CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting Period: March 28, 2022 to April 3, 2022

03/31/22

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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 FWP 02: To-Be Process Flows – Wave 4 (San Mateo) on 03/30/22.

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 FDEL 02.15: Monthly Status Report – March 2022 on 04/05/22.
   o FDEL 01.15: Work Plan Monthly Updates – March 2022 on 04/05/22.
   o FWP 02: To-Be Process Flows – Wave 4 (San Diego) on 04/06/22.
   o FDEL 04.08: Business Process Reengineering Plan – Wave 3 (Ventura) on 04/06/22.
   o FDEL 04.07: Business Process Reengineering Plan – Wave 3 (Orange) on 04/06/22.
   o FDEL 04.06: Business Process Reengineering Plan – Wave 3 (Santa Barbara) on 04/06/22.
   o County Review 04.12: Business Process Reengineering Plan – Wave 4 (Solano) on 04/08/22.
   o County Review 04.11: Business Process Reengineering Plan – Wave 4 (Santa Cruz) on 04/08/22.
   o County Review 04.10: Business Process Reengineering Plan – Wave 4 (San Mateo) on 04/08/22.

2.0 Business Process Reengineering (BPR)

2.1 Highlights of the Reporting Period

► Continued follow-up with Placer County on open items after BPR/OCM Refactoring/Closeout Sessions from 03/07/22-03/18/22.
► Completed Week-2 of BPR/OCM Refactoring/Closeout Sessions with remaining Wave-1 Counties (Contra Costa and Yolo) from 03/21/22-04/01/22.
► Scheduled additional BPR/OCM Refactoring/Closeout Sessions for Wave-1 Counties (Contra Costa and Yolo) on week of 04/04/22.
► Continued planning for onsite BPR sessions for Waves 5–6 beginning in April 2022.
► Submitted To-Be Final Work Product (FWP) for San Diego County on 04/01/22.
► Submitted Wave-3 BPR Plan after resolving Consortium comments on 04/01/22.
► Conducted Week 0 Q&A sessions for Alameda and Fresno Counties, prior to the start of To-Be BPR sessions (03/28/22–04/01/22).
► Initiated planning for Waves 2-4 BPR/OCM Closeout activities.
► Completed Pre-Meet Pt. 1 for Sonoma and San Francisco Counties.

► Finalized onsite staffing plan for To-Be BPR Sessions starting 04/04/22 for Fresno County.
► Began updating Global To-Be Flows with lessons learned from Wave-1 Refactoring.

	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	03/30/22	04/05/22	04/19/22
San Diego	02/14/22	03/11/22	03/16/22	03/30/22	04/06/22	04/10/22	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	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	05/09/22	06/03/22	06/06/22	06/17/22	06/27/22	07/01/22	07/18/22
Sacramento	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 03/28/22)

2.2 Activities for the Next Reporting Period

► Complete Week-1 of To-Be BPR sessions for Fresno County through hybrid onsite/remote delivery.
► Conduct Week-3 of BPR/OCM Refactoring/Closeout Sessions with Wave-1 Counties (Contra Costa and Yolo) from 04/05/22-04/08/22.
► Develop plan to conduct Fiscal 101 workshop for Waves 2-4.
► Continue discussions with Waves 5-6 Counties on To-Be BPR schedule for sessions beginning on 05/09/22 and 06/13/22.
► Define plan for BPR Closeout Activities for Waves 2-4.
► Conduct leadership meeting for San Francisco County on 04/03/22.
► Continue updating Global To-Be Flows with lessons learned from Wave-1 Refactoring.
► Conduct CAPI demo and Q&A session for Sacramento, San Mateo, San Diego, and Contra Costa Counties on 04/08/22.
► Conduct GA/GR Q&A session for Alameda and Fresno Counties on 04/08/22

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

► Continue to co-facilitate BPR and OCM sessions with Contra Costa and Yolo Counties to finalize change impacts for the CDGs.
► Continue development of the CDGs.
► Finalize communication materials for EDBC and Application Registration for distribution toward the end of March 2022.
► Share T-Minus 12 Readiness Surveys for Tulare and Santa Clara Counties share with the Consortium week of 04/04/22.
► Share T-Minus 9 Readiness Surveys for Placer, Yolo and Contra Costa Counties share with the Counties week of 04/04/22.

3.2   Activities for the Next Reporting Period

► Continue to co-facilitate BPR and OCM sessions with Contra Costa and Yolo Counties to finalize change impacts for the CDGs.
► Continue development of the CDGs.
► Finalize communication materials for EDBC and Application Registration for distribution toward the beginning of April 2022.
► Prepare for T-12 Surveys for Wave 3 Counties.

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 and Draft County Training Plans.
► Continued planning classroom and scheduling logistics for Counties in all waves.
► Continued working with the Consortium Training Manager to plan for the LMS and Training Environment for training for the CalWIN Counties.
► Met with Tech Team to discuss technical considerations for CalWIN county training classrooms.
► Met with Contact Center team to discuss CalWIN county training needs and delivery.

Instructor-Led Course Development Percent of Work Remaining

	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	03/25/22	04/01/22	05/20/22
Actual	100%	74%	68%	68%	63%	60%	55%	50%	47%	49%	46%	
Planned	100%	72%	65%	62%	57%	54%	51%	46%	43%	46%	41%	0%

Figure 4.1-1 – Instructor-Led Training Development Progress

ILT Course Title	Course – Total % Complete	ILT Course Title	Course – Total % Complete
General Eligibility	73%	Foster Care	55%
CalFresh Eligibility	73%	Supervisor Eligibility	73%
Medi-Cal Eligibility	70%	Supervisor Clerical	27%
Clerical	29%	Fiscal	73%
CalFresh/Medi-Cal Multi-Program	64%	QA/QC	72%
CalWORKs Eligibility	73%	RDB Maintainers	66%
CalFresh/CalWORKs Multi-Program	64%	Special Investigations/IEVS (Fraud)	67%
CalFresh/CalWORKs/Medi-Cal Multi-Program	60%	Child Care	32%
RCA	64%	Hearings	54%
Employment Services Welfare to Work	70%	GA/GR Eligibility	13%
CAPI	27%	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	07/18/22 – 10/27/22	07/05/22	7	0	175	0
1	Placer	07/18/22 – 10/27/22	07/07/22	3	0	75	60
1	Yolo	07/18/22 – 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.
► 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 Wave 1 counties to confirm use of classrooms for training.
► Continue meeting with Tech Team to discuss technical considerations for CalWIN county training classrooms.
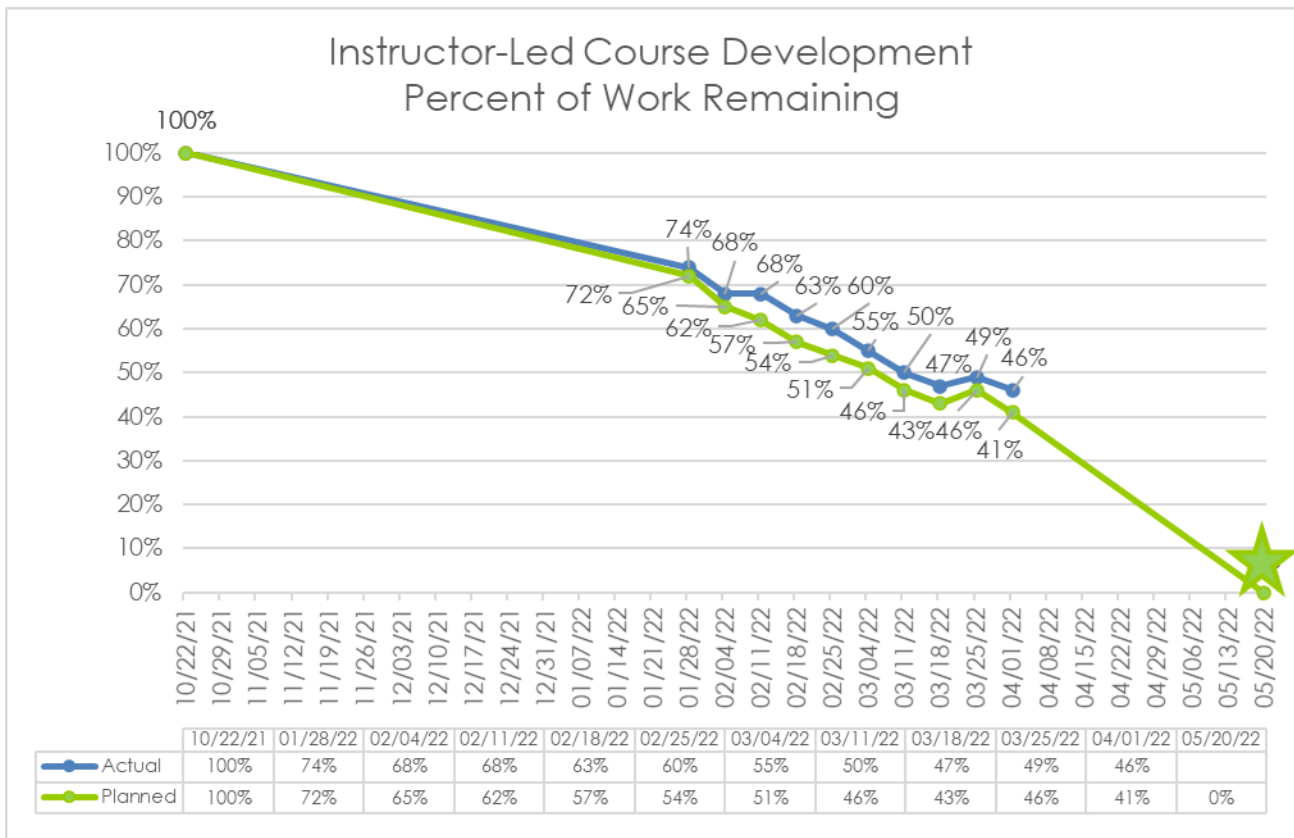► Meet with Contact Center team to discuss CalWIN county training needs and delivery.

► Complete DDEL08 County-Specific Training Plans for Contra Costa, Placer and Yolo Counties.
► Participate in Wave 1 Check-in meeting on 04/06/22.

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. Working with the ISS team to prepare information for necessary actions and documentation. The current statuses of the 86 items are noted below:

Status	County
Impact Analysis Requested	0
Not Started	0
Awareness for Go-Live (include in Go-Live Packet)	55
No Action Needed from CDT Group	20
Requested Additional Clarification	3
Pre-Cutover Bulk Update	3
Pre-Cutover Review Guide	0
Post-Go Live Case Review Guide	3
County Prep	2

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.
► Conducted follow-up meetings with Accenture and Consortium teams on 04/07/22 and 04/08/22 for work plan re-baseline efforts: imaging, technical, conversion and UAT.
► Conducted a weekly Checklist and Task Sync meeting with TOSS teams on 03/29/22.
► Participated in the weekly IPOC/TOSS meeting for Contra Costa County on 03/29/22.
► Prepare for Global IPOC meeting on 04/06/22.
► Develop and draft implementation readiness packet information and socialize with Implementation managers. Develop County Preparation schedule of activities and review the County Prep document activities; met with managers to discuss meeting cadence(s) for County Prep and Go-Live preparation 04/01/22.

5.2   Activities for the Next Reporting Period

► Continue documenting the project readiness checklist items, categories/subcategories, and readiness criteria/metrics for Implementation. Conduct follow-up meetings for re-baseline work plan efforts: Contact Center and Security Work Plan on 04/04/22.

► 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 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. Complete scheduling for Wave 4–6 ad-hoc sessions.

► Conduct cross project meetings for: UAT execution cross-project meetings and imaging/contact center updates on 04/04/22; Wave 2 TPOC meeting on 04/06/22 and Conversion Implementation Readiness Weekly sync on 04/08/22.

► Conduct Global IPOC meeting on 04/06/22.

► 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.

► Discuss, modify, and update the County Prep activities timeline for internal review; County Prep Planning Working sessions on 04/07/22.

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
01.15	Work Plan Monthly Updates – March 2022	N/A	N/A	N/A		
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	01/27/21
02.15	Monthly Status Report – March 2022	N/A	N/A	N/A		
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	04/12/22	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
01.15	Work Plan Monthly Updates – March 2022	On track	FDEL submission 04/05/22 FDEL approval 04/13/22
02.15	Monthly Status Report – March 2022	On track	FDEL submission 04/05/22 FDEL approval 04/13/22
04.06	Business Process Reengineering Plan – Wave 3 (Orange)	On track	FDEL submission 04/07/22 FDEL approval 04/13/22

DEL #	Deliverable Name	Status	Next Deadline
04.07	Business Process Reengineering Plan – Wave 3 (Santa Barbara)	On track	FDEL submission 04/07/22 FDEL approval 04/13/22
04.08	Business Process Reengineering Plan – Wave 3 (Ventura)	On track	FDEL submission 04/07/22 FDEL approval 04/13/22

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	03/30/22	04/06/22
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)	04/12/22	N/A	N/A
07.02	County Change Guide – Wave 1 (Placer County)	04/12/22	N/A	N/A
07.03	County Change Guide – Wave 1 (Yolo County)	04/12/22	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 Flows – Wave 4 (San Diego)	On Track	FWP submission 04/04/22 FWP approval 04/08/22

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	Risk Level	Date Logged
240	The scaling of CalSAWS Production Operations, including Batch Operations, to provide 40 and 58 County support, without effectively taking into account the multi-county and multi-vendor CalSAWS ecosystem may	As we expand to 58 counties and with continual activities to support policy, the consequences of a misstep in executing the CalSAWS M&O batch schedule magnifies the potential impact to business operations and benefits to the participants.	Open	4	Medium	03/03/21

ID	Title	Details	Status	Impact	Risk Level	Date Logged
	impact business operations					
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	4	High	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	01/13/22
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,	Open	5	High	01/12/22

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		Development, and Testing timelines (i.e., schedule) and putting their County Readiness for Go-Live at-risk.				
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
None.						

Table 6.2-2 – CITs

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

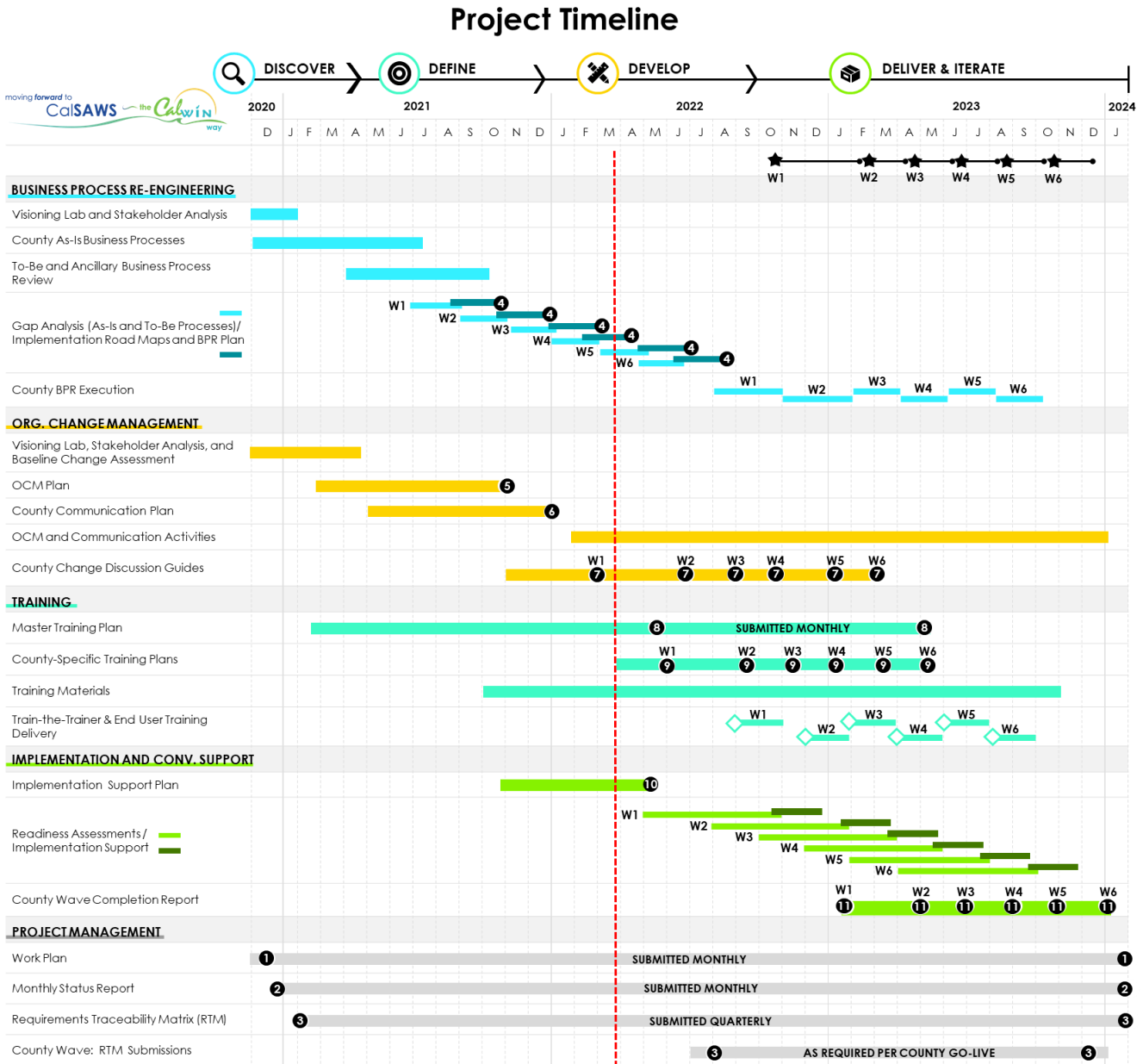| CRFI ID	To	Subject	Category	Distribution Date	Response Due Date
None					

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