

CalSAWS | WCDS SUBCOMMITTEE MEETING  
AGENDA PACKAGE

Friday, April 16, 2021  
12:00 P.M. – 2:00 P.M.

Virtual Meeting  
Dial-In: 1 (323) 475-9970  
Conference ID: 839263046#



# Meeting Reminder

Please:

1. Mute phone when not speaking
2. Do not put your phone line on hold
3. Unmute and identify yourself to speak and limit background noise

# Agenda

1. Call Meeting to Order
2. Roll Call and Confirmation of Quorum
3. Public Opportunity to speak on items NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

Note: The public may also speak on any Item ON the Agenda by waiting until that item is read, then requesting recognition from the Chair to speak.

- *See supplemental document for full agenda.*



## 4. Action Items

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# Action Items

4. Approval of the Minutes and review of the action items:
  - a. November 13, 2020 WCDS Subcommittee

*Refer to attached supplemental document.*



## Discussion Items

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5. WCDS Subcommittee JPA  
Board Members Update

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## 6. Stakeholder Updates

- CDSS
  - DHCS
  - OSI
  - CWDA
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## 7. CalWIN Implementation Support Services

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# Agenda

- 1 **Introductions**
- 2 **Implementation Support Services Timeline | Wave 1 View**
- 3 **Business Process Re-engineering Update | County Visits and Schedule**
- 4 **Organizational Change Management Overview | OCM POC Working Sessions**
- 5 **Training Update | Training Advisory Council**
- 6 **Visioning Lab | Key Takeaways**
- 7 **Next Steps**

# Introductions



**Rachel Frey**  
*Deloitte CalWIN ISS  
Project Executive*

Email:  
FreyR@calsaws.org



**Juli Baker**  
*Deloitte CalWIN ISS  
Project Manager*

Email:  
BakerJ@calsaws.org



**Cathryn van Namen**  
*Deloitte CalWIN ISS  
Implementation and  
Conversion Manager*

Email:  
vanNamenC@calsaws.org



**Renée Carter**  
*Deloitte CalWIN ISS  
Training Manager*

Email:  
CarterR@calsaws.org



**Duncan Gilliam**  
*Deloitte CalWIN ISS  
BPR Manager*

Email:  
GilliamD@calsaws.org



**Richard Neumann**  
*Deloitte CalWIN ISS  
PMO Lead*

Email:  
NeumannR@calsaws.org



**Jeric Huang**  
*Deloitte CalWIN ISS  
OCM Manager*

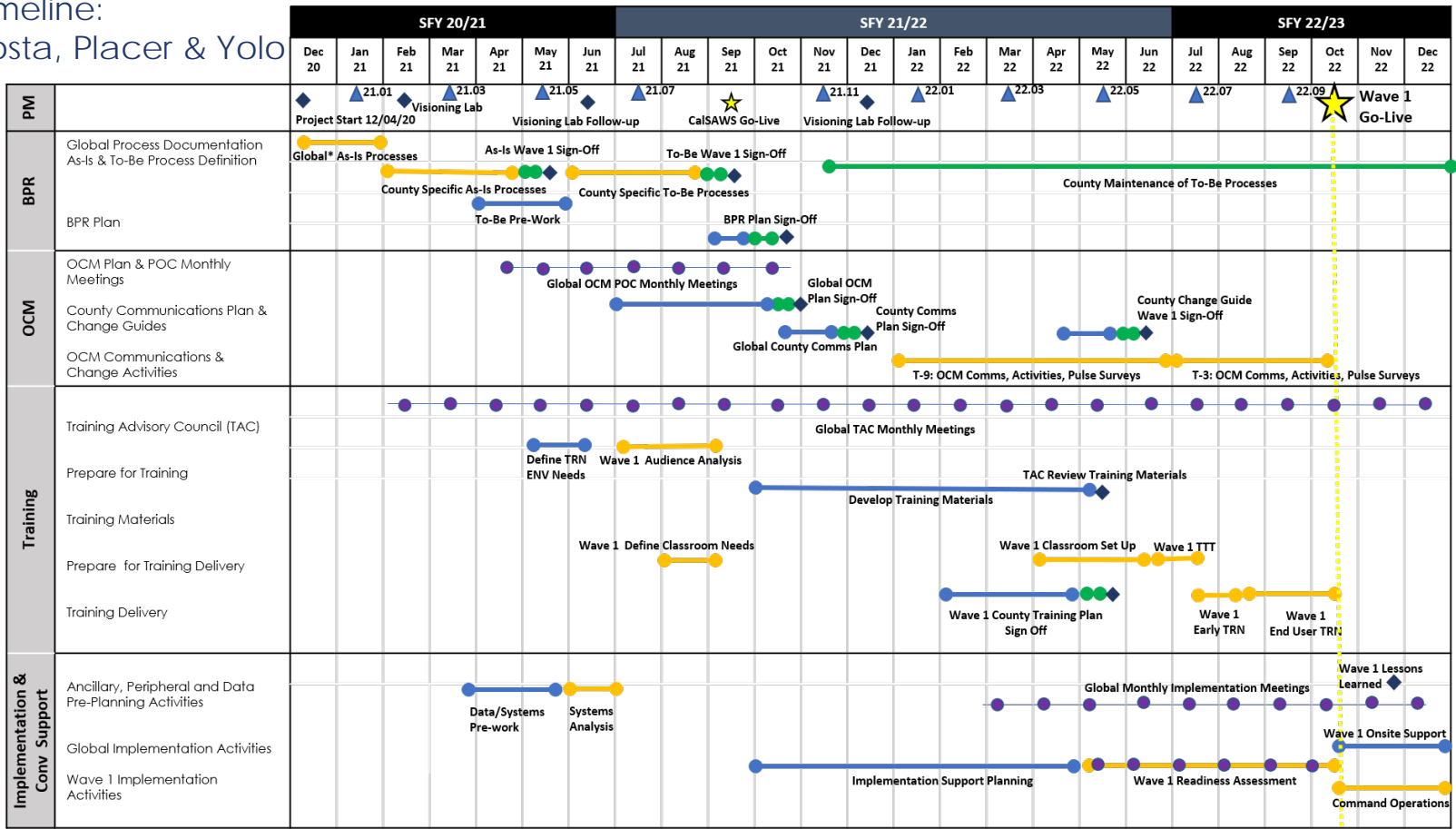
Email:  
HuangJ@calsaws.org



**Rick Lytle**  
*Deloitte CalWIN ISS  
OCM Advisor*

Email:  
LytleR@calsaws.org

# Wave 1 Timeline: Contra Costa, Placer & Yolo



\*Global refers to all 18 CalWIN County Activities

Deloitte ● County ● Both ● Milestone ◆ Meeting ● CalSAWS Release ▲ Go Live ★

As of 03/22/21

# Business Process Re-engineering (BPR): What is As-Is?...And To-Be?

Below are descriptions of the two main components of Business Process Reengineering (BPR) – As-Is Process Documentation and To-Be Process Definition:

## As-Is Process Documentation

- **OBJECTIVE:** Document the current business processes for each county, providing a baseline of how county staff manage and deliver services today. This includes core processes such as Intake, Ongoing/Case Maintenance, CalWORKs, CalFresh, Medi-Cal and County Programs. It also will consider how ancillary systems are used to do business.
- **OUTCOME:** As-Is documentation documents business processes *as they exist today*. The sign-off on As-Is provides confirmation that *existing business process* for their county has been baselined, to serve as a reference point before documenting the future state of business, with CalSAWS (To-Be process definition).

## To-Be Process Definition

- **OBJECTIVE:** Define *“future state” core business processes* for each CalWIN County. This takes into consideration differences between CalWIN and CalSAWS, gaps and opportunities and decisions on disposition of ancillary systems.
- **OUTCOME:** CalWIN Counties have a *“baseline” of complete process documentation* to run their business on Day-1 of CalSAWS Go-Live.

# BPR Update: As-Is Process Site Visit Dates (by Wave)

\*As of 4/9/2021

Highlighted = Complete

County	Session Start Date	Session End Date	First Review Start Date	First Review End Date	Incorporate Feedback	Start Final Review	County Sign-Off on FINAL As-Is Processes
<b>Wave 1</b>							
Contra Costa	02/22/21	03/25/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
Placer	02/22/21	03/12/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
Yolo	03/01/21	03/19/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
<b>Wave 2</b>							
Tulare	03/01/21	03/19/21	03/29/21	04/09/21	04/16/21	04/19/21	04/23/21
Santa Clara	03/22/21	04/02/21	04/05/21	04/16/21	04/23/21	04/26/21	04/30/21
<b>Wave 3</b>							
Santa Barbara	03/22/21	04/02/21	04/05/21	04/16/21	04/23/21	04/26/21	04/30/21
Orange	04/05/21	04/16/21	04/19/21	04/30/21	05/07/21	05/10/21	05/14/21
Ventura	04/05/21	04/16/21	04/19/21	04/30/21	05/07/21	05/10/21	05/14/21
<b>Wave 4</b>							
Solano	04/19/21	04/30/21	05/03/21	05/14/21	05/21/21	05/24/21	06/01/21
Santa Cruz	04/19/21	04/30/21	05/03/21	05/14/21	05/21/21	05/24/21	06/01/21
San Mateo	05/03/21	05/14/21	05/17/21	05/28/21	06/07/21	06/08/21	06/15/21
San Diego	05/03/21	05/14/21	05/17/21	05/28/21	06/07/21	06/08/21	06/15/21
<b>Wave 5</b>							
Alameda	05/17/21	05/28/21	06/01/21	06/15/21	06/22/21	06/23/21	06/30/21
Fresno	05/17/21	05/28/21	06/01/21	06/15/21	06/22/21	06/23/21	06/30/21
Sonoma	06/14/21	06/25/21	06/28/21	07/09/21	07/16/21	07/19/21	07/23/21
<b>Wave 6</b>							
San Francisco	06/07/21	06/18/21	06/21/21	07/02/21	07/09/21	07/12/21	07/16/21
Sacramento	06/14/21	06/25/21	06/28/21	07/09/21	07/16/21	07/19/21	07/23/21
San Luis Obispo	06/01/21	06/11/21	06/14/21	06/25/21	07/02/21	07/05/21	07/09/21

# County Schedule: As-Is Process Definition

← 8-Weeks Total →

Activity	Timing	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Prepare for County Visit & Finalize County Specific As-Is Flows	2-Weeks Prior to County Visit								
Conduct County Visit (capture feedback, populate Opportunity Matrix)	2-Weeks								
Review Updated As-Is Documentation	2-Weeks								
Incorporate Comments from Formal Review	1-Week								
Sign-Off on County Specific As-Is Work Product	1-Week								

Key	
Deloitte	
County	
Deloitte & County	

- Initial Flows w/CRFI data incorporated
- Updated Work Product w/feedback from As-Is Sessions
- Final Flows for Sign-Off
- As-Is Work Product Sign-Off

# Organizational Change Management (OCM) – 1 of 3

**Below are descriptions of the main components of Organizational Change Management**

## **Organizational Change Management Plan**

- **OBJECTIVE:** The OCM Plan will entail the approach, activities, and strategies to enable County leadership to help impacted users move to a transformed future state.

**Note:** *“Impacted Users” refers to anyone directly or indirectly impacted by the change. This may include staff, partner organizations, as well as end-users external to the organization but are impacted by the change.*

- **OUTCOME:** The OCM Plan includes the following components – OCM approach, communications strategies, change readiness approach (and measures), Impacted Users register, Impacted Users engagement plan, roles & responsibilities, individual County OCM plans, and assumptions.



## Below are descriptions of the main components of Organizational Change Management

### Communications Plan

- **OBJECTIVE**: The Communication Plan will include specific approaches for communications to impacted users, including messages, templates, and timeline.
- **OUTCOME**: The Communication Plan includes the following components – communication and marketing materials, communication timeline, methods, and toolkit for all stages of the CalSAWS rollout (readiness, implementation, and go live).

## Below are descriptions of the main components of Organizational Change Management

### County Change Discussion Guides

- **OBJECTIVE:** Individual County and role-specific Change Discussion Guides which will describe in detail the process changes affecting the way staff will perform their jobs utilizing CalSAWS.
- **OUTCOME:** The Change Discussion Guides include – tasks within each job process, steps the person in the role will complete once they begin utilizing CalSAWS.

# Organizational Change Management: Point of Contact Working Sessions

## **Purpose:**

- Provide an overview of the CalWIN OCM approach, work products, key milestones, and how County input will be used to inform the OCM strategy
- Describe how the OCM strategy will be executed at each County, including key milestones and activities

**Duration:** April 2021 – October 2021, participating in monthly 2-hour working sessions with follow up activities and sessions each month as needed to address specific topics

**OCM POCs** = 1 per county + 1 back up per county

## **POC Session Topics:**

- Roles and Responsibilities for OCM POCs
- County-Specific lessons learned from past implementations and “hopes and hesitations” for the future
- County-Specific change readiness and communication channels
- Staff engagement and communications strategies
- Management of change impacts and OCM mitigation strategies
- Design and strategy for activating the Change Network Champions

# Training

Below are descriptions of Training components and deliverables. The Training Advisory Council is the catalyst for collaboration among the CalWIN Counties, the Consortium, and the Implementation Team to create a realistic and comprehensive plan for training.

## Master Training Plan and County-Specific Training Plans

- **OBJECTIVE:** The Master Training Plan and County-specific Training Plans are the foundation of training. The training needs assessment and functional analysis are synthesized into a blueprint for how the CalSAWS training program is created and delivered. The Master Training Plan becomes the template for building the County-specific Training Plans.
- **OUTCOMES:** The Master Training Plan discusses scope, methodology, management, design, and development of training courses and materials throughout the project. The County-Specific Training Plans are focused on the training needs assessment for each County, descriptions of the customized curricula for different job roles, and implementation stage activities for training delivery.

## Training Advisory Council (TAC)

- **OBJECTIVE:** TAC represents all 18 CalWIN Counties for the purpose of working together on the strategy and delivery of CalSAWS training.
- **OUTCOME:** TAC input into the CalSAWS training strategy results in an overall training program that meets the implementation needs of the CalWIN Counties.

# Training Update

- Next Training Advisory Council (TAC) Meeting: April 21, 2021, 1:00 – 3:00 p.m.
- TAC Agendas:

## March

- Prototype Walkthrough: Learning Journey Map
- Strategies for preparing staff *early* for learning CalSAWS

## April

- CalWIN to CalSAWS: Overview & Key Differences
- CalSAWS Awareness & Learning Toolkit

## May


- Training Customizations based on BPR and OCM
- Review of Instructional Design Maps & Instructor-Led Training (ILT) Templates


### Key Takeaways from the March TAC:


- ✓ The use of gaming in training and the *Learning Journey Map* concept was well-received
- ✓ The need for more information about how CalSAWS works is important to the CalWIN counties
- ✓ We'll look for ways to provide more system demonstrations in the coming months

# Visioning Lab Recap


## VISIONING LAB BY THE #S:

  
**2/24/21**  
Visioning Lab  
Date

  
**70+**  
Workshop  
Attendees

  
**18**  
Counties  
Represented

  
**4**  
Acts  
(modules)

  
**3**  
Breakout Sessions

  
**1**  
Team

- ... gather Leadership to identify **success factors** and lessons learned for CalWIN's migration to CalSAWS. Understanding **HIGH PERFORMING TEAMS** and *walking through their shoes* ...
- Taking the insights and interactions from the session into our journey to CalSAWS is important for the project success
- Let's take a look.....



# CalWIN ISS – Visioning Lab Key Takeaways

**Front-line staff** and **supervisors** will experience the highest degree of change during the migration to CalSAWS

- **Front-line staff** – the face and voice of CalSAWS to customers
  - Motivators: *impacting the lives* of customers in their communities
  - Highlight: Importance of knowledge sharing
    - ✦ Communicate! Share updates in multiple comms channels (emails, daily stand-ups, team huddles)
    - ✦ Easy to follow *How-To* guides with screenshots and process steps
  - Highlight: Need to understand the impacts to front line staff workload leading up to go-live (and post go-live)

# CalWIN ISS – Visioning Lab Key Takeaways

**Front-line staff** and **supervisors** will experience the highest degree of change during the migration to CalSAWS

- **Supervisors** – they are experts in program policy and system processes, but the rate of change is fast!
  - Motivators: leading successful teams and feeling that their voices are heard
  - Highlight: Staff undergo the highest amount of change –policy changes, technology or system changes, in addition to our current work from home environment changes – what additional tools and resources are needed to help Supervisors provide their teams with the necessary information?
  - Highlight: Specific for the CalWIN migration – heightened need for Supervisors to understand all system changes
    - ✦ Understanding *what* changes (process/system/organizational) for the workers will be critical for Supervisors to manage expectations at the front-line worker level
    - ✦ Providing that clear, transparent communications to them early and often will enable a smoother transition to the new system, with less resistance to change



# CalWIN ISS – Visioning Lab: Sharing with Others

Providing ways to share outputs from the Visioning Lab in your County:

- Management or team meetings:
  - Talk about the attributes of strong performing teams
  - Create a Walk in their Shoes exercise once per month for different user groups ... keep the outputs and share via a monthly leadership newsletter (email)
- Create a Positive Working Culture:
  - Feature a Spotlight Corner (bulletin boards)
  - Highlight or feature different team members each month either via email, monthly newsletter or all hands meetings (team)
  - Have staff or supervisors highlight positive behaviors or situations

# CalWIN ISS – Next Steps for the Counties

## Keeping the momentum!

- The follow-up to the Visioning Lab, our next Leadership Meeting, will be in Summer 2021
- Be on the look-out for a *Save the Date* invitation **and** a quick three-to-five-minute survey – coming in May
- County As-Is business process meetings continue in Wave-by-Wave sequence, through July 2021
- CalWIN County OCM POCs are meeting monthly/twice/month as needed
- CalWIN County Training POCs are meeting monthly in the Training Advisory Council



## 8. BenefitsCal Update

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# BenefitsCal Operational Readiness

## Project Status as of 04/09/21

Area	Categories	Status	
		Current Period	Previous Period
Application	Design	C	C
	Development	G	G
	System Test	G	G
	User Acceptance Test	NS	NS
	Usability Test	G	NS
Integration	Design	C	C
	Development	G	G
	System Test	G	NS
	Interface Partner Test	G	NS
Technical	Infrastructure	G	NS
	Security Testing	G	NS
	Performance Testing	NS	NS
Conversion	Conversion Readiness	G	NS
	Converted Data Test	NS	NS
Training	Training Plan	G	NS
	Training Materials	G	NS
	Training Delivery	NS	NS
Implementation	Service Desk	NS	NS
	System Operations	NS	NS
	Prod Deployment Plans	NS	NS
Change Readiness	Communications	G	NS
	Partner Readiness (County)	NS	NS

Key Milestones				
Key Decisions	Status	Evaluation Start Date	Decision Date	Go?
Exit SIT	NS	07/12/21	07/16/21	
Exit UAT	NS	08/16/21	09/03/21	
Prod Dry Run	NS	08/06/21	08/13/21	
Green light for Production	NS	09/06/21	09/13/21	

Executive Highlights
<ul style="list-style-type: none"> <li>• <b>Functional and Technical Design</b> is in progress for Release 3.0.</li> <li>• <b>Development</b> of Increment 1 is complete. Increment 2 development is in progress. The project team is able to submit a SAWS1 application and a simple SAWS2+ application, end to end flow is available for test.</li> <li>• <b>System Test</b> for Increment 1, Cycles 1 and 2 is in progress.</li> <li>• <b>Partner Testing</b> with CalSAWS began in March, currently 100% of the test cases pass testing. Partner Testing with FNS begins 04/12/21 for EBT functions.</li> <li>• User Centered Design (UCD) <b>usability tests</b> continue to continuously validate and measure the current system designs. Round 3 completed in March.</li> <li>• Training Discovery sessions are scheduled to validate the approach. Training Plan is in progress for delivery in April.</li> <li>• Submitted the <b>Communications Strategy</b> work product for review. Drafts of the actual communications (emails, letters) are in progress.</li> <li>• The <b>Production Go-Live Activities List</b> is in progress, to plan the detailed events during the go-live weekend (09/24/21 – 09/27/21).</li> </ul>

Project Status	G	On Track	Y	< 14 Days	R	>= 14 Days	C	Complete	NS	Not Started
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# BenefitsCal User Acceptance Testing (UAT)

## CalWIN Updates

- CalWIN Counties are invited to participate in the UAT activities for BenefitsCal Release 1.0.
- The scope of the UAT activities would be focused on BenefitsCal functions. CalWIN County participants will not test within CalSAWS.
- [CRFI 21-018](#) submitted on 03/15/21 to request CalWIN County Participants for BenefitsCal UAT. The due date was 04/02/21. The UAT team will review the responses and schedule participants for the test activity.

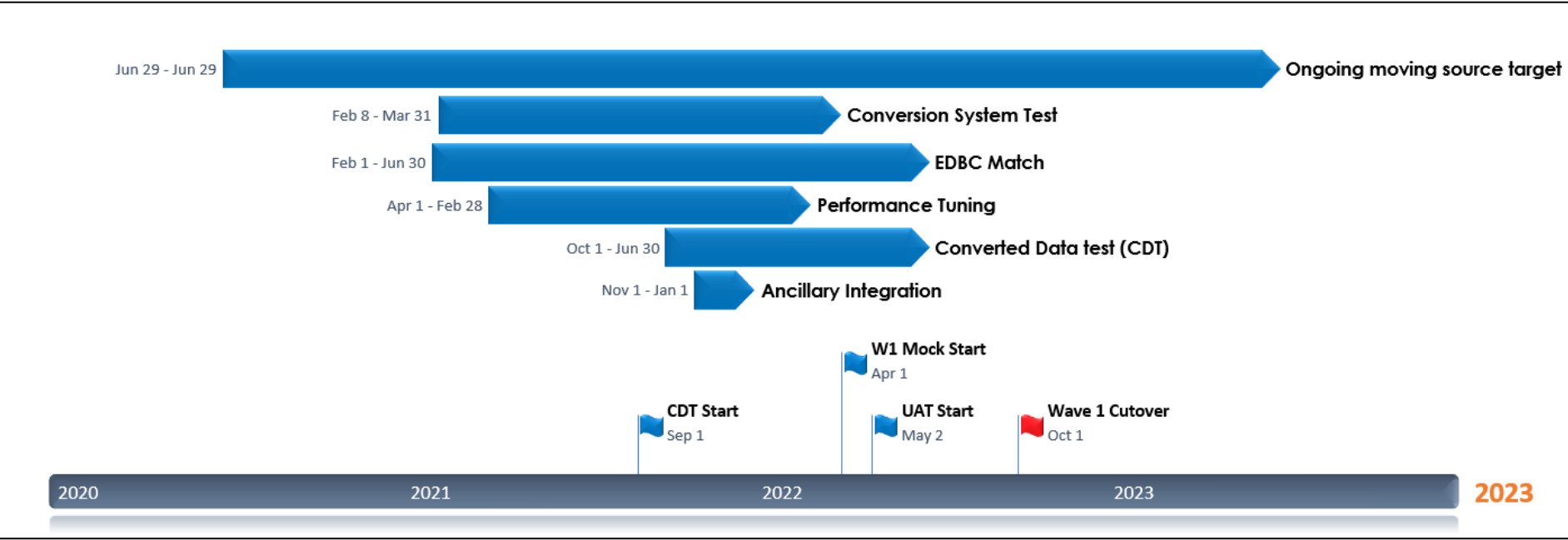


## 9. Conversion



# CalWIN Conversion

## What's next



# Data Cleansing Support Tool

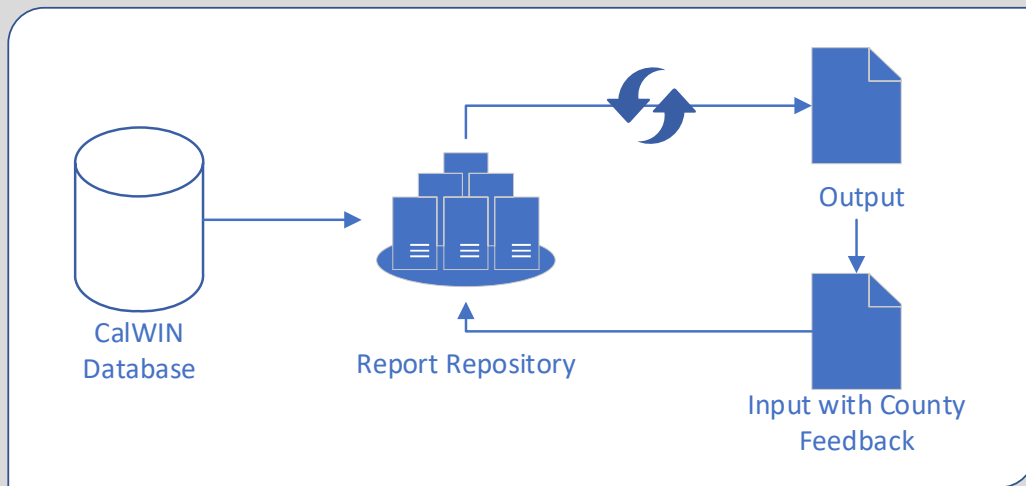
The Project 53755 CalSAWS Address Longitude & Latitude implemented with Release 62 in August 2020

This Project was implemented to capture CalWIN Address Latitude and Longitude in the CalWIN database as they are needed in CalSAWS. As a result, CalWIN was able to automatically identify many addresses, but some were unable to be identified.

CalWIN currently produces a list monthly for Latitude/Longitude for county review and cleanup



# Data Cleansing Support Tool



CalWIN Proposal 57957 was opened to start conversations with Counties to gather requirements for a tool to assist in Data Cleansing Activities before go live

The Goal of the tool is to provide a standardized approach, centralized location and a feedback mechanism to the counties.

8 Counties have participated in 3 Business Strategy Meetings to date. Additional meetings have been scheduled

CalWIN will continue to look for automation opportunities when possible



## 10. County Purchase Guidelines



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# County Purchase Guidelines

## Background

- The C-IV, LRS/CalSAWS, and CalWIN agreements include provisions for county purchases (aka “county directs” for CalWIN).
- Counties have used these provisions to achieve preferred pricing available to the Consortium for purchase of hardware and software or services which are outside the scope of the project and project IAPDU but required at the local county level to support operations.
- In order to prepare for CalSAWS implementation, CalWIN counties require access to certain suppliers available to the Consortium (via the Accenture prime contracts) that are not available via local procurements.
- In order to support ongoing operations, the LRS/CalSAWS contract will need to be amended to support hardware/software purchases via Proquire as of October 2021 when the C-IV contract expires.
- In order to accommodate AWS cost impacts related to county purchases, the Consortium must establish a process for review, approval, and subsequent county payment for the additional AWS costs.

# County Purchase Guidelines

## Criteria

County Purchases must meet at least one the following criteria:

- The required product or service is **only available from one source** (e.g., maintenance and/or upgrades of existing proprietary software in circumstances where a competitive bid is not feasible, Original Equipment Manufacturer, etc.).
- Sole source procurement is needed to **avoid financial loss to the Consortium or member counties** (e.g., interruption of essential operations, damage to existing resources, etc.).
- **Exercise of an option to extend the term of a contract** for a reasonable period (considering the nature of the procurement) when the terms of the original contract provided for extension and the option was evaluated during the bid process.

# County Purchase Guidelines

## Examples

1. Kiosks, which are customized for use in lobbies, may be procured through the county purchase process if the county does not have access to the vendor (Meridian). The customized software must be purchased through the county purchase process.
2. FACT Tablets based on project specifications will need to be procured outside the contract, though the services to configure and install the customized software may be procured through the county purchase process.
3. Workstations and laptops based on project specifications must be procured outside the contract, though the managed counties may procure the services to configure the workstations/laptops via county purchase.
4. Equipment, such as printers, require no special software and must be procured outside the contract.
5. Services for enhancements to the application which counties need prioritized beyond the 15K hours/month must be purchased via county purchase process.
6. Services related to migration of images is related to existing work and may be purchased via county purchase process.
7. Services through vendors that are not already contracted with CalSAWS must be procured separately.

# County Purchase Guidelines

## Process Enhancement for CalSAWS County Purchases

Counties to document justification with the Service Now request.

The required **product or service is only available from one source**. Yes  No

The required **product or service is required to avoid financial loss** (e.g., interruption of essential operations, damage to existing resources, etc.). Yes  No

If yes, please describe: \_\_\_\_\_

Please describe **unique performance factors of the product**: \_\_\_\_\_

Why is the acquisition **limited to a particular supplier**? Is the sole source acquisition necessary because of compatibility with existing hardware, software, or other resources?  
\_\_\_\_\_

Identify **consequences** of not obtaining the commodity from the sole source (cost, loss of business continuity, undue delay, etc.)  
\_\_\_\_\_

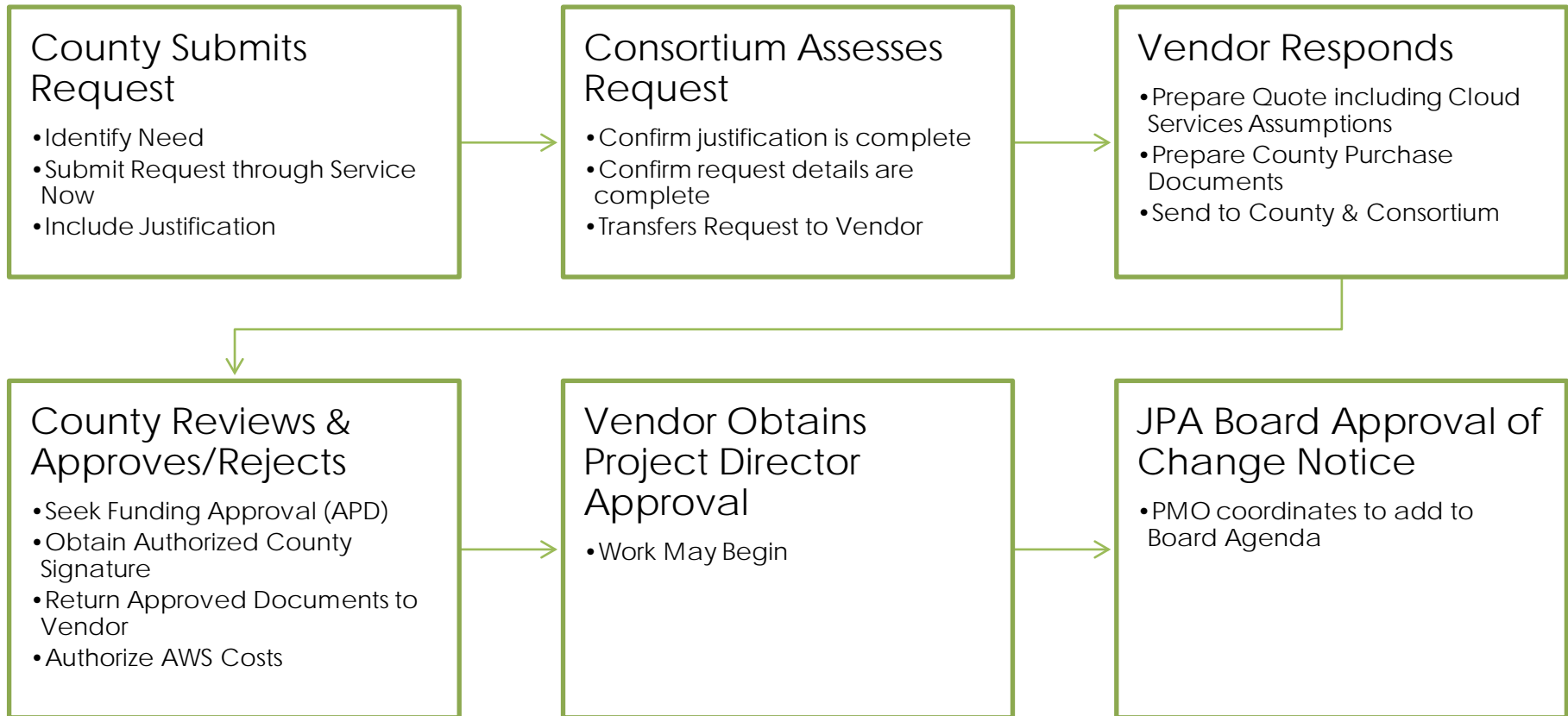
County Authorization \_\_\_\_\_

Consortium Authorization \_\_\_\_\_

EXAMPLE

# County Purchase Guidelines

## Process for CalSAWS County Purchases



# County Purchases

## Next Steps

- Amend LRS/CalSAWS Agreement to accommodate hardware/software purchases (add Proquire) by June 2021
- Update tools to support the enhanced process, including county approval for AWS costs
- Issue detailed instructions via CIT to all counties once the amendment and tools are in place





## 11. Fiscal Update



# CalSAWS Quarterly Financial Updates

## Overview

CalSAWS DD&I and  
Premise

CalWIN M&O

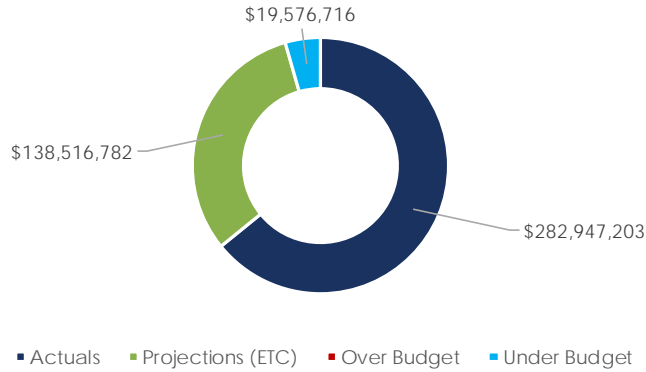
C-IV M&O

LRS M&O

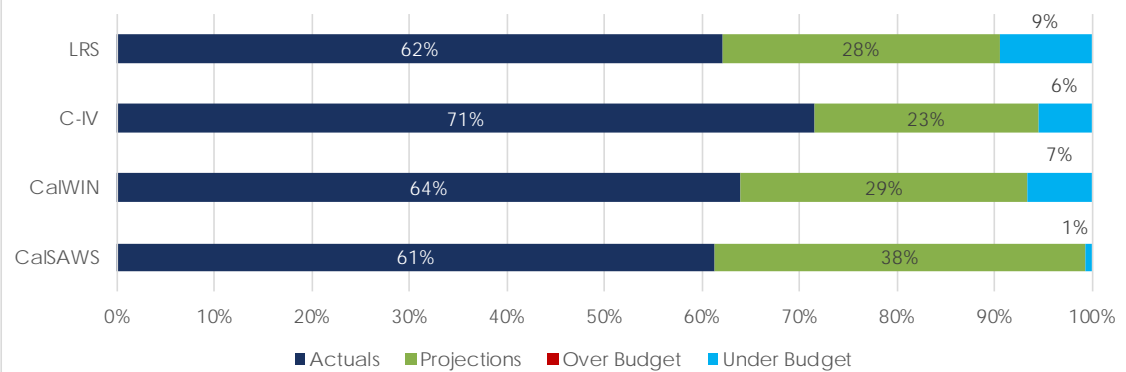
JPA Admin

- 1 Actuals to Date  
Based on Vendor Invoices & County Claims
- 2 Projections (Estimates to Complete)  
Estimated Costs for Future Months
- 3 Estimate at Completion (EAC)  
Actual Costs Plus Estimated
- 4 Total Allocation/Budget  
Amount Allocated by Line Item for the Approved Budget
- 5 Balance  
Difference Between EAC and Budget  
Negative balance is over budget  
Positive balance is under budget
- 6 % Expended to Date (Actuals)  
Percent of Actuals to Date Divided by the Budget
- 7 % EAC to Budget  
Percent of EAC Divided by the Budget

Total Actuals & Projections



% Expended to Date



Category	Actuals to Date <sup>1</sup>	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalSAWS</b>	<b>\$107,313,781</b>	<b>\$66,614,395</b>	<b>\$173,928,176</b>	<b>\$175,202,259</b>	<b>\$1,274,083</b>	<b>61.3%</b>	<b>99.3%</b>	
DD&I App. Dev.	\$24,493,697	\$7,865,914	\$32,359,611	\$32,359,611	\$0	75.7%	100.0%	
DD&I Non-App. Dev.	\$65,526,591	\$40,955,092	\$106,481,683	\$106,623,884	\$142,201	61.5%	99.9%	Staff and Travel less than planned
DD&I Training	\$1,003,398	\$584,729	\$1,588,127	\$1,843,453	\$255,326	54.4%	86.1%	Staff and Travel less than planned
DD&I GA/GR	\$5,586,599	\$1,618,771	\$7,205,370	\$7,205,370	\$0	77.5%	100.0%	
DD&I Procurement	\$348,821	\$218,343	\$567,164	\$571,134	\$3,970	61.1%	99.3%	Projected Savings from Staff
CalSAWS M&O	\$2,950,426	\$6,807,972	\$9,758,398	\$10,367,728	\$609,330	28.5%	94.1%	Innovation Lab costs expected to be less than planned
CalSAWS Premise	\$7,404,249	\$8,563,574	\$15,967,823	\$16,231,079	\$263,256	45.6%	98.4%	Projected Savings
<b>CalWIN M&amp;O</b>	<b>\$70,613,623</b>	<b>\$32,573,011</b>	<b>\$103,186,634</b>	<b>\$110,471,494</b>	<b>\$7,284,860</b>	<b>63.9%</b>	<b>93.4%</b>	
CalWIN M&O	\$64,549,712	\$30,248,705	\$94,798,417	\$95,290,261	\$491,844	67.7%	99.5%	Projected Savings from Staff
CalHEERS Interface	\$5,031,141	\$1,870,838	\$6,901,979	\$13,325,231	\$6,423,252	37.8%	51.8%	Projected Savings from Application Maintenance
CalHEERS CSCN	\$1,032,770	\$453,468	\$1,486,238	\$1,856,002	\$369,764	55.6%	80.1%	Projected Savings from Application Maintenance
<b>C-IV M&amp;O</b>	<b>\$66,497,964</b>	<b>\$21,393,803</b>	<b>\$87,891,767</b>	<b>\$93,062,064</b>	<b>\$5,170,297</b>	<b>71.5%</b>	<b>94.4%</b>	
C-IV M&O	\$59,806,127	\$18,517,842	\$78,323,969	\$79,351,205	\$1,027,236	75.4%	98.7%	Staff, GEN 1365 Print Savings
CalHEERS Interface	\$4,739,018	\$1,806,569	\$6,545,587	\$10,351,837	\$3,806,250	45.8%	63.2%	Projected Savings from Application Maintenance
Covered CA CSC	\$1,952,819	\$1,069,392	\$3,022,211	\$3,359,022	\$336,811	58.1%	90.0%	Projected Savings from Staff
<b>LRS M&amp;O</b>	<b>\$38,168,690</b>	<b>\$17,517,208</b>	<b>\$55,685,898</b>	<b>\$61,523,374</b>	<b>\$5,837,476</b>	<b>62.0%</b>	<b>90.5%</b>	
LRS M&O	\$36,488,807	\$16,330,591	\$52,819,398	\$56,225,002	\$3,405,604	64.9%	93.9%	HW/SW, Staff, GEN 1365 Print Savings
CalHEERS Interface	\$1,679,883	\$1,186,617	\$2,866,500	\$5,298,372	\$2,431,872	31.7%	54.1%	Projected Savings from Application Maintenance
<b>JPA Admin. Budget</b>	<b>\$353,145</b>	<b>\$418,365</b>	<b>\$771,510</b>	<b>\$781,510</b>	<b>\$10,000</b>	<b>45.2%</b>	<b>98.7%</b>	
CalSAWS 58 Counties	\$353,145	\$418,365	\$771,510	\$781,510	\$10,000	45.2%	98.7%	Projected Savings
<b>Total</b>	<b>\$282,947,203</b>	<b>\$138,516,782</b>	<b>\$421,463,985</b>	<b>\$441,040,701</b>	<b>\$19,576,716</b>	<b>64.2%</b>	<b>95.6%</b>	

<sup>1</sup> July-April Payment Month (February Claims/Partial Actuals per Advance)

## CalSAWS | SFY 2020/21 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalSAWS DD&amp;I</b>	<b>\$12,270,779</b>	<b>\$5,758,084</b>	<b>\$18,028,863</b>	<b>\$18,412,634</b>	<b>\$383,771</b>	<b>66.6%</b>	<b>97.9%</b>	
Consortium Personnel - County <sup>1</sup>	\$4,304,002	\$1,970,299	\$6,274,301	\$6,492,264	\$217,963	66.3%	96.6%	Projected Savings
Consortium Personnel - Contractor <sup>2,3</sup>	\$7,966,777	\$3,787,785	\$11,754,562	\$11,920,370	\$165,808	66.8%	98.6%	Projected Savings
<b>CalWIN M&amp;O</b>	<b>\$2,576,545</b>	<b>\$1,338,816</b>	<b>\$3,915,361</b>	<b>\$4,387,259</b>	<b>\$471,898</b>	<b>58.7%</b>	<b>89.2%</b>	
Consortium Personnel - County <sup>1</sup>	\$73,676	\$48,604	\$122,280	\$122,280	\$0	60.3%	100.0%	
Consortium Personnel - Contractor <sup>2,3</sup>	\$2,502,869	\$1,290,212	\$3,793,081	\$4,264,979	\$471,898	58.7%	88.9%	Projected Savings
<b>C-IV M&amp;O</b>	<b>\$2,715,742</b>	<b>\$967,795</b>	<b>\$3,683,537</b>	<b>\$4,228,500</b>	<b>\$544,963</b>	<b>64.2%</b>	<b>87.1%</b>	
Consortium Personnel - County	\$1,346,404	\$509,513	\$1,855,917	\$1,855,917	\$0	72.5%	100.0%	
Consortium Personnel - Contractor <sup>2</sup>	\$1,369,338	\$458,282	\$1,827,620	\$2,372,583	\$544,963	57.7%	77.0%	Projected Savings
<b>LRS M&amp;O</b>	<b>\$8,331,516</b>	<b>\$3,109,191</b>	<b>\$11,440,707</b>	<b>\$13,373,256</b>	<b>\$1,932,549</b>	<b>62.3%</b>	<b>85.5%</b>	
Consortium Personnel - County	\$8,315,263	\$3,042,181	\$11,357,444	\$13,240,610	\$1,883,166	62.8%	85.8%	Projected Savings
Consortium Personnel - Contractor <sup>2</sup>	\$16,253	\$67,010	\$83,263	\$132,646	\$49,383	12.3%	62.8%	Projected Savings
<b>Premise</b>	<b>\$228,473</b>	<b>\$111,203</b>	<b>\$339,676</b>	<b>\$339,676</b>	<b>\$0</b>	<b>67.3%</b>	<b>100.0%</b>	
Consortium Personnel - County	\$116,385	\$62,403	\$178,788	\$178,788	\$0	65.1%	100.0%	
Consortium Personnel - Contractor <sup>2</sup>	\$112,088	\$48,800	\$160,888	\$160,888	\$0	69.7%	100.0%	
<b>Total</b>	<b>\$26,123,055</b>	<b>\$11,285,089</b>	<b>\$37,408,144</b>	<b>\$40,741,325</b>	<b>\$3,333,181</b>	<b>64.1%</b>	<b>91.8%</b>	

## CalSAWS | SFY 2020/21 CONSORTIUM PERSONNEL BUDGET & FTEs

SFY 2020/21 - Consortium Personnel FTE Counts	Current/Planned FTEs
<b>CalSAWS DD&amp;I</b>	<b>118</b>
Consortium Personnel - County <sup>1</sup>	39
Consortium Personnel - Contractor <sup>2</sup>	52
Consortium Personnel - Contractor Limited Term <sup>3</sup>	19
TBD <sup>4</sup>	8
<b>CalWIN M&amp;O</b>	<b>21</b>
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	13
Consortium Personnel - Contractor Limited Term <sup>3</sup>	6
TBD <sup>4</sup>	1
<b>C-IV M&amp;O</b>	<b>25</b>
Consortium Personnel - County <sup>1</sup>	13
Consortium Personnel - Contractor <sup>2</sup>	9
Consortium Personnel - Contractor Limited Term <sup>3</sup>	3
TBD <sup>4</sup>	0
<b>LRS M&amp;O</b>	<b>68</b>
Consortium Personnel - County <sup>1</sup>	64
Consortium Personnel - Contractor <sup>2</sup>	1
Consortium Personnel - Contractor Limited Term <sup>3</sup>	0
TBD <sup>4</sup>	3
<b>Premise</b>	<b>2</b>
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	1
<b>Total</b>	<b>234</b>

<sup>1</sup>Includes only Consortium Staff, does not include County Support Staff

<sup>2</sup>Includes RGS and CSAC employees

<sup>3</sup>Includes RGS, CSAC, and First Data Staff (Non-Employees)

<sup>4</sup>Does not account for backfill considerations

## CalSAWS | SFY 2020/21 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalWIN M&amp;O</b>	<b>\$11,868,962</b>	<b>\$6,116,713</b>	<b>\$17,985,675</b>	<b>\$24,591,933</b>	<b>\$6,606,258</b>	<b>48.3%</b>	<b>73.1%</b>	
CalWIN M&O	\$9,534,925	\$4,881,507	\$14,416,432	\$14,416,432	\$0	66.1%	100.0%	
CalHEERS Interface Change Budget	\$1,465,593	\$678,161	\$2,143,754	\$8,282,786	\$6,139,032	17.7%	25.9%	Projected Savings from Application Maintenance
CalHEERS CSCN Change Budget	\$0	\$0	\$0	\$249,595	\$249,595	0.0%	0.0%	Projected Savings from Application Maintenance
CalWIN Premise	\$868,444	\$557,045	\$1,425,489	\$1,643,120	\$217,631	52.9%	86.8%	Projected Savings for Premise
<b>C-IV M&amp;O</b>	<b>\$19,215,707</b>	<b>\$3,932,152</b>	<b>\$23,147,859</b>	<b>\$25,343,339</b>	<b>\$2,195,480</b>	<b>75.8%</b>	<b>91.3%</b>	
C-IV M&O	\$17,029,328	\$2,459,633	\$19,488,961	\$17,755,704	(\$1,733,257)	95.9%	109.8%	
CalHEERS Interface Change Budget	\$1,049,723	\$512,041	\$1,561,764	\$5,367,843	\$3,806,079	19.6%	29.1%	Projected Savings from Application Maintenance
Covered CA CSC Change Budget	\$340,866	\$238,044	\$578,910	\$701,568	\$122,658	48.6%	82.5%	Projected Savings from Application Maintenance
C-IV Premise	\$795,790	\$722,434	\$1,518,224	\$1,518,224	\$0	52.4%	100.0%	
<b>LRS M&amp;O</b>	<b>\$14,390,421</b>	<b>\$9,970,105</b>	<b>\$24,360,526</b>	<b>\$24,999,205</b>	<b>\$638,679</b>	<b>57.6%</b>	<b>97.4%</b>	
LRS M&E	\$9,838,357	\$4,078,262	\$13,916,619	\$12,123,426	(\$1,793,193)	81.2%	114.8%	
CalHEERS Interface Change Budget	\$702,264	\$410,316	\$1,112,580	\$3,544,452	\$2,431,872	19.8%	31.4%	Projected Savings from Application Maintenance
LRS/Calsaws Premise	\$3,849,800	\$5,481,527	\$9,331,327	\$9,331,327	\$0	41.3%	100.0%	
<b>TOTAL</b>	<b>\$45,475,090</b>	<b>\$20,018,970</b>	<b>\$65,494,060</b>	<b>\$74,934,477</b>	<b>\$9,440,417</b>	<b>60.7%</b>	<b>87.4%</b>	

Note: Includes 8,000 hours/month for M&O per system, plus premise hours.

## CalSAWS | SFY 2020/21 CONTRACT OBLIGATIONS

### Warranty & Liquidated Damages Detail - SFY 2020/21

Category	Contract	Service Month	Amount	Invoice Month	Invoice #
Deliverable(s) to UAT on schedule	CalWIN	June-20	\$5,000	April-21	
Operations Deliverables and Reports Delivery	CalWIN	June-20	\$263	April-21	
Core CalWIN System Availability	CalWIN	July-20	\$10,000	December-20	60003080
Benefits CalWIN System Availability	CalWIN	July-20	\$157,000	December-20	60003080
Core CalWIN System Availability	CalWIN	August-20	\$40,000	January-21	60003540
Core CalWIN System Availability	CalWIN	September-20	\$5,000	January-21	60003540
Deliverable(s) to UAT on schedule	CalWIN	September-20	\$5,000	January-21	60003540
Backup Completion	CalWIN	September-20	\$10,000	January-21	60003540
Benefits CalWIN System Availability	CalWIN	October-20	\$250,000	March-21	60004565
Benefits CalWIN System Availability	CalWIN	October-20	\$750,000	April-21	
Core CalWIN System Availability	CalWIN	November-20	\$42,250	April-21	
Core CalWIN System Availability	CalWIN	December-20	\$4,000	April-21	
Core CalWIN System Availability	CalWIN	January-21	\$74,000	April-21	
C-IV Application Maintenance	C-IV	June-20	\$12,012	September-20	1100697154
C-IV Application Maintenance	C-IV	September-20	\$7,462	November-20	1100712162
C-IV Application Maintenance	C-IV	November-20	\$2,327	January-21	1100725990
C-IV Application Maintenance	C-IV	December-20	\$179	February-21	1100732331
C-IV Application Maintenance	C-IV	January-21	\$885	February-21	1100732331
C-IV Application Maintenance	C-IV	January-21	\$4,296	April-21	1100739068
LRS Daily Prime Business Hours Availability	LRS	August-20	\$5,000	October-20	1100704824
LRS Daily Prime Business Hours Availability	LRS	September-20	\$2,000	January-21	1100726690
LRS Daily Prime Business Hours Availability	LRS	October-20	\$10,000	January-21	1100726690
LRS Daily Prime Business Hours Availability	LRS	November-20	\$2,000	February-21	1100732706
LRS Daily Prime Business Hours Availability	LRS	November-20	\$5,000	February-21	1100732706
LRS Daily Prime Business Hours Availability	LRS	November-20	\$10,000	February-21	1100732706
LRS Batch Production Jobs	LRS	December-20	\$10,000	April-21	
LRS Daily Prime Business Hours Availability	LRS	December-20	\$10,000	April-21	
LRS Batch: Postage Credit - DPSS	LRS	January-21	\$23,859	February-21	1100729390
<b>Total</b>			<b>\$1,457,533</b>		

### Hours & Credits

Category	Actuals	Projections (ETC)	EAC	Allowance	BALANCE +Under / (-Over)
CalWIN Modernization ("Modification") Hours	\$4,367,935	\$642,371	\$5,010,306	\$8,217,460	\$3,207,154
CalWIN Business Intelligence (BI)	\$3,971,215	\$0	\$3,971,215	\$3,971,215	\$0
CalWIN IDMS	\$737,100	\$762,900	\$1,500,000	\$1,500,000	\$0
CalWIN Business Rules Engine (BRE)	\$0	\$3,500,000	\$3,500,000	\$3,500,000	\$0
C-IV Royalty Fees (Accenture Licensing Agreement f	\$600,000	\$0	\$600,000	\$600,000	\$0
<b>Total</b>	<b>\$9,676,249</b>	<b>\$4,905,271</b>	<b>\$14,581,520</b>	<b>\$17,788,675</b>	<b>\$3,207,154</b>
<b>Notes:</b>					
Modernization Hours are updated each August with 8,500 hours; includes hours from prior years (updated 8/6/20).					
IDMS \$1.5M to be applied to CalSAWS GA/GR.					
BRE \$3.5M to be applied to CalSAWS GA/GR.					
Royalty fees includes \$200k shifted from SFY 18/19 and \$200K from SFY 20/21 in addition to SFY 19/20.					

## CalSAWS | SFY 2020/21 CHANGE NOTICE TRACKING

C-IV Contract (Premise/Maintenance and Operations Services)	Total Amount	Allocation Letter Ref.
<b>Total Baseline Allocation (Amendment 111)</b>	<b>\$15,000,000</b>	
Earned Income Disregard	\$192,096	ONE
Software for Los Angeles County DCFS IVR Call Flow	\$8,251	ONE
C-IV Application Maintenance Services (SFY 2020/21)	\$451,617	ONE
<b>Total Allocated Amounts</b>	<b>\$651,964</b>	
<b>Total Remaining Allocation</b>	<b>\$14,348,036</b>	

C-IV Contract (County Purchases)	Total Amount	Allocation Letter Ref.
<b>Total Baseline Allocation (Amendment 111)</b>	<b>\$20,000,000</b>	
County Purchases	\$6,566,404	ONE
<b>Total Allocated Amounts</b>	<b>\$6,566,404</b>	
<b>Total Remaining Allocation</b>	<b>\$13,433,596</b>	

LRS Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation (Amendment 23)</b>	<b>\$50,000,000</b>	
CalHEERS Maintenance	\$3,470,952	FIVE
SB 1341 Maintenance	\$2,088,345	FIVE
Stage One Continuous Eligibility (Child Care Provider Portal)	\$2,383,800	FIVE
Homeless Assistance Automation	\$585,000	SIX
CalFresh Safe Drinking Water Pilot	\$1,134,480	SIX
Los Angeles County Workforce Management	\$38,976	SIX
LRS M&O Training Environment	\$281,098	SEVEN
ForgeRock IAM Enterprise Enablement	\$4,156,229	SEVEN
CalSAWS APIs for Statewide Portal Integration	\$2,932,480	SEVEN
Los Angeles County DCFS IVR Call Flow	\$137,060	EIGHT
Continuum of Care Automation	\$499,989	EIGHT
Earned Income Disregard	\$560,628	EIGHT
LRS M&E Services for State Fiscal Year 2020/2021	\$699,380	EIGHT
<b>Total Allocated Amounts</b>	<b>\$18,968,417</b>	
<b>Total Remaining Allocation</b>	<b>\$31,031,583</b>	

LRS Contract (County Purchases)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation (Amendment 23)</b>	<b>\$20,000,000</b>	
N/A	\$0	
<b>Total Allocated Amounts</b>	<b>\$0</b>	
<b>Total Remaining Allocation</b>	<b>\$20,000,000</b>	

CalWIN Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation</b>	<b>\$54,516,908</b>	
Previously Approved	\$18,419,400	N/A
<b>Total Allocated Amounts</b>	<b>\$18,419,400</b>	
<b>Total Remaining Allocation</b>	<b>\$36,097,508</b>	

CalWIN Contract (County Purchases)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation</b>	<b>\$6,968,662</b>	
Previously Approved	\$1,805,812	N/A
<b>Total Allocated Amounts</b>	<b>\$1,805,812</b>	
<b>Total Remaining Allocation</b>	<b>\$5,162,850</b>	

First Data C-IV Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation (Amendment 70)</b>	<b>\$300,000</b>	
<b>Total Allocated Amounts</b>	<b>\$0</b>	
<b>Total Remaining Allocation</b>	<b>\$300,000</b>	

First Data C-IV Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation (Amendment 5)</b>	<b>\$400,000</b>	
Stage One Continuous Eligibility (Child Care Provider Portal)	\$78,416	
CF Safe Drinking Water Pilot	\$49,648	
ABAWD	\$107,068	
SB 1341	\$15,660	
Short-term Testing Support	\$87,000	
<b>Total Allocated Amounts</b>	<b>\$337,792</b>	
<b>Total Remaining Allocation</b>	<b>\$62,208</b>	

Infosys Contract (App Maintenance Services)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation</b>	<b>\$10,000,000</b>	
Previously Approved	\$7,002,152	
<b>Total Allocated Amounts</b>	<b>\$7,002,152</b>	
<b>Total Remaining Allocation</b>	<b>\$2,997,848</b>	





## 12. Policy Update



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# Policy Update

## COVID-19 Pandemic Policy Support



Activities still being completed on a routine basis

- CalWORKs time-clocks
- RCA time limit extension
- CalFresh Emergency Allotments
- Medi-Cal-supporting no negative actions or renewal processing



Watching and anticipating For extensions/expansions

- Extensions related to CalWORKs time clocks  
RCA time limited eligibility, FC aging out youth  
CF Student Eligibility, and CF Emergency Allotments (new methodology)
- Extensions of several Unemployment Benefit types and any changes to how counted
- CalWORKs Pandemic Emergency Assistance
- Rental Assistance (not specific to CalWORKs)
- Medi-Cal-potential State option coverages
- CA budget items (encompassing most assistance programs) – bills under consideration such additional monies, eligibility expanded for different populations, and temporary policy changes (ending after specified time)

# Policy Update

## Golden State Grant

- Grants issued

County	Cases	\$ Paid
ALA	7,092	\$4,255,200
CCS	5,745	\$3,447,000
FRS	16,699	\$10,019,400
ORG	11,877	\$7,126,200
PLA	699	\$419,400
SAC	17,508	\$10,504,800
SBR	2,737	\$1,642,200
SCL	4,476	\$2,685,600
SCZ	1,201	\$720,600
SDG	14,127	\$8,476,200
SFO	2,796	\$1,677,600
SLO	971	\$582,600
SMT	707	\$424,200
SOL	2,967	\$1,780,200
SON	1,220	\$732,000
TUL	9,617	\$5,770,200
VEN	3,290	\$1,974,000
YOL	943	\$565,800
<b>Totals</b>	<b>104,672</b>	<b>\$62,803,200</b>

- Approach

- CalWORKs active cases as of 3/27/21 eligible
- Directly applied \$600 grant to cases and issued by EBT, EFT or warrant
- System case comments entered "Golden State Grant"
- CDSS conducted messaging campaign
- MyBCW message banners
- Lists for counties and CDSS for messaging and reconciliation

# CalFresh Emergency Allotments/Max Allotments

## CalWIN Consortia quick facts

CalFresh EA/Max allotments paid	
2020 Benefit months March-December	\$1,064,997,378
2021-to date Benefit months Jan and Feb <ul style="list-style-type: none"><li>• 15% increase effective Jan</li><li>• one more cycle for Jan to be issued in April and two more cycles for Feb to be issued April and May</li></ul>	\$244,364,971
Case Counts	
2020 number of cases	5,910,625
2021-to date number of cases	1,271,427

Figures represent those applied by CalWIN through mass update processes for all 18 counties

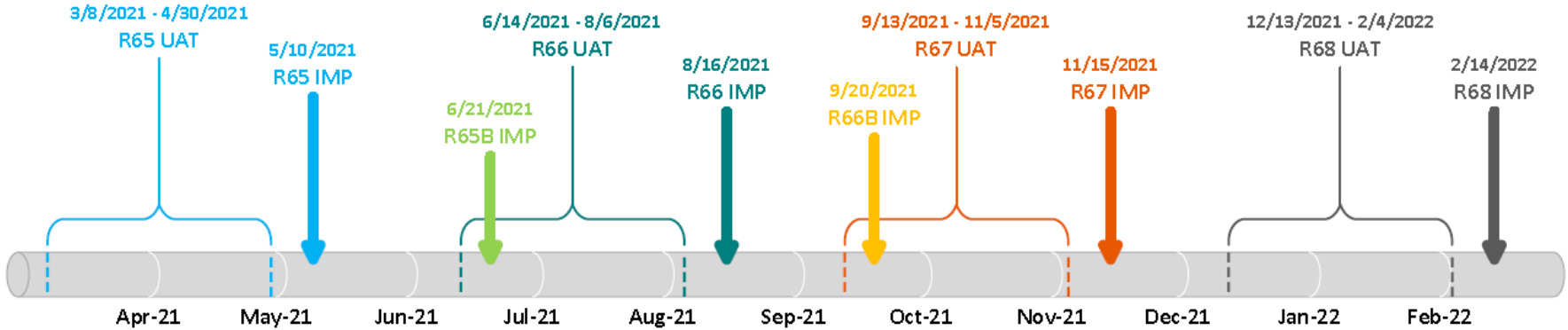
CalWIN anticipate the issuance of these benefits will continue for several more months, CDSS continues to submit requests.

# Policy Update

## Upcoming Releases

Rev: 4/12/2021

### CalWIN Release Delivery Impact



Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	
<b>R65 – 5/10/2021</b> <i>(11,826 Effort Hours)</i>		<b>R65B – 6/21/2021</b> <i>(4,141 Effort Hours)</i>		<b>R66 – 8/16/2021</b> <i>(15,914 Effort Hours)</i>		<b>R66B – 9/20/21,</b> <i>(Effort Hours - 1361)</i>		<b>R67 – 11/15/2021</b> <i>(25,300 Effort Hours)</i>		<b>R68 – 2/14/2022</b> <i>(16,883 Effort Hours)</i>	
55721 Enhancement of Lawfully Present Immigration statuses - Non-MAGI Eligibility Evaluations (ACWDL 18-09) 55737 Immediate and Continuous Child Care 55890 Modify Arabic and Farsi NOA Master Templates 55954 Board & Care Deduction not Allowed in the Medicare Savings Program (MSP) Budget 55139 MyBCW- SAR 7 (update window field) 55204 NHR SAWS 30 - Validate Individual is In the Home 55355 PIN Issuance Process Update 55428 Enhancement of Vehicle Exemption in the LTC Property Evaluation 57337 Automation of housing supplement for Foster Care THP-NMIDs program 57675 Older American Assistance Act of 1965 Payments 55768 Informatica Power Center Upgrade		57387 EERC Codes for BREPS Eligibility Review CR 164544 57388 SEP Reason Code Modifications to Align with CR164783 58024 Periodic Verification Check - EERC Reason Codes to align CR44000		56200 MC 347 Denial NOA Variables Pulling Incorrect Data 56354 CW CC changes for EID 56696 Reg THA Must Not Exceed 12 Month 56841 Enh of Inc - other Edu loans, scholar fellow, Exempt/Non Exempt 57225 CMS PI 12 BI Solution Detail Delta (DHCS SIRFRM# 1107) 57473 CW 48-Month Clock Should not Tick for Unaided Individuals 57833 Pre-popul MAGI/Non-MAGI Medi-Cal Annual Renewal Form redesign 57677 CalWIN eICT file del to CalSAWS after migr of C-IV counties to CalSAWS 57992 CalFresh Recertify Delayed Processing 57993 CAPI policy change for Legal Perm Resident (LPR) expired cards 58169 SAWS to OCAT Interfaces Upd 57921 Restaurant Meals Prg incoir changes to non-RMP 57863 LHHEAP EBT expurgements 57922 eICT for SSI cash out 57763 Untaxed Private Disability Ins Benefits 57485 MyBCW Remediation Phase II 57971 CF 377.2B NEC NOA ESAP Update NOA and change to batch print mode 58620 WTW 25/25A BI reports Updates 58109 CW Earned Income Disregard 2021 56792 OBIEE Upgrade		54477 SSN Marked "Not Received", However CalHEERS Showing "SAWS Verified" 58109 WTW 25/25A BI reports Updates		58208 CW Child Support Disregard Increases 57924 Qualified Medicare Beneficiary (QMB) Program - Effective Date of Eligibility 58225 Redesign MAGI/Non-MAGI Medi-Cal Annual Renewal Forms to be automated in MyBenefits CalWIN 58110 GA/GR Appointment Letter - Consortia Form 58085 SSP 14 - New automated variables 58030 CW 5 - New automated variables 58029 EBT Issuance for Homeless Assistance 58084 e-Verification for Non-MAGI Eligibility Determinations (ACWDL 20-17) 58025 Increase of Medicare Part B Premium 58131 Exemption of Census Income for Non-MAGI Medi-Cal 57923 CD SBR Update CalWIN With External Data 56207 MOD00 Migrate Notice CalWIN to AWS 57816 Add New Batch AU "MC Batch Expt-Awaiting Review" option to include/exclude for COLA/Mass Update for CH 164544 58079 CD ALA Automate MC RRR to Both Client and AR		58210 CalFresh ESAP SAR 7 Elimination 58079 CalWORKs Time Limit Changed to 60 Months 58211 Repeal of the WTW 24-Month Time Clock 58070 Enhancement of Individual Level Eligibility Determinations 58099 Treatment of CalWORKs/RCA Cases on Incoming ICTs 58593 Citizenship Verification Marked "Not Received", However CalHEERS Showing "SAWS Verified"	

\*Forecasted total Effort Hours will increase as estimates are finalized and if additional content is added to the releases.



## 13. Operations Update



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# Inventory of Imaging Equipment and Software

- At the WCDS Subcommittee meeting in May of 2020, the CalWIN Directors raised a question of whether the scanners used in the 18 counties would be compatible with CalSAWS
- CRFI 11-3087 was sent to ask the counties to identify their Scanning and Document Management Systems models/versions, associated vendors and any planned changes
- This CRFI also asked all 18 counties to document all scanners used within each county
- The county responses were shared with the CalSAWS Imaging Team to determine whether each scanner identified would be compatible with CalSAWS
- The findings were presented to the CalWIN County Managers at the CalWIN OPAC meeting on March 25, 2021

# Point of Presence (POP) Server Refresh

- Project 56766 (POP server refresh) is migrating Online User Manual (OLUM) and Management Report (MR) extracts to AWS CalWIN centralized environment
  - Migrate OLUM file system to AWS
    - New AWS server for OLUM is available effective 3/1/2021 with cutover on 3/29/2021
  - Migrate MR extracts/files to AWS
    - MR extract files will be available for up to 2 years for access in AWS (consistent with current practice on MR servers)
    - MR files are available on AWS starting 3/1/2021 with the cutover date 3/29/2021
    - County will have access to retrieve MR extract files from current County site MR server and new AWS environment from March 29th, 2021 to April 30th, 2021.
  - Provide AWS access for OLUM and MR Extracts
    - Project team is working with each county as needed to support firewall/DNS setup and SSH key generation
  - Retire existing MR and POP servers
    - POP/MR server will be retired as of May 1st, 2021.





## 14. Reporting Steering Committee Update

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# Reporting Executive Steering Committee Updates

- MR Legacy transformation to BI Platform completed. Since January, all reporting is through BI Platform, including final Lift and Shift Reports. Hardware and MR Infrastructure retirement in progress.
- BI Training continues through Webinar format. Additional BI 101 classes were added for delivery this calendar year.
- BI Data Purge process moving forward. Project will include process and documentation to note difference in Data Retention Policy and BI Purge Policy.



## 15. Adjourn Meeting

- Next meeting June 11, 2021

