procedure	Planned Release
1	OP-2924	Low	Solutions Tracking for ForgeRock Profile Issue (OP-2880)	FR/ User Management	Closed – Issue has not occurred since November	11/08/22	Login issues or ForgeRock help with GUID	N/A	TBD
2	OP-2927	Low	Solutions Tracking for CalSAWS - OCAT User & ForgeRock Profile Issue (OP-2880/CA-254280/CA-260230)	FR / User Management	Closed – Issue has not occurred since November	11/09/22	Login issues or ForgeRock help with GUID	N/A	TBD

4.4 SIRFRA/SCERFRA Information Highlights of the Reporting Period

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

Table 12: Summary of SIRFRA/SCERFRA

Status	Total
New	0
Reopened	1
Assigned	4
Completed	30
Duplicate	0
In review	0

STATUS	TOTAL
Withdrawn	4
Rejected	0
Pending Clarification	0
Ready for Review	0
TOTAL	**39**

Note: Table displays SIRFRA (non-query, non-recurring)/SCERFRA requests from March 5, 2025 through the end of the reporting period.

Table 13: List of SIRFRA/SCERFRA

ID	DESCRIPTION	STATUS	DUE DATE
CA-288389	SCERFRA 25-913 - AB 936 - CalFresh Fruit and Vegetable Supplemental Benefits Program	Reopened	N/A
CA-290900	SCERFRA 25-933 – SB 420 – Automated Decision Systems	Assigned	5/23/2025
CA-291008	SCERFRA 25-934 – AB 1337 – Information Practices Act of 1977	Assigned	5/27/2025
CA-274442	SIRFRA 1352 – Automation of CDCRs Incarceration Reporting to Counties	Assigned	5/30/2025
CA-290462	SIRFRA 1433 – AR MEDS Screen	Assigned	6/2/2025
CA-288385	SCERFRA 25-914 - AB 1211 - CalFresh: Maintenance of Benefit Level	Completed	3/14/2025
CA-288424	SCERFRA 25-915 - AB 42 - CalWORKs: CalFresh: Eligibility: Income and Resource Exclusions	Completed	3/17/2025
CA-288441	SCERFRA 25-918 - AB 969 - CalWORKs: Family Violence Option and Gender-based Violence Information	Completed	3/17/2025
CA-288427	SCERFRA 25-916 - AB 1324 - CalWORKs	Completed	3/17/2025
CA-288538	SCERFRA 25-919 - AB 1161 - Public Social Services: State of Emergency or Health Emergency	Completed	3/17/2025
CA-288440	SCERFRA 25-917 - SB 33 - Homeless Pupils: California Success, Opportunity, and Academic Resilience (SOAR) Guaranteed Income Program	Completed	3/24/2025
CA-283423	SIRFRA 1401 – Updating Member Address NCOA	Completed	3/28/2025
CA-289149	SIRFRA 1429 - AB 543	Completed	3/31/2025
CA-288749	SCERFRA 25-503 – BenefitsCal Release of Information (ROI) to Community-Based Organization (CBO)	Completed	4/2/2025
CA-288542	SCERFRA 25-920 - AB 1402 - Fresh Start Grants: Personal Income Tax Law: Credits	Completed	4/7/2025
CA-289296	SCERFRA 25-921 - AB 474- Tenancy: Nonprofit Home-sharing Program: Income Tax Exclusion: Eligibility for Public Social Services	Completed	4/11/2025
CA-289299	SCERFRA 25-922 - AB 461 - Truancy CalWORKs School Attendance	Completed	4/11/2025

ID	Description	Status	Due Date
CA-289300	SCERFRA 25-923 - AB 1357 -Guaranteed Income Payments: Consideration as Income of Resources	Completed	4/11/2025
CA-289422	SCERFRA 25-924 - AB 680 - Public Social Services: Foster Care Benefits	Completed	4/14/2025
CA-289457	SCERFRA 25-925 - AB 890 - Nonminor Dependents: County of Residence	Completed	4/14/2025
CA-289489	SCERFRA 25-927 - AB 1186 - Data Collection: Race and Ethnicity: Minimum Categories	Completed	4/15/2025
CA-289009	SCERFRA 25-504 - CalWORKs FRA Pilot	Completed	4/17/2025
CA-289767	SCERFRA 25-929 – SB 761 – CalFresh: Student Eligibility	Completed	4/18/2025
CA-289775	SCERFRA 25-931 – State Healthy Food Access Policy	Completed	4/18/2025
CA-289501	SIRFRA 1431- Cost Analysis for AB 1186	Completed	4/18/2025
CA-289815	SIRFRA 1432 – AB 1357	Completed	4/22/2025
CA-284372	SIRFRA 1406 – CalSAWS Auditor Access Profile	Completed	4/24/2025
CA-289876	SCERFRA 932 – AB 1242 – Language Access	Completed	4/25/2025
CA-290315	SCERFRA 25-506 – SB 1254 CalFresh Enrollment of Incarcerated Individuals	Completed	4/30/2025
CA-290196	SCERFRA 25-926 – AB 1018 – Automated Data Systems	Completed	4/30/2025
CA-288424	SCERFRA 25-915 - AB 42 - CalWORKs: CalFresh: Eligibility: Income and Resource Exclusions	Completed	5/8/2025
CA-288209	SIRFRA 1426- State Only Aid Codes for Immigrants	Completed	5/8/2025
CA-25-928	SCERFRA 25-928 – AB 548 – Enhanced Services for Asylees and Vulnerable Noncitizens Programs	Withdrawn	4/9/2025
CA- 289772	SCERFRA 25-930 – AB 777 – Food Assistance: Disasters: Public Utilities	Withdrawn	4/10/2025
CA-288389	SCERFRA 24-913 – SB 1254 CalFresh Enrollment of Incarcerated Individuals	Withdrawn	4/23/2025
CA-274442	SIRFRA 1352 – Automation of CDCRs Incarceration Reporting to Counties	Withdrawn	5/12/2025