CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting Period: June 5, 2023 to June 11, 2023

06/15/23

Table of Contents

1.0 Project Management 3
1.1 Executive Summary 3
1.2 Highlights of the Reporting Period 5
1.3 Activities for the next Reporting Period 5
2.0 Business Process Reengineering (BPR) 5
2.1 Highlights of the Reporting Period 5
2.2 Activities for the Next Reporting Period 6
3.0 Organizational Change Management (OCM) 6
3.1 Highlights of the Reporting Period 6
3.2 Activities for the Next Reporting Period 7
4.0 Training 7
4.1 Highlights of the Reporting Period 7
4.2 Activities for the Next Reporting Period 14
5.0 Implementation 15
5.1 Highlights of the Reporting Period 15
5.2 Activities for the Next Reporting Period 16
6.0 Appendices 17
6.1 Appendix A – Deliverable Summary 17
6.2 Appendix B – Risks and Issues Summary 18
6.3 Appendix C – Project Work Plan Reports 24

1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Business Process Reengineering (BPR)	► **Wave 4** o Provided Configuration support for County Prep activities. ► **Wave 5** o Facilitated Configuration Working session with Fresno County 06/05/23 through 06/09/23. o Provided Configuration support for Process Simulation scenario review for Alameda County. o Conducted the Wave 5 Process Simulation preparation session with Alameda County on 06/07/23. o Continued internal Wave 5 Process Simulation preparation for Sonoma County from 06/05/23 to 06/08/23. o Process simulation internal preparation for Fresno in person session from 06/06/23 to 06/08/23. ► **Wave 6** o Re-Scheduled Configuration Kickoff meeting with San Francisco County for 06/13/23.
Organizational Change Management (OCM)	► **Wave 5 Change Discussion Guides** o Continue to monitor and report the Feedback Form responses to Alameda County through 06/09/23. ► **Wave 6 Change Discussion Guides** o Conducted the Change Discussion Office Hours with Wave 6 Counties on the week of 06/05/23. o Submitted the DDEL signoff to the Wave 6 Counties on 06/06/23. o Sent the Change Discussion Prep Q&A document to the Wave 6 Counties. o Sent the Change Discussion Prep Session Feedback Survey to San Luis Obispo County. o Scheduled and conducted the Weekly PPOC Touchpoints with the Wave 6 Counties. ► **Change Network Champions** o Sent the Wave 4 CNC deck to Consortium for a review on 06/05/23. ► **Change Readiness Surveys** o Monitored the Wave 3 T+6 Change Readiness Survey on the week of 06/05/23. o Closed the Wave 6 T-6 Change Readiness Survey on 06/05/23 and begin to develop the presentation. o Opened the Wave 5 T-3 Readiness Surveys on 06/05/23.

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	► **Newsletter/Infographics** o Sent the June Infographics Packet for Waves 4-6 to the Consortium on 06/05/23.
Training	► **Training** o Continued the Wave 4 Counties' Web Based Training for all staff. o Continued Instructor Led Training in all Wave 4 Counties. o Continued the Wave 5 Counties' Web Based Training for all staff. o Started Instructor Lead Training for Early Training and Train the Trainer participants in the Wave 5 Counties. o Continued the Wave 6 Counties' Web Based Training for Early Training and Train the Trainer Participants. o Completed LMS load and WBT curriculum assignments for Wave 6 Counties' end users. o Continued tailoring Instructor Led Training materials for the Wave 6 Counties. o Hosted Training touchpoints with San Francisco County, San Diego County, Solano County, San Mateo County, Alameda County, Sonoma County, Santa Cruz County, and Sacramento County.
Implementation	► **Wave 3** o Completed the seventh week of Wave 3 post-Implementation support. o Conducted daily business metrics review and Implementation Team calls. o Managed onsite resource tracker and provided daily resourcing needs. o Conducted Fact Sheet Working Group to develop new Fact Sheets. ► **Go-Live Packet (GLP)** o Fielding questions from counties on the GLP. o Presented update on GLP at the CNC meeting on 06/07/23. o Updated GLP Orientation content in preparation for sessions the week of 06/12/23. ► **Future Waves** o Wrapped up all discussions with Sacramento County related to their requests for early information. Provided discussion notes or crafted Q&A docs to address all questions raised. Provided guidance on approaches that the county wants to take across three different areas of functionality. o Continue updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center. Also supporting Model Office activities for Wave-4 counties. o Conducted the Wave 4 County Prep Office hours and Daily Debrief, including metrics review on 06/08/23. o Continued updates to the Readiness Dashboards and Packets for Wave 4, Wave 5, and Wave 6 Counties. o Conducted W4 Full Orientation Option 1 for County Volunteers on 06/07/23. o Updated Wave 4 onsite resource materials including CalSAWS/Trip Books.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 Highlights of the Reporting Period

- **Staff Onboarding**
  - Continued planning for and onboarding staff resources.
- **Information Coordination for CalWIN Counties**
  - Continued to collaborate with other teams to coordinate information for the CalWIN Counties.
- **County Work Plans**
  - Critical Path Reporting Waves 2 through Wave 6 - developed weekly summary report and made available for review to the Consortium Leadership during the week of 06/11/23.
  - 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 and updates, and to 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:**
  - FDEL 01.29: Work Plan Monthly Updates – May 2023 on 06/05/23.
  - FDEL 02.29: Monthly Status Report – May 2023 on 06/05/23.
  - FDEL 03.09: Requirements Traceability Matrix (RTM) – Q9 on 06/05/23.
  - FDEL 11.03: County Implementation Completion Report – Wave 3 (Part 1) on 06/05/23.

1.3 Activities for the next Reporting Period

- **Staff Onboarding**
  - Continue planning for and onboarding staff resources.
- **Information Coordination for CalWIN Counties**
  - Continue to collaborate with other teams to coordinate information for the CalWIN Counties.
- **County Work Plans**
  - Continue updating Waves 2–6 County Work Plans for the Implementation Readiness Checklist.
- **Deliverables and Work Products – Submit the following:**
  - FDEL 07.16: County Change Guide – Wave 6 (Sacramento) on 06/13/23.
  - FDEL 07.17: County Change Guide – Wave 6 (San Francisco) on 06/13/23.
  - FDEL 07.18: County Change Guide – Wave 6 (San Luis Obispo) on 06/13/23.
  - DDEL 11.03: County Implementation Completion Report – Wave 3 (Part 2) on 06/12/23.

2.0 Business Process Reengineering (BPR)

2.1 Highlights of the Reporting Period

- **Process Simulation**
  - Continued preparation activities with the Wave 5 Alameda County and Sonoma County to provide detailed scenario steps and security roles.
  - Initialed wave 5 data request creation for submission which is due 06/16/23.

- Updated county comments for Alameda scenarios on 06/06/23
- Updated county comments for Sonoma scenarios on 06/07/23 - 06/08/23

► **Configuration**

- Provided Configuration support to Wave 4 Counties for County Prep activities.
- Provided Configuration support for Alameda Process Simulation scenario review.
- Facilitated Configuration Working session with Fresno County from 06/05/23 - 06/09/23.
- Re-Scheduled a Configuration Kickoff meeting with San Francisco County for 06/13/23.

2.2 Activities for the Next Reporting Period

► **Process Simulation**

- Complete Process Simulation scenario finalization for Alameda County by 06/17/23
- Complete Process Simulation scenario level 2 updates for Sonoma County by 06/16/23.
- Prepare in-person Process Simulation preparation sessions for Fresno County from 06/13/23 to 06/15/23.

► **Configuration**

- Provide Configuration support to Wave 4 Counties for County Prep activities.
- Facilitate the Configuration Kickoff meeting with San Luis Obispo County 06/12/23.
- Facilitate the Configuration Kickoff meeting with Sacramento and San Francisco Counties 06/13/23.
- Facilitate the Configuration Verification Session with Sonoma County, 06/14/23 through 06/15/23.

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

► **Wave 5 Change Discussion Guides**

- Fresno and Sonoma Counties have reported that they completed the Change Discussions on 05/26/23.
- Continue to monitor and report the Feedback Form responses to Alameda County through 06/09/23.

► **Wave 6 Change Discussion Guides**

- Conducted the Change Discussion Office Hours with Wave 6 Counties on the week of 06/05/23.
- Submitted the DDEL signoff to the Wave 6 Counties on 06/06/23.
- Sent the Change Discussion Prep Q&A document to the Wave 6 Counties.
- Sent the Change Discussion Prep Session Feedback Survey to San Luis Obispo County.
- Scheduled and conducted the Weekly PPOC Touchpoints with the Wave 6 Counties.

► **Change Network Champions**

- Sent the Wave 4 CNC deck to Consortium for a review on 06/05/23.

► **Change Readiness Surveys**

- Monitored the Wave 3 T+6 Change Readiness Survey on the week of 06/05/23.

- Closed the Wave 6 T-6 Change Readiness Survey on 06/05/23 and begin to develop the presentation.
- Opened the Wave 5 T-3 Readiness Surveys on 06/05/23.

► **Newsletter/Infographics**
- Sent the June Infographics Packet for Waves 4-6 to the Consortium on 06/05/23.

3.2 Activities for the Next Reporting Period

► **Wave 5 Change Discussion Guides**
- Close out the Feedback Form and complete the Change Discussions for Alameda County.

► **Wave 6 Change Discussion Guides**
- Continue to conduct the Change Discussion Office Hours with Wave 6 Counties through the week of 06/15/23.
- Submit the FDEL signoff to the Wave 6 Counties on 06/13/23.
- Continue to conduct the Weekly PPOC Touchpoints with the Wave 6 Counties.

► **Change Network Champions**
- Conduct the Wave 5 &6 CNC Session on 06/13/23.
- Prepare to send the Wave 4 and 5 & 6 CNC Session Material to the counties.
- Conduct the Wave 4 CNC Session on 06/15/23.

► **Change Readiness Surveys**
- Close the Wave 3 T+6 Change Readiness Survey on 06/12/23 and begin to analyze the survey.
- Continue to develop the Wave 6 T-6 Change Readiness Survey presentation.
- Monitor the Wave 5 T-3 Readiness Surveys and close the survey on 06/16/23.

► **Newsletter/Infographics**
- Send the June Infographics Packet for Waves 4-6 to the CIT/CRFI Review Group on the week of 06/12/23.
- Send the Wave 6 Newsletter #3 to the Consortium for a review on the week of 06/12/23.

4.0 Training

4.1 Highlights of the Reporting Period

► **Training Advisory Council**
- Continued planning for Training Advisory Council (TAC) Meeting on 06/14/23.

► **Wave 4: San Diego, San Mateo, Santa Cruz, and Solano County Training**
- Continued WBTs for all staff.
- Continued ILTs in all Wave 4 Counties.
- Hosted Training Touchpoint with San Mateo County.
- Hosted Training Touchpoint with Santa Cruz County.
- Hosted Training Touchpoint with Solano County.

► **Wave 5: Alameda, Fresno, and Sonoma County Training**
- Continued WBTs for all staff.
- Continued ILTs for Train the Trainer in Fresno County and Sonoma County.
- Continued ILTs for Early Training in Alameda County.
- Hosted Training Touchpoint Fresno County.
- Hosted Training Touchpoint with Sonoma County.

- **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
  - Continued WBTs for Early Training and Train the Trainer participants.
  - Stated WBTs for all staff.
  - Continued tailoring ILT materials for the Wave 6 Counties.
  - Hosted ILT Walkthroughs for Sacramento County.
  - Hosted Training Touchpoint with San Luis Obispo County.

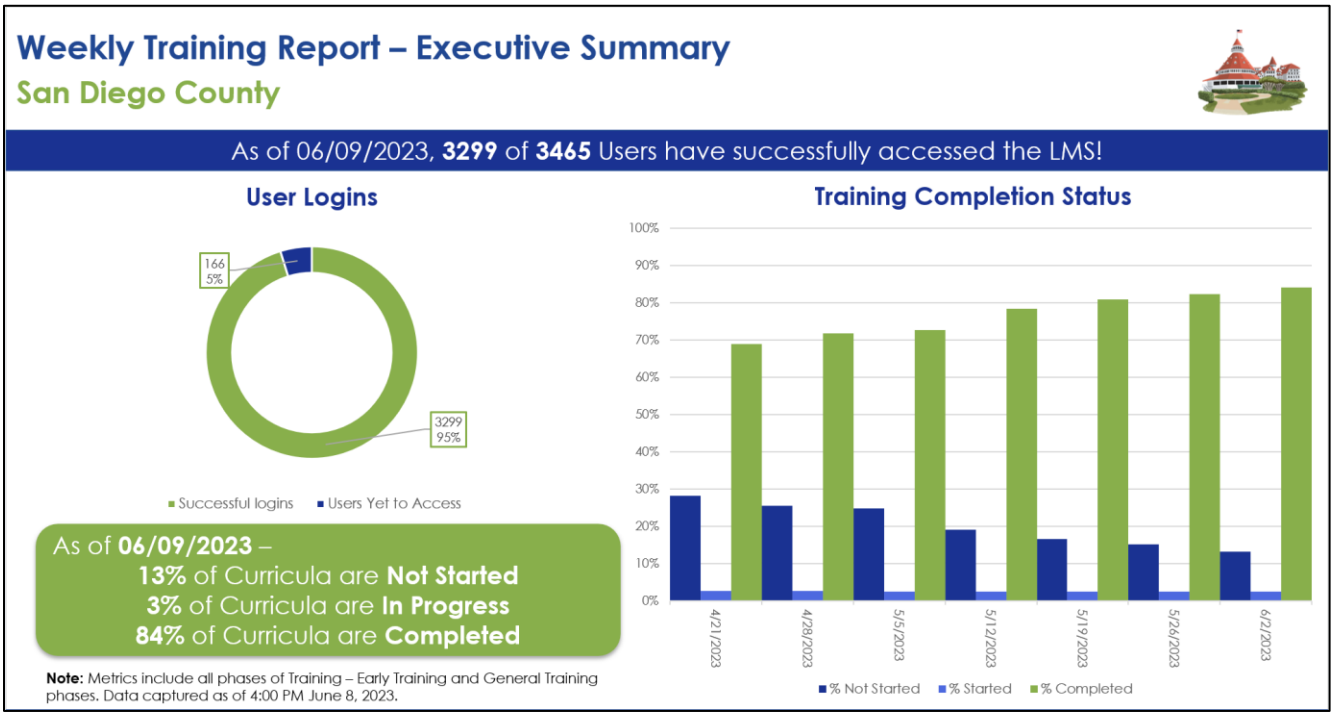

Figure 4.1-1 – Weekly WBT Training Report – San Diego County

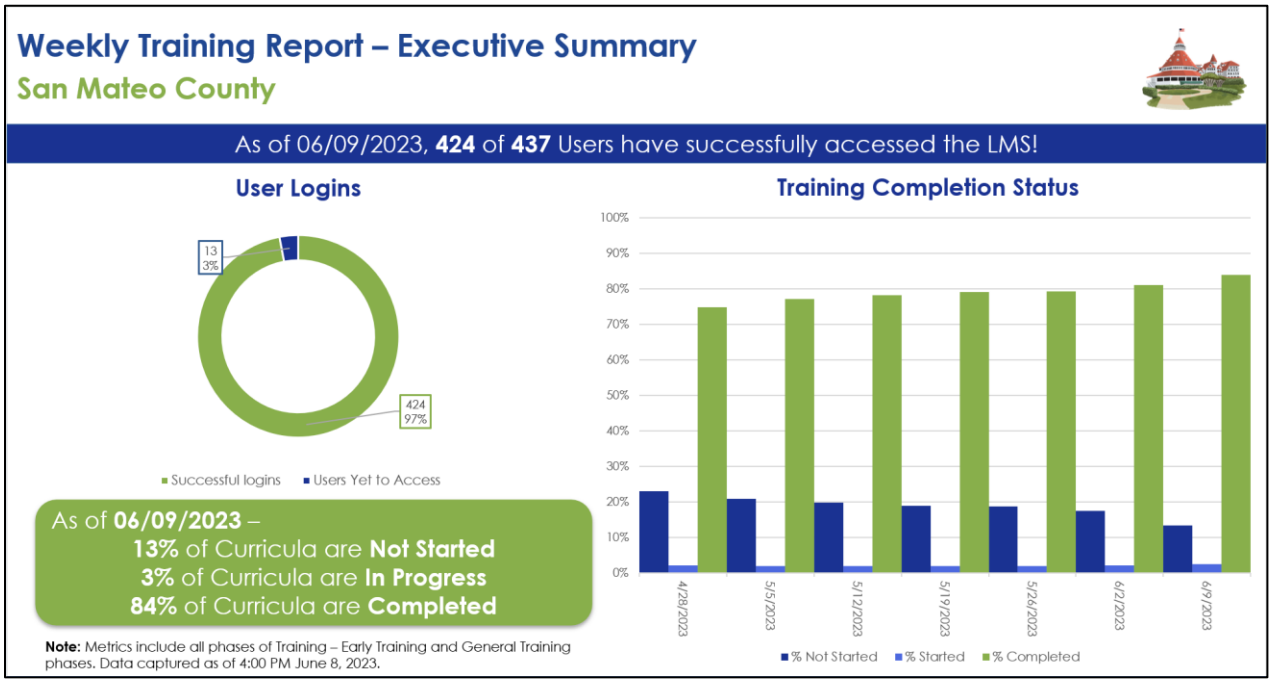

Figure 4.1-2 – Weekly WBT Training Report – San Mateo County

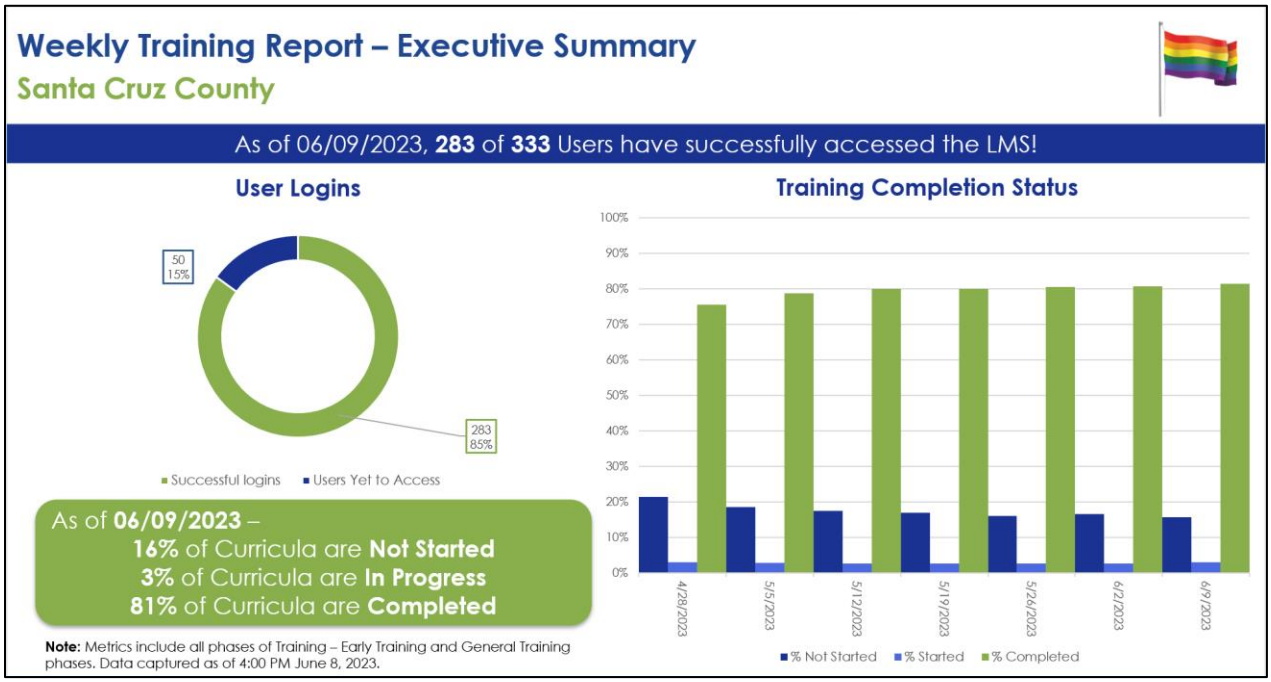

Figure 4.1-3 – Weekly WBT Training Report – Santa Cruz County

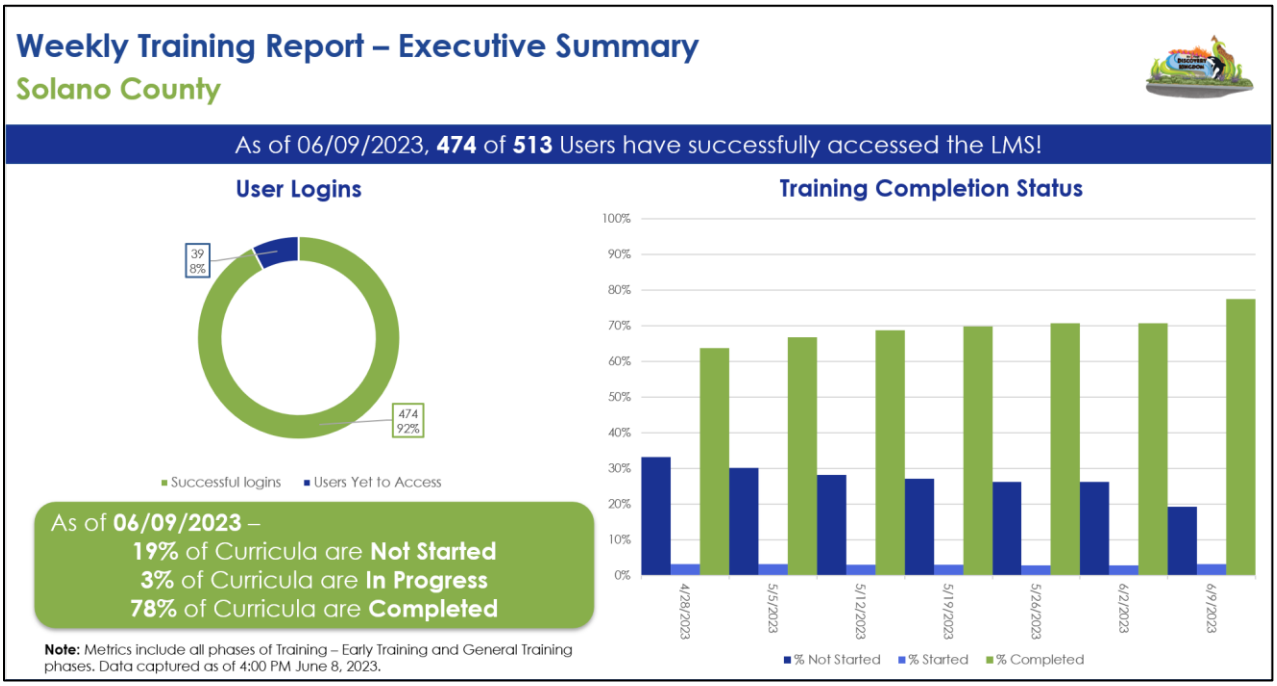

Figure 4.1-4 – Weekly WBT Training Report – Solano County

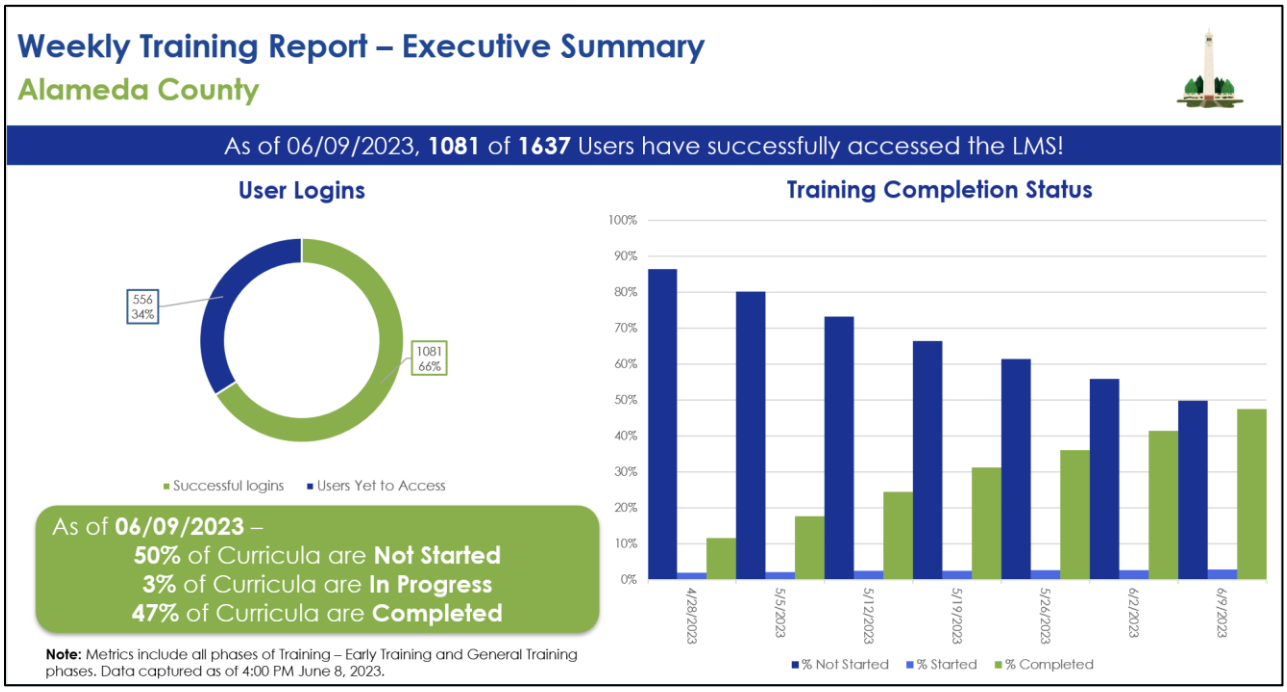

Figure 4.1-5 – Weekly WBT Training Report – Alameda County

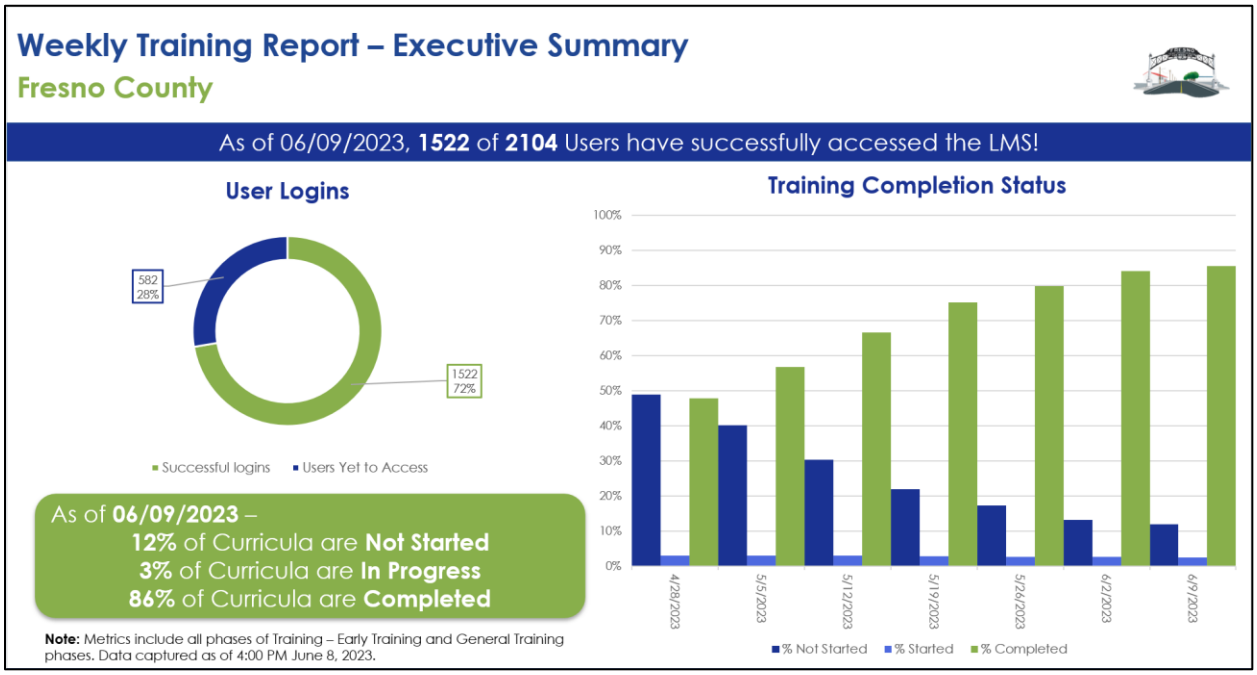

Figure 4.1-6 – Weekly WBT Training Report – Fresno County

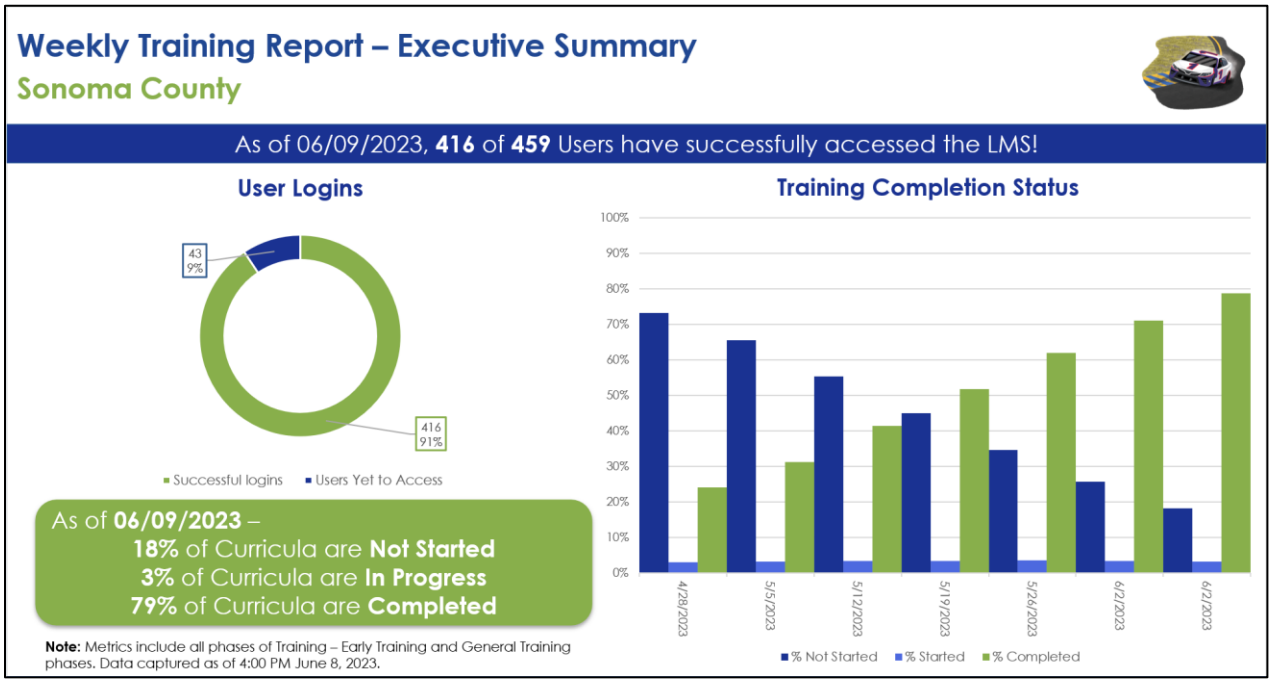

Figure 4.1-7 – Weekly WBT Training Report – Sonoma County

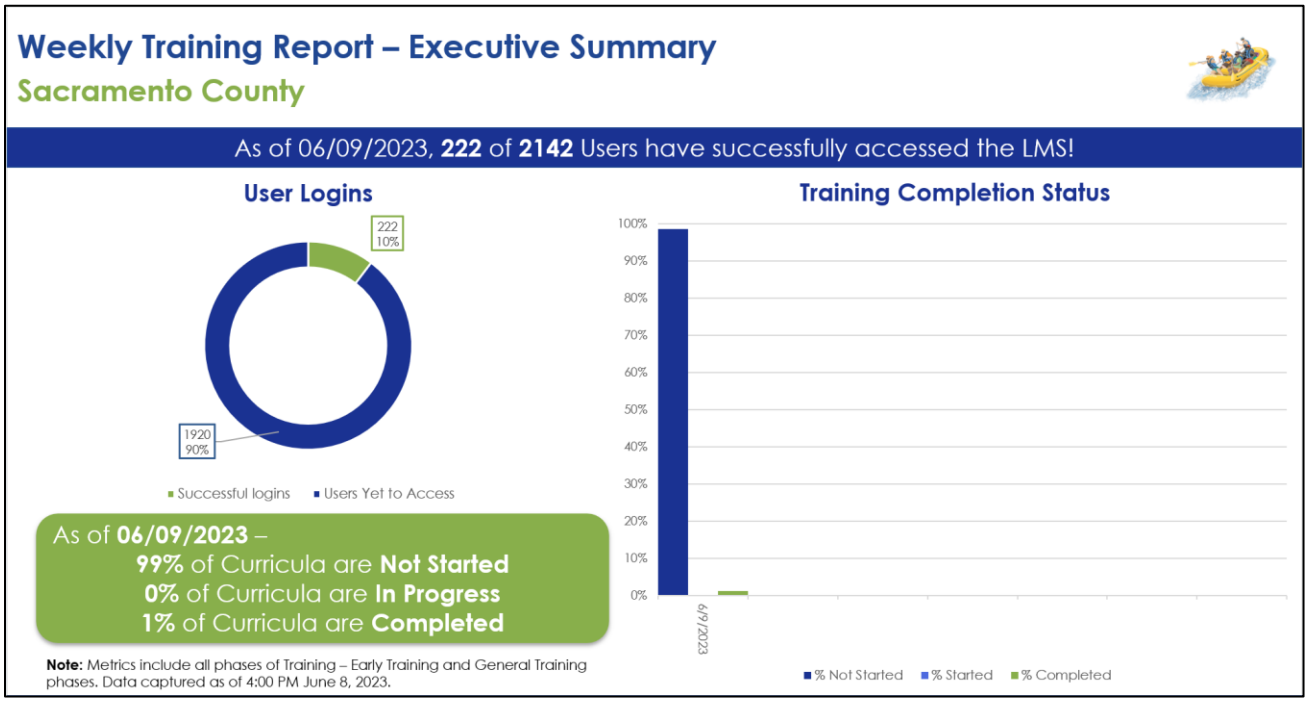

Figure 4.1-8 – Weekly WBT Training Report – Sacramento County

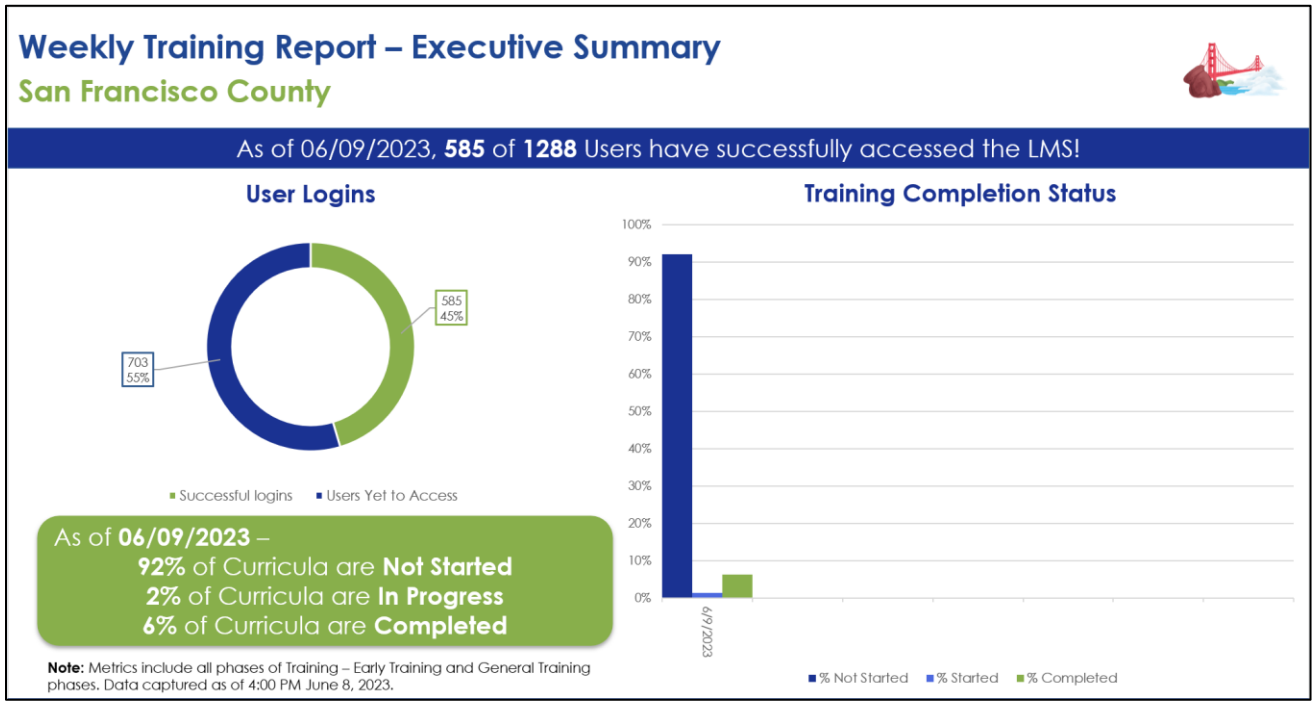

Figure 4.1-9 – Weekly WBT Training Report – San Francisco County

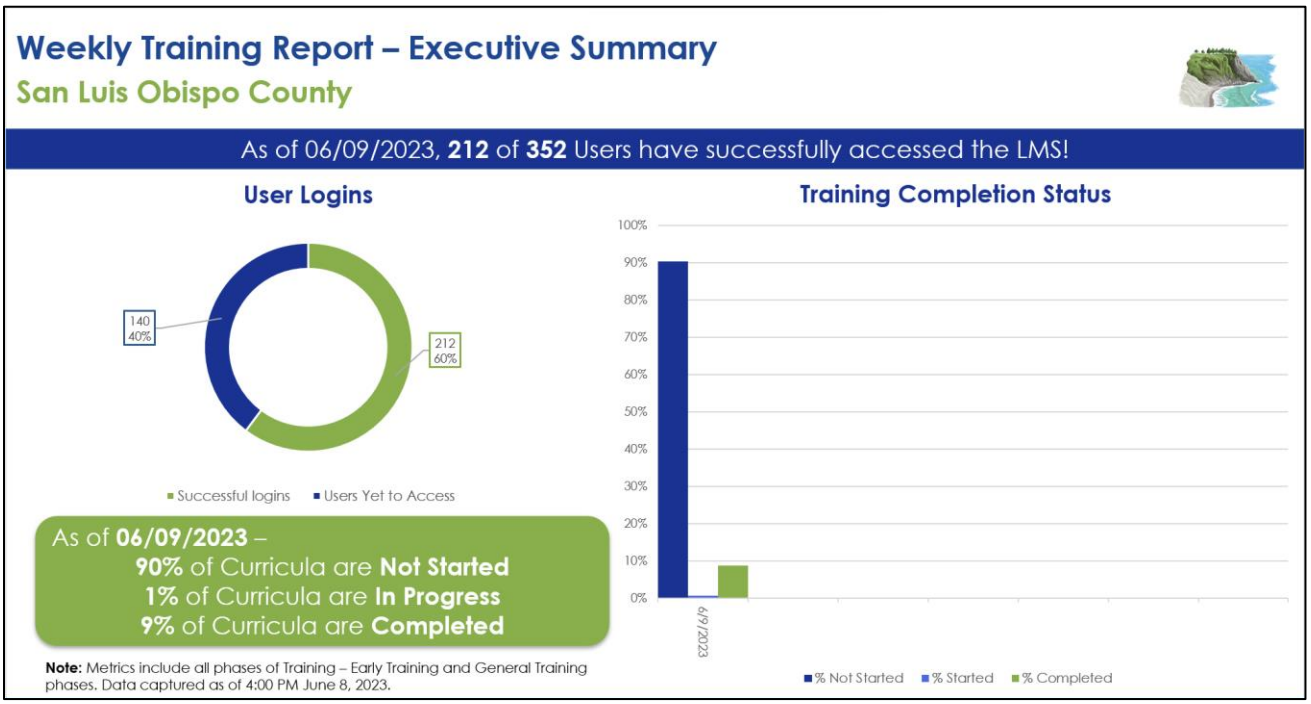

Figure 4.1-10 – Weekly WBT Training Report – San Luis Obispo County

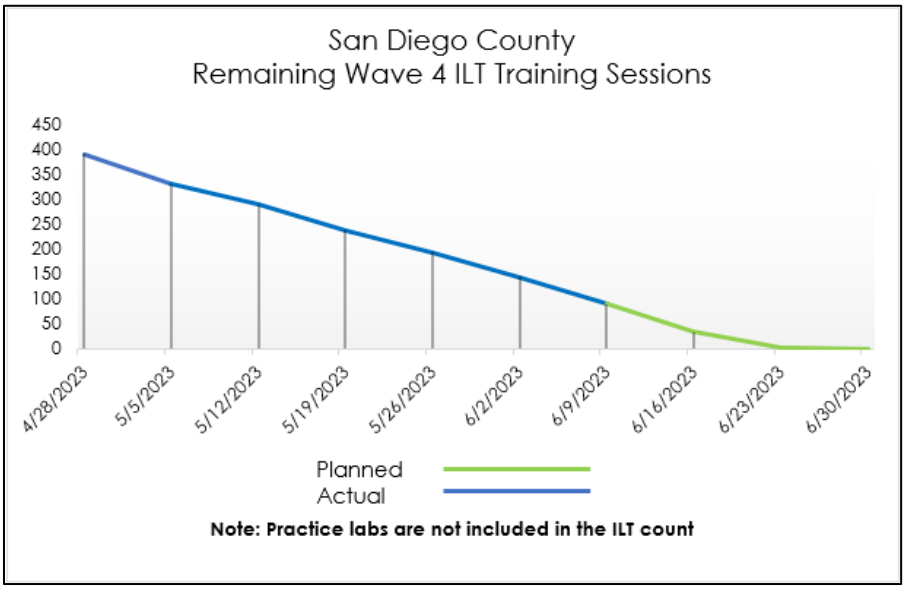

Figure 4.1-11 – Weekly WBT Training Report – San Diego County

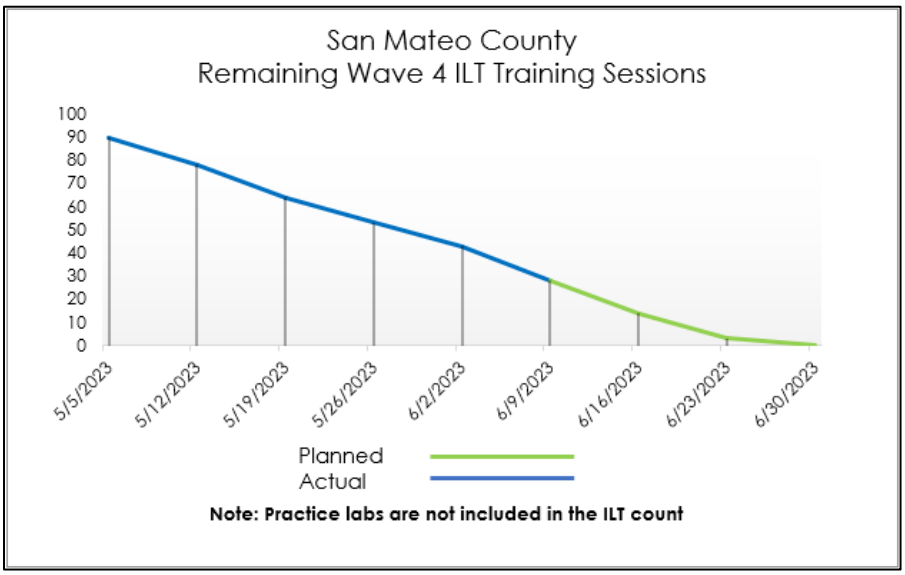

Figure 4.1-12 – Weekly WBT Training Report – San Mateo County

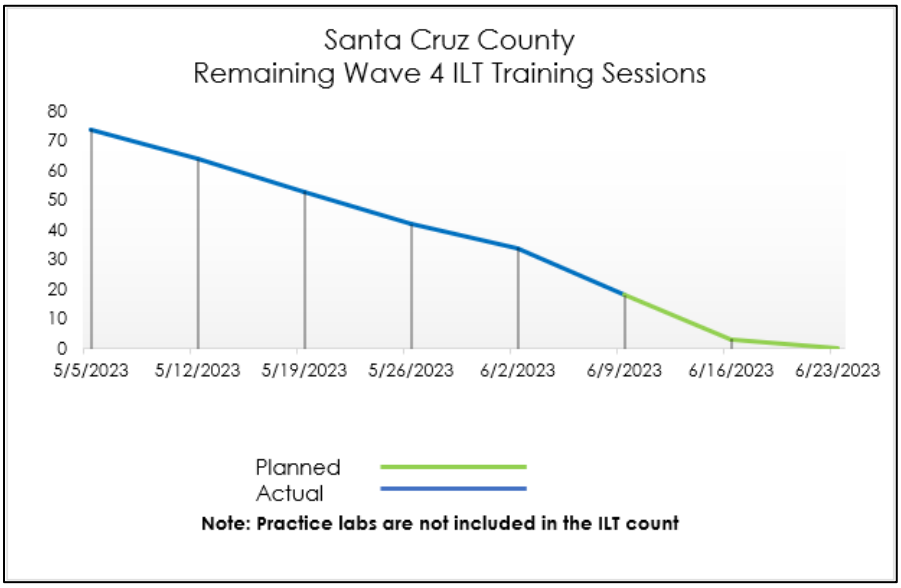

Figure 4.1-13 – Weekly WBT Training Report – Santa Cruz County

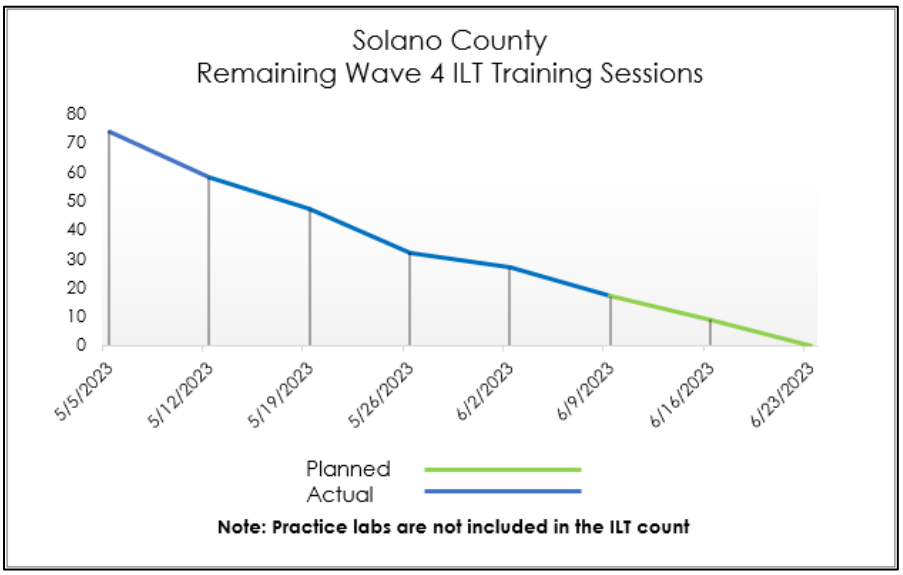

Figure 4.1-14 – Weekly WBT Training Report – Solano County

4.2 Activities for the Next Reporting Period

- **Training Advisory Council**
  - Host Training Advisory Council (TAC) meeting on 06/14/23.
- **Wave 4: San Diego, San Mateo, Santa Cruz, and Solano County Training**
  - Continue WBTs for all staff.
  - Continue ILTs for all staff in all Wave 4 Counties.
  - Host Training Touchpoint with San Diego County.
  - Host Training Touchpoint with San Mateo County.
  - Host Training Touchpoint with Santa Cruz County.
  - Host Training Touchpoint with Solano County.

- **Wave 5: Alameda County, Fresno County, and Sonoma County Training**
  - Continue WBTs all staff.
  - Continue ILTs for Early Training and Train the Trainer.
  - Host Training Touchpoint with Alameda County.
- **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
  - Continue WBTs for all staff.
  - Host ILT Walkthroughs for San Francisco County.
  - Continue County tailoring of ILT materials.
  - Host Training Touchpoint with San Francisco County.
  - Host Training Touchpoint with Sacramento County.

5.0 Implementation

5.1 Highlights of the Reporting Period

- **Readiness Dashboard and Packet**
  - Continued collecting updates for the Wave 4 through Wave 6 Readiness Packets.
- **Lead TOSS/IPOC Meetings**
  - Conducted TOSS/IPOC checklist review for San Diego (06/07/23), Alameda (06/07/23), San Mateo County (06/09/23) and Solano County (06/09/23).
- **Lead Wave IPOC Meetings**
  - Conducted the Wave 6 IPOC meeting on 06/08/23.
- **County Prep Phase**
  - Conducted the Wave 4 County Prep Phase Office Hours and Debriefs including metrics review and individual county progress checkpoint on 06/08/23.
- **Go-Live Packet (GLP)**
  - Fielding questions from counties on the GLP.
  - Presented update on GLP at the CNC meeting on 06/07/23.
  - Updated GLP Orientation content in preparation for sessions the week of 06/12/23.
  - Crafted new appendix to support County request for list of URLs to track.
- **Future Waves**
  - Wrapped up all discussions with Sacramento County related to their requests for early information. Provided discussion notes or crafted Q&A docs to address all questions raised. Provided guidance on approaches that the county wants to take across three different areas of functionality.
  - Continue updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center. Also supporting Model Office activities for Wave 4 Counties.
  - Crafted presentation that aggregates all RDB documentation by audience for distribution to counties.
- **Post-Implementation Support**
  - Completed the seventh week of Wave 3 post-Implementation support to counties.
  - Conducted daily business metrics reviews and standing Implementation Team calls.

- Conducted Fact Sheet Working Group to develop new Fact Sheets.
- Managed the onsite resource tracker and provided a daily review of resource needs.
- Delivered Wave 4 Full Orientation Option 1 for County Volunteers on 06/07/23.
- Updated Wave 4 onsite resource materials including CalSAWS/Trip Books.

5.2 Activities for the Next Reporting Period

- **Post-Implementation Support**
  - Complete the eighth week of W3 Onsite / Virtual post-Implementation support.
  - Track Wave 3 interactions and ServiceNow ticket reporting for daily meetings.
  - Schedule Wave 5 County Site Visits throughout the month of June for post-Implementation support.
  - Observe and document post-Implementation metric trends and issue resolutions.
  - Prepare Wave 4 Virtual Support Zoom invites and accompanying Infographics.
  - Deliver Wave 4 Full Orientation Option 2 for County Volunteers on 06/14/23.
  - Facilitate Fact Sheet Review meetings and develop Fact Sheets for distribution.
- **Readiness Dashboard and Packet**
  - Continue collecting updates for the Wave 4 through Wave 6 Readiness Packets.
  - Finalize and Distribute Readiness Dashboards for Waves 4, 5, and 6 Counties.
- **Wave 4 Go-Live Packet**
  - Assess changes to defects for Wave 4 to plan for follow-up strike team meetings.
  - Continue responding to questions about Wave 4 Go-Live Packet Orientation sessions for the Wave 4 Counties, CNC meetings, or general GLP questions.
- **Other Implementation Support**
  - Continue activities in support of Sacramento County's requests.
  - Draft RDB Guide for counties.
  - Finalize and Distribute OCAT Conversion CIT to Wave 5 Counties.
  - Submit ICT Conversion CIT for final review.
- **County Prep Phase**
  - Conduct the Wave 4 County Prep Phase Office Hours and Debriefs including metrics review and individual county progress checkpoint.
  - Prepare for Wave 5 County Prep Kickoff.
- **TOSS/IPOC Meetings**
  - Conduct TOSS/IPOC checklist review for Santa Cruz County (06/13/23), Sonoma County (06/23/23), San Diego County (06/14/23), Solano County (06/16/23) and San Mateo County (06/16/23).
- **Lead Wave IPOC Meetings**
  - Conduct the Wave 4 IPOC meeting on 06/14/23.

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
01.28	Work Plan Monthly Updates – April 2023	N/A	N/A	N/A	05/05/23	05/19/23
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	05/13/22
02.28	Monthly Status Report – April 2023	N/A	N/A	N/A	05/05/23	05/19/23
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
03.09	Requirements Traceability Matrix – Q9	N/A	N/A	N/A	06/05/23	06/12/23
04	Business Process Reengineering Plan	N/A	N/A	09/02/22	09/26/22	10/03/22
07	County Change Guide – Wave 6 (Sacramento, San Francisco, San Luis Obispo)	N/A	N/A	05/22/23	06/13/23	06/22/23
08	Master Training Plan	10/27/21	11/08/21	05/13/22	06/06/22	06/13/22
08.10	Master Training Plan Monthly Update – 10	N/A	N/A	N/A	05/05/23	05/12/23
09	County-Specific Training Plan – Wave 6 (Sacramento, San Francisco, San Luis Obispo)	N/A	N/A	05/08/23	05/30/23	06/08/23
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
11.03	County Implementation Completion Report – Wave 3 (Part 1)	N/A	N/A	05/24/23	06/05/23	06/09/23
11.03	County Implementation Completion Report – Wave 3 (Part 2)	N/A	N/A	06/12/23	06/26/23	07/05/23

Figure 6.1-1 – Deliverable Status by Submission

Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
01.29	Work Plan Monthly Updates – May 2023	On Track	FDEL submitted 06/05/23 FDEL approval 06/23/23
02.29	Monthly Status Report – May 2023	On Track	FDEL submitted 06/05/23 FDEL approval 06/14/23
03.09	Requirements Traceability Matrix (RTM) – Q9	On Track	FDEL submitted 06/05/23 FDEL approval 06/12/23
07.16	County Change Guide – Wave 6 (Sacramento)	On Track	FDEL submission 06/13/23 FDEL approval 06/22/23
07.17	County Change Guide – Wave 6 (San Francisco)	On Track	FDEL submission 06/13/23 FDEL approval 06/22/23
07.18	07.18: County Change Guide – Wave 6 (San Luis Obispo)	On Track	FDEL submission 06/13/23 FDEL approval 06/22/23
11.03	County Implementation Completion Report – Wave 3 (Part 2)	On Track	DDEL submission 06/12/23 FDEL submission 06/26/23 FDEL approval 07/05/23

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)	04/24/23	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
	There are no more scheduled submissions for County Work Products.		

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 1–3: Closed Wave 4–6: 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 1–4: Closed Wave 5–6: Open	5	Wave 1: Low Wave 2–5: High Wave 6: Low	11/03/21
262	The CalWIN Counties may not be fully prepared for go-live if they do not have	The CalWIN Counties and County Directors have voiced concern that they do not have sufficient information	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	12/13/21

ID	Title	Details	Status	Impact	Risk Level	Date Logged
	sufficient or timely 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.			Wave 4–6: Medium	
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 1–3: Closed Wave 4–6: 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	Wave 1–2: Closed Wave 2–6: Open	Wave 1: 3 Wave 2–6: 4	Medium	09/14/22

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		State reports to CDSS on a monthly basis (and timely)				
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 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	Wave 3: Closed Wave 4–6: Open	3	Medium	02/08/23

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		processes, escalation procedures, and strong support systems in place to ensure staff adoption and sustainment of CalSAWS and minimize business disruptions.				
289	Transition from CalWIN Lite to CalSAWS/BenefitsCal/ Child Care Portal for external partners	CalWIN Counties have been given background on the differences between the features and functions of their existing CalWIN Lite application and the features and functions provided by the combination of CalSAWS (core), BenefitsCal and the CalSAWS Child Care Portal. Although the history, rationale and requirements imposed by CDSS and DHCS have been described to CalWIN Counties, some counties still feel as if the combined CalSAWS solution(s) do not provide the same kind of access to external partners that CalWIN Lite currently provides	Open	3	Low	04/24/23

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
0198-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers (R1, R5); Section Directors	Wave 4 CalSAWS Infographics #11	CalWIN Migration	05/30/23	Helen Cruz	Araceli Gallardo
0207-23	PPOCs (48, San Diego, San Mateo, Santa Cruz, Solano); Help	Wave 4B Cutover Weekend	CalSAWS M&E	06/0823	Art Robles	Lesley Pevnry

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
	Desk (San Diego, San Mateo, Santa Cruz, Solano); Production Operations; Regional Managers	Calendar Infographic	CalWIN Migration			
0209-23	CalSAWS Primary Point of Contacts and the Public	Recruitment of CalSAWS Project Staff, Closing on July 5, 2023	CalSAWS M&E CalWIN Migration	06/06/23	Jennifer Smith	Holly Murphy
0210-23	Fiscal Admin. Management (Alameda, Contra Costa, Fresno, Orange, Placer, Sacramento, San Bernardino, San Diego, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Solano, Sonoma, Yolo); PPOCs ((Alameda, Contra Costa, Fresno, Orange, Placer, Sacramento, San Bernardino, San Diego, San Francisco, San Luis Obispo, San Mateo, Santa Barbara, Santa Clara, Santa Cruz, Solano, Sonoma, Yolo); Regional Managers (R1, R2, R4, R5)	CalWIN M&O County Allocations SFY 2022-23 v3	CalWIN Migration	06/07/23	Tracy Berhel	Grirish Uppal
0211-23	Fiscal Admin. Management (40, Placer, Yolo); PPOCs (40, Placer, Yolo); Regional Managers (R1, R2, R3, R4, R5, R6)	CalSAWS Additional Funding Mass Notice – End of CalFresh Emergency Allotments County Allocations SFY 2022-23	CalSAWS M&E	06/07/23	Melissa Gates	Tina Weinmeister
0212-23	PPOCs (All); Regional Managers	New How-to Videos Posted to BenefitsCal	CalSAWS M&E CalWIN Migration	06/07/23	Marsale Eramya	Carlos Zepeda
0213-23	Fiscal Admin. Management (18, 40); PPOCs (18, 40); Regional Managers (R1, R2, R3, R4, R5, R6)	CalSAWS County Cost Summary – June 2023 Update	CalSAWS M&E	06/07/23	Britt Carlsen	Tracy Berhel

CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
0214-23	PPOCs (48); Regional Managers; Medical CMSP Committee; CalWORKs Committee; CalFresh Committee; Welfare to Work Committee; Help Desk Committee	Appointment Scheduling and Wave 4 Cutover Activities	CalSAWS M&E	06/08/23	Fredrick Gains	Dymas Pena

Table 6.2-2 – CITs

The following table outlines CalSAWS Information Transmittals (CITs) sent for the reporting period.

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary Contact	Backup Contact
23-083	PPOCs (Alameda, Fresno, Sonoma); IPOCs (Wave 5); TPOCs (Wave 5); CalWIN Conversion; Regional Managers (R1, R4)	Wave 5 Application Security Conversion: Security Roles – Sync-Up	06/06/23	Open	06/21/23	Mike Tombakian	Christy Sharma

Table 6.2-3 – CRFIs

6.3 Appendix C – Project Work Plan Reports

Project Timeline

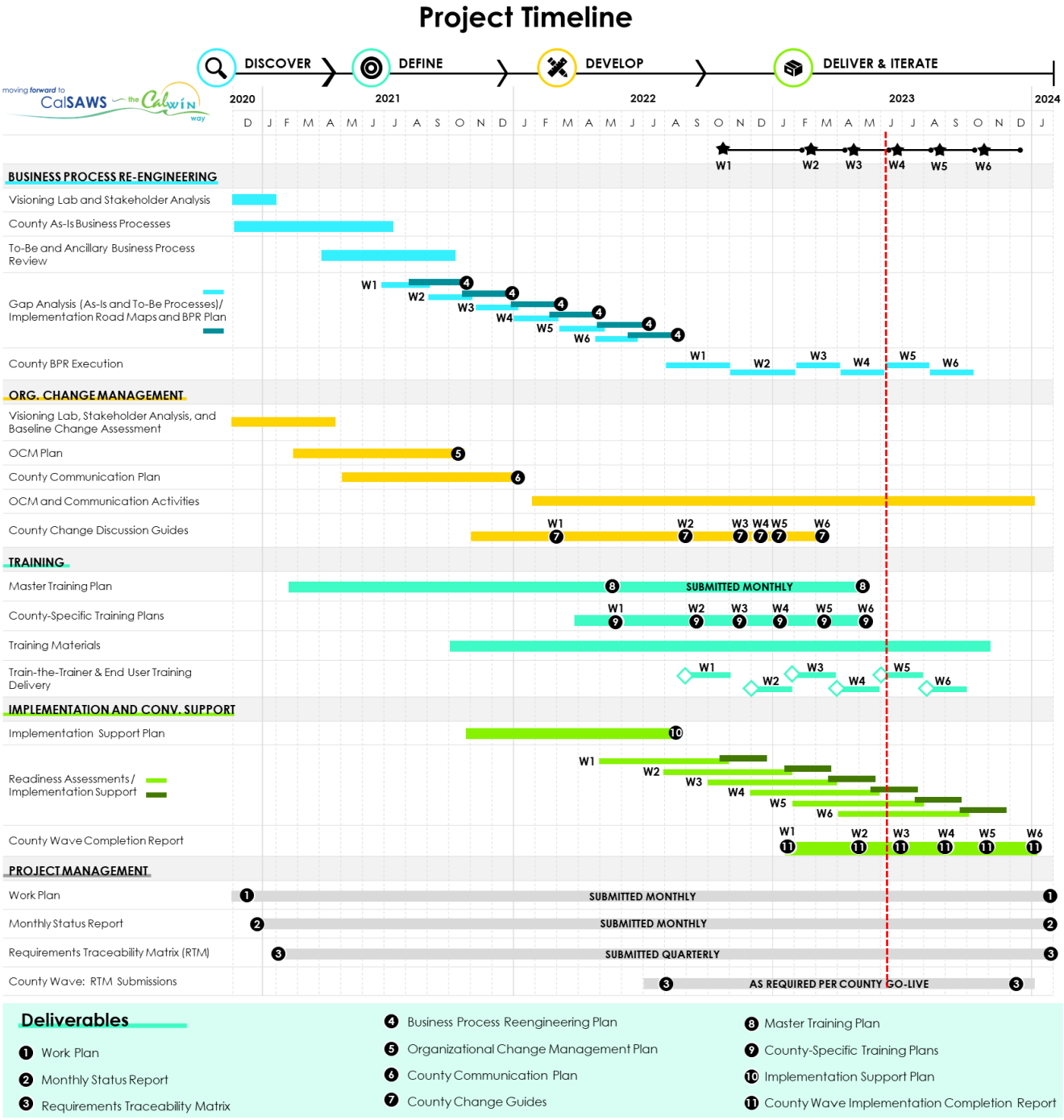

Figure 6.3-1 – Project Timeline

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