☐ **CalSAWS M&E**   ☒ **CalWIN Migration**

Distribution Date:	September 13, 2022
To:	Consortium.RegionalManagers.All, PPOC Wave 1 Counties, IPOC Wave 1 Counties
CIT Name:	**REVISED: Wave 1 CalWIN County Prep Phase Kickoff, Activities, and Materials**
From:	CalSAWS Implementation Support

PPOCs, please forward to the appropriate impacted staff in your county:

☒ General
☐ Policy
    ☐ CW
    ☐ CF
    ☐ MC
    ☐ CMSP
    ☐ FC/KG/AAP
    ☐ Child Care
    ☐ WtW
    ☐ Other Program(s)_____
☐ MyBenefits CalWIN   ☐ BenefitsCal
☐ Customer Correspondence
☐ Other_____

☐ Reports
    ☐ Fiscal
    ☐ Caseload Movement
    ☐ Management
☐ Fiscal
☒ Security
☐ Batch and Interfaces
☐ Imaging
☒ Migration
☐ Conversion
☐ Technical
☐ Training
☐ Help Desk

Description: (Including any step-by-step instructions)	**Purpose** The purpose of this CIT is to inform the Wave 1 CalWIN Counties (Placer and Yolo) of the County Prep Phase Kickoff Meeting, Packet, and supporting documents. These resources will prepare Wave 1 CalWIN Counties for the County Prep Phase, which starts Monday, September 19th, 2022, and goes through Thursday, October 27th, 2022. **Background** The Conversion Team will convert organizational data such as county offices, addresses, and hours of operation into the production environment of CalSAWS. During the County Prep Phase, County Security Administrators and/or other identified County Staff will have the opportunity to configure the CalSAWS application options, review and update Staff Profiles, and county organization data in preparation for Go-Live. In addition, during the County Prep Phase, **All County staff** that will be CalSAWS users will be required to log into the CalSAWS application to validate their CalSAWS credentials and confirm system access prior to go-live. **Note:** Users will not be able to see Caseload Data and Program Functionality pages, as those items will **not be** converted during the County Prep Phase. Case data will be converted at Go-Live.

County Prep Phase Packet

The purpose of the County Prep Phase Packet is to prepare Wave 1 CalWIN Counties for the activities to take place during the County Prep Phase.

More specifically, the purpose of the packet is for CalWIN Counties to:
- Review and understand the instructions for **required** activities
- Review and understand the steps on how to log-in to CalSAWS
- Review CalSAWS application optional activities and associated instructions

Activities	Priority	Level of Effort
43 Total Activities		An estimated amount of time to complete an activity. Represented by a duration per specific action.
26 are Required Must complete for a successful Go-Live	**31 are High Priority** Must have for Go-Live (24 are Required and 7 are Required if Applicable)	
		Examples:
4 are Optional Should be completed during county prep, but can be completed post Go-Live, or not at all	**5 are Medium** Important for Go-Live (2 are Required, 2 are Required if Applicable. 1 is Optional)	5-10 minutes per staff member to Add Staff Schedules to CalSAWS (Required if Applicable activity)
13 are Required if Applicable Optional functionality that must be configured if counties opt in	**7 are Low** Minor impact for Go-Live (3 are Optional, 4 are Required if Applicable)	< 5 minutes per user to Login to CalSAWS (Required activity)

Additional Information
County Prep Phase Kickoff Meeting

The Implementation Team will be hosting a Kickoff Meeting to provide an overview of the County Prep Phase Packet and other supporting materials included with this CIT, as well as the Project Support available during the County Prep Phase. This will also be an opportunity for staff to ask any questions that they may have regarding the required actions that need to be taken.

The targeted audience for this event will be County PPOCs, IPOCs, TPOCs, Security Administrators, and any other County Staff who are responsible for making updates to Staff Profiles and County Organization data. The Kickoff Meeting **will be recorded** and available for viewing on the Web Portal.

The County Prep Phase Kickoff Meeting is scheduled for Thursday, **August 18, 2022, from 1:00 PM– 3:00 PM.**

Meeting invites will go out to County PPOCs and IPOCS. **County PPOCs/IPOCs will be responsible for distributing the invites to the appropriate individuals within their county.**

Note: There will be an additional CIT at a later date as an addendum to the County Prep materials and a separate Kickoff Meeting to provide guidance on System Maintained and County Maintained Security/Staff Profiles and security groups for CalSAWS pages.

	REVISIONS The County Prep Phase Packet has been revised to eliminate one County Preparation activity: • EBT Printer Setup and add three new activities: • Configure Office Type & Region • Configure Units • Configure Security Roles Additionally, the reference materials have been revised to combine the CalSAWS Configuration Guide and the CalSAWS Additional Configuration Guide into a single document called the "**CalSAWS Configuration Guide.**" A new "**CalSAWS Security Role Configuration Guide**" and a "**CalSAWS Login Helpful Hints**" page have also been included. The CalSAWS Login Helpful Hints document should be distributed to your Staff to assist with their task of logging into CalSAWS for the first time. Lastly, the County Prep Phase Kickoff PowerPoint document has been revised to reflect the updated County Prep Phase support model, which includes general Office Hours (open to all subject matter areas) from 8:00 am – 12:00 pm for the first two weeks of the County Prep Phase (09/19/22 through 09/30/22), Monday through Friday, and 9:00 am – 10:30 am for the rest of the County Prep Phase (10/03/22 through 10/27/22) Monday through Friday. Outlook invitations for Daily Office Hours and Daily Debriefs will be distributed to County IPOCs, PPOCs, on 09/13/22. County PPOCs and IPOCs may forward these meeting invitations to targeted staff at their county's discretion. **County Action** The two Wave 1 CalWIN Counties should review the documents listed below, which are also attached to the CIT, **prior to** the Kickoff Meetings and come prepared with any questions that may be outstanding on how to complete the needed updates. • County Prep Phase Packet • CalSAWS Configuration Guide • CalSAWS Additional Configuration Guide • CalSAWS Lobby Monitor Setup Guide • County Prep Phase Non-Configuration worksheets (optional tool to help with data entry planning) If you have any question on this CIT please reach out to the contacts below and cc your Regional Manager(s) (RMs).
Primary Project Contact: (Name, phone number, email address)	Jennifer Carpenter Email: CarpenterJ@CalSAWS.org

Backup Project Contact: (Name, phone number, email address)	Mara Jennings Email: JenningsM@CalSAWS.org
Attachments:	• County Prep Phase Packet • CalSAWS Configuration Guide • CalSAWS Security Role Configuration Guide • CalSAWS Wave-1 County Prep Kickoff.pptx • CalSAWS Login Helpful Hints
Web Portal Link:	██████ OR You may also retrieve the CIT document and attachments by following these steps: 1. Click on the CRFIs & CITs link at the top of the page. 2. Click on the "CalSAWS Information Transmittal (CIT)" folder. 3. Click on the "2022" folder. 4. Click on the appropriate CIT # folder.