CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting Period: March 13, 2023 to March 19, 2023

03/22/23

Table of Contents

1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC

Business Process Reengineering (BPR)	► Wave 2
	   o Provided support to Wave 2 Counties for Go-Live Configurations.
	   o Provided support to Contra Costa County related to Task Management.
	► Wave 3
	   o Provided Configuration support to Wave 3 Counties during County Prep Office Hours.
	   o Completed finding disposition for Ventura County, Santa Barbara County, and Orange County.
	► Wave 4
	   o Facilitated Configuration Kickoff meeting with Santa Cruz County and San Mateo County.
	   o Facilitated Configuration Verification Session with San Diego County.
	   o Scheduled Process Simulation prep sessions for Solano County and San Mateo County.

Organizational Change Management (OCM)	► Wave 4
	   o Continued to monitor the change discussions taking place in Wave 4 Group 1 Counties. Solano County reported the change discussion has been completed on 03/17/23. San Mateo County reported the change discussion has been completed on 03/10/23.
	   o Conducted the PPOC Weekly Touchpoints with Santa Cruz County from 02/16/23 to 03/16/23 and continued to monitor the change discussions.
	► Wave 5
	   o Completed the Wave 5 CDG FWP comments and reviewed by 03/17/23.
	► Wave 6
	   o Conducted the Wave 6 Working Session Kickoff on 03/16/22 for all Wave 6 Counties.
	   o Sent the CDG Working Sessions Schedule to Wave 6 Counties.
	   o Sent the recording and materials from the Wave 6 Working Session Kickoff.
	► Reviewed the Wave 6 T-9 surveys results with Consortium.
	► Sent the CIT for Wave 4 T-3 to CIT/CRFI Review Group on 03/13/23.
	► Sent the CIT for Wave 2 T+6 to CIT/CRFI Review Group on 03/15/23.
	► Conducted the CNC Session Waves 3–6 on 03/14/23 and 03/16/23.
	► Sent the Newsletter for Wave 3 and Wave 6 to the Consortium.

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Training	► Continued the Wave 3 Counties' Web Based Training for all staff. ► Continued the Wave 3 Counties' Instructor Led Training for all staff. ► Continued the Wave 4 Counties' Web Based Training for all staff. ► Continued the Wave 4 Counties' Instructor Led Training for Early Training and Train the Trainer. ► Started the Wave 5 Counties' Web Based Training for Early Training and Train the Trainer participants. ► Hosted Training Touchpoints with Ventura County, Santa Barbara County, Orange County, San Diego County, San Francisco County, San Mateo County, and Solano County.

Implementation	► Wave 3
	    o Completed 4 of 6 planned strike team meetings on 03/14/23 and 03/16/23
	    o Completed review of 68 conversion defects – 17 will be added to GLP
	 ► Continue working with counties on their CWA user access needs.
	 ► Distributed Readiness Dashboards to Wave 3.
	 ► Conducted the Wave 3 County Prep Office Hours and Debriefs, including individual progress review sessions and presenting metrics on 03/16/23.
	 ► Conducted TOSS IPOC meetings for San Luis Obispo County, Orange County, and Ventura County on 03/15/23 and Wave IPOC meetings for Wave 3 on 03/15/23.
	 ► Completed third week of Wave 2 Post-Implementation support.
	 ► Distributed 3x Fact Sheets for common user questions relevant to Go-Live.
	 ► Conducted daily business metrics review and standing internal team calls.
	 ► Managed onsite resource tracker and provided daily resourcing needs.
	 ► Reported Zoom utilization metrics for Santa Clara County, Contra Costa County and Tulare County and proposed virtual support consolidation plan to better serve counties.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 Highlights of the Reporting Period

► **Staff Onboarding**
   o Continued planning for and onboarding staff resources.
► **Information Coordination for CalWIN Counties**
   o Continued to collaborate with other teams to coordinate information for the CalWIN Counties.
► **County Work Plans**
   o Critical Path Reporting Waves 2–6 – Developed weekly summary report and made available for review to the Consortium Leadership during the week of 03/15/23.
   o Work Plan Updates – Continued to facilitate the Work Plan updates for Wave 2 through Wave 6 with the Consortium project teams to improve Project Plan

accuracy, updates, identify milestones, critical path, and cross-team dependencies. Escalations provided for items not on track in the Work Plans.
► **Deliverables and Work Products – Submitted the following:**
   o FWP 07.13: County Change Guide – Wave 5 (Alameda) on 03/13/23.
   o FWP 07.14: County Change Guide – Wave 5 (Fresno) on 03/13/23.
   o FWP 07.15: County Change Guide – Wave 5 (Sonoma) on 03/13/23.

1.3   Activities for the next Reporting Period

► **Staff Onboarding**
   o Continue planning for and onboarding staff resources.
► **Information Coordination for CalWIN Counties**
   o Continue to collaborate with other teams to coordinate information for the CalWIN Counties.
► **County Work Plans**
   o Continue updating Wave 1–6 County Work Plans for the Implementation Readiness Checklist.
► **Deliverables and Work Products – Submit the following:**
   o No scheduled submissions.

2.0 Business Process Reengineering (BPR)

2.1   Highlights of the Reporting Period

► **Process Simulation**
   o Completed Process Simulation finding disposition with Orange County, Santa Barbara County, and Ventura County.
   o Continued prep activities for the Wave 4 Counties.
   o Conducted kickoff session for Wave 4 (San Mateo County and Solano County).
   o Finalized weekly sessions schedule with Santa Cruz County and Solano County.
   o Finalized 3-day prep plan for San Diego County and San Mateo County.
► **Configuration**
   o Provided continued support to Wave 2 Counties for Go-Live configurations.
   o Provided Configuration support to Wave 3 Counties during County Prep Office Hours.
   o Facilitated Configuration Kickoff meeting with Santa Cruz County on 03/14/23.
   o Facilitated Configuration Kickoff meeting with San Mateo County on 03/15/23.
   o Facilitated Configuration Verification Session with San Diego County on 03/15/23 and 03/16/23.

2.2   Activities for the Next Reporting Period

► **Process Simulation**
   o Process Simulation prep sessions with Santa Cruz County to begin on 03/20/23.
   o Process Simulation prep sessions with Solano County to begin on 03/21/23.
   o Continue prep sessions for Wave 4 Counties.

► **Configuration**
- o Facilitate Configuration Working session with San Diego County 03/20/23 – 03/24/23.
- o Provide Configuration support to Wave 2 Counties for Go-Live configurations.
- o Provide Configuration support to Wave 3 Counties for county prep activities.

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

► **Wave 4 Change Discussion Guides**
- o Continued to monitor the change discussions taking place in Wave 4 Group 1 Counties. Solano County reported the change discussion completed on 03/17/23. San Mateo County reported the change discussion completed on 03/10/23.
- o Conducted the PPOC Weekly Touchpoints with Santa Cruz County from 02/16/23 to 03/16/23 and continued to monitor the change discussions.

► **Wave 5 Change Discussion Guides**
- o Completed the Wave 5 CDG FWP comments and submitted on 03/13/23.

► **Wave 6 Change Discussion Guides**
- o Conducted the Wave 6 Working Session Kickoff on 03/16/22 for all Wave 6 Counties.
- o Sent the CDG Working Sessions Schedule to Wave 6 Counties.
- o Sent the recording and materials from the Wave 6 Working Session Kickoff.

► **Change Readiness Surveys**
- o Reviewed the Wave 6 T-9 surveys results with Consortium.
- o Sent the CIT for Wave 4 T-3 to CIT/CRFI Review Group on 03/13/23.
- o Tested and finalized the Wave 5 T-6 to Wave 5 Counties on the week of 03/13/23.
- o Sent the CIT for Wave 2 T+6 to CIT/CRFI Review Group on 03/15/23.

► **Change Network Champion (CNC) Meetings**
- o Conducted the CNC Session Waves 3–6 on 03/14/23 and 03/16/23.
- o Finalized the CNC Session deck for Wave 2.

► **Infographics**
- o Continued to review Wave 3-6 infographics with the Consortium.

► **Newsletter**
- o Sent the Newsletter for Wave 3 and Wave 6 to Consortium.
- o Continued to develop the Newsletter Wave 2 Post-Go-Live.

3.2 Activities for the Next Reporting Period

► **Wave 4 Change Discussion Guides**
- o Continue to monitor the change discussions taking place in Wave 4 Counties.

► **Wave 5 Change Discussion Guides**
- o Obtain Wave 5 CDG FWP County sign-off the week of 03/20/23.
- o Prepare to conduct the Wave 5 CDG Prep Sessions with Alameda County and Sonoma County on the week of 03/27/23.

► **Wave 6 Change Discussion Guides**
- o Confirm the CDG Working Sessions Schedule with Wave 6 Counties.
- o Send the CDG Working Sessions Invites to the Wave 6 Counties.

- ► **Change Readiness Surveys**
  - o Review the Wave 6 T-9 surveys results with San Francisco County and Sacramento County on 03/20/23 and 03/24/23.
  - o Distribute the CIT for Wave 4 T-3 to the Wave 4 Counties on 03/20/23.
  - o Open the Wave 5 T-6 to Wave 5 Counties on 03/20/23.
  - o Distribute the CIT for Wave 2 T+6 to the Wave 2 Counties on 03/20/23.
- ► **Change Network Champion (CNC) Meetings**
  - o Conduct the dry run for CNC Session Wave 2.
  - o Send the CNC Session materials and resources to Waves 3–6.
- ► **Infographics**
  - o Send the Wave 3–6 infographics to the CIT/CRFI Review Group on 03/20/23.
- ► **Newsletter**
  - o Send the Newsletter for Wave 3 and Wave 6 to the CIT/CRFI Review Group on 03/22/23.
  - o Continued to develop the Newsletter Wave 2 Post-Go-Live.

4.0 Training

4.1 Highlights of the Reporting Period

- ► **Training Advisory Council**
  - o Continued planning for Training Advisory Council (TAC) meeting on 03/29/23.
- ► **Wave 3: Orange, Santa Barbara, and Ventura County Training**
  - o Continued WBTs of WBTs for all staff.
  - o Continued ILTs for all staff.
  - o Hosted Training Touchpoint with Orange County.
  - o Hosted Training Touchpoint with Santa Barbara County.
  - o Hosted Training Touchpoint with Ventura County.
- ► **Wave 4: San Diego, San Mateo, Santa Cruz, and Solano County Training**
  - o Completed Week 9 of WBTs for Early Training and Train the Trainer participants.
  - o Completed Week 6 of WBTs for all staff.
  - o Continued ILTs for Santa Cruz County Early Training.
  - o Started ILTs for San Diego County Train the Trainer Group 1.
  - o Hosted Training Touchpoint with San Diego County.
  - o Hosted Training Touchpoint with San Mateo County.
  - o Hosted Training Touchpoint with Solano County.
- ► **Wave 5: Alameda, Fresno, and Sonoma County Training**
  - o Completed Week 1 of WBTs for Early Training and Train the Trainer participants.
  - o Hosted Alameda County ILT Walkthroughs.
- ► **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
  - o Hosted Training Touchpoint with San Francisco County.

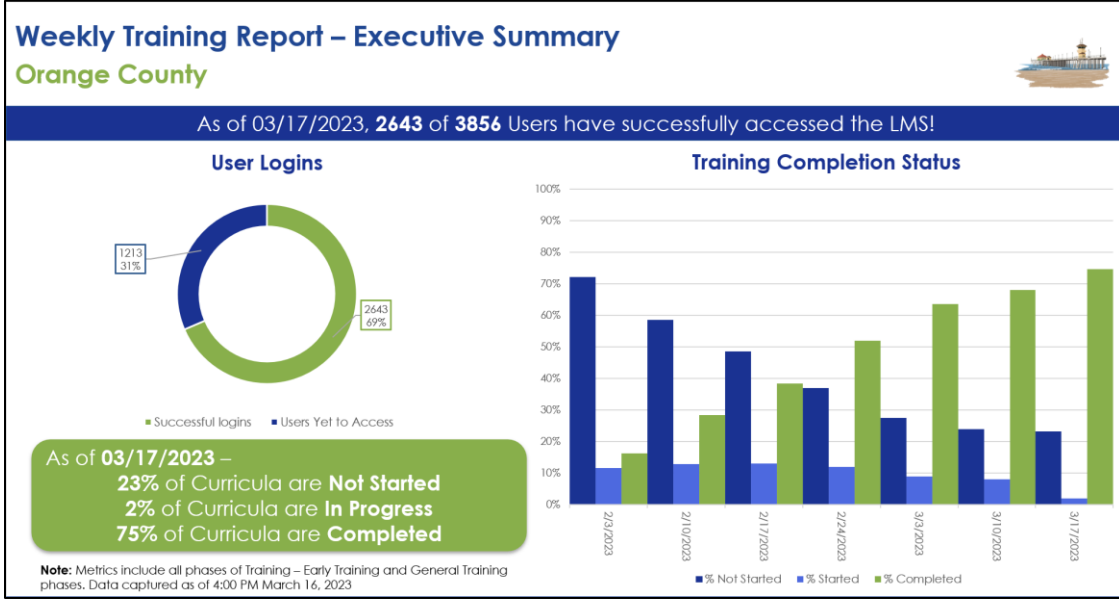**Figure 4.1-1 – Weekly WBT Training Report – Orange County**

Figure 4.1-2 – Weekly WBT Training Report – Ventura County

Figure 4.1-3 – Weekly WBT Training Report – Santa Barbara County
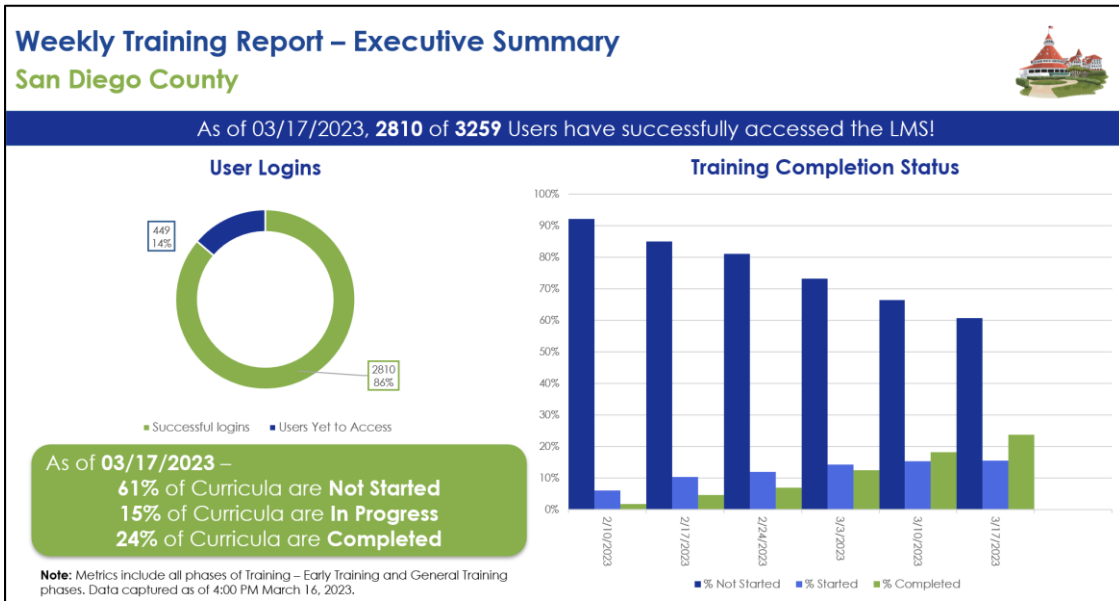
Figure 4.1-4 – Weekly WBT Training Report – San Diego County
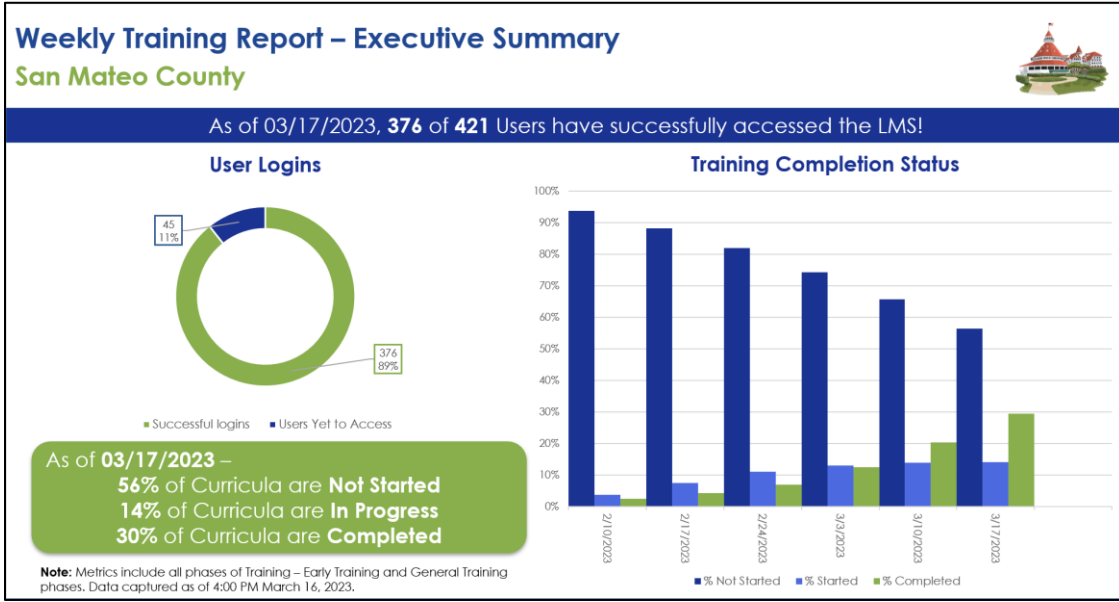
Figure 4.1-5 – Weekly WBT Training Report – San Mateo County
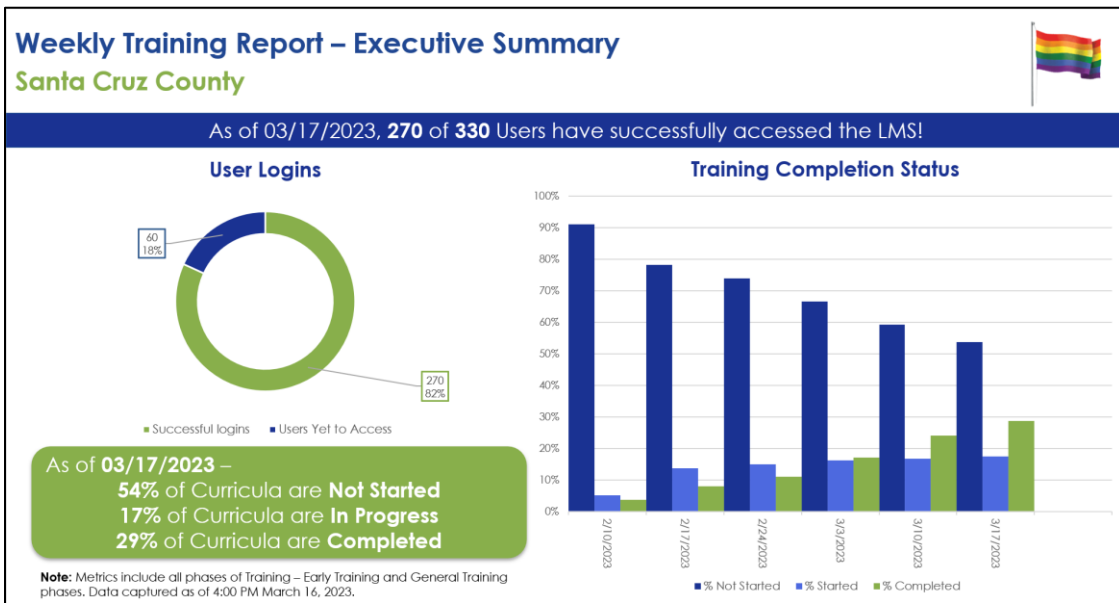
Figure 4.1-6 – Weekly WBT Training Report – Santa Cruz County

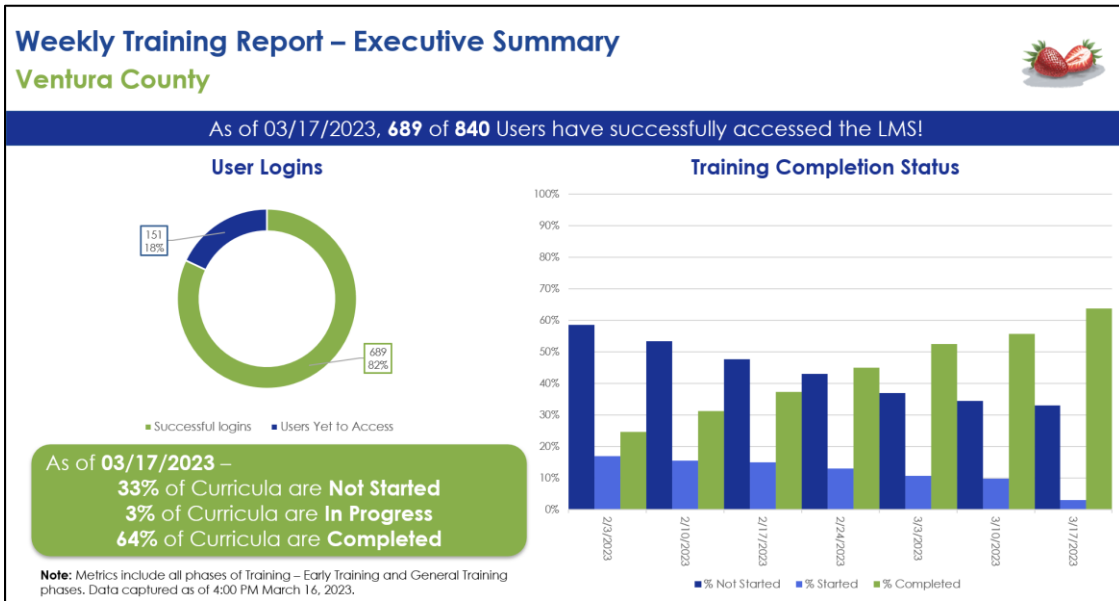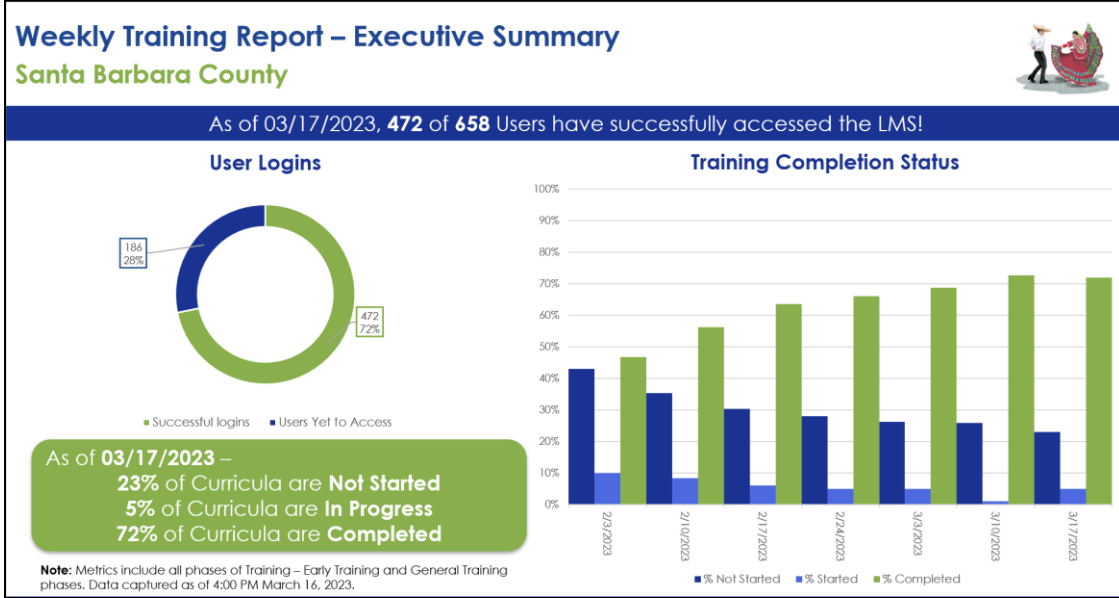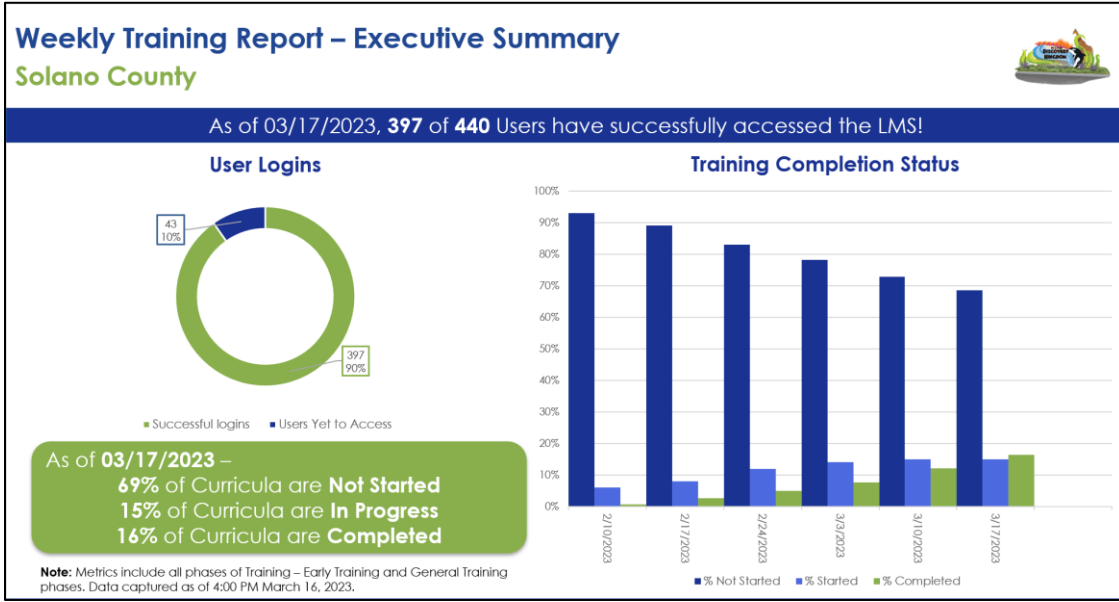**Figure 4.1-7 – Weekly WBT Training Report – Solano County**
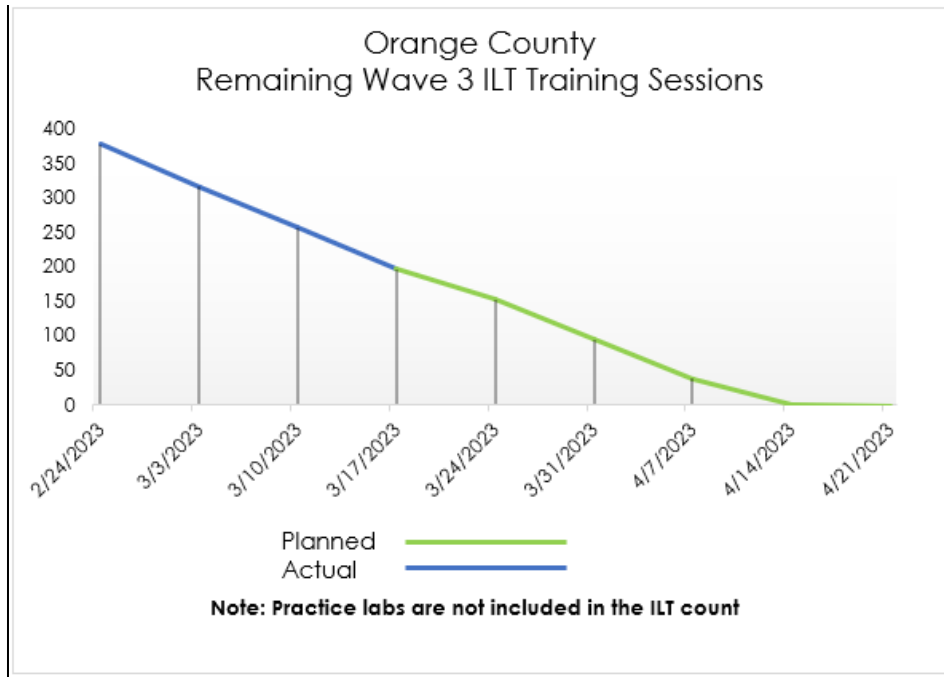
Figure 4.1-8 – Weekly ILT Training Report – Orange County
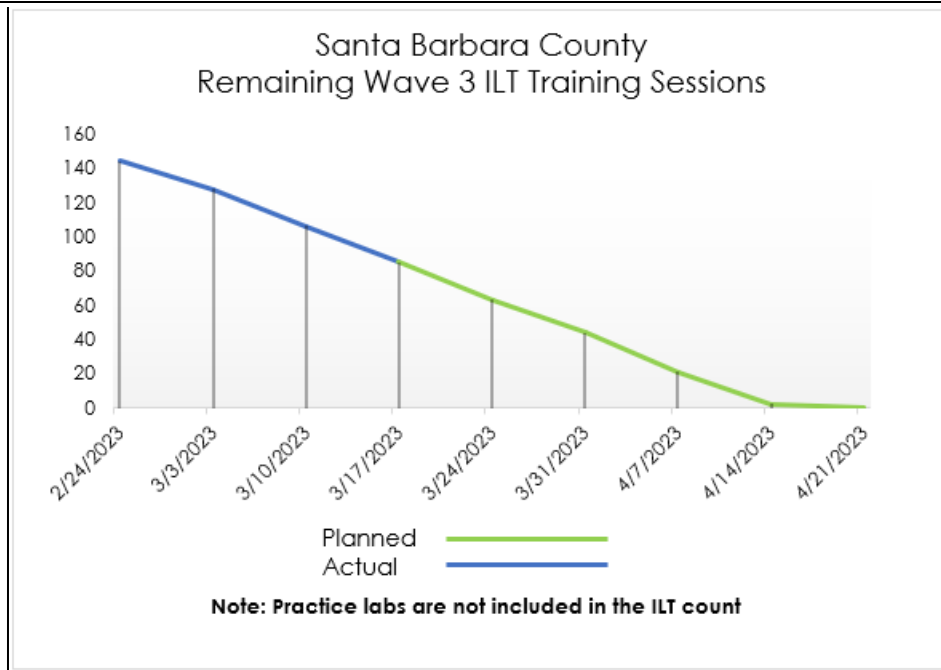
Figure 4.1-9 – Weekly ILT Training Report – Santa Clara County
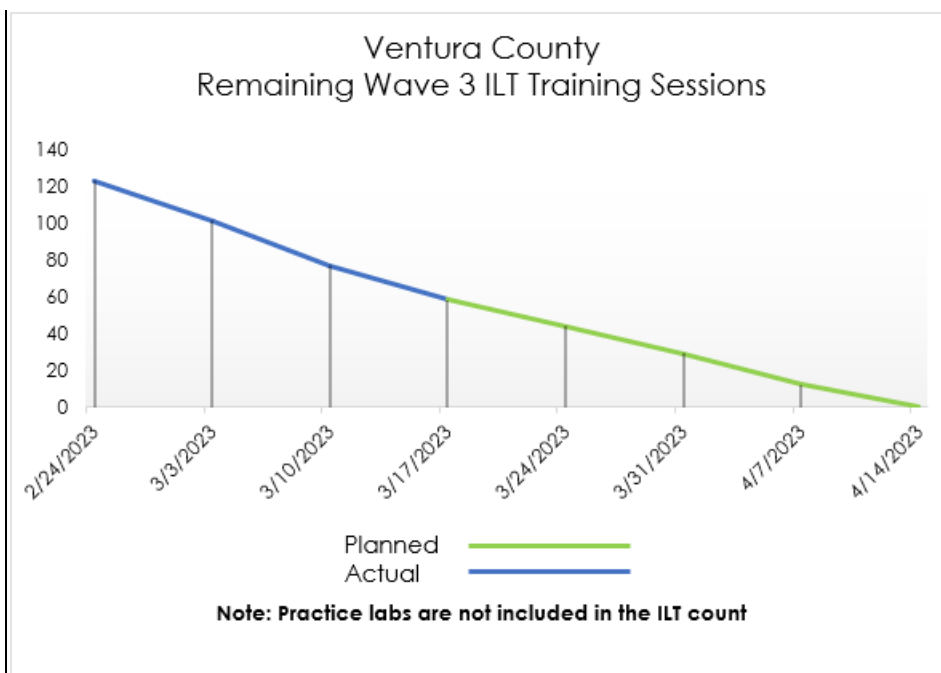
Figure 4.1-10 – Weekly ILT Training Report – Ventura County

4.2   Activities for the Next Reporting Period

► **Training Advisory Council**
  o   Continue planning for Training Advisory Council (TAC) meeting on 03/29/23.
► **Wave 3: Orange, Santa Barbara, and Ventura County Training**
  o   Continue WBTs for all staff.
  o   Continue ILTs for all staff.
  o   Host Training Touchpoint with Ventura County.

- o Host Training Touchpoint with Santa Barbara County.
- o Host Training Touchpoint with Orange County.
- o Attend Santa Barbara County Leadership Meeting.
- o Attend Ventura County Leadership Meeting.
- o Attend Orange County Leadership Meeting.
- ► **Wave 4: San Diego, San Mateo, Santa Cruz, and Solano County Training**
  - o Continue WBTs for all staff.
  - o Continue ILTs for Santa Cruz County Early Training.
  - o Continue ILTs for San Diego County Train the Trainer.
  - o Host Training Touchpoint with San Mateo County.
  - o Host Training Touchpoint with Santa Cruz County.
- ► **Wave 5: Alameda, Fresno, and Sonoma County Training**
  - o Host Fresno County ILT walkthroughs.
  - o Host Training Touchpoint with Fresno County.
- ► **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
  - o Host Training Touchpoint with San Luis Obispo County.
  - o Host Training Touchpoint with Sacramento County.

5.0 Implementation

5.1 Highlights of the Reporting Period

- ► **Readiness Dashboard and Packet**
  - o Distributed Readiness Dashboard and Packet for Wave 3.
  - o Continued updates to Wave 3, Wave 4, and Wave 5 Readiness Packets and Dashboards.
  - o Began collecting updates to Wave 6 Readiness Dashboard and Packet.
- ► **Lead TOSS/IPOC Meetings**
  - o Conducted TOSS/IPOC checklist review for San Luis Obispo County, Orange County, and Ventura County on 03/15/23.
- ► **Wave IPOC Meetings**
  - o Conducted Wave IPOC meeting for Wave 3 on 03/15/23.
- ► **County Prep Phase**
  - o Facilitated Wave 3 County Prep Office Hours and Debriefs.
  - o Conducted County Prep Progress review sessions with each Wave 3 county and presented metrics on the 03/16/23 Debrief.
- ► **Go-Live Packet (GLP)**
  - o GLP strike team completed 4 of the 6 meetings planned with Wave 3 stakeholders
  - o Completed review of 68 conversion defects; will add 17 to GLP
  - o Scheduled meetings with Wave 3 Counties to review managing Yellow Banner and discrepant data workload.
- ► **Post-Implementation Support**
  - o Completed third week of Wave 2 post-Implementation support.
  - o Distributed three (3) Fact Sheets for common user issues relevant for Go-Live.
  - o Conducted daily business metrics review and standing Implementation Team calls.
  - o Managed onsite resource tracker and provided daily review of resource needs.
  - o Reported Zoom utilization metrics for Santa Clara County, Contra Costa County, and Tulare County and proposed virtual support consolidation plan to better serve counties.

5.2 Activities for the Next Reporting Period

► **Post-Implementation Support**
  o Continue Onsite, Virtual Support to Wave 2 Counties for Post-Implementation.
  o Track interactions and ServiceNow ticket reporting metrics for daily sync meetings.
  o Observe and document post-Implementation trends and issue resolutions.
  o Conduct Virtual Site Visit with Ventura County offices for Wave 3 planning.
  o Review L.A. County CRFI response for W3 Post-Imp and update Gap Analysis.
  o Schedule Wave 3 virtual orientation sessions.
  o Complete Wave 6 draft county profiles.

► **Readiness Dashboard and Packet**
  o Finalize and distribute Readiness Dashboard and Packet for Wave 3 and Wave 5.
  o Continue collecting updates for Waves 3-6 Readiness Packets.

► **Go-Live Packet (GLP)**
  o Strike team will complete review of all open Wave-3 defects.
  o Meet with Wave 3 Counties to review managing Yellow Banner and discrepant data cleanup work.
  o Complete GLP documentation for the Version 3 Go-Live packet.

► **County Prep Phase**
  o Conduct Wave 3 County Prep Office Hours and Daily Debrief.
  o Revise and distribute Wave 3 County Prep Materials with new additions to the Activity list.

► **TOSS/IPOC Meetings**
  o Conduct TOSS/IPOC checklist review for Alameda County (03/21/23, San Francisco County, Orange County (03/22/23), and San Mateo County (03/24/23).

► **Wave IPOC**
  o Conduct Wave IPOC meetings for Wave 5.

6.0 Appendices

6.1 Appendix A – Deliverable Summary

Deliverable Status by Submission

| | | Complete | | Coming Soon | | WAC Approval Pending |

DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final Approval
01	Work Plan – Initial	12/04/20	12/15/20	12/23/20	01/14/21	01/22/21
01.25	Work Plan Monthly Updates – January 2023	N/A	N/A	N/A	02/07/23	02/21/23
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	05/13/22
02.25	Monthly Status Report – January 2023	N/A	N/A	N/A	02/07/23	02/16/23
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
03.08	Requirements Traceability Matrix – Q8	N/A	N/A	N/A	03/03/23	03/10/23
04	Business Process Reengineering Plan	N/A	N/A	09/02/22	09/26/22	10/03/22
07	County Change Guide – Wave 4 Group 2 (Alameda, Fresno, Sonoma)	N/A	N/A	03/27/23	04/18/23	04/27/23
08	Master Training Plan	10/27/21	11/08/21	05/13/22	06/06/22	06/13/22
08.07	Master Training Plan Monthly Update – 07	N/A	N/A	N/A	02/07/23	02/16/23
09	County-Specific Training Plan – Wave 4 (Alameda, Fresno, Sonoma)	N/A	N/A	03/06/23	03/27/23	04/06/23
10	Implementation Support Plan	01/14/22	01/27/22	07/15/22	08/05/22	08/16/22
11	County Implementation Completion Report	09/15/22	09/27/22	N/A	N/A	N/A
11.01	County Implementation Completion Report - Wave 1	N/A	N/A	01/17/23	01/31/23	02/07/23

Figure 6.1-1 – Deliverable Status by Submission

Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
	No schedules submissions.		

Table 6.1-2 – Upcoming Deliverable Deadlines

| | Complete | Coming Soon | County Sign-Off Pending |

ID	Work Product Name	DWP	FWP	Final Approval
07.09	County Change Guide – Wave 4, Group 2 (San Diego)	12/19/22	01/11/23	01/19/23
07.11	County Change Guide – Wave 4, Group 2 (San Cruz)	12/19/22	01/11/23	01/19/23
07.13	County Change Guide – Wave 5 (Alameda)	02/20/23	03/13/23	03/30/23
07.14	County Change Guide – Wave 5 (Fresno)	02/20/23	03/13/23	03/30/23
07.15	County Change Guide – Wave 5 (Sonoma)	02/20/23	03/13/23	03/30/23
09.09	County-Specific Training Plans – Wave 4 (San Diego)	11/18/22	12/19/22	12/27/22
09.10	County-Specific Training Plans – Wave 4 (San Mateo)	11/18/22	12/13/22	12/20/22
09.11	County-Specific Training Plans – Wave 4 (Santa Cruz)	11/18/22	12/13/22	12/20/22
09.12	County-Specific Training Plans – Wave 4 (Solano)	11/18/22	12/21/22	12/29/22
09	County-Specific Training Plans – Wave 5 (Alameda, Fresno, and Sonoma)	01/27/23	02/17/23	02/24/23

Figure 6.1-3 – Work Product Status by Submission

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
07.13	County Change Guide – Wave 5 (Alameda)	On Track	FWP submission 03/13/23 FWP approval 03/20/23
07.14	County Change Guide – Wave 5 (Fresno)	On Track	FWP submission 03/13/23 FWP approval 03/20/23
07.15	County Change Guide – Wave 5 (Sonoma)	On Track	FWP submission 03/13/23 FWP approval 03/20/23

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 considering the multi-County and multi-vendor CalSAWS ecosystem may impact business operations	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
258	The CalWIN Conversion Cutover Window is at-risk of Completing past the 84-hour cutover window.	The CalWIN Conversion Cutover Window is at-risk of Completing past the 84-hour cutover window.	Wave 1–2: Closed Wave 3–6: Open	5	Wave 1: Low Wave 2–6: High	11/03/21
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	Wave 1–2: Closed Wave 3–6: Open	Wave 1: 4 Wave 2–4: 3 Wave 5–6: 2	Wave 1: Low Wave 2: Medium Wave 3: Low Wave 4–6: Medium	12/13/21

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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.	Wave 1–2: Closed Wave 3–6: Open	Wave 1–3: 4 Wave 4–6: 3	Medium	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	Wave 1–2: Closed Wave 3–6: Open	3	Wave 1: Low Wave 2–6: Medium	01/12/22

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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.				
278	CalWIN OCM Implementation Support Plan	Deloitte Deliverable 10, CalWIN OCM Implementation Support Plan, is late, continues to require rework, and does not provide the structure or details necessary to inform the project or County teams of how support will be provided after the CalWIN Counties cut over to CalSAWS. The DDEL was originally due on May 16, 2022, but not released until June 6, 2022. On June 15, 2022, it was decided that the review should be paused due to the coordination needed with project teams on Pre- and Post-Deployment Support roles, responsibilities, tasks, activities, and resources. DDEL 10 will be revised in working sessions with the project teams, and the draft deliverable is targeted to be resubmitted on July 15, 2022. Based on the deliverable process, the earliest the DEL 10 is likely to be finalized is August 18, 2022. The most immediate impact is to the Wave 1 Counties. Without adequate information, neither the project nor County teams can prepare for post-	Closed	4	Wave 1: Low Wave 2–6: Medium	06/28/22

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		implementation support, and County post-implementation support might be insufficient, disorganized, and/or ineffective				
279	CalWIN Counties may not be prepared to reconcile Fiscal and submit State Reports, timely, as they Migrate to CalSAWS	As CalWIN migrates to CalSAWS, Counties may need assistance (from the project) on how to reconcile Fiscal reports as they prepare to submit State reports to CDSS on a monthly basis (and timely)	Wave 1: Closed Wave 2–6: Open	Wave 1: 3 Wave 2–6: 4	Medium	09/14/22
285	Preparing CalWIN counties to operationalize CalSAWS after their Go-Live	If CalWIN counties are not prepared to operationalize CalSAWS after their Go-Live, timely and effective delivery of services could be impacted. During the 60-calendar day Post Implementation support period, migrating CalWIN counties must have available resources and volunteers appropriately allocated for post implementation support, and plan for a gradual transition to self-sufficiency. Success relies on migrating CalWIN Counties demonstrating self-sufficiency at the end of the support period by self-serving and using tools such as the Go-Live Packet and Fact Sheets. It also depends on a collective effort of staff from Deloitte, the Consortium, Accenture, Gainwell, ClearBest, and Counties who can commit to providing a hybrid of virtual and	Open	3	Medium	02/08/23

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		onsite support during the first 60 days after each Wave's Go-Live. CalSAWS Production Counties have knowledge, experience, and use of CalSAWS. However, it is unknown how many support volunteers will be received for each Wave. Migrating CalWIN counties must have internal processes, escalation procedures, and strong support systems in place to ensure staff adoption and sustainment of CalSAWS and minimize business disruptions.				

Table 6.2-1 – Project Risks and Issues

CRFI/CIT/CalSAWS 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
0094-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers (All); IPOCs (Wave 4); TPOCs (Wave 4)	CalWIN Wave 4 March Readiness Dashboard and Packet	CalWIN Migration	03/13/23	Jennifer Carpenter	Mara Jennings
0095-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano, Alameda, Fresno, Sonoma, Sacramento, San Luis Obispo, San Francisco); IPOCs (Wave 4, Wave 5, Wave 6); TPOCs (Wave 4, Wave 5, Wave 6);	County Data Validation (CDV) and Process Simulation – Wave 4 – 6 updated dates	CalWIN Migration	03/13/23	Mike Tombakian	Christy Sharma

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
	Regional Managers					
0097-23	PPOCs (Orange, Santa Barbara, Ventura); Regional Manager (All); IPOCs (Wave 3); TPOCs (Wave 3)	BenefitsCal Features Training – Tier 1 Support Staff	CalWIN Migration	03/13/23	Marsale Eramya	Carrie White
0099-23	PPOCs (Orange, Santa Barbara, Ventura); Regional Managers (All); IPOCs (Wave 3); TPOCs (Wave 3)	CalWIN Wave 3 Readiness Dashboard and Packet – 1st Biweekly March 2023	CalWIN Migration	03/14/23	Jennifer Carpenter	Mara Jennings
0103-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano, Alameda, Fresno, Sonoma, Sacramento, San Luis Obispo, San Francisco); IPOCs (Wave 4, Wave 5, Wave 6); TPOCs (Wave 4, Wave 5, Wave 6)	Update Caseload ID in CalWIN	CalWIN Migration	03/16/23	Mike Tombakian	Christy Sharma

Table 6.2-2 – CITs

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

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary Contact	Backup Contact
23-042	PPOCs (Ventura, Santa Barbara, Orange); Regional Manager (R5)	Wave 3 - Request for Counties to Identify Point of Contact for CBO Support	03/13/23	Open	03/27/23	Marsale Eramya	Carrie White
23-044	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); TPOCs (Wave 4); IPOCs (Wave 4); Regional Managers (R1)	CalWIN Tech Enablement and Security Compliance Wave 4	03/14/23	Open	04/10/23	Melanie Gines	Matt Zoir

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary Contact	Backup Contact
23-045	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); TPOCs (Wave 4); IPOCs (Wave 4); Regional Managers (R1)	CalWIN Wave 2 Pre-Migration Regression Testing	03/15/23	Open	04/10/23	Lloyd Rankine	Matthew Zior

Table 6.2-3 – CRFIs

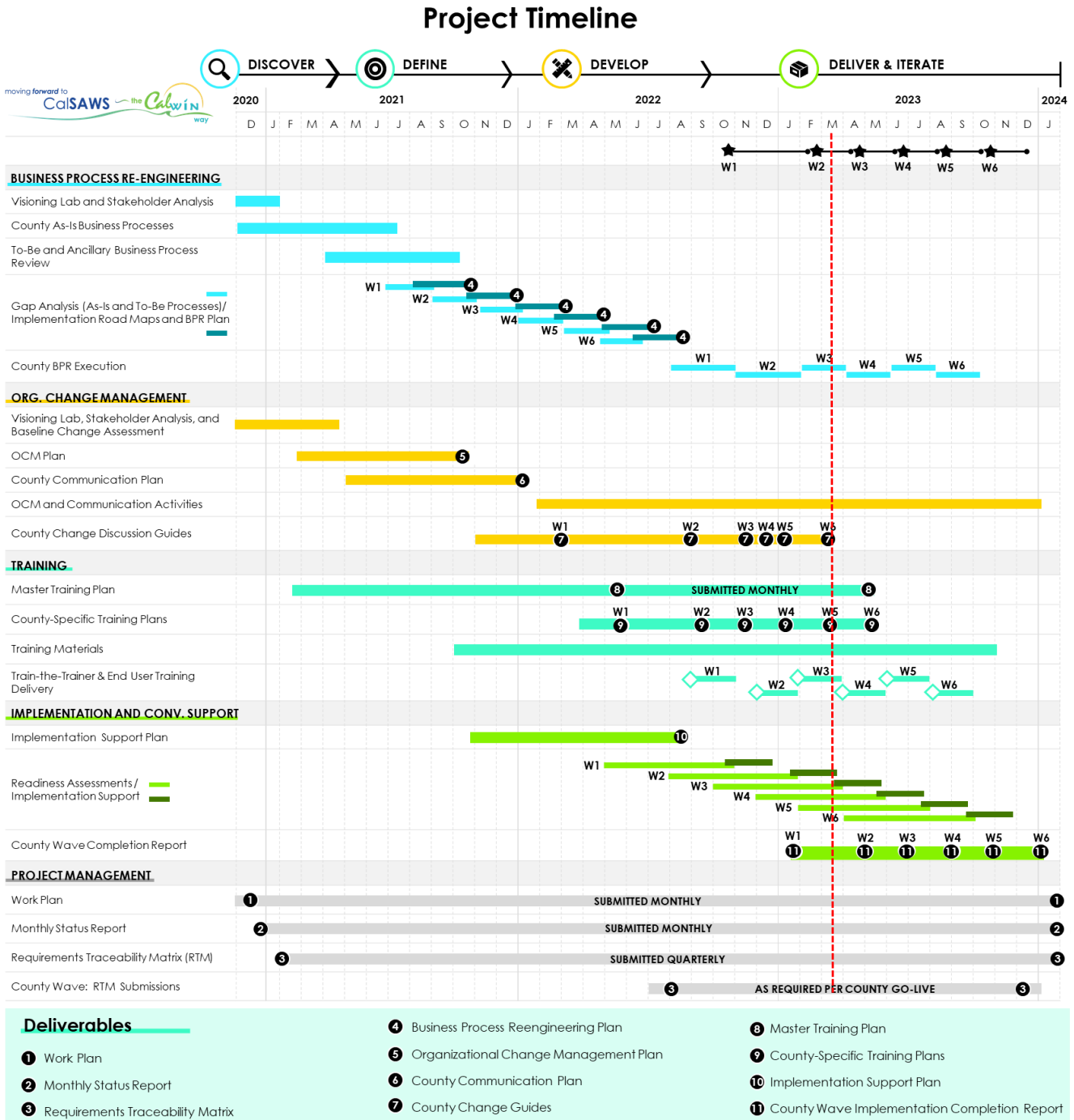## 6.3   Appendix C – Project Work Plan Reports

Project Timeline

Figure 6.3-1 – 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