# CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

**Reporting Period: March 14, 2022 to March 20, 2022**

03/23/22

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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.
► Submitted the following Deliverables and Work Products:
  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.
  o DWP 02: San Diego County To-Be Process Maps on 03/16/22.

## 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.

# 2.0 Business Process Reengineering (BPR)

## 2.1 Highlights of the Reporting Period

► Submitted the To-Be Draft Work Product (DWP) for San Diego County on 03/16/22.
► Completed BPR/Organizational Change Management (OCM) Refactoring/Closeout sessions with Placer County on 03/17/22.
► Coordinated the first Fiscal 101 Workshop for Placer County on 03/16/22 and created plan to host workshop for other Wave-1 Counties on week of 03/28/22.
► Prepared for the BPR/OCM Refactoring/Closeout sessions with the remaining Wave 1 Counties (Contra Costa and Yolo) from 03/22/22 through 04/01/22.
► Scheduled the To-Be BPR sessions for Wave 5 Counties (Alameda and Fresno) – Fresno County starting on 04/04/22 and Alameda County starting on 04/11/22.
► Continued planning for the Process Simulation Testing in coordination with the User Acceptance Testing (UAT) Team.
► Finalized the revised BPR timeline with the Wave 5–6 Counties.

| | 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 | 03/09/22 | 03/22/22 | 03/28/22 | 04/01/22 | 04/15/22 |
| San Diego | 02/14/22 | 03/11/22 | 03/16/22 | 03/30/22 | 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 03/20/22)**

## 2.2 Activities for the Next Reporting Period

► Conduct Week 1 of BPR/OCM Refactoring/Closeout sessions with Wave 1 Counties (Contra Costa and Yolo) from 03/21/22 to 03/25/22.
► Continue planning for Process Simulation Testing in coordination with UAT Team.
► Continue planning for To-Be BPR sessions with Wave 5-6 Counties given the BPR shift.
► Finalize plan to introduce Fiscal 101 Workshop and additional flows to Counties from Waves 2–6.

# 3.0 Organizational Change Management (OCM)

## 3.1 Highlights of the Reporting Period

► Continued co-facilitating sessions with Placer County to finalize change impacts for the Change Discussion Guides (CDGs).
► Continued development of the CDGs and the plan for the working sessions with the Wave 1 Counties.
► Shared the Placer County CDG sections for review with Placer County and the Consortium.
► Developed communication materials for Eligibility Determination and Benefit Calculation (EDBC) and Application Registration for distribution in March.
► Analyzed T-Minus 12 Readiness Surveys for Tulare and Santa Clara Counties – surveys closed on 03/15/22.
► Analyze T-Minus 9 Readiness Surveys for Placer, Yolo, and Contra Costa Counties – surveys closed on 03/15/22.

## 3.2 Activities for the Next Reporting Period

► Co-facilitate BPR and OCM sessions with Contra Costa and Yolo to finalize change impacts for the CDGs.

► Continue development of the CDGs.
► Share the Placer CDG sections for review with Placer County and the Consortium 03/21/22.
► Finalize communication materials for EDBC and Application Registration for distribution towards the end of March.
► Analyze T-Minus 12 Readiness Surveys for Tulare and Santa Clara Counties share with the Consortium week of 03/21/22.
► Analyze T-Minus 9 Readiness Surveys for Placer, Yolo, and Contra Costa Counties share with the Consortium week of 03/21/22.
► Request time to meet with Wave 1 and 2 Counties to review Readiness Survey Results for week of 04/04/22.

# 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.
► Prepared for the Training Advisory Council (TAC) meeting scheduled for 03/23/22.
► Continued planning classroom and scheduling logistics for Counties in all waves.
► 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 the Project Contact Center team on 03/14/22 to discuss the CalWIN training needs for the Contact Center.
► Participated in the CalWIN Stand Up meeting on 03/14/22.
► Presented training updates at the Welfare Client Data Systems (WCDS) Committee meeting on 03/18/22.
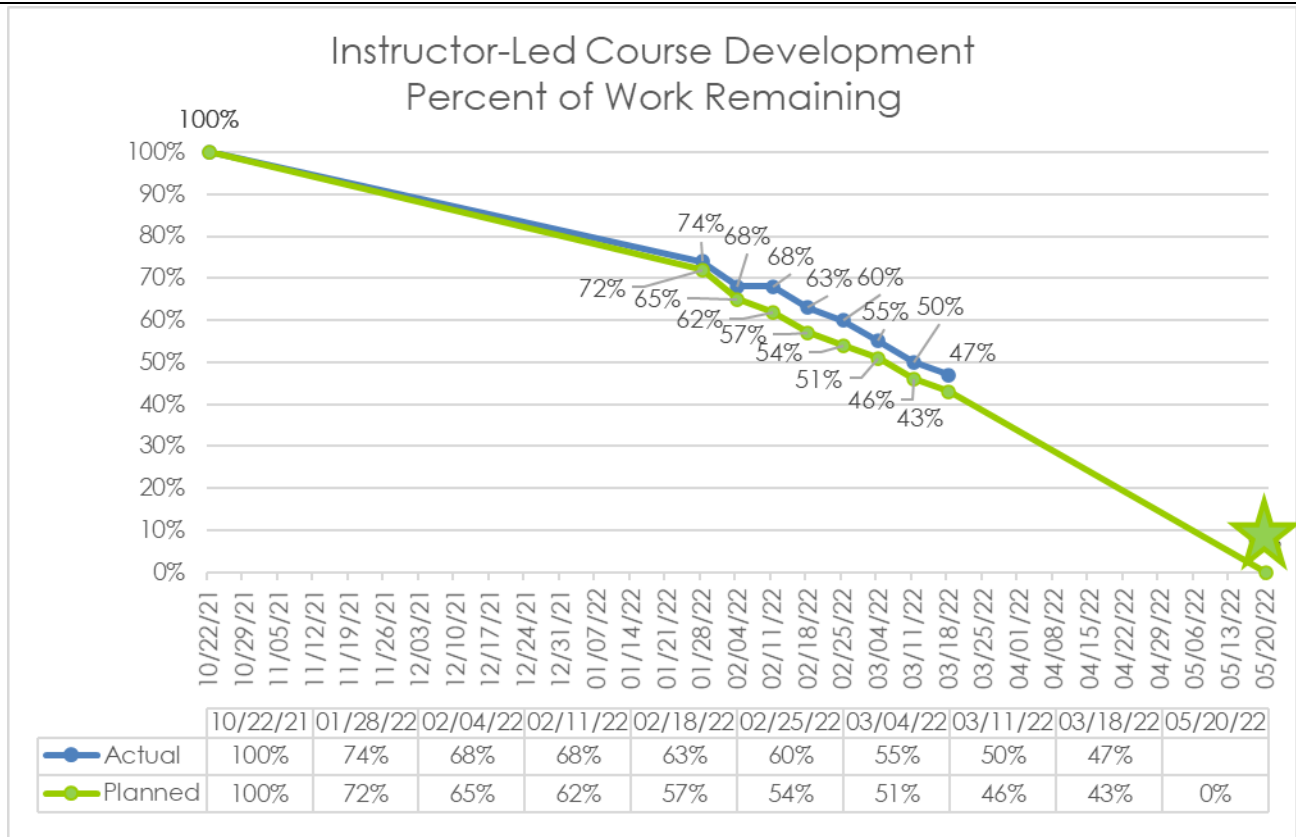
**Figure 4.1-1 – Instructor-Led Training Development Progress**

| | 10/22/21 | 01/28/22 | 02/04/22 | 02/11/22 | 02/18/22 | 02/25/22 | 03/04/22 | 03/11/22 | 03/18/22 | 05/20/22 |
|---|---|---|---|---|---|---|---|---|---|---|
| Actual | 100% | 74% | 68% | 68% | 63% | 60% | 55% | 50% | 47% | |
| Planned | 100% | 72% | 65% | 62% | 57% | 54% | 51% | 46% | 43% | 0% |

| ILT Course Title | Course – Total % Complete | ILT Course Title | Course – Total % Complete |
|---|---|---|---|
| General Eligibility | 70% | Foster Care | 50% |
| CalFresh Eligibility | 70% | Supervisor Eligibility | 69% |
| Medi-Cal Eligibility | 70% | Supervisor Clerical | 30% |
| Clerical | 32% | Fiscal | 69% |
| CalFresh/Medi-Cal Multi-Program | 65% | QA/QC | 68% |
| CalWORKs Eligibility | 68% | RDB Maintainers | 68% |
| CalFresh/CalWORKs Multi-Program | 64% | Special Investigations/IEVS (Fraud) | 66% |
| CalFresh/CalWORKs/Medi-Cal Multi-Program | 63% | Child Care | 34% |
| RCA | 66% | Hearings | 46% |
| Employment Services Welfare to Work | 68% | GA/GR Eligibility | 6% |
| 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 | 07/12/22 – 10/27/22 | 07/05/22 | 7 | 0 | 175 | 0 |
| 1 | Placer | 07/12/22 – 10/27/22 | 07/07/22 | 3 | 0 | 75 | 60 |
| 1 | Yolo | 07/12/22 – 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 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.
► Participate in the Waves 1 & 2 Change Network Champions meeting on 03/22/22.
► Conduct/facilitate the TAC meeting on 03/23/22.
► Present training updates at the OPAC meeting on 3/24/22.

# 5.0 Implementation

## 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.

► Conducted a weekly Conversion Defect Testing (CDT) Internal Work Group meeting on 03/15/22. The current statuses of the 84 items are noted below:

| Status | County |
|---|---|
| Impact Analysis Requested | 4 |
| Not Started | 7 |
| Awareness for Go-Live (include in Go-Live Packet) | 47 |
| No Action Needed from CDT Group | 1 |
| 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**

► 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.
► Continued working on Work Plan enhancements for Wave 2 Counties (to distribute week of 03/21/22).
► Conducted a weekly Checklist and Task Sync meeting with TOSS teams on 03/14/22.
► Participated in the CalSAWS/Placer Weekly Contact Center Discovery Session on 03/15/22.
► Participated in the TOSS Touchpoint meeting on 03/15/22.
► Participated in the weekly IPOC/TOSS meeting for Contra Costa County on 03/15/22. Participated in the Team Placer County TOSS Weekly meeting on 03/16/22.
► Participated in the CalWIN Wave 2 TPOC meeting on 03/16/22.
► Participated in the CalSAWS TPOC meeting on 03/17/22.
► Consolidated the OPAC meeting materials and conducted an internal review.
► Drafted the County Prep activities and draft schedule of activities for internal review and socialization.
► Reviewed and analyzed the Work Plan updates from Accenture for Wave 1–Wave 2 Work Plan synchronization for API, interface partner testing (IPT), imaging, lobby management, and system related activities; continued to update for Work Plan re-baselining based on County feedback.

## 5.2 Activities for the Next Reporting Period

► Continue documenting the 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 scheduled for the week of 03/21/22, pending review of the Accenture provided Work Plan activities).
► 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 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 1 Management Site Visit (MSV) meeting on 03/23/22.
► 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. Begin consolidating for Wave 3 Counties.
► 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.
► Prepare for the Global IPOC meeting scheduled for 04/06/22 (agenda, materials, look ahead).
► Discuss, modify, and update the County Prep activities timeline for internal review.
► Resubmit Wave 1 and Wave 2 re-baselined Work Plans; perform sync with Jira for readiness checklist resubmissions.

# 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 | 03/09/22 | 03/29/22 |
| 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 | 03/29/22 | 04/20/22 | 04/29/22 |
| 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 |

**Figure 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 Approval 03/16/22 |
| 02.14 | Monthly Status Report – February 2022 | On track | FDEL Approved 03/14/22 |
| 03.04 | Requirements Traceability Matrix – Q4 | On track | FDEL Approval 03/14/22 |

**Table 6.1-2 – Upcoming Deliverable Deadlines**

## Work Product Status by Submission

| | | Complete | | Coming Soon |
|---|---|---|---|---|

| ID | Work Product Name | DWP | FWP | Final Approval |
|---|---|---|---|---|
| 02 | **To-Be Process Maps – Wave 4 (Solano County)** | 02/07/22 | 03/04/22 | 03/11/22 |
| 02 | **To-Be Process Maps – Wave 4 (Santa Cruz County)** | 02/07/22 | 03/04/22 | 03/11/22 |
| 02 | **To-Be Process Maps – Wave 4 (San Mateo County)** | 03/09/22 | 03/28/22 | 04/01/22 |
| 02 | **To-Be Process Maps – Wave 4 (San Diego County)** | 03/16/22 | 04/04/22 | 04/08/22 |
| 07.01 | **County Change Guide – Wave 1 (Contra Costa County)** | 03/29/22 | N/A | N/A |
| 07.02 | **County Change Guide – Wave 1 (Placer County)** | 03/29/22 | N/A | N/A |
| 07.03 | **County Change Guide – Wave 1 (Yolo County)** | 03/29/22 | N/A | N/A |

**Figure 6.1-3 – Upcoming Work Product Deadlines**

## Upcoming Work Product Deadlines

| WP # | Work Product Name | Status | Next Deadline |
|---|---|---|---|
| 02 | To-Be Process Maps – Wave 4 (Solano County) | On track | FWP Approval 03/14/22 |
| 02 | To-Be Process Maps – Wave 4 (San Mateo County) | On track | FWP Submitted 03/09/22 <br> FWP Approval 03/28/22 |

**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 prepare, they may not be ready for cutover. This includes clear communication and timelines for what is needed to be completed by when, | Open | Medium | 50% | 12/13/21 |

| ID | Title | Details | Status | Impact | Probability | Date Logged |
|---|---|---|---|---|---|---|
| | | 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 |
| 270 | The CalWIN counties may not be fully prepared for Go-Live if there is insufficient | If OCM does not have sufficient documentation and resources to create CDGs, and counties do not have adequate time to review and provide | Open | Medium | 50% | 02/02/22 |

| ID | Title | Details | Status | Impact | Probability | Date Logged |
|---|---|---|---|---|---|---|
| | information in the Organizational Change Management (OCM) Change Discussion Guides (CDGs) | 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. | | | | |

**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.

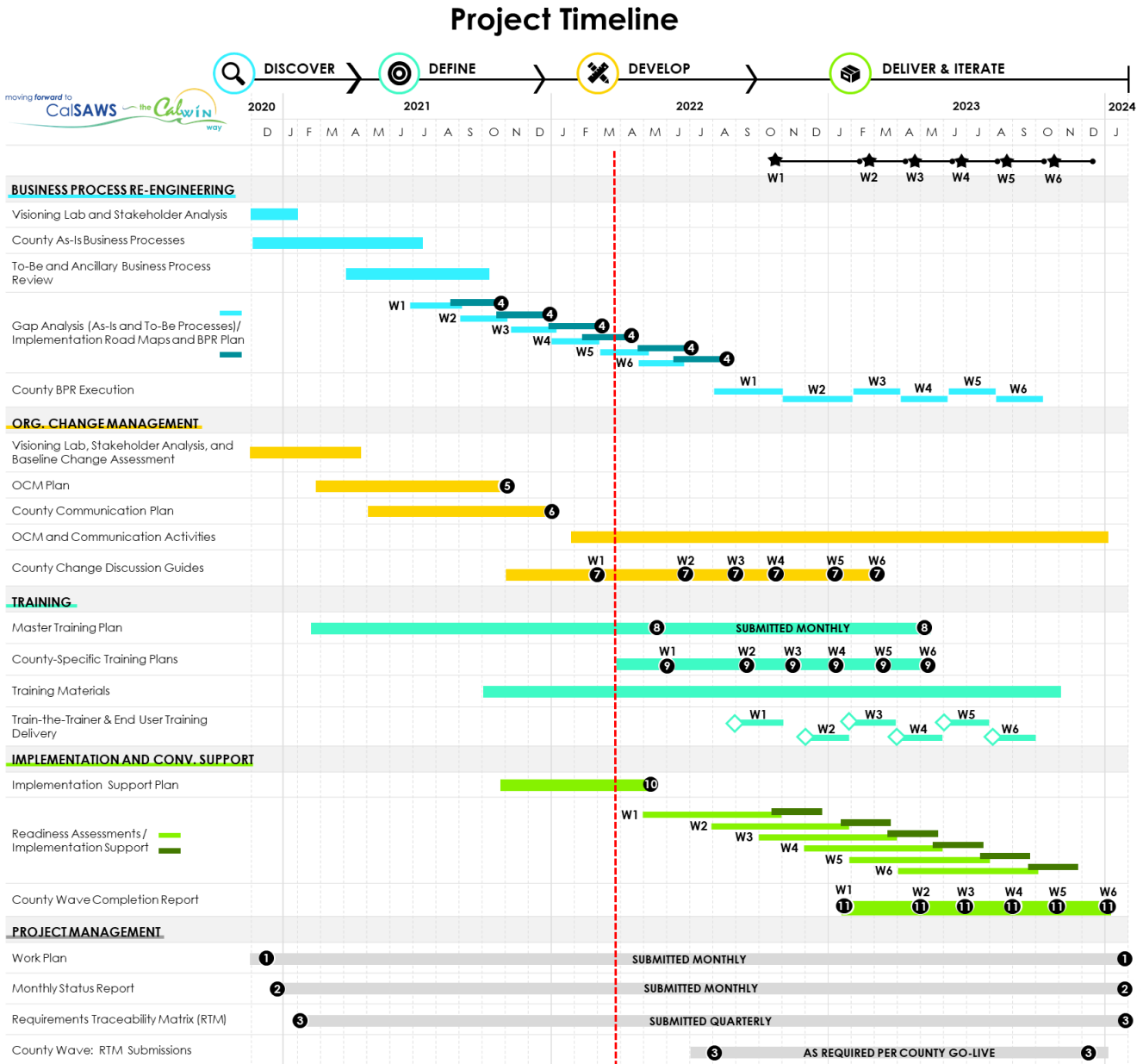| CIT ID | To | Subject | Category | Distribution Date | Primary CalSAWS Contact | Backup CalSAWS Contact |
|---|---|---|---|---|---|---|
| | | | | | | |

**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**