

CalSAWS M&E

CalWIN Migration

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| Distribution Date: | February 6, 2023 |
| To: | Consortium.RegionalManagers.All, PPOC.Ventura, PPOC.Santa Barbara, PPOC.Orange, IPOC.CalWIN.Wave 3 Counties |
| CIT Name: | Wave 3 CalWIN County Prep Phase Kickoff, Activities, and Materials |
| From: | CalSAWS Implementation Support |

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

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| <input checked="" type="checkbox"/> General | <input type="checkbox"/> Reports |
| <input type="checkbox"/> Policy | <input type="checkbox"/> Fiscal |
| <input type="checkbox"/> CW | <input type="checkbox"/> Caseload Movement |
| <input type="checkbox"/> CF | <input type="checkbox"/> Management |
| <input type="checkbox"/> MC | <input type="checkbox"/> Fiscal |
| <input type="checkbox"/> CMSP | <input checked="" type="checkbox"/> Security |
| <input type="checkbox"/> FC/KG/AAP | <input type="checkbox"/> Batch and Interfaces |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Imaging |
| <input type="checkbox"/> WtW | <input checked="" type="checkbox"/> Migration |
| <input type="checkbox"/> Other Program(s) _____ | <input type="checkbox"/> Conversion |
| <input type="checkbox"/> MyBenefits CalWIN | <input type="checkbox"/> Technical |
| <input type="checkbox"/> Customer Correspondence | <input type="checkbox"/> Training |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Help Desk |

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| <p>Description: (Including any step-by-step instructions)</p> | <p>Purpose The purpose of this CIT is to inform the Wave 3 CalWIN Counties (Orange, Santa Barbara, and Ventura) of the County Prep Phase Kickoff Meeting, Packet, and supporting documents. These resources will prepare Wave 3 CalWIN Counties for the County Prep Phase, which starts Monday, March 13th, 2023, and goes through Thursday, April 20th, 2023.</p> <p>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.</p> <p>County Prep Phase Packet</p> |
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The purpose of the County Prep Phase Packet is to prepare Wave 3 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 |
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| <p>42 Total Activities</p> <p>24 are Required Must complete for a successful Go-Live</p> <p>4 are Optional Should be completed during county prep, but can be completed post Go-Live, or not at all</p> <p>14 are Required if Applicable Optional functionality that must be configured if counties opt in</p> | <p>31 are High Priority Must have for Go-Live (22 are Required and 9 are Required If Applicable)</p> <p>4 are Medium Important for Go-Live (2 are Required, 1 is Required If Applicable, 1 is Optional)</p> <p>7 are Low Minor Impact for Go-Live (3 are Optional, 4 are Required if Applicable)</p> | <p>An estimated amount of time to complete an activity. Represented by a duration per specific action.</p> <p>Examples:</p> <p>5-10 minutes per staff member to Add Staff Schedules to CalSAWS (Required If Applicable activity)</p> <p>< 5 minutes per user to Login to CalSAWS (Required activity)</p> |

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 Tuesday, **February 14th, 2023, from 1:30 PM – 3:00 PM.**

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

County Action

The three Wave 3 CalWIN Counties should review the documents listed below, which are also attached to the CIT, **prior to** the Kickoff Meetings and come

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| | <p>prepared with any questions that may be outstanding on how to complete the needed updates.</p> <ul style="list-style-type: none"> • County Prep Phase Packet • CalSAWS Configuration Guide • CalSAWS Lobby Monitor Setup Guide • CalSAWS CalWIN UAT_Security and Configuration • CalSAWS Login Helpful Hints • County Prep Activity Completion Checklist <p>If you have any question on this CIT please reach out to the contacts below and cc your Regional Manager(s) (RMs).</p> |
| <p>Primary Project Contact: (Name, phone number, email address)</p> | <p>Jennifer Carpenter Email: CarpenterJ@CalSAWS.org</p> |
| <p>Backup Project Contact: (Name, phone number, email address)</p> | <p>Mara Jennings Email: JenningsM@CalSAWS.org</p> |
| <p>Attachments:</p> | <ul style="list-style-type: none"> • County Prep Phase Packet • CalSAWS Configuration Guide • CalSAWS Lobby Monitor Setup Guide • CalSAWS CalWIN UAT_Security and Configuration • CalSAWS Login Helpful Hints • County Prep Activity Completion Checklist |
| <p>Web Portal Link:</p> | <p>██████████</p> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"> 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 "2023" folder. 4. Click on the appropriate CIT # folder. |

