CalSAWS – CalWIN Implementation Support Weekly Status Report

Reporting Period: February 14, 2022 to February 20, 2022

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1.0 CalWIN Implementation Support Services

1.1 Highlights of the Reporting Period

Project Management
► Continued planning for and onboarding staff resources.
► Continued to collaborate with other teams to coordinate information for the CalWIN Counties.
► Continued gathering timelines for the Project teams for CalWIN County implementation activities.

Business Process Reengineering (BPR)
► Obtained Consortium final approval on Wave 2 County Specific BPR Plan Final Deliverables (FDELs) (Tulare and Santa Clara Counties).
► Obtained County sign-off on Draft Deliverables (DDEL) for the Wave 3 County-Specific BPR Plans (Santa Barbara, Ventura, and Orange Counties).
► Completed Week 2 of To-Be BPR sessions for San Mateo County.
► Completed Week 1 of To-Be BPR sessions for San Diego County.
► Scheduled Pre-Meets Part 1 for Alameda and Fresno Counties.
► Continued planning for Process Simulation Testing in coordination with the User Acceptance Testing (UAT) Team.
► Continued planning for pay code and fund code mapping discussions with Wave 1 Counties.
► Initiated a discussion with Wave 1 Counties (Placer County) and scheduled a discussion (Contra Costa County) regarding splitting up large caseloads that are greater than the CalSAWS limitation.
► Revised and validated Child Care To-Be Business Process Flow to be integrated into Wave1 County To-Be Business Process Flows and initiated planning for Wave-1 workshops after attending a Targeted Topic session on Child Care.
► Created a plan for integrating E2Lite interface functionality into the Wave 1 Counties' existing Employment Services To-Be Business Process Flows.
► Created and validated three (3) new Fiscal Interfaces process flows to be integrated into the Wave 1 Counties' To-Be Business Process Flows and initiated planning for Wave-1 workshops.

► Drafted a plan to revisit the To-Be Business Process Flows for Wave 1 Counties, specifically related to pending decisions, changes due to new functionality, or need for more detail (pending Consortium approval). Targeted completion date is 03/25/22 for Wave 1 Counties.

Figure 1 – To-Be Process Timetable by County

	Session Start Date	Session End Date	First Review Start Date	First Review End Date	Start Final Review	County Sign-Off on Final To-Be Work Product
Wave 1						
Contra Costa	06/21/21	07/30/21	08/04/21	09/02/21	09/02/21	09/10/21
Placer	06/21/21	07/30/21	08/04/21	08/20/21	08/30/21	09/07/21
Yolo	07/12/21	08/11/21	08/11/21	08/27/21	09/08/21	09/17/21
Wave 2						
Tulare	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/08/21
Santa Clara	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/08/21
Wave 3						
Santa Barbara	10/18/21	11/12/21	11/15/21	11/30/21	12/08/21	12/14/21
Orange	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22
Ventura	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22
Wave 4						
Solano	01/10/22	02/04/22	02/07/22	02/21/22	02/28/22	03/04/22
Santa Cruz	01/10/22	02/04/22	02/07/22	02/21/22	02/28/22	03/04/22
San Mateo	02/07/22	03/04/22	03/07/22	03/18/22	03/28/22	04/01/22
San Diego	02/14/22	03/11/22	03/14/22	03/25/22	04/04/22	04/08/22
Wave 5						
Alameda	03/21/22	04/15/22	04/18/22	04/29/22	05/09/22	05/13/22
Fresno	03/21/22	04/15/22	04/18/22	04/29/22	05/09/22	05/13/22
Sonoma	04/25/22	05/20/22	05/23/22	06/06/22	06/14/22	06/20/22
Wave 6						
San Francisco	04/25/22	05/20/22	05/23/22	06/06/22	06/14/22	06/20/22
Sacramento	05/31/22	06/27/22	06/28/22	07/15/22	07/25/22	07/29/22
San Luis Obispo	05/31/22	06/27/22	06/28/22	07/15/22	07/25/22	07/29/22

As of 02/21/22

Organizational Change Management (OCM)
► Continued drafting the Change Discussion Guides (CDGs) for Wave 1.
► Continued planning for the February Change Network Champions (CNC) meeting scheduled for 02/22/22.
► Drafted March Infographics for Application Registration and Eligibility Determination and Benefit Calculation (EDBC).
► Assisted Counties to test survey distribution ahead of the February 21 distribution of Wave 1 and Wave 2 surveys.
► Met with Yolo County regarding CDG content and structure.
► Developed a plan to mitigate concerns regarding the CDGs.

Training
► Continued training development, creating Instructor Guide documents for the CalSAWS Instructor-Led Training curriculum.
► Continued development of the Learning Journey Maps.
► Continued developing the Master Training Plan Deliverable.

► Continued planning classroom and scheduling logistics for Wave 1 Counties.
► Continued working with the Consortium Training Manager to plan for the Learning Management System (LMS) and Training Environment for training for the CalWIN Counties.
► Planned and prepared for the Training Advisory Council (TAC) meeting on 02/23/22.
► Participated in the CalWIN ISS Standup Meeting on 02/14/22.
► Participated in the OCM Change Discussion meeting with Yolo County on 02/15/22.
► Participated in the CalWIN UAT planning and preparation for the OCM/BPR and Application Training meeting on 02/17/22.

Figure 2 – Instructor-Led Training Development Progress

	10/22/2021	1/28/2022	2/4/2022	2/11/2022	2/18/2022	5/20/2022
Actual	100%	74%	68%	68%	63%	
Planned	100%	72%	65%	62%	57%	0%
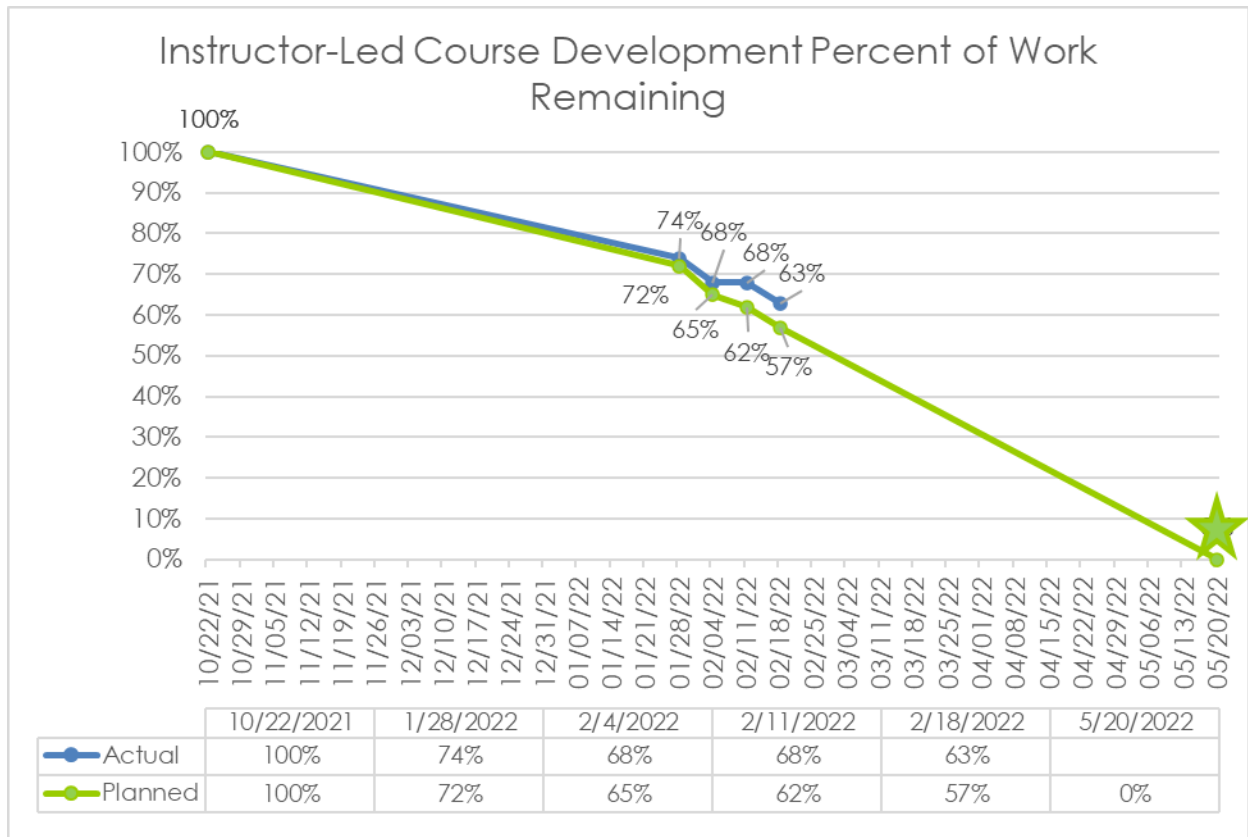
CalSAWS – California Statewide Automated Welfare System (CalSAWS)
CalWIN Implementation Support Phase
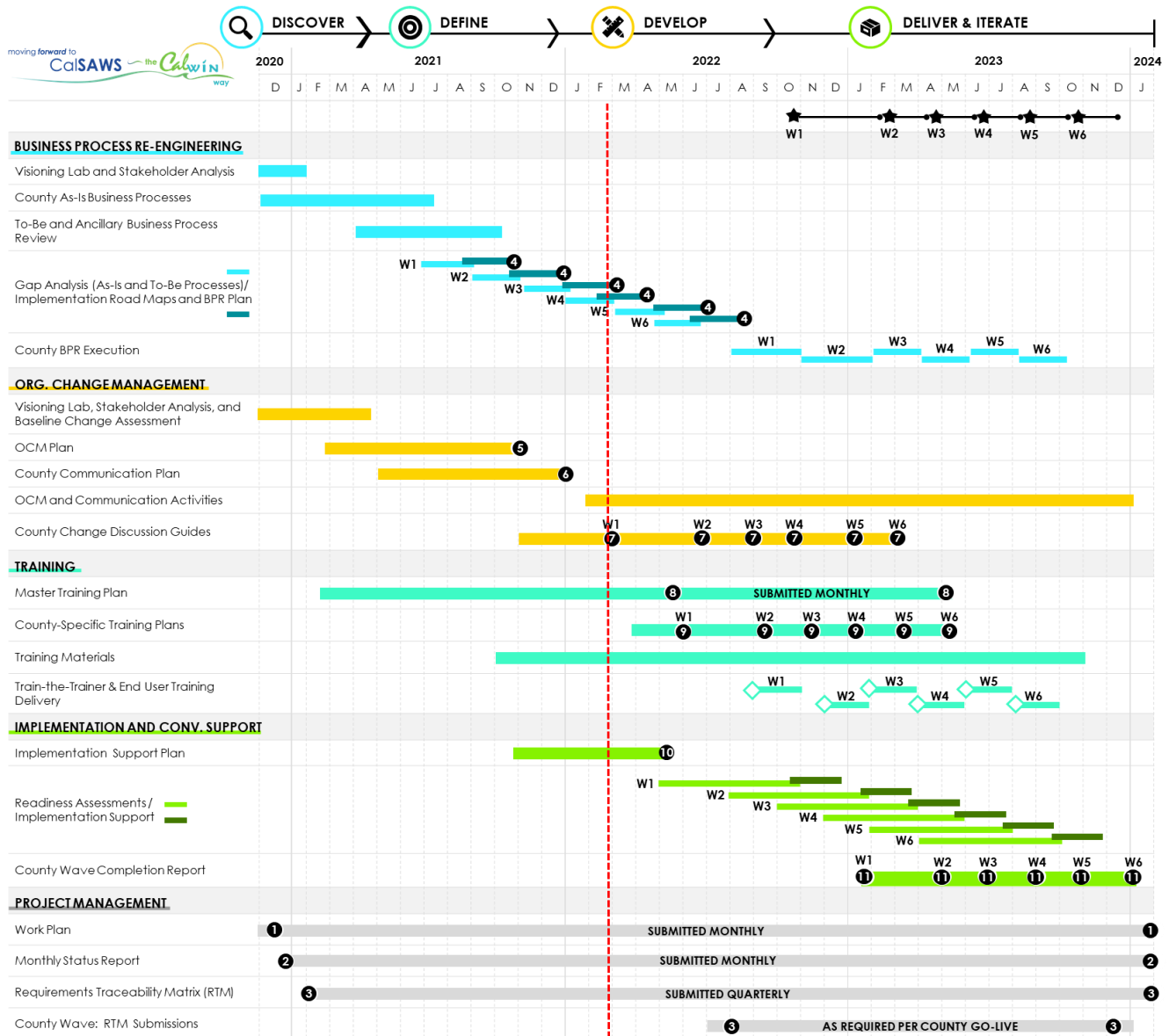Weekly Status Report, February 23, 2022
Reporting Period: February 14, 2022 to February 20, 2022

Table 1 – Instructor-Led Training Development Progress

ILT Course Title	Course – Total % Complete	ILT Course Title	Course – Total % Complete
General Eligibility	68%	Foster Care	31%
CalFresh Eligibility	68%	Supervisor Eligibility	40%
Medi-Cal Eligibility	60%	Supervisor Clerical	30%
Clerical	30%	Fiscal	40%
CalFresh/Medi-Cal Multi-Program	45%	QA/QC	40%
CalWORKs Eligibility	38%	RDB Maintainers	48%
CalFresh/CalWORKs Multi-Program	30%	Special Investigations/IEVS (Fraud)	30%
CalFresh/CalWORKs/Medi-Cal Multi-Program	30%	Child Care	30%
RCA	30%	Hearings	30%
Employment Services Welfare to Work	40%	GA/GR Eligibility	0%
CAPI	30%	Learning Journey Maps (non ILT)	5%

Implementation Support Services (ISS)

► Conducted/participated in the Weekly Implementation Manager and Targeted On-Site Support (TOSS) Team meetings, including weekly meeting with Contra Costa.
► Conducted the weekly project Ad-Hoc Reporting meeting on 02/17/22, discussing revised approach for ad-hoc reporting (communicating at OPAC) and county discovery kick-off meetings
► Conducted twice weekly Conversion Defect Testing (CDT) Defect Internal Work Group meetings on 02/15/22 and 02/17/22. The Current Status of the 59 items are noted below:

Table 2 – Status of CDT Items

Status	County
Impact Analysis Requested	14
Not Started	0
Awareness for Go-Live (include in Go-Live Packet)	34
No Action Needed from CDT Group	6
Requested Additional Clarification	3
Training/Communications Needed for County	2

► Distributed the Application Security CIT CalSAWS Information Transmittal (CIT) to the CalWIN Counties (02/17/22) and distributed the calendar invites for the two education sessions on 02/18/22 (educational sessions are on 03/08/22 – 03/09/22).
► Coordinated the Max Caseload cross-project impact meetings.
► Participated in ongoing meetings with DD&I and the Consortium for conversion, imaging, application programming interface (API) user groups, UAT, contact center discovery sessions, TPOC bi-weekly meetings, and DDID.
► Participated in the Implementation Readiness Checklist Building Session on 02/07/22

► Prepared CalSAWS agenda for the February 24 OPAC meeting and all CalSAWS materials for distributions (02/18/22).

► Participated in the CalSAWS/Placer Weekly Contact Center discovery session on 02/15/22 and participated in the CalSAWS/Yolo Weekly Contact Center discovery session on 2/16/22

► Participated in the CalWIN Conversion and Change Management Meeting on 02/15/22.

► Participated in the Contra Costa County Weekly TOSS/Implementation Points of Contact (IPOC) Meeting on 02/15/22 and participated in the Team Placer Weekly TOSS meeting on 02/16/22.

► Participated in the CalSAWS Technical Points of Contact (TPOC) meeting on 02/17/22.

► Participated in the CalWIN UAT Planning meeting on 02/17/22.

► Conducted a Jira Checklist Review meeting with the Placer County TOSS Team on 02/17/22 to demonstrate how to interact with the Implementation Readiness Checklist in Jira and answer questions about the weekly sync.

Project Timeline

Figure 3 – Project Gantt Chart

Project Timeline

1.2 Project Deliverable Summary

Deliverable Activity is summarized within the tables below.

Table 3 – Deliverable Status for Current Reporting Period

	Completed	Coming Soon

DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final
01	Workplan – Initial	12/04/20	12/15/20	12/23/20	01/14/21	01/22/21
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	01/27/21
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
04	Business Process Reengineering Plan	07/14/21	07/26/21	10/01/21	10/22/21	10/27/21
05	Organizational Change Management Plan	07/14/21	07/26/21	10/04/21	10/26/21	11/02/21
06	County Communication Plan	08/16/21	08/26/21	01/03/22	01/25/22	02/01/22
07	County Change Guide	02/09/22	02/21/22	03/24/23	04/17/23	04/24/23
08	Master Training Plan	10/27/21	11/08/21	05/13/22	06/06/23	06/13/23
09	County Specific Training Plan (Wave 1)	10/27/21	11/08/21	05/13/22	06/06/23	06/13/23
10	Implementation Support Plan	01/14/22	01/27/22	05/16/22	06/07/22	06/14/22
11	Wave Completion Report	09/15/22	09/27/22	01/11/24	01/24/24	01/31/24

Table 4 – Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
01	Work Plan – Initial	Complete	
01.14	Work Plan – February 2021	On-Track	FDEL submission 03/04/22 FDEL approval due 03/11/22
02	Monthly Status Report – Initial	Complete	
02.14	Monthly Status Report – February 2021	On-Track	FDEL submission 03/04/22 FDEL approval due 03/11/22
03	Requirements Traceability Matrix Initial	Complete	
03.04	Requirement Traceability Matrix – Quarter 4	On-Track	FDEL submission 03/04/22 FDEL approval due 03/11/22

DEL #	Deliverable Name	Status	Next Deadline
04	Business Process Reengineering Plan	Complete	
04.06	County BPR Plan – Wave 3 (Orange)	On-Track	DDEL Submission 03/15/22 FDEL Submission 04/06/22
04.07	County BPR Plan – Wave 3 (Santa Barbara)	On-Track	DDEL Submission 03/15/22 FDEL Submission 04/06/22
04.08	County BPR Plan – Wave 3 (Ventura)	On-Track	DDEL Submission 03/15/22 FDEL Submission 04/06/22
05	Organizational Change Management Plan	Complete	
06	County Communication Plan	Complete	
07	County Change Guide	On-Track	DDED Submitted 02/09/22 FDED submission 02/21/22
08	Master Training Plan	On-Track	DDEL submission 05/13/22 FDEL submission 06/06/22
09.01	County Specific Training Plan – Wave 1 (Contra Costa)	On-Track	DDEL submission 05/13/22 FDEL submission 06/06/22
09.02	County Specific Training Plan – Wave 1 (Placer)	On-Track	DDEL submission 05/13/22 FDEL submission 06/06/22
09.03	County Specific Training Plan – Wave 1 (Yolo)	On-Track	DDEL submission 05/13/22 FDEL submission 06/06/22
10	Implementation Support Plan	On-Track	DDEL submission 05/06/22 FDEL submission 06/07/22
11	Wave Completion Report	On-Track	DDED submission 09/15/22 FDED submission 09/27/22

1.3   Project Risks and Issues

There following table lists the open risks and issues for the reporting period.

Table 5 – Risks & Issues

ID	Title	Details	Status	Impact	Severity	Date Logged
262	The CalWIN counties may not be fully prepared for go-live if they do not have sufficient or timely information	The CalWIN counties and County Directors have voiced concern that they do not have sufficient information or direction from the CalWIN ISS team to adequately prepare for go-live. In some cases, they have begun creating their own materials based on what they understand. If the counties do not have a framework within which to prepare, they may not be ready for cutover. This includes clear communication and timelines for what is needed to be completed by when, readiness checklists, early conversations on the transition from the current state to the future state, and clear direction.	Open	3	Medium	12/13/21
268	Implementation Readiness for CalWIN Cutover to CalSAWS	If implementation readiness (project and county) is not on track to meet their respective exit criteria by 04/29/2022, then the CalWIN Wave 1 cutover to CalSAWS could either be delayed or require significantly greater support to help counties through outstanding issues. Individual risks have been opened related to the ability to be fully ready in time for a successful CalWIN Wave 1 cutover to CalSAWS on October 27, 2022 and subsequent waves. This risk serves as an overarching risk for the overall readiness of the project and CalWIN counties to cutover to CalSAWS.	Open	4	High	01/13/22S

ID	Title	Details	Status	Impact	Severity	Date Logged
269	CalWIN Counties may not have enough development and testing timeline to Refactor their Ad-hoc Reports and Ancillary System before Go-Live	The CalWIN Counties need time in the schedule, leading up to their respective Go-Live, to Refactor Ad-hoc Reports and/or Ancillary Systems. To do so, the counties need connectivity and access to CalSAWS environments, data model (and definitions), as well as data. The current CalSAWS delivery schedule (of these) is compressing the CalWIN counties Design, Development, and Testing timelines (i.e., schedule) and putting their County Readiness for Go-Live at-risk.	Open	5	High	01/13/22
270	The CalWIN counties may not be fully prepared for Go-Live if there is insufficient information in the Organizational Change Management (OCM) Change Discussion Guides (CDGs)	If OCM does not have sufficient documentation and resources to create CDGs, and counties do not have adequate time to review and provide feedback, the CDG delivery timeframe and level of detail might be impacted. The OCM team uses the County To-Be Process documentation to create the CDGs. Requirement DEL-11 states that CDGs must capture tasks within each job process, steps the person in the role will complete once they begin utilizing the new System, and impacts to the 18 CalWIN Counties along with the steps that the person will stop completing once they begin utilizing the CalSAWS System. If County To-Be process documentation does not capture this information, more work must be done on the CDG content to make it useful for counties. The Training team leverages the CDGs by linking roles and changes to related training content and depends on receiving accurate CDGs in the expected timeframes.	Open	4	Medium	02/02/22

1.4   CRFI/CIT Communications Information

The following table lists the open CalSAWS Request for Information (CRFI) for the reporting period.

Table 6 – CRFIs

CRFI ID	To	Subject	Category	Distribution Date	Response Due Date

The following table lists the open CalSAWS Information Transmittals (CITs) for the reporting period.

Table 7 – CITs

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
CIT 0053-22	CalWIN Counties	CalWIN Conversion: Application Security Education Sessions	Conversion	02/17/22	Cathryn van Namen	Nicole Williams

1.5   Activities for the Next Reporting Period

Project Management
► Continue planning for and onboarding staff resources.
► Continue to collaborate with other teams to coordinate information for the CalWIN Counties.
► Continue compiling tasks for the Implementation Readiness Checklist from Counties, Consortium, and other Project Threads.
► Submit the following Deliverables:
   o DEL 07: County Change Guide Draft Deliverable Expectation Document (FDED) on 02/21/21.

Business Process Reengineering (BPR)
► Complete Week 3 of the To-Be BPR sessions for San Mateo County.
► Complete Week 2 of the To-Be BPR sessions for San Diego County.
► Confirm final comments resolutions for the To-Be Process Flows Final Work Products (FWPs) for Solano and Santa Cruz Counties.
► Complete Pre-Meet Parts 1 and 2 for Alameda and Fresno Counties.
► Prepare for the leadership meeting with Alameda and Fresno Counties.
► Continue planning for Process Simulation Testing in coordination with the UAT Team.
► Continue planning for pay code and fund code mapping discussions with the Wave 1 Counties.
► Initiate a discussion with Contra Costa County on splitting up large caseloads that are greater than CalSAWS limitations.
► Finalize plan to revisit the To-Be Business Process Flows for the Wave 1 Counties, specifically related to pending decisions, changes due to new functionality, or need for

more detail (pending Consortium approval) and begin scheduling time with Counties. This will be combined with an effort to add new flows as needed..

Organizational Change Management (OCM)

► Address comments received for the DEL 07: County Change Guide FDED.
► Facilitate the February CNC meeting on 02/22/22.
► Review and finalize agreement with the Consortium on the revised CDG plan.
► Develop communication materials for EDBC and Application Registration for distribution in March.
► Research and plan for session on Task Management in April to address Wave 1 concerns and questions.
► Distribute T-Minus 12 Readiness Surveys for Tulare and Santa Clara Counties on 02/22/22.
► Distribute T-Minus 9 Readiness Surveys for Placer, Yolo, and Contra Costa Counties on 02/22/22.

Training

► Continue training development, creating Instructor Guide documents for the CalSAWS Instructor-Led Training curriculum.
► Continue development of the Learning Journey Maps.
► Continue developing the Master Training Plan Deliverable.
► Continue planning classroom and scheduling logistics for Wave 1 Counties.
► Continue working with the Consortium Training Manager to plan for the LMS and Training Environment for training for the CalWIN Counties.
► Work with PMO to make training updates to the CalWIN ISS Work Plan on 02/23/22.
► Conduct the TAC meeting on 02/23/22.
► Participate in the CalWIN ISS planning sessions on 02/22/22 and 02/23/22.
► Present training update at the OPAC meeting on 02/24/22.

Implementation Support Services

► Continue documenting project readiness checklist items, categories/subcategories, and readiness criteria/metrics for Implementation. Continue working on updating project work plans and Wave 2 county specific work plans. Wave 2 T-12 county specific work plan for distribution the week of 02/21/22.
► Conduct the February Operations and Policy Advisory Committee (OPAC) meeting on 02/24/22.
► Prepare materials for the Application Security Education sessions with the Counties for the sessions on 03/08/22 and 03/09/22.
► Continue conducting twice weekly CDT rejected items for OCM impacted items with the CDT Workgroup (Accenture, Gainwell, Consortium, and Customer Engagement). Review the impact analysis.
► Conduct Weekly Implementation manager and TOSS team meetings. Continue working with Project Reporting [Ad-Hoc] to complete planning efforts for Wave 1 and subsequent waves work groups.
► Conduct the CalWIN County Stand-Up Meeting on 02/14/22.
► Create the T-9 view across the project for prioritized and critical path for Wave 1 counties.

► Participate in ongoing meetings with DD&I and the Consortium for conversion, imaging, application programming interface (API) user groups, UAT, contact center discovery sessions, TPOC bi-weekly meetings, and DDID.

1.6   Deviations from Plan/Adjustments

► None for the reporting period.