CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting Period: April 17, 2023 to April 23, 2023

04/26/23

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC

Business Process Reengineering (BPR)	► Wave 2
	   o Provided support for Go-Live Configurations.
	► Wave 3
	   o Provided Configuration support for County Prep.
	► Wave 4
	   o Facilitated a Configuration Working Session with San Mateo County.
	   o Documented Configuration requirements for Process Simulation for San Diego County and Santa Cruz County.
	   o Facilitated the final weekly Process Simulation prep sessions with Santa Cruz County and Solano County, respectively.
	   o Completed Process Simulation prep sessions with San Diego County.
	   o Kicked off data identification for Wave 4 Counties.
	► Wave 5
	   o Scheduled the Process Simulation Kickoff Session discussion with Fresno County for 05/15/23.
	   o Continued the planning for Configuration Kickoff meetings. Scheduled meetings for Alameda County (04/22/23) and Fresno County (05/10/23).

Organizational Change Management (OCM)	► Wave 4 Change Discussion Guides
	   o Continued to monitor the change discussions taking place in Wave 4 Counties.
	► Wave 5 Change Discussion Guides
	   o Conducted the PPOC Weekly Touchpoints with the Wave 5 Counties.
	   o Conducted Change Discussion Office Hours with the Wave 5 Counties.
	   o Submitted the Wave 5 County Change Guide/Change Discussion Guide (CCG/CDG) Draft Deliverables (DDELs) on 04/18/23.
	► Wave 6 Change Discussion Guides
	   o Continued to conduct the Sacramento County Working Sessions and address any comments/action items from the Working Sessions.
	   o Continued to conduct the Sacramento County Weekly Wrap-ups.
	   o Reviewed the CRFI responses from the Wave 6 CDG Prep and prepared to send Wave 6 CDG Prep Session invites.
	► Analyzed the Wave 4 T-3 Readiness Surveys results and developed the survey decks to present to Consortium.
	► Presented the Wave 5 T-6 Surveys results to the Counties on 04/17/23 to 04/20/23.
	► Continued to monitor the Wave 2 T+6 Readiness Surveys for Contra Costa County and Tulare County and closed the survey on 04/21/23.

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	► Monitored the Wave 2 T+6 Readiness Survey for Santa Clara County. ► Sent the CNC Session materials to Waves 3–6. ► Sent the Waves 5 & 6 to the CIT/CRFI Review Group for review on 04/14/23. ► Sent the Wave 4 Infographics to the CIT/CRFI Review Group on 04/20/23. ► Distributed the Wave 3 Infographics to the Wave 3 Counties on 04/19/23. ► Distributed the Waves 5 & 6 Infographics to the Waves 5 & 6 Counties on 04/21/23.
Training	► Completed the Wave 3 Counties' training. ► 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. ► Continued the Wave 5 Counties' Web Based Training for all staff. ► Hosted Training Touchpoints with San Mateo, Ventura, Santa Barbara, San Francisco, Alameda, and Santa Cruz Counties.

Implementation	► Wave 3
	  o The Go-Live Packet (GLP) Strike Team completed a review of all defects for the final Wave 3 GLP.
	  o Completed table-top exercise to validate availability of all reports and folder access for all reporting teams.
	  o Drafted and distributed update CIT for GLP.
	  o Collaborated with the Consortium teams to create FAQ on User Security, caseload mapping, and CBO access.
	  o Tracked Postage payment task through completion for all Wave 3 Counties.
	► Future Waves
	  o Added checklist items to follow up on county approach for Postage initial payment setup.
	  o Added checklist items and improved communication materials to track county approach for CBO access.
	  o Proposed checklist items to track county approach for Lobby Management.
	  o Proposed checklist items to track county approach for Contact Center.
	  o Proposed plan to follow up on supporting Sacramento's requests.
	► Released five (5) revised Fact Sheets and one (1) new Fact Sheet.
	► Distributed a CIT for the Wave 3 Fact Sheets which will be applicable at cutover/Go-Live on 04/19/23.
	► Distributed Trip Books for Orange County, Santa Barbara County, and Ventura County on 04/19/23.
	► Distributed CalSAWS Books on 04/20/23 with Orange County, Santa Barbara County, and Ventura County office support resource information.

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	► Conducted the final Wave 3 County Prep Office Hours and Debriefs on 04/20/23, including individual progress review sessions and presenting metrics.
	► Distributed Wave 3 revised County Prep Materials and CIT on 04/17/23.
	► Distributed Readiness Dashboards and Packets to Wave 3, Wave 4, and Wave 5 counties.
	► Completed the eighth week of Wave 2 post-Implementation support.
	► Delivered the final Wave 3 IPOC Meeting for post-Implementation support on 04/19/23.
	► Conducted daily business metrics review and standing internal team calls.
	► Managed onsite resource tracker and provided daily resourcing needs.
	► Conducted Wave 3 Help Desk Meet & Greet sessions for virtual coordinators.
	► Distributed final resource assignments for onsite/virtual/extended to Orange County, Santa Barbara County, and Ventura County for Weeks 1-9.
	► Distributed Wave 3 Fact Sheets for Go-Live CIT on 04/19/23.
	► Distributed Wave 3 Trip Books for Onsite Teams on 04/19/23.
	► Distributed CalSAWS Books for Onsite Teams to the Wave 3 County PPOCs.

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 04/16/23.
  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 FDEL 07.13: County Change Guide – Wave 5 (Alameda) on 04/18/23.
  o FDEL 07.14: County Change Guide – Wave 5 (Fresno) on 04/18/23.
  o FDEL 07.15: County Change Guide – Wave 5 (Sonoma) on 04/18/23.
  o DWP 07.17: County Change Guide – Wave 6 (San Francisco) on 04/17/23.
  o FDEL 09.16: County Training Plan – Wave 6 (Sacramento) on 04/21/23.
  o FDEL 09.17: County Training Plan – Wave 6 (San Francisco) on 04/21/23.
  o FDEL 09.18: County Training Plan – Wave 6 (San Luis Obispo) on 04/21/23.

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 2–6 County Work Plans for the Implementation Readiness Checklist.
► **Deliverables and Work Products – Submit the following:**
  o DWP 07.16: County Change Guide – Wave 6 (Sacramento) on 04/24/23.
  o FDEL 11.02: County Implementation Completion Report – Wave 2 on 04/28/23.

2.0 Business Process Reengineering (BPR)

2.1   Highlights of the Reporting Period

► **Process Simulation**
  o Continued prep activities with Santa Cruz County, San Diego County, and Solano County.
  o Finalized execution plan with Santa Cruz County and Solano County.
  o Kicked off data identification for Wave 4 Counties.
► **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 a Configuration Working Session with San Mateo County on 04/12/23 and 04/13/23.
  o Scheduled meetings for Alameda County (04/22/23) and Fresno County (05/10/23).

2.2   Activities for the Next Reporting Period

► **Process Simulation**
  o Complete Scenario finalization and execution plan with San Mateo County.
  o Complete JIRA access, UAT2 access, and virtual print setup for all Wave 4 Counties as part of process simulation preparation.
  o Complete data identification and verification documents for execution.
  o Finalize the scenario packets for the Wave 4 Counties.
► **Configuration**
  o Facilitate the Configuration Verification session with Solano County 04/26/23 – 05/05/23.
  o Facilitate Configuration Setup for Process Simulation in UAT2 with San Diego County and Santa Cruz County on 04/24/23.
  o Provide Configuration support to Wave 3 Counties for Go-Live activities.
  o Schedule Configuration Kickoff meeting with Sonoma County.

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 Counties.
- ► **Wave 5 Change Discussion Guides**
  - o Conducted the PPOC Weekly Touchpoints with the Wave 5 Counties.
  - o Conducted Change Discussion Office Hours with all Wave 5 Counties.
  - o Submitted the Wave 5 DDEL CCG/CDG on 04/18/23.
- ► **Wave 6 Change Discussion Guides**
  - o Continued to conduct the Sacramento County Working Sessions and address any comments/action items from the Working Sessions.
  - o Continued to conduct the Sacramento County Weekly Wrap-ups.
  - o Reviewed the CRFI responses from Wave 6 CDG Prep and prepared to send Wave 6 CDG Prep Session invites.
- ► **Change Readiness Surveys**
  - o Analyzed the Wave 4 T-3 Readiness Surveys results and developed the survey decks to present to Consortium.
  - o Presented the Wave 5 T-6 Surveys results to the Counties on 04/17/23 to 04/20/23.
  - o Continued to monitor the Wave 2 T+6 Readiness Surveys for Contra Costa County and Tulare County and closed the survey on 04/21/23.
  - o Monitored the Wave 2 T+6 Readiness Survey for Santa Clara County.
- ► **Change Network Champion (CNC) Meetings**
  - o Sent the CNC Session materials to Waves 3–6.
- ► **Infographics**
  - o Sent the Waves 5 & 6 Infographics to the CIT/CRFI Review Group for review on 04/14/23.
  - o Sent the Wave 4 Infographics to the CIT/CRFI Review Group on 04/20/23.
  - o Distributed the Wave 3 Infographics to the Wave 3 Counties on 04/19/23.
  - o Distributed the Waves 5 & 6 Infographics to the Waves 5 & 6 Counties on 04/21/23.

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 Group 2 Counties.
- ► **Wave 5 Change Discussion Guides**
  - o Conduct the PPOC Weekly Touchpoints with the Wave 5 Counties.
  - o Conclude the Change Discussion Office Hours with all Wave 5 Counties.
- ► **Wave 6 Change Discussion Guides**
  - o Submit the CCG/CDG DWP to Sacramento County on 04/24/23.
  - o Send the Wave 6 CDG Prep Session invites to the Wave 6 Counties.
- ► **Change Readiness Surveys**
  - o Prepare the Wave 4 T-3 Readiness Surveys results to present to the Consortium.
  - o Analyze the Wave 2 T+6 Readiness Surveys results decks for Contra Costa County and Tulare County.

- o Close the Wave 2 T+6 Readiness Survey for Santa Clara County on 04/26/23.
  - o Send the Wave 6 T-6 Readiness Survey CIT to the Consortium for their review on 04/24/23.
- ► **Change Network Champion (CNC) Meetings**
  - o Prepare to conduct the May CNC Sessions for Wave 4–6.
- ► **Newsletters/Infographics**
  - o Send the May Infographics outlines to the Consortium the week of 04/24/23.
  - o Send the May Newsletter outlines to the Consortium the week of 04/24/23.

4.0 Training

4.1 Highlights of the Reporting Period

- ► **Training Advisory Council**
  - o Continued planning for Training Advisory Council (TAC) meeting on 05/17/23.
- ► **Wave 3: Orange, Santa Barbara, and Ventura County Training**
  - o Completed WBTs for all staff.
  - o Completed ILTs for all staff.
  - 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 Continued WBTs for all staff.
  - o Continued ILTs for Early Training and Train the Trainer.
  - o Hosted Training Touchpoint with San Mateo County.
  - o Hosted Training Touchpoint with Santa Cruz County.
- ► **Wave 5: Alameda, Fresno, and Sonoma County Training**
  - o Continued WBTs for all staff.
  - o Continued County-specific updates to ILT materials based on County Walkthroughs.
  - o Hosted Training Touchpoint with Alameda County.
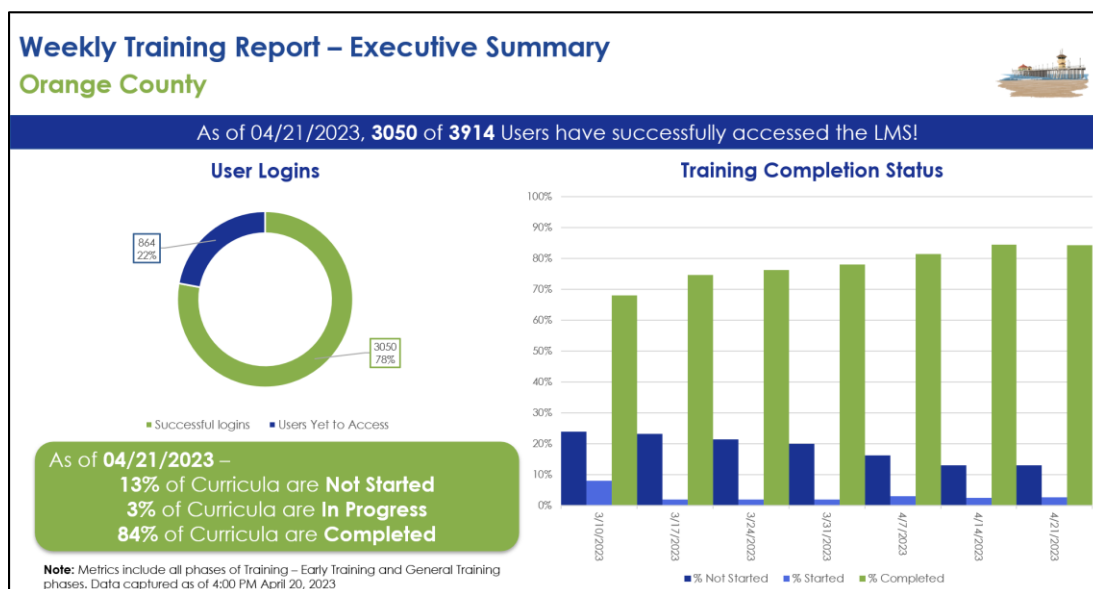- ► **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
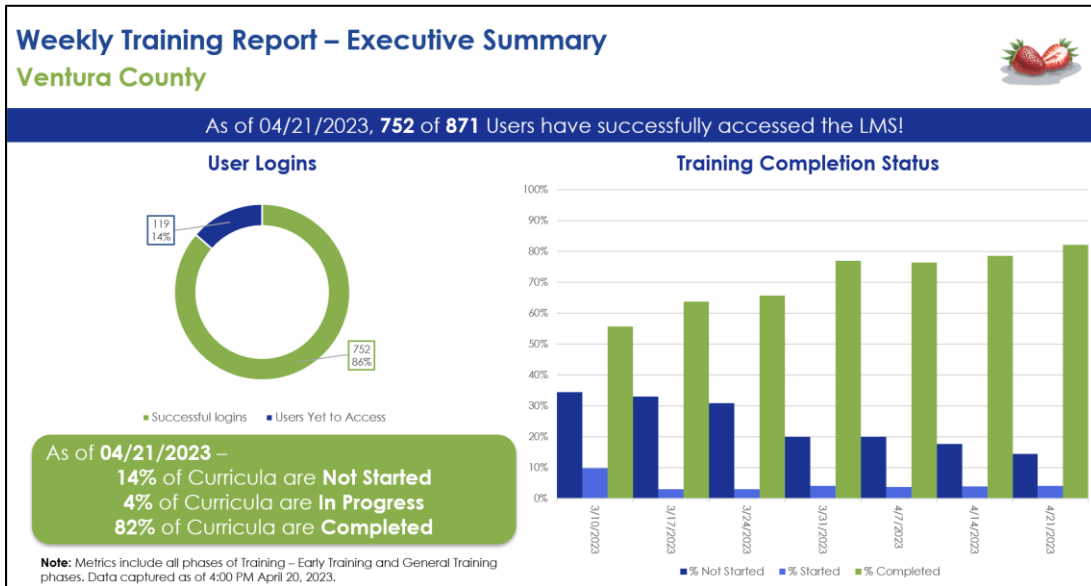

Figure 4.1-1 – Weekly WBT Training Report – Orange County

Figure 4.1-2 – Weekly WBT Training Report – Ventura County
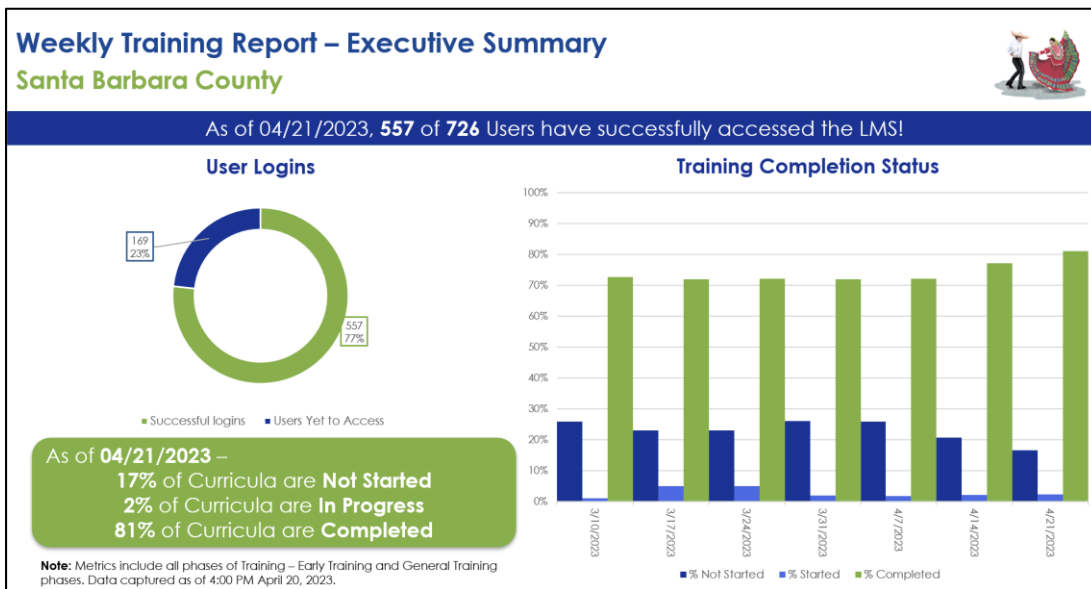
Figure 4.1-3 – Weekly WBT Training Report – Santa Barbara County

Figure 4.1-4 – Weekly WBT Training Report – San Diego County

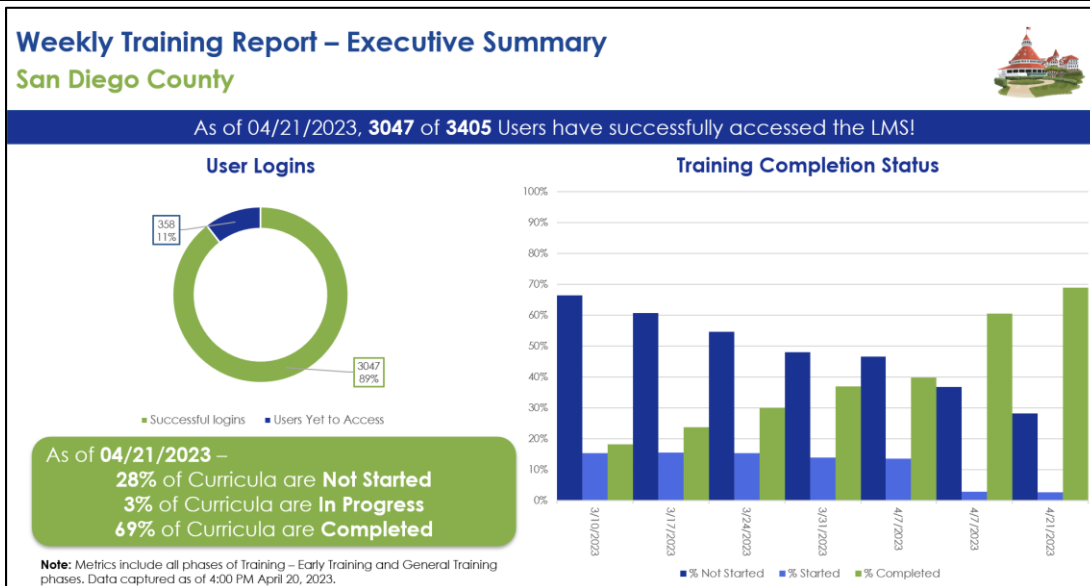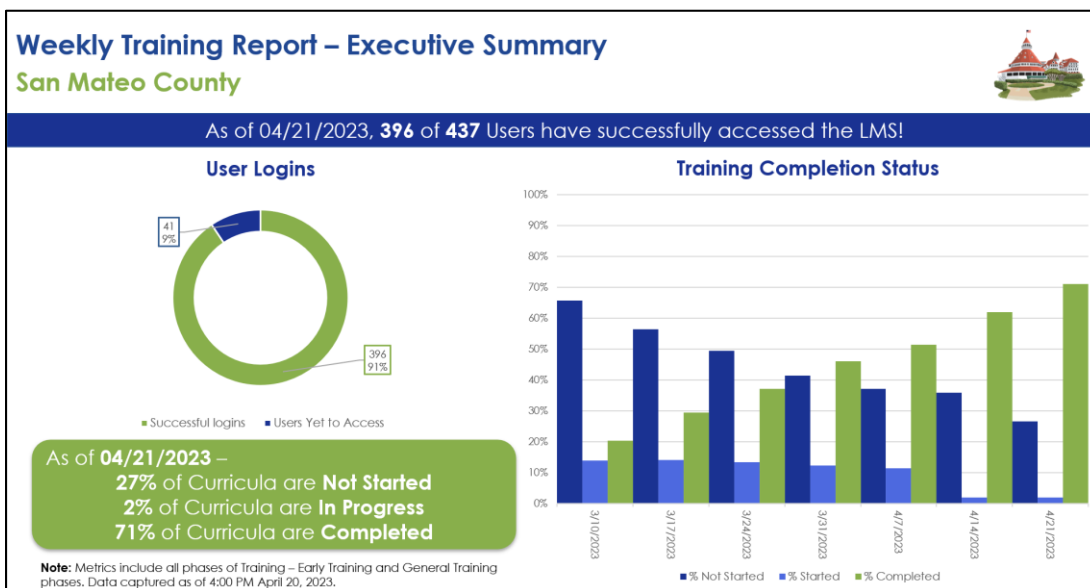**Figure 4.1-5 – Weekly WBT Training Report – San Mateo County**
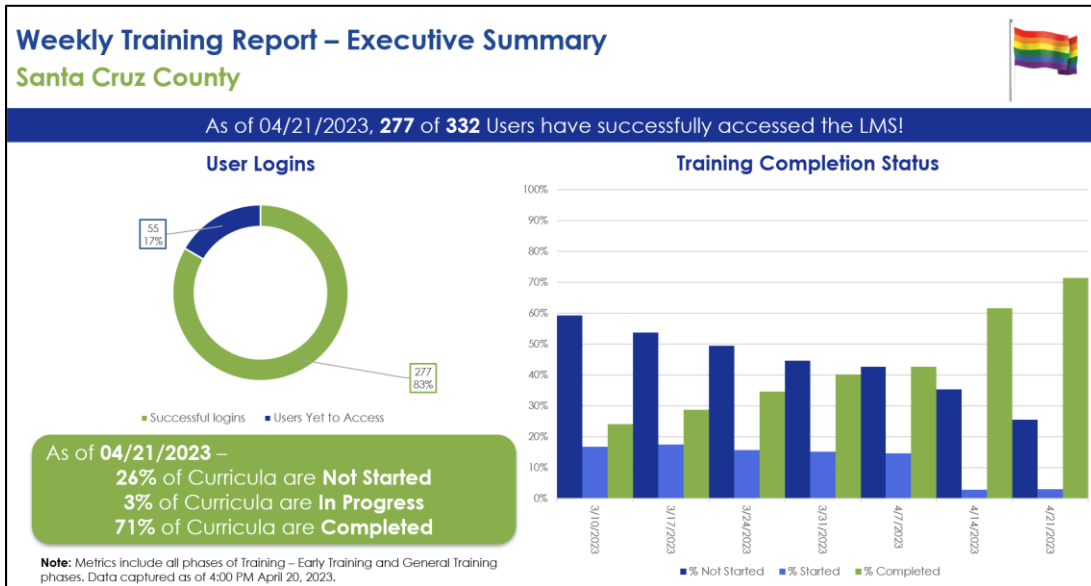
Figure 4.1-6 – Weekly WBT Training Report – Santa Cruz County
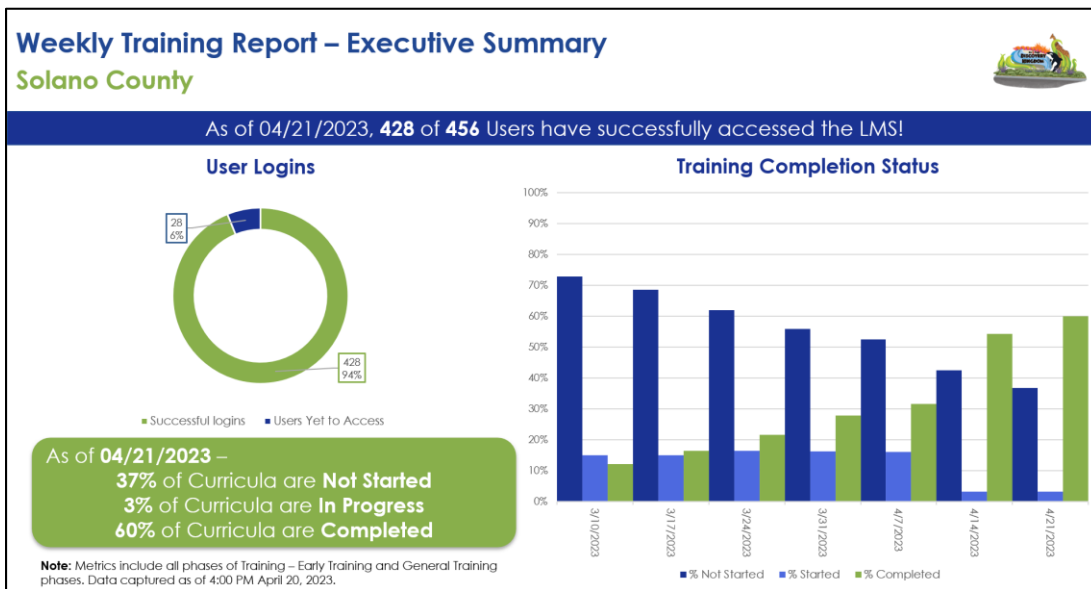
Figure 4.1-7 – Weekly WBT Training Report – Solano County
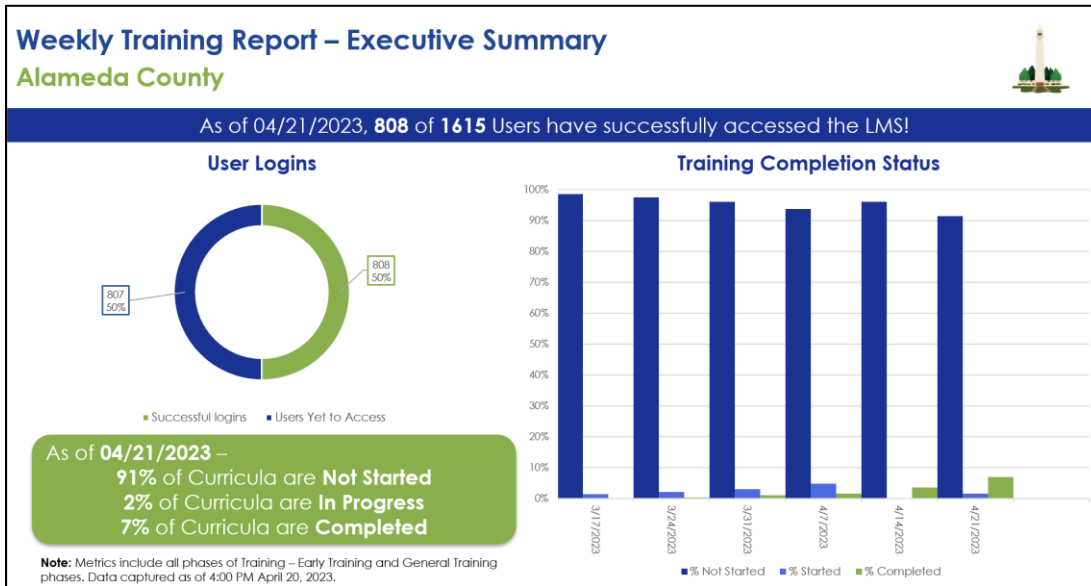
Figure 4.1-8 – Weekly WBT Training Report – Alameda County
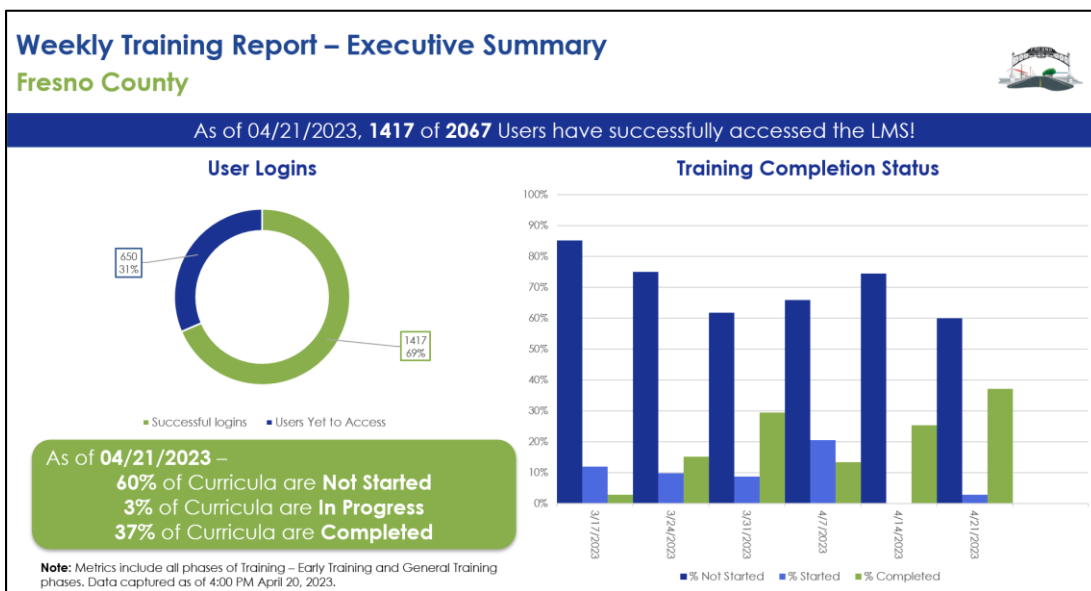
Figure 4.1-9 – Weekly WBT Training Report – Fresno County
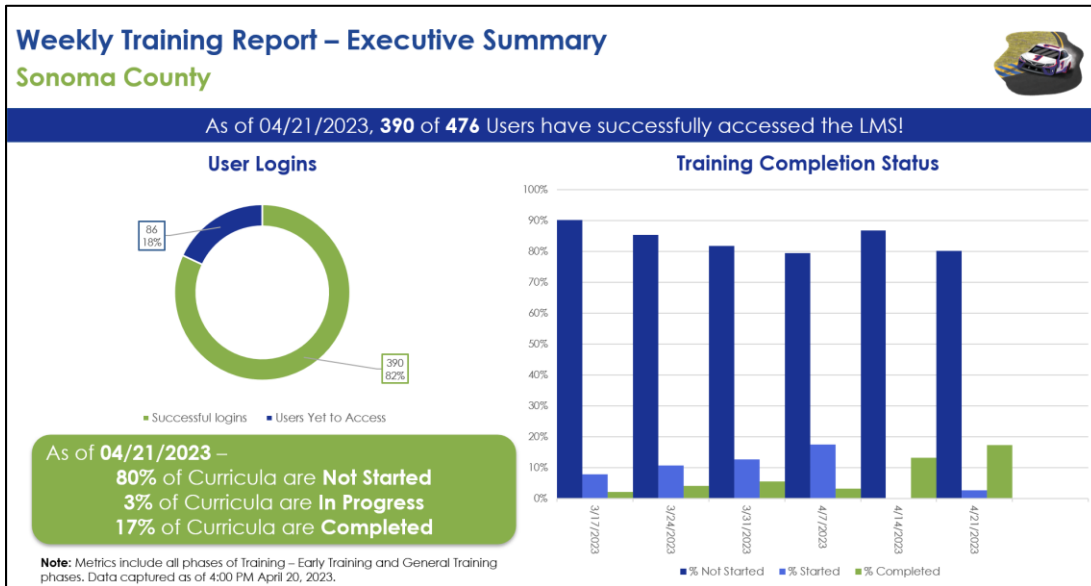
Figure 4.1-10 – Weekly WBT Training Report – Sonoma County
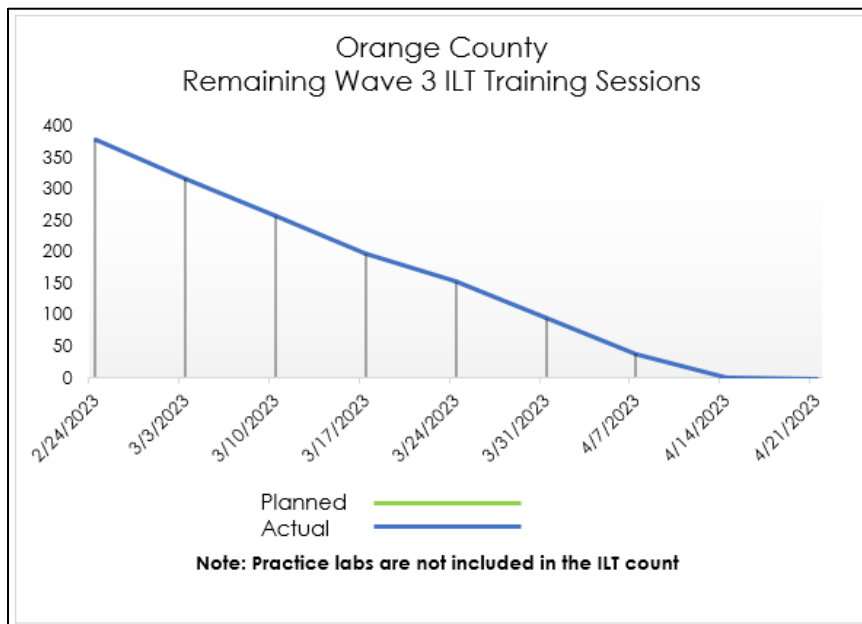
Figure 4.1-11 – Weekly ILT Training Report – Orange County
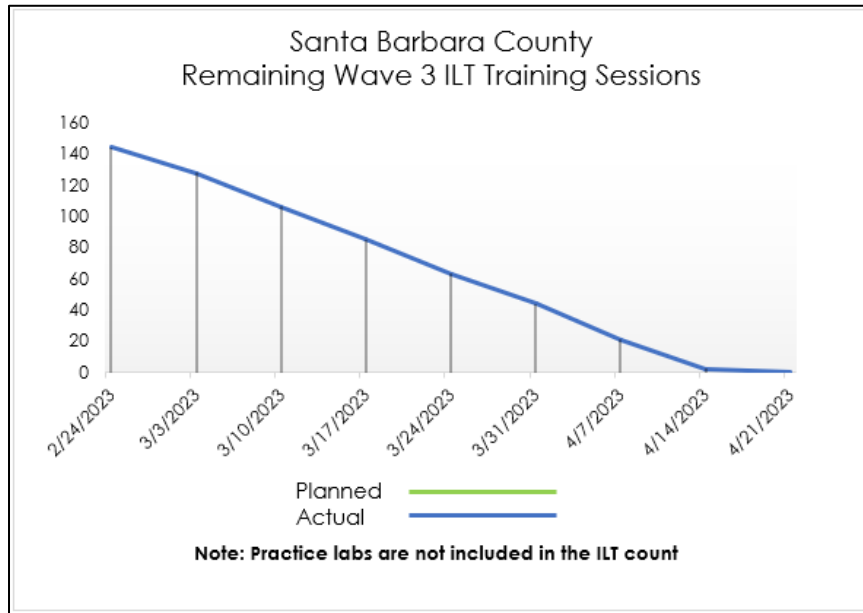
Figure 4.1-12 – Weekly ILT Training Report – Santa Barbara County
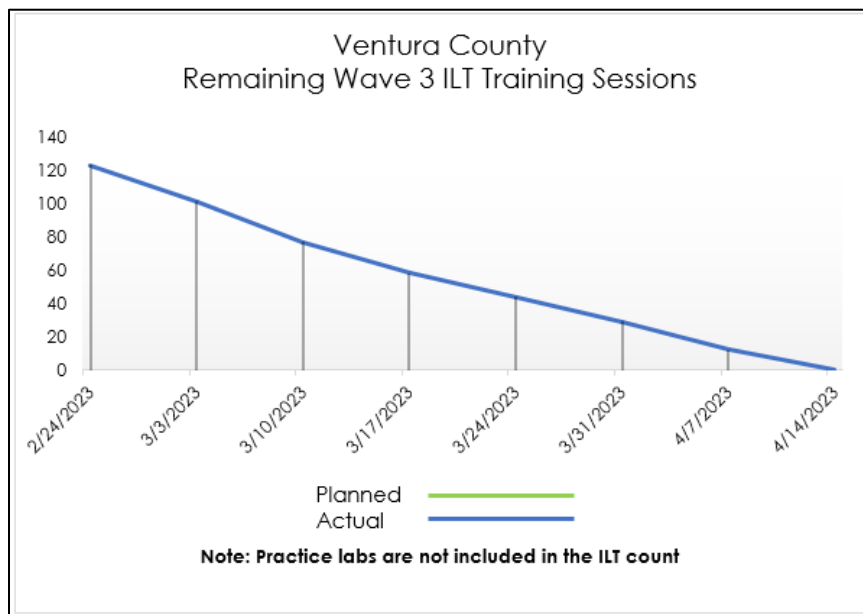
**Figure 4.1-13 – Weekly ILT Training Report – Ventura County**

4.2   Activities for the Next Reporting Period

► **Training Advisory Council**
   o   Continue planning for Training Advisory Council (TAC) meeting on 05/17/23.
► **Wave 4: San Diego, San Mateo, Santa Cruz, and Solano County Training**
   o   Continue WBTs for all staff.
   o   Continue ILTs for Early Training and Train the Trainer.
   o   Host Training Touchpoint with Solano County.
   o   Host Training Touchpoint with San Diego County.
► **Wave 5: Alameda, Fresno, and Sonoma County Training**
   o   Continue WBTs all staff.

- o   Continue County-specific updates to ILT materials based on County Walkthroughs.
- o   Host Training Touchpoint with Fresno County.
- o   Host Training Touchpoint with Sonoma County.
- ► **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
  - o   Continue planning for Wave 6 CalSAWS training.
  - 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 Dashboards and Packets for Waves 3–5.
  - o   Continued updates to Waves 4–6 Readiness Packets and Dashboards.
- ► **Lead TOSS/IPOC Meetings**
  - o   Conducted TOSS/IPOC checklist review for Alameda County (04/18/23), Santa Barbara County (04/18/23), San Diego County (04/19/23), San Luis Obispo County (04/19/23), and Ventura County (04/19/23).
- ► **Wave IPOC Meetings**
  - o   Conducted the Wave 3 IPOC meeting (04/19/23).
- ► **Green Light Meetings**
  - o   Conducted the Wave 3 Go Live Green Light meeting (04/19/23).
- ► **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 04/20/23 debrief.
  - o   Distributed revised Wave 3 County Prep Materials and CIT to Wave 3 Counties of 04/17/23.
  - o   Developed Wave 4 Kickoff Materials.
- ► **Go-Live Packet (GLP)**
  - o   The Go-Live Packet (GLP) Strike Team completed a review of all defects for the final Wave 3 GLP.
  - o   Completed table-top exercise to validate availability of all reports and folder access for all reporting teams.
  - o   Drafted and distributed an updated CIT for GLP.
- ► **Other Implementation Support**
  - o   Worked with the Consortium teams to create FAQ on User Security, caseload mapping, and CBO access.
  - o   Tracked Postage payment task through completion for all Wave 3 Counties.
  - o   Proposed plan to follow up on supporting SACs various requests.
- ► **Post-Implementation Support**
  - o   Completed eighth week of Wave 2 post-Implementation support.
  - o   Conducted daily business metrics review and standing Implementation Team calls.
  - o   Managed the onsite resource tracker and provided daily review of resource needs.
  - o   Distributed final resource assignments for onsite/virtual/extended to Orange County, Santa Barbara County, and Ventura County for Weeks 1–9.
  - o   Conducted Wave 3 Help Desk Meet & Greet sessions for virtual coordinators.

- o Distributed the Wave 3 Fact Sheets for Go-Live CIT on 04/19/23.
- o Distributed the Wave 3 Trip Books for Onsite Teams on 04/19/23.
- o Distributed the CalSAWS Books for Onsite Teams to the Wave 3 County PPOCs.
- o Released five (5) revised Fact Sheets and one (1) new Fact Sheet.
- o Distributed the CIT for the Wave 3 Fact Sheets which will be applicable at cutover/Go-Live.
- o Distributed the Trip Books and CalSAWS Books for the Wave 3 post-Implementation Teams.

5.2 Activities for the Next Reporting Period

- ► **Post-Implementation Support**
  - o Conclude Onsite and Virtual Support for Wave 2 Counties post-Implementation.
  - o Deploy Onsite and Virtual Support to Wave 3 Counties for post-Implementation.
  - o Track Wave 2 and 3 interactions and ServiceNow ticket reporting metrics for daily sync meetings.
  - o Observe and document post-Implementation metric trends and issue resolutions.
  - o Facilitate Fact Sheet Review meetings and develop Fact Sheets for distribution.
  - o Review initial Wave 4 Gap Analysis for review and feedback with stakeholders.
  - o Schedule remaining Wave 4 county site visits for post-implementation support.
- ► **Readiness Dashboard and Packet**
  - o Continue collecting updates for Waves 4 through Wave 6 Readiness Packets.
- ► **Go-Live Packet (GLP)**
  - o Distribute final Wave 3 GLP and all Yellow-banner, discrepant data, and CRG reports.
  - o Request Mock 1 data for volume analysis and county workload forecasts.
- ► **Other Implementation Activities**
  - o Update Section Managers on new documentation for User security, caseload/workerID questions, and CBO access questions.
  - o Work with TOSS to incorporate various checklists.
- ► **County Prep Phase**
  - o Conduct Wave 4 County Prep Kickoff on 04/25/23.
- ► **TOSS/IPOC Meetings**
  - o Conduct TOSS/IPOC checklist review for Santa Cruz County (04/25/23), Sonoma County (04/25/23), San Francisco County (04/26/23), and Fresno County (04/26/23).
- ► **Wave IPOC Meetings**
  - o Conduct the Wave 5 IPOC meeting (04/26/23).

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
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
11.02	County Implementation Completion Report - Wave 2	N/A	N/A	04/14/23	04/28/23	05/09/23

Figure 6.1-1 – Deliverable Status by Submission

Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
11.12	County Implementation Completion Report – Wave 2	On Track	FDEL submission 04/28/23 FDEL approval 05/09/23

Table 6.1-2 – Upcoming Deliverable Deadlines

	Complete	Coming Soon	County Sign-Off Pending

ID	Work Product Name	DWP	FWP	Final Approval
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
07.16	County Change Guide – Wave 6 (Sacramento)	04/17/23	05/08/23	05/15/23
07.17	County Change Guide – Wave 6 (San Francisco)	04/17/23	05/08/23	05/15/23
07.18	County Change Guide – Wave 6 (San Luis Obispo)	04/17/23	05/08/23	05/15/23
09.16	County Training Plan – Wave 6 (Sacramento)	03/31/23	04/21/23	04/28/23
09.17	County Training Plan – Wave 6 (San Francisco)	03/31/23	04/21/23	04/28/23
09.18	County Training Plan – Wave 6 (San Luis Obispo)	03/31/23	04/21/23	04/28/23

Figure 6.1-3 – Work Product Status by Submission

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
07.16	County Change Guide – Wave 6 (Sacramento)	On Track	DWP submission 04/24/23 FWP submission 05/08/23 FWP approval 05/15/23

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.	Wave 1–2: Closed Wave 3–6: 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 ready for cutover. This includes clear communication and timelines for what is	Wave 1–3: Closed Wave 4–6: 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
		needed to be completed by when, readiness checklists, early conversations on the transition from the current state to the future state, and clear direction.				
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.	Wave 1–2: Closed Wave 3–6: Open	3	Wave 1: Low Wave 2–6: Medium	01/12/22
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	Open	3	Medium	02/08/23

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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 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
0144-23	PPOCs (Sacramento, San Francisco, San Luis Obispo); Regional Managers (All); IPOCs (Wave 6); TPOCs (Wave 6)	CalWIN Wave 6 April Readiness Dashboard and Packet	CalWIN Migration	04/17/23	Jennifer Carpenter	Mara Jennings
0145-23	PPOCs (Sacramento, San Francisco, San Luis Obispo); Regional Managers (R1, R2, R4); IPOC (Wave 6)	CalSAWS ForgeRock and LMS Access (Wave 6)	CalWIN Migration	04/18/23	Ashley Arnold	Yogesh Patel
0147-23	PPOCs (Orange, Santa Barbara, Ventura); Regional Managers (R5); Section Directors	Wave 3 CalSAWS Infographics #10	CalWIN Migration	04/19/23	Helen Cruz	Araceli Gallardo
0148-23	PPOCs (Orange, Santa Barbara, Ventura, Santa Clara, Contra Costa, Tulare, Yolo, Placer); Regional Managers; IPOCs (Wave 1, Wave 2, Wave 3)	Fact Sheets Available at Wave 3 Go-Live	CalWIN Migration	04/19/23	Jonathan Leathers	Marcharda White
0149-23	PPOCs (48); HelpDesk.All; operator@calheers.ca.gov; EBTManag@osi.ca.gov; bill.kelly@fisglobal.com	Outbound Interface Files Transfer Delay – Post Wave 3B Cutover	CalWIN Migration	04/20/23	Naveen Bhumandala	Umair Khan
0150-23	PPOCs (Orange, Santa Barbara, Ventura); Regional Managers; IPOCs (Wave 3); TPOCs (Wave 3)	CalWIN Wave 3 Readiness Dashboard and Packet – 3rd Weekly April 2023	CalWIN Migration	04/20/23	Jennifer Carpenter	Mara Jennings
0151-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers; IPOCs (Wave 4); TPOCs (Wave 4)	CalWIN Wave 4 Readiness Dashboard and Packet – Monthly April 2023	CalWIN Migration	04/20/23	Jennifer Carpenter	Mara Jennings
0152-23	PPOCs (Alameda, Fresno, Sonoma); Regional Managers; TPOCs (Wave 5); IPOCs (Wave 5)	CalWIN Wave 5 Readiness Dashboard and Packet – Monthly April 2023	CalWIN Migration	04/20/23	Jennifer Carpenter	Mara Jennings

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
0153-23	PPOCs (Ventura, Orange, Santa Barbara); Regional Managers; HelpDesk (All)	CalSAWS Reports, Enhanced Data Reporting (EDR) and Dashboards Availability Post Wave 3C Cutover Go-Live	CalWIN Migration	04/21/23	Claudia Pinto	Cathryn VanNamen
0154-23	PPOCs (Alameda, Fresno, Sacramento, San Francisco, San Luis Obispo, Sonoma); Regional Managers (R1, R2, R4); Section Directors	Waves 5 and 6 CalSAWS Infographics #6	CalWIN Migration	04/21/23	Helen Cruz	Araceli Gallardo

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
23-041	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers (R1, R5)	CalWIN Wave 4 Counties - Request to Identify/Review Portal CBO Data	03/08/23	Open	04/21/23	Marsale Eramya	Carlos Zepeda
23-051	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers	CalWIN Counties BenefitsCal Options – Wave 4	03/31/23	Open	04/21/23	Marsale Eramya	Carlos Zepeda
23-052	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers (R1, R5); IPOCs (Wave 4)	CalWIN Wave 4 Counties – Verify Number of Imaging Office Queues	04/03/23	Open	04/23/23	Inez Finnigan	Rhiannon Chin
23-053	PPOCs (Sacramento); Regional Managers (R2); Section Directors	CalSAWS Wave 6 Sacramento Change Discussion Preparation Sessions	04/06/23	Closed	04/20/23	Araceli Gallardo	Helen Cruz
23-054	PPOCs (San Francisco); Regional Managers (R1); Section Directors	CalSAWS Wave 6 San Francisco Change Discussion Preparation Sessions	04/06/23	Closed	04/20/23	Araceli Gallardo	Helen Cruz

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary Contact	Backup Contact
23-055	PPOCs (San Luis Obispo); Regional Managers (R4); Section Directors	CalSAWS Wave 6 San Luis Obispo Change Discussion Preparation Sessions	04/07/23	Closed	04/21/23	Araceli Gallardo	Helen Cruz
23-056	PPOCs (45); Regional Managers	Request for Counties to Identify Approved List of CBOs for ROI	04/10/23	Open	04/21/23	Marsale Eramya	Carlos Zepeda
23-063	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers	Wave 4 Counties – BenefitsCal Features Training – Request to Identify Participant Information	04/19/23	Open	05/03/23	Marsale Eramya	Carlos Zepeda
23-064	PPOCs (Orange, Santa Barbara, Ventura); Regional Managers	CalWIN Migration Wave 4 – CalSAWS County On-Site & Virtual Support	04/19/23	Open	05/03/23	Jeffrey Fuller	Michael Gates
23-065	PPOCs (Alameda, Fresno, Sonoma); Regional Managers	CalWIN Migration Wave 4 – Observers From Wave 5 CalWIN Counties	04/19/23	Open	05/03/23	Jeffrey Fuller	Michael Gates
23-066	PPOCs (Alameda, Fresno, Sonoma); Regional Managers	CalWIN Migration Wave 4 –On-Site Support From Wave 5 CalWIN Counties	04/19/23	Open	05/03/23	Jeffrey Fuller	Michael Gates

Table 6.2-3 – CRFIs

6.3   Appendix C – Project Work Plan Reports

Project Timeline
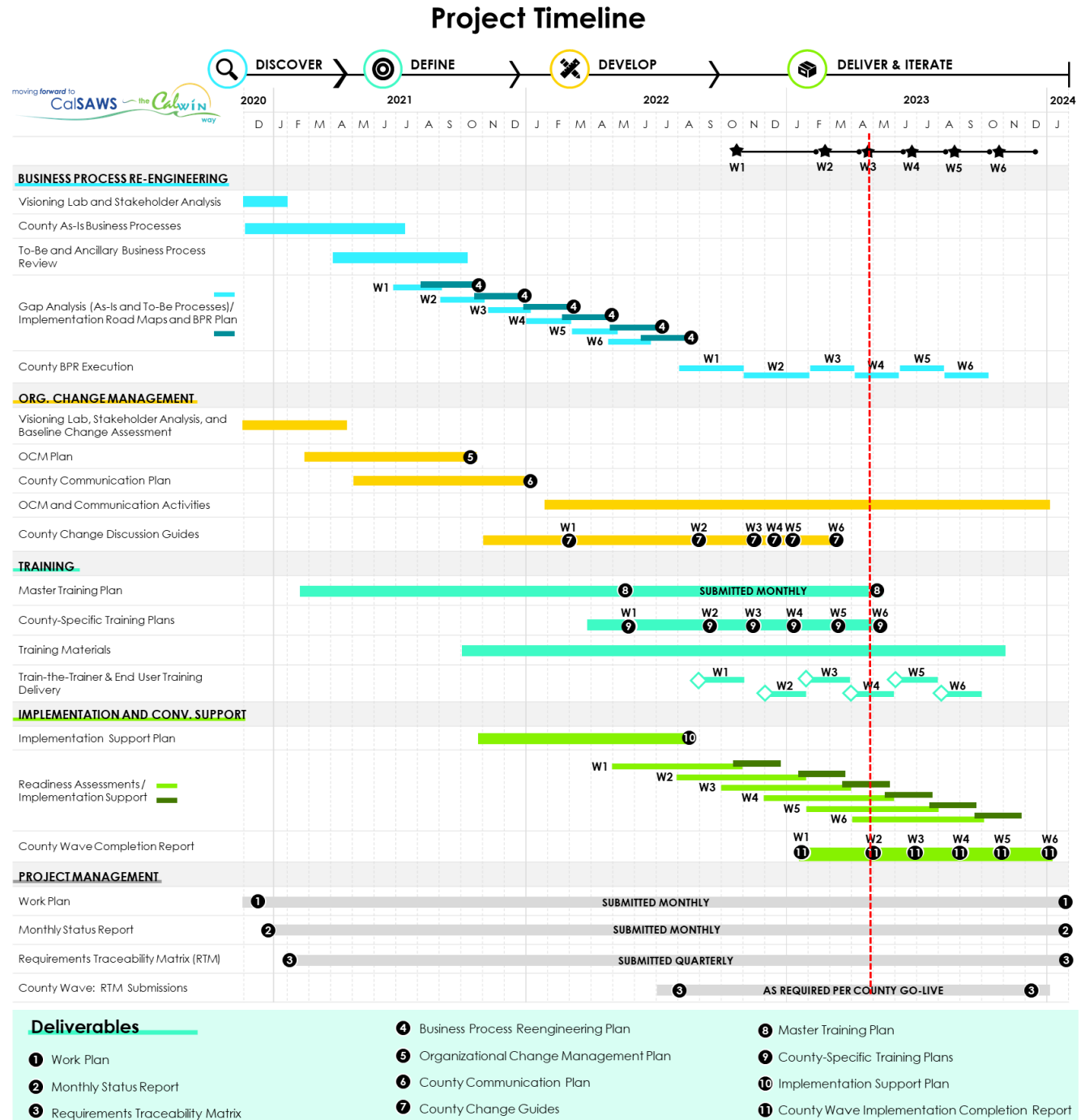
Figure 6.3-1 – Project Timeline

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