CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting Period: March 7, 2022 to March 13, 2022

03/16/22

CalSAWS – CalWIN ISS Weekly Status Report
Weekly Status Report, March 16, 2022
Period: March 7, 2022 to March 13, 2022

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1.0   Project Management

1.1   Highlights of the Reporting Period
- ► Continued planning for and onboarding staff resources.
- ► Continued to collaborate with other teams to coordinate information for the CalWIN Counties.
- ► Continued updating Wave 1 County Work Plans for the Implementation Readiness Checklist.
- ► Attended the Implementation Readiness Checklist Review meeting with the ISS Implementation Team and Accenture PMO on 03/11/22.
- ► Submitted the following Deliverables and Work Products:
  - o   FWP 02: To-Be Process Flows – San Mateo County on 03/08/22.
  - o   FDEL 01.14: Work Plan Monthly Updates – February 2022 on 03/09/22.

1.2   Activities for the Next Reporting Period
- ► Continue planning for and onboarding staff resources.
- ► Continue to collaborate with other teams to coordinate information for the CalWIN Counties.
- ► Continue updating Wave 1 County Work Plans for the Implementation Readiness Checklist.
- ► Submit the following Deliverables and Work Products:
  - o   DWP 02: To-Be Process Flows – Wave 4 (San Diego) on 03/14/22.
  - o   DDEL 04.08: Business Process Reengineering Plan – Wave 3 (Ventura) on 03/15/22.
  - o   DDEL 04.07: Business Process Reengineering Plan – Wave 3 (Santa Barbara) on 03/15/22.
  - o   DDEL 04.06: Business Process Reengineering Plan – Wave 3 (Orange) on 03/15/22.

2.0   Business Process Reengineering (BPR)

2.1   Highlights of the Reporting Period
- ► Submitted the To-Be Draft Work Product (DWP) for San Mateo County.
- ► Completed Week 4 of To-Be BPR sessions for San Diego County.
- ► Resolved comments received for the To-Be Final Work Products (FWPs) for Solano and Santa Cruz Counties.
- ► Finalized the new BPR schedule for Wave 5 Counties (Alameda and Fresno) based on available Business Analyst (BA) support.
- ► Continued planning for Process Simulation Testing in coordination with the User Acceptance Testing (UAT) Team.
- ► Completed Week 1 of BPR/OCM Closeout sessions with Placer County in partnership with the OCM Team to close out pending decisions in the Process Change Inventory, identify automated actions, validate key change impacts, and add new flows as needed (e.g., Community Based Organization (CBO) Manger Account Provisioning, Child Care, Fiscal Interfaces & Operations). Contact Center flow is pending design.

	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	DWP BPR Plan Submit
Wave 1							
Contra Costa	06/21/21	07/30/21	08/04/21	09/02/21	09/02/21	09/10/21	09/27/21
Placer	06/21/21	07/30/21	08/04/21	08/20/21	08/30/21	09/07/21	09/27/21
Yolo	07/12/21	08/11/21	08/11/21	08/27/21	09/08/21	09/17/21	09/27/21
Wave 2							
Tulare	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/08/21	11/19/21
Santa Clara	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/08/21	11/19/21
Wave 3							
Santa Barbara	10/18/21	11/12/21	11/15/21	11/30/21	12/08/21	12/14/21	02/11/22
Orange	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22	02/11/22
Ventura	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22	02/11/22
Wave 4							
Solano	01/10/22	02/04/22	02/07/22	02/22/22	03/07/22	03/11/22	03/25/22
Santa Cruz	01/10/22	02/04/22	02/07/22	02/22/22	03/07/22	03/11/22	03/25/22
San Mateo	02/07/22	03/04/22	03/07/22	03/18/22	03/28/22	04/01/22	04/15/22
San Diego	02/14/22	03/11/22	03/14/22	03/25/22	04/04/22	04/08/22	04/22/22
Wave 5							
Alameda	04/11/22	05/06/22	05/09/22	05/20/22	05/31/22	06/06/22	06/20/22
Fresno	04/04/22	04/29/22	05/02/22	05/13/22	05/23/22	05/27/22	06/13/22
Sonoma (TBD)	05/09/22	06/03/22	06/06/22	06/17/22	06/27/22	07/01/22	07/18/22
Wave 6							
San Francisco (TBD)	05/09/22	06/03/22	06/06/22	06/17/22	06/27/22	07/01/22	07/18/22
Sacramento (TBD)	06/13/22	07/08/22	07/11/22	07/22/22	08/01/22	08/05/22	08/19/22
San Luis Obispo	06/13/22	07/08/22	07/11/22	07/22/22	08/01/22	08/05/22	08/19/22

Figure 2.1-1 – To-Be Process Timetable by County (As of 03/13/22)

2.2 Activities for the Next Reporting Period

► Submit the To-Be DWP for San Diego County.
► Schedule finalized BPR schedule for Wave 5 Counties (Alameda and Fresno).
► Continue planning for Process Simulation Testing in coordination with UAT Team.
► Lead the BPR/OCM Closeout sessions with Placer County and prepare for next week's sessions with Contra Costa and Yolo Counties.
► Collaborate with Wave 5 (Sonoma) and Wave 6 (San Francisco, Sacramento, and San Luis Obispo) Counties to finalize BPR timeline.

Commented [KO1]: @Nadia Ahmed @Richard Peck This sentence is confusing.

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

► Co-facilitate sessions with Placer County to finalize change impacts for the Change Discussion Guides (CDGs).
► Continue development of the CDGs and plan for working sessions with Wave 1 Counties.
► Develop communication materials for Eligibility Determination and Benefit Calculation (EDBC) and Application Registration for distribution in March.
► Begin analysis of the T-Minus 12 Readiness Surveys for Tulare and Santa Clara Counties closing on 03/15/22.
► Begin analysis of the T-Minus 9 Readiness Surveys for Placer, Yolo, and Contra Costa Counties closing on 03/15/22.

3.2 Activities for the Next Reporting Period

► Continue co-facilitating sessions with Placer County to finalize change impacts for the CDGs.

► Continue development of the CDGs and plan for working sessions with Wave 1 Counties.
► Share Placer CDG sections for review with Placer County and the Consortium.
► Develop communication materials for EDBC and Application Registration for distribution in March.
► Analyze T-Minus 12 Readiness Surveys for Tulare and Santa Clara Counties closing on 03/15/22.
► Analyze T-Minus 9 Readiness Surveys for Placer, Yolo, and Contra Costa Counties closing on 03/15/22.

4.0   Training

4.1   Highlights of the Reporting Period

► 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 and 2 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.
► Met with Project teams on 03/08/22 to discuss the Waves 2 through 6 CalWIN UAT and Training user load for ForgeRock, LMS, Jira, Virtual Private Network (VPN), ServiceNow, and Implementation Support Services (ISS).

	10/22/21	01/28/22	02/04/22	02/11/22	02/18/22	02/25/22	03/04/22	03/11/22	05/20/22
Actual	100%	74%	68%	68%	63%	60%	55%	50%	
Planned	100%	72%	65%	62%	57%	54%	51%	46%	0%
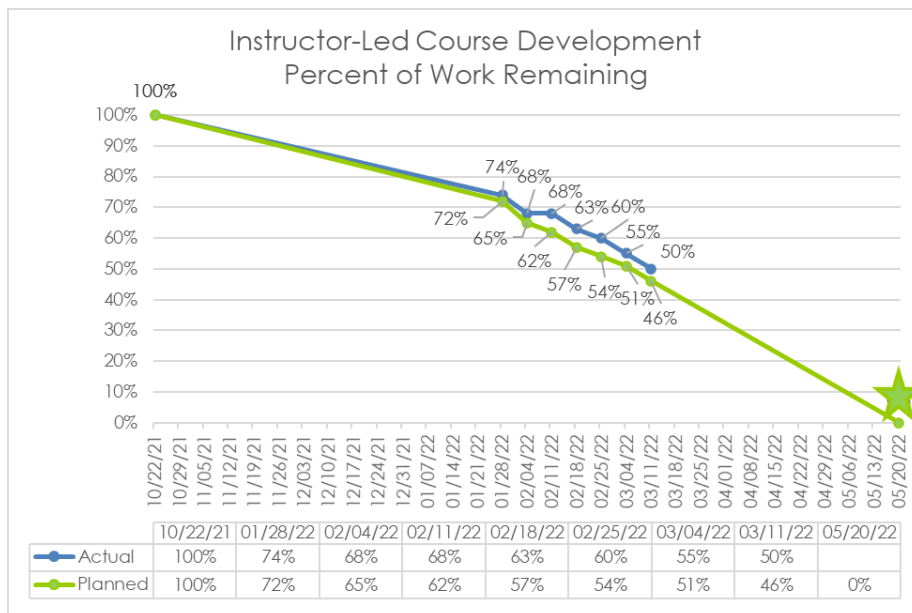
Figure 4.1-1 – Instructor-Led Training Development Progress

ILT Course Title	Course – Total % Complete	ILT Course Title	Course – Total % Complete
General Eligibility	70%	Foster Care	40%
CalFresh Eligibility	70%	Supervisor Eligibility	67%
Medi-Cal Eligibility	70%	Supervisor Clerical	30%
Clerical	32%	Fiscal	66%
CalFresh/Medi-Cal Multi-Program	62%	QA/QC	65%
CalWORKs Eligibility	65%	RDB Maintainers	65%
CalFresh/CalWORKs Multi-Program	61%	Special Investigations/IEVS (Fraud)	63%
CalFresh/CalWORKs/Medi-Cal Multi-Program	49%	Child Care	30%
RCA	63%	Hearings	39%
Employment Services Welfare to Work	65%	GA/GR Eligibility	1%
CAPI	30%	Imaging	0%

Table 4.1-2 – Instructor-Led Training Development Progress

Wave	County	ILT Training Dates (Includes Early Training, Train the Trainer, End User Training)	Estimated Setup Date	Total # Classrooms Needed	# Classrooms to Lease (In progress)	Total # Workstations Required for Training	# Project-Provided Workstations Needed
1	Contra Costa	07/12 – 10/27/22	07/05/22	7	0	175	0
1	Placer	07/12 - 10/27/22	07/07/22	3	0	75	60
1	Yolo	07/12 - 10/27/22	07/08/22	3	2	75	50
2	Santa Clara	11/28/22 – 02/24/23	11/15/22 – 11/16/22	7	0	175	0
2	Tulare	11/28/22 – 02/24/23	11/17/22 – 11/18/22	6	0	150	36

Table 4.1-3 – Waves 1 and 2 Classroom Needs and Set-Up

4.2   Activities for the Next Reporting Period

► 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.
► Prepare for the Training Advisory Council (TAC) meeting scheduled for 03/23/22.
► Continue planning classroom and scheduling logistics for Counties in all waves.
► Continue working with the Consortium Training Manager to plan for the LMS and Training Environment for training for the CalWIN Counties.
► Meet with the Project Contact Center team on 03/14/22 to discuss the CalWIN training needs for the Contact Center.
► Participate in the CalWIN Stand Up meeting on 03/14/22.

► Present training updates at the Welfare Client Data Systems (WCDS) Committee meeting on 3/18/22.

5.0   Implementation

Commented [RN2]: @Katherine O'Brien added 5.1 Highlights of the reporting period

5.1   Highlights of the Reporting Period

► Conducted and participated in the Weekly Implementation Manager and Targeted On-Site Support (TOSS) Team meetings, including a weekly meeting with Contra Costa County.
► Scheduled Ad-Hoc reporting discovery kick-off meetings for San Diego and Ventura County.
► Conducted a weekly Conversion Defect Testing (CDT) Defect Internal Work Group meeting 03/10/22. The current statuses of the 81 items are noted below:

Status	County
Impact Analysis Requested	4
Not Started	8
Awareness for Go-Live (include in Go-Live Packet)	46
No Action Needed from CDT Group	11
Requested Additional Clarification	4
Pre-Cutover Bulk Update	5
Pre- Cutover Review Guide	0
Post-Go Live Case Review Guide	3

Table 5.1-1 – Status of CDT Items

► Conducted the Application Security for the Conversion education sessions on 03/08/22 and 03/09/22.
► Participated in ongoing meetings with DD&I and the Consortium for conversion, imaging, application programming interface (API) user groups, UAT, contact center discovery sessions, Technical Points of Contact (TPOC) bi-weekly meetings, and DDID.
► Conducted the Wave 2 County Work Plan walkthrough for Santa Clara and Tulare Counties on 03/09/22.
► Participated in the CalWIN Conversion and Change Management Meeting on 03/08/22.
► Participated in an Implementation Readiness Checklist review meeting with the Accenture team on 03/11/22.

Commented [R3]: @Rebecca Henrie @Cathryn VanNamen can we get a line item in "Next Reporting Period" with expected meetings and Spreadsheets for next week. I.E. receive the updated checklist tasks from Accenture?

Commented [C4R3]: Added as the last bullet on status

5.2   Activities for the Next Reporting Period

► Continue documenting project readiness checklist items, categories/subcategories, and readiness criteria/metrics for Implementation. Continue updating the project Work Plans and Wave 2 County specific Work Plans (resubmission by 03/21/22).
► Finalize the Application Security Conversion Q&A document and distribute to the Counties; schedule office hours for the week of 03/21/22.

► Continue conducting twice-weekly Conversion Defect Testing (CDT) rejected items for OCM impacted items with the CDT Workgroup (Accenture, Gainwell, Consortium, and Customer Engagement) and review the impact analysis.
► Conduct the Region 5 Management Site Visit (MSV) meeting on 03/16/22.
► Conduct Weekly Implementation Manager and TOSS Team meetings and continue working with Project Reporting (Ad-Hoc) to complete planning efforts for Wave 1 and Wave 2.
► Participate in ongoing meetings with DD&I and the Consortium for conversion, imaging, API user groups, UAT, contact center discovery sessions, TPOC bi-weekly meetings, and DDID.
► Receive and begin analyzing the work plan and readiness checklist updates from Accenture on API, IPT, imaging, lobby management and system related activities to incorporate into the Wave 1 and Wave 2 work plans and checklists on 03/18/22.

6.0 Appendices

6.1 Appendix A – Deliverable Summary

		Complete		Coming Soon	

DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final Approval
01	Workplan – Initial	12/04/20	12/15/20	12/23/20	01/14/21	01/22/21
01.14	Work Plan Monthly Updates – February 2022	N/A	N/A	N/A	03/04/22	03/11/22
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	01/27/21
02.14	Monthly Status Report – February 2022	N/A	N/A	N/A	03/04/22	03/11/22
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 6.1-1 – Deliverable Status for Current Reporting Period

Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
01.14	Work Plan Monthly Updates – February 2022	On track	FDEL Submission 03/09/22 FDEL Approval 03/16/22
02.14	Monthly Status Report – February 2022	On track	FDEL Submitted 03/04/22 FDEL Approval 03/14/22
03.04	Requirements Traceability Matrix – Q4	On track	FDEL Submitted 03/04/22 FDEL Approval 03/14/22

Table 6.1-2 – Upcoming Deliverable Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
02	To-Be Process Maps – Wave 4 (Solano County)	On track	FWP Submitted 03/04/22 FWP Approval 03/14/22
02	To-Be Process Maps – Wave 4 (Santa Cruz County)	On track	FWP Submitted 03/04/22 FWP Approval 03/14/22
02	To-Be Process Maps – Wave 4 (San Mateo County)	On track	FWP Submitted 03/08/22 FWP Approval 03/28/22

Table 6.1-3 – Upcoming Work Product Deadlines

Work Product Status by Submission

DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final Approval
01	Workplan – Initial	12/04/20	12/15/20	12/23/20	01/14/21	01/22/21
01.14	Work Plan Monthly Updates – February 2022	N/A	N/A	N/A	03/04/22	03/14/22
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	01/27/21
02.14	Monthly Status Report – February 2022	N/A	N/A	N/A	03/04/22	03/14/22
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 6.1-4 – Upcoming Work Product Deadlines

6.2 Appendix B – Risks and Issues Summary

Project Risks and Issues

ID	Title	Details	Status	Impact	Probability	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	Open	Medium	50%	12/13/21

ID	Title	Details	Status	Impact	Probability	Date Logged
		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.				
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	High	70%	01/13/22
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	High	50%	01/12/22

ID	Title	Details	Status	Impact	Probability	Date Logged
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	Medium	50%	02/02/22

Table 6.2-1 – Project Risks and Issues

CRFI/CIT/CalSAWS CR Communications Information

The following table outlines CalSAWS Information Transmittals (CITs) sent for the reporting period.

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact

Table 6.2-2 – CITs

The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period.

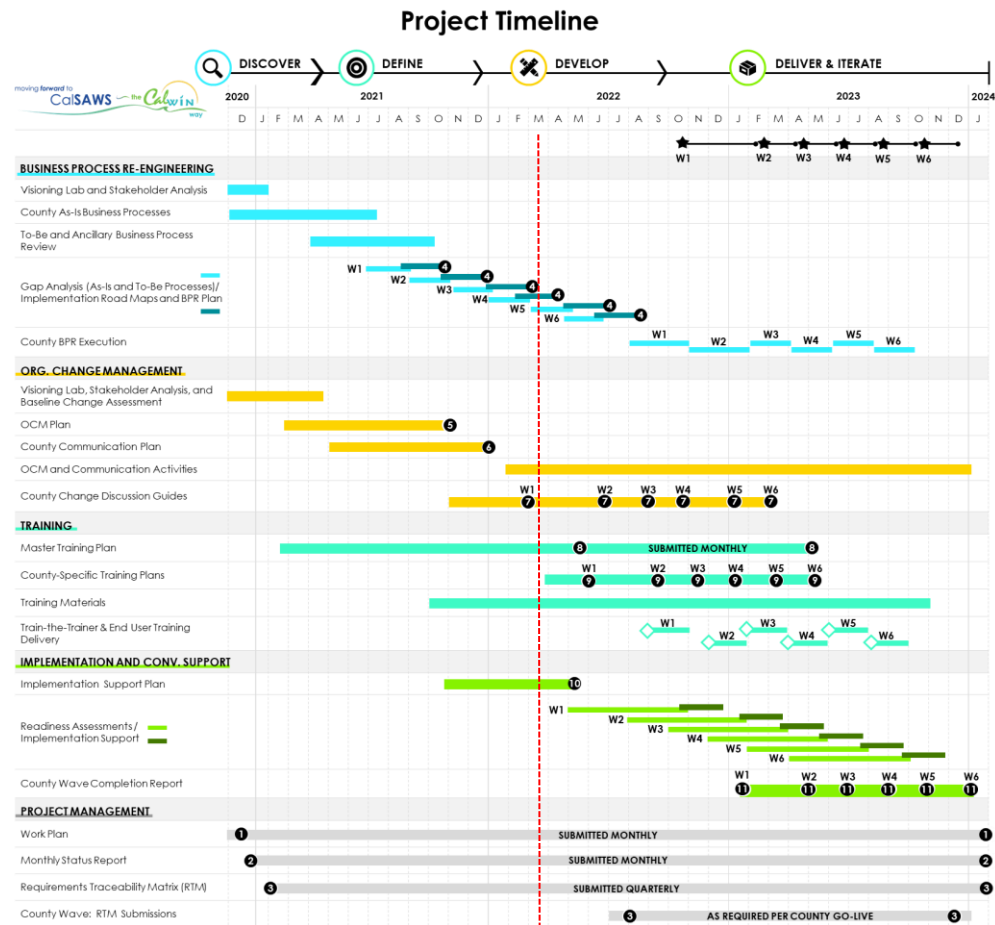| CRFI ID	To	Subject	Category	Distribution Date	Response Due Date
None					

Table 6.2-3 – CRFIs

6.3 Appendix C – Project Work Plan Reports

Project Timeline

Project Action Items – Overdue

This table lists overdue action items, including the owner and due date.

ID	Description	Owner	Due Date
None.			

Table 6.3-1 – Overdue Action Items