

# CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

**Reporting Period: May 15, 2023 to May 21, 2023**

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## 1.0 Project Management

### 1.1 Executive Summary

| STATUS REPORT<br>SUB-SECTION                    | STATUS AGENDA TOPIC   |
|---|---|
| Business Process<br>Reengineering<br>(BPR)      | <ul style="list-style-type: none"> <li>▶ <b>Wave 3</b> <ul style="list-style-type: none"> <li>○ Provided support for Go-Live Configurations.</li> </ul> </li> <li>▶ <b>Wave 4</b> <ul style="list-style-type: none"> <li>○ Provided Configuration support for Process Simulation execution for San Mateo County and Solano County.</li> <li>○ Provided Configuration support for County Prep activities.</li> <li>○ Completed 54% of the Process Simulation execution sessions with San Mateo County.</li> <li>○ Completed 59% of the Process Simulation execution sessions with Solano County.</li> </ul> </li> <li>▶ <b>Wave 5</b> <ul style="list-style-type: none"> <li>○ Facilitated a Configuration Verification Session with Alameda County.</li> <li>○ Conducted the Wave 5 Process Simulation kickoff with Fresno County on 05/15/23.</li> <li>○ Conducted the Wave 5 Process Simulation preparation session with Alameda County and Sonoma County.</li> </ul> </li> </ul>   |
| Organizational<br>Change<br>Management<br>(OCM) | <ul style="list-style-type: none"> <li>▶ <b>Wave 5 Change Discussion Guides</b> <ul style="list-style-type: none"> <li>○ Continued to monitor the change discussions taking place in Wave 5 Counties through 05/26/23.</li> <li>○ Continued to report the Feedback Form responses through 05/26/23 to Alameda County.</li> </ul> </li> <li>▶ <b>Wave 6 Change Discussion Guides</b> <ul style="list-style-type: none"> <li>○ Received the last County signoff for the Wave 6 County Change Guide/Change Discussion Guide (CCG/CDG) FWP (San Francisco County) on 05/18/23.</li> <li>○ Conducted the Change Discussion Prep sessions with Sacramento County from 05/16/23 to 05/19/23.</li> <li>○ Sent the Change Discussion Prep session material to Sacramento County on 05/16/23.</li> <li>○ Sent the CDG Prep session feedback survey to Sacramento County on 05/19/23.</li> <li>○ Presented the Wave 2 T+6 Readiness Surveys results decks to the Consortium the week of 05/15/23.</li> <li>○ Validated the stakeholder list of the Wave 6 Counties T-6 Change Readiness Survey.</li> <li>○ Sent the Wave 3 T+6 Readiness Survey CIT to the Counties the week of 05/15/23.</li> </ul> </li> </ul> |

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| STATUS REPORT<br>SUB-SECTION | STATUS AGENDA TOPIC  |
|------------------------------|--|
|                              | <ul style="list-style-type: none"> <li>○ Sent the Wave 5 T-3 Readiness Survey CIT to the CIT/CRFI Review Group the week of 05/15/23.</li> <li>○ Conducted the May CNC session for Wave 3 and Wave 4 on 05/18/23.</li> <li>○ Sent the May CNC session materials to Wave 3 and Wave 4 the week of 05/15/23.</li> <li>○ Prepared the May CNC Session materials to send to Wave 5 and Wave 6.</li> <li>○ Distributed the May Infographics for the Wave 5 and 6 packets to the Wave 5 and Wave 6 Counties the week of 05/15/23.</li> <li>○ Sent the May Infographics Packet for Wave 4 to the Consortium on the week of 05/15/23.</li> </ul>  |
| Training                     | <ul style="list-style-type: none"> <li>▶ Continued the Wave 4 Counties' Web Based Training for all staff.</li> <li>▶ Continued Instructor Led Training in all Wave 4 Counties.</li> <li>▶ Continued the Wave 5 Counties' Web Based Training for all staff.</li> <li>▶ Started the Wave 6 Counties' Web Based Training for Early Training and Train the Trainer Participants.</li> <li>▶ Continued tailoring Instructor Led Training materials for the Wave 6 Counties.</li> <li>▶ Hosted Training touchpoints with Solano County, San Francisco County, Alameda County, Sonoma County, San Mateo County, Santa Cruz County, and San Mateo County.</li> </ul>   |
| Implementation               | <ul style="list-style-type: none"> <li>▶ <b>Wave 3</b> <ul style="list-style-type: none"> <li>○ Completed the fourth week of Wave 3 Post-Implementation support.</li> <li>○ Conducted daily business metrics review and Implementation Team calls.</li> <li>○ Managed onsite resource tracker and provided daily resourcing needs.</li> </ul> </li> <li>▶ <b>Future Waves</b> <ul style="list-style-type: none"> <li>○ The GLP Strike Team completed reviewing material for the Wave 4 Go-Live Packet (GLP) that is now going through editorial review.</li> <li>○ Met with Santa Cruz County and reviewed estimated YB and discrepant data and strategies for tackling them – 05/16/23.</li> <li>○ Working with the Regional Managers to create invites for San Mateo and San Diego Counties to review the post-Go-live workload planning.</li> <li>○ Continued activities in support of Sacramento County's asks.</li> <li>○ Reviewed checklist items to track the county approach for Lobby Management and Contact Center.</li> <li>○ Conducted the Wave 4 County Prep Office hours and Daily Debrief, including metrics review on 05/18/23.</li> <li>○ Continued updates to the Readiness Dashboards and Packets for Waves 4, Wave 5, and Wave 6 Counties.</li> <li>○ Finalized Wave 4 Resource Baseline with CalSAWS County volunteers.</li> <li>○ Conducted Wave 4 County Leadership Touchpoint meetings with Santa Cruz County, Solano County, and San Diego County for Post-Implementation support.</li> </ul> </li> </ul> |

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| STATUS REPORT SUB-SECTION | STATUS AGENDA TOPIC   |
|---------------------------|---|
|                           | <ul style="list-style-type: none"><li>○ Prepared for the Wave 4 County site visits to San Diego County and Santa Cruz County.</li><li>○ Conducted site visits to San Mateo County and Solano County.</li><li>○ Provided lessons learned and feedback to Implementation Management Retro Session.</li><li>○ Conducted Fact Sheet Working Group and released one new Fact Sheet.</li><li>○ Conducted a Wave 6 County Profile walkthrough with San Luis Obispo County.</li></ul> |

**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 05/21/23.
  - 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, 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:**
  - DDEL 11.03: County Implementation Completion Report – Wave 3 (Part 1) on 05/24/23.

### 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 Wave 2–6 County Work Plans for the Implementation Readiness Checklist.
- ▶ **Deliverables and Work Products – Submit the following:**
  - DDEL 07.16: County Change Guide – Wave 6 (Sacramento) on 05/22/23.
  - DDEL 07.17: County Change Guide – Wave 6 (San Francisco) on 05/22/23.
  - DDEL 07.18: County Change Guide – Wave 6 (San Luis Obispo) on 05/22/23.

## 2.0 Business Process Reengineering (BPR)

### 2.1 Highlights of the Reporting Period

#### ► Process Simulation

- Initiated preparation activities with wave 5 counties – Alameda County and Sonoma County to provide county with detailed preparation plan and next steps.
- Conducted the Wave 5 Process Simulation preparation session with Alameda County on 05/19/23 and 05/18/23 to complete scenario overview and review preparation plan.
- Conducted the Wave 5 Process Simulation preparation session with Sonoma County on 05/19/23 to complete scenario overview and review preparation plan.
- Facilitated San Mateo and Solano execution working sessions from 05/15/23 – 05/19/23 to accomplish 50% execution target.
- Provided data support to San Diego for internal testing data requirements.
- Provide support to San Diego to triage their internal findings.

#### ► Configuration

- Provided Configuration support to Wave 3 Counties for Go-Live configurations.
- Provided Configuration support to Wave 4 Counties for County Prep activities.
- Provided Configuration support to San Mateo and Solano Counties for Process Simulation execution.
- Facilitated Configuration Verification Session with Alameda County 05/17/23 – 05/18/23.

### 2.2 Activities for the Next Reporting Period

#### ► Process Simulation

- Target 100% execution completion for San Mateo County and Solano County by 05/26/23.
- Continue virtual Process Simulation preparation with Wave 5 counties – Alameda County and Sonoma County.
- Schedule in person Process Simulation preparation sessions with Fresno County on 06/13/23 and 06/15/23.

#### ► Configuration

- Provide Configuration support to Wave 3 Counties for Go-Live configurations.
- Provide Configuration support to Wave 4 Counties for County Prep activities.
- Provide Configuration support to San Mateo and Solano counties for Process Simulation execution.
- Facilitate Configuration Working Session with Alameda County 05/22/23 through 05/26/23.

### 3.0 Organizational Change Management (OCM)

#### 3.1 Highlights of the Reporting Period

► **Wave 5 Change Discussion Guides**

- Continued to monitor the change discussions taking place in Wave 5 Counties through 05/26/23.
- Continued to report the Feedback Form responses through 05/26/23 to Alameda County.

► **Wave 6 Change Discussion Guides**

- Signed off Wave 6 FWP CCG/CDG on 05/18/23.
- Conducted the Change Discussion Prep sessions with Sacramento County from 05/16/23 to 05/19/23.
- Sent the Change Discussion Prep session material to Sacramento County on 05/16/23.
- Sent the CDG Prep session feedback survey to Sacramento County on 05/19/23.

► **Change Readiness Surveys**

- Presented the Wave 2 T+6 Readiness Surveys results decks to the Consortium the week of 05/15/23.
- Validated the stakeholder list of the Wave 6 Counties T-6 Change Readiness Survey.
- Sent the Wave 3 T+6 Readiness Survey CIT to the Counties the week of 05/15/23.
- Sent the Wave 5 T-3 Readiness Survey CIT to the CIT/CRFI Review Group the week of 05/15/23.

► **Change Network Champion (CNC) Meetings**

- Conducted the May CNC session for Waves 3 and 4 on 05/18/23.
- Sent the May CNC session materials to Waves 3 and 4 the week of 05/15/23.
- Prepared the May CNC Session materials to send to Waves 5 and 6.

► **Infographics**

- Distributed the May Infographics for the Wave 5 and 6 packets to the Wave 5 and 6 Counties the week of 05/15/23.
- Sent the May Infographics Packet for Wave 4 to the Consortium on the week of 05/15/23.

#### 3.2 Activities for the Next Reporting Period

► **Wave 5 Change Discussion Guides**

- Continue to monitor the change discussions taking place in Wave 5 Counties through 05/26/23.
- Continue to report the Feedback Form responses through 05/26/23 to Alameda County.

► **Wave 6 Change Discussion Guides**

- Conduct the Change Discussion Prep sessions with San Francisco County from 05/22/23 to 05/23/23.
- Send the feedback session survey to Sacramento County on 05/22/23.
- Send the Change Discussion Prep session material to San Francisco County on 05/22/23.

► **Change Readiness Surveys**

- Validate the stakeholder list of the Wave 3 T+6 Change Readiness Survey.

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- Open the Wave 6 T-6 Change Readiness Survey on 05/22/23.
- Send the Wave 5 T-3 Readiness Survey CIT to the Counties the week of 05/22/23.
- ▶ **Change Network Champion (CNC) Meetings**
  - Send the May CNC session materials to Waves 3 and 4 the week of 05/22/23.
- ▶ **Infographics**
  - Send the May Infographics Packet for Wave 4 to the CIT/CRFI Review Group on the week of 05/22/23.

## 4.0 Training

### 4.1 Highlights of the Reporting Period

- ▶ **Training Advisory Council**
  - Started planning for Training Advisory Council (TAC) Meeting on 6/14/23.
- ▶ **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.
  - Started room set-up and connectivity testing for Early Training and Train the Trainer ILT.
  - Hosted Training Touchpoint with Alameda County.
  - Hosted Training Touchpoint with Sonoma County.
- ▶ **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
  - Started WBTs for Early Training and Train the Trainer participants.
  - Continued tailoring ILT materials for the Wave 6 Counties.
  - Hosted Training Touchpoint with San Francisco County.
  - Hosted Training Touchpoint with Sonoma County.

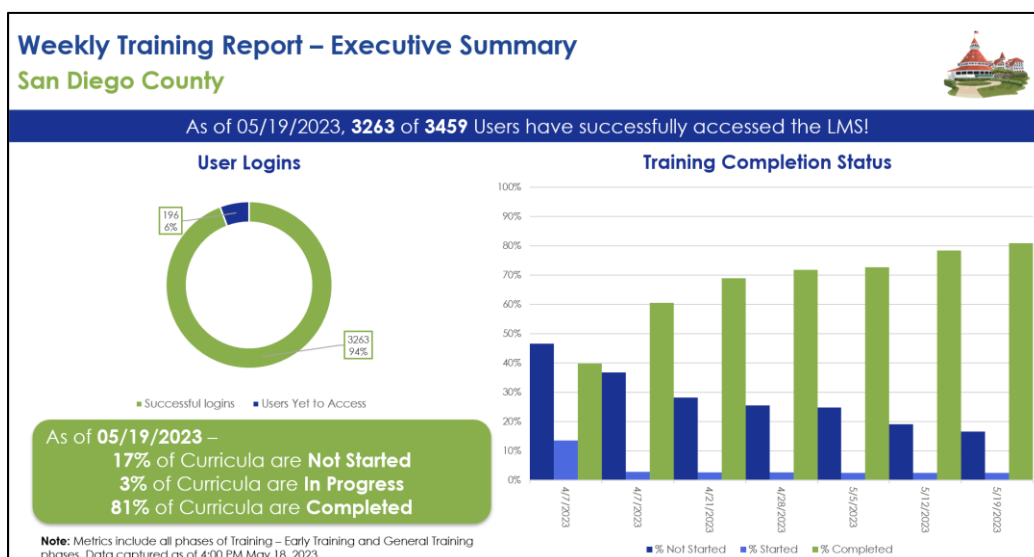


Figure 4.1-1 – Weekly WBT Training Report – San Diego County



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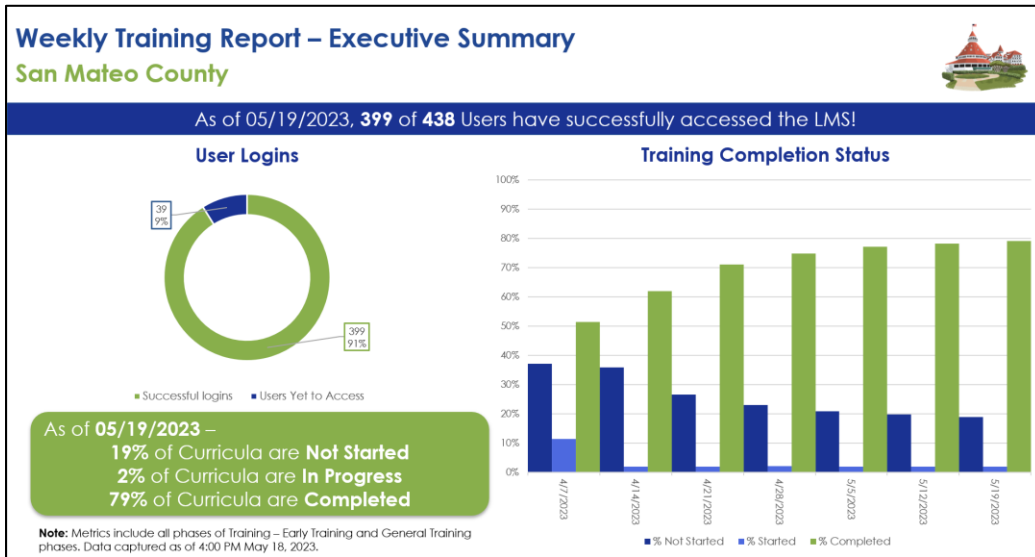


Figure 4.1-2 – Weekly WBT Training Report – San Mateo County

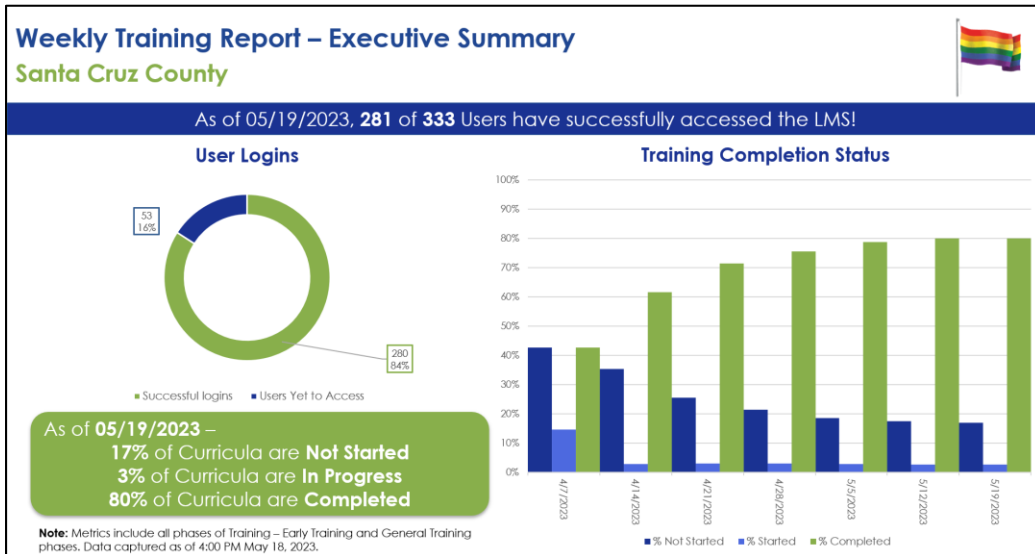


Figure 4.1-3 – Weekly WBT Training Report – Santa Cruz County

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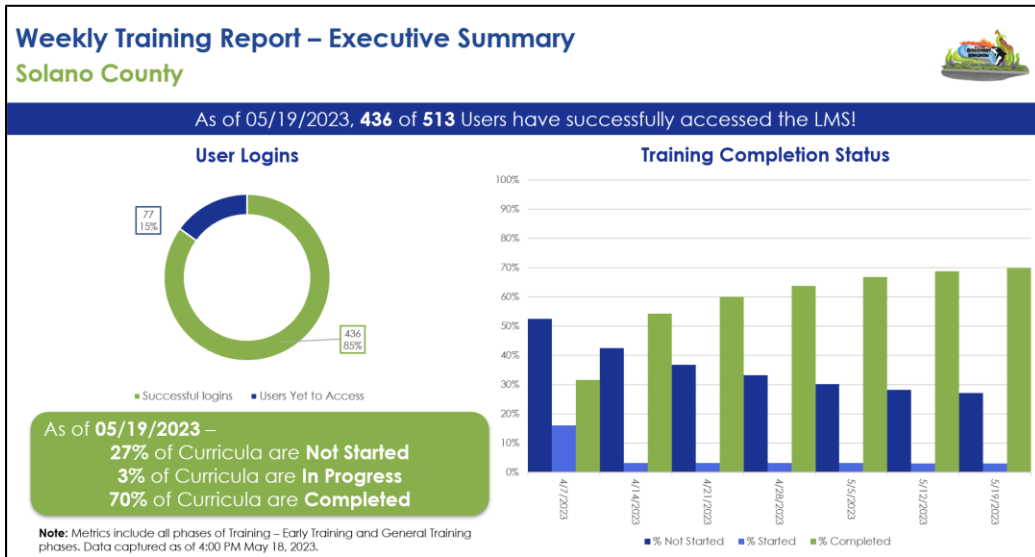


Figure 4.1-4 – Weekly WBT Training Report – Solano County

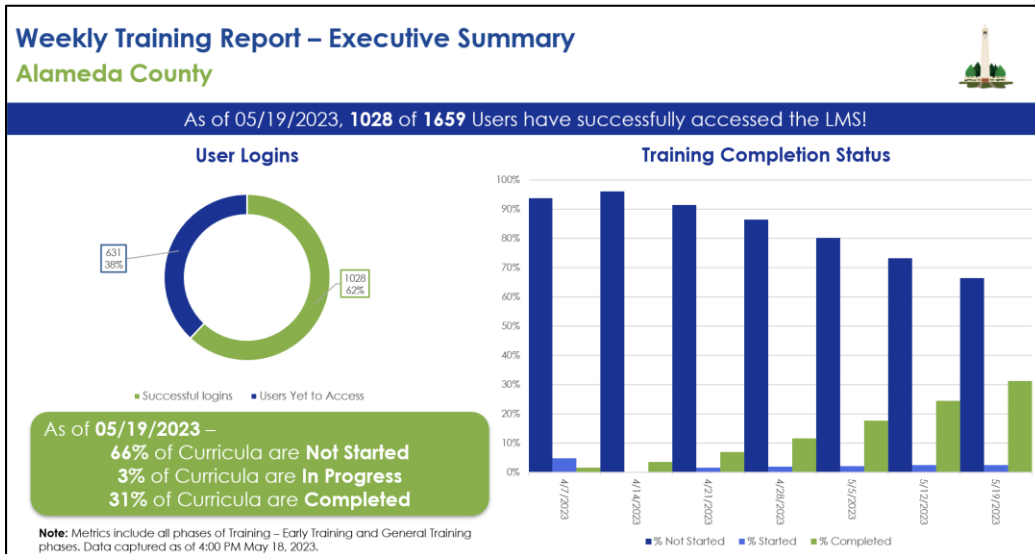


Figure 4.1-5 – Weekly WBT Training Report – Alameda County

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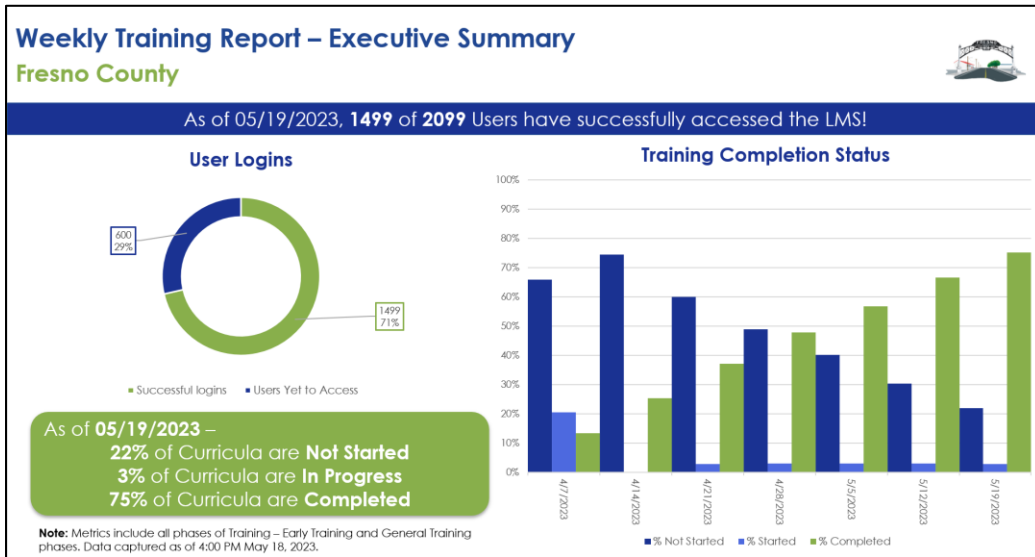


Figure 4.1-6 – Weekly WBT Training Report – Fresno County

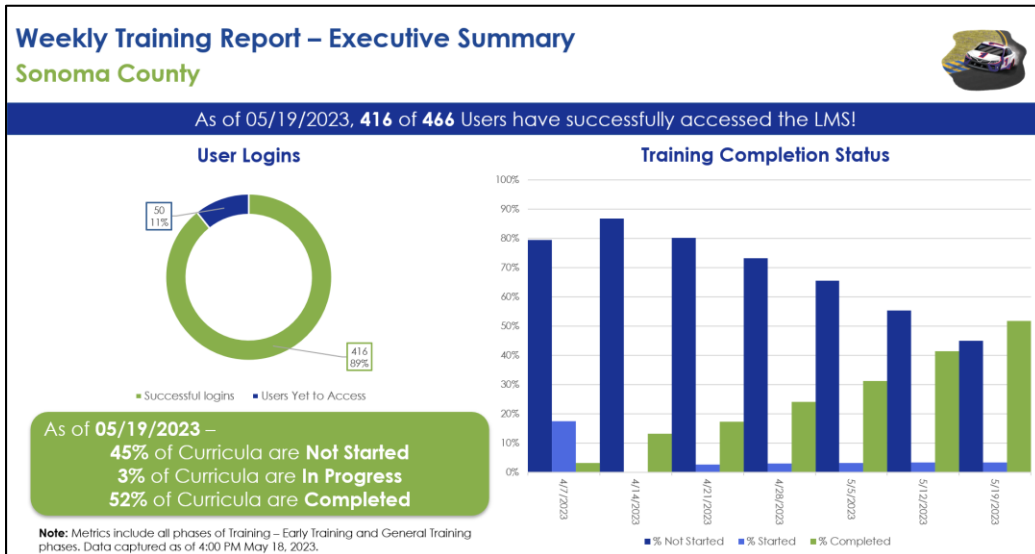


Figure 4.1-7 – Weekly WBT Training Report – Sonoma County

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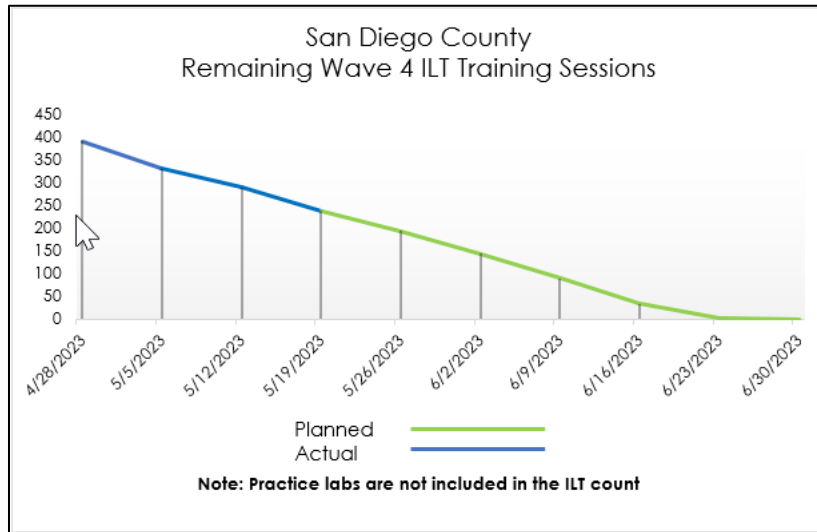


Figure 4.1-8 – Weekly WBT Training Report – San Diego County

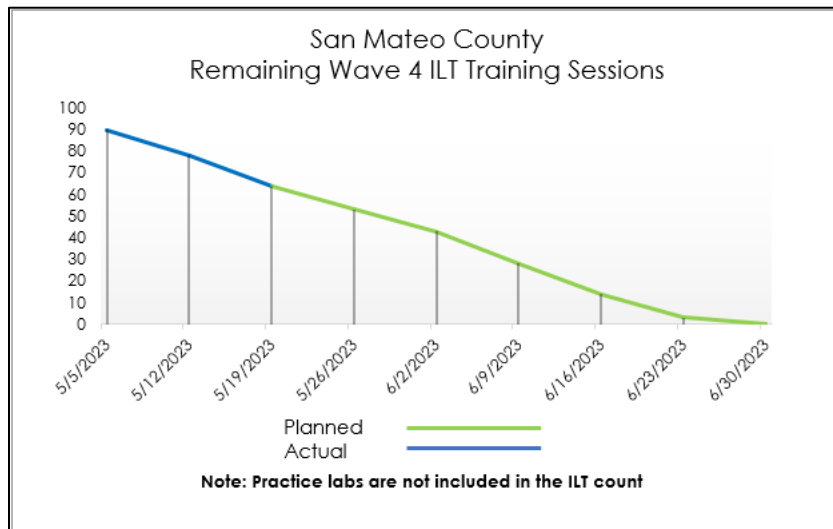


Figure 4.1-9 – Weekly WBT Training Report – San Mateo County

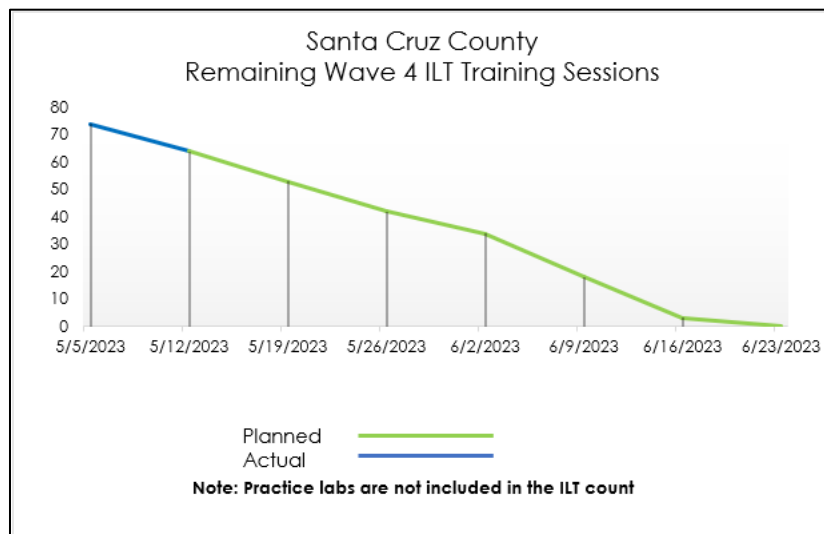


Figure 4.1-10 – Weekly WBT Training Report – Santa Cruz County

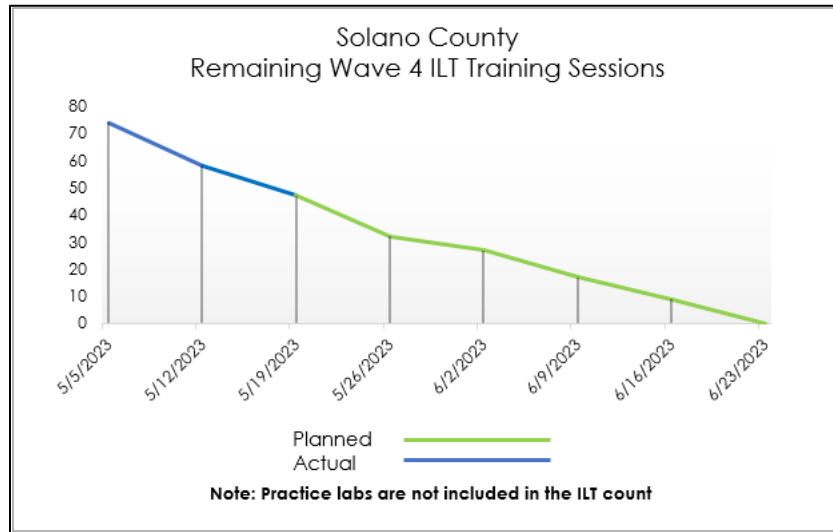


Figure 4.1-11 – Weekly WBT Training Report – Solano County

## 4.2 Activities for the Next Reporting Period

- ▶ **Training Advisory Council**
  - Continue planning for 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.
  - Complete room set-up and connectivity testing for Early Training and Train the Trainer ILT.
  - Host Training Touchpoint with Fresno County.
- ▶ **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
  - Continue WBTs for Early Training and Train the Trainer participants.
  - Host Training Touchpoint with San Luis Obispo County.

## 5.0 Implementation

### 5.1 Highlights of the Reporting Period

- ▶ **Readiness Dashboard and Packet**
  - Continued collecting updates for Waves 4 through Wave 6 Readiness Packets.
- ▶ **Lead TOSS/IPOC Meetings**
  - Conducted TOSS/IPOC checklist review for Santa Cruz County (05/16/23), Alameda County (05/16/23), San Diego County (05/17/23), San Luis Obispo County (05/17/23), San Mateo County (05/18/23), Sacramento County (05/18/23), and Solano County (05/19/23).

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### ► **County Prep Phase**

- Conducted the Wave 4 County Prep Phase Office Hours and Debriefs including metrics review and individual county progress checkpoint.

### ► **Wave 4 Go-Live Packet (GLP)**

- The GLP Strike Team completed reviewing material for the Wave 4 Go-Live Packet (GLP) that is now going through editorial review.
- Met with Santa Cruz County and reviewed estimated YB and discrepant data and strategies for tackling them – 05/16/23.
- Working with RMs on invites to the remaining two Wave 4 Counties to review the post-Go-live workload planning.

### ► **Other Implementation Support**

- Continued activities in support of Sacramento County's requests.
- Reviewed checklist items to track the county approach for Lobby Management and Contact Center.

### ► **Post-Implementation Support**

- Completed the fourth week of Wave 3 Post-Implementation support to counties.
- Conducted daily business metrics reviews and standing Implementation Team calls.
- Managed the onsite resource tracker and provided a daily review of resource needs.
- Finalized Wave 4 Resource Baseline with CalSAWS County volunteers.
- Conducted Wave 4 County Leadership Touchpoint meetings with Santa Cruz County, Solano County, and San Diego County for Post-Implementation support.
- Prepared for the Wave 4 County site visits to San Diego County and Santa Cruz County.
- Conducted site visits to San Mateo County and Solano County.
- Provided lessons learned and feedback to Implementation Management Retro Session.
- Conducted Fact Sheet Working Group and released a new Fact Sheet.
- Conducted a Wave 6 County Profile walkthrough with San Luis Obispo County.

## 5.2 Activities for the Next Reporting Period

### ► **Post-Implementation Support**

- Complete the fifth week of Wave 3 Onsite & Virtual post-Implementation support.
- Track Wave 3 interactions and ServiceNow ticket reporting for daily meetings.
- Complete Wave 4 County Leadership Touchpoint meetings for post-Implementation support with San Mateo County.
- Conduct Wave 4 County Site Visit to San Diego County on 5/25/23.
- Complete Wave 4 resource assignments and refresh all onsite travel materials.
- Observe and document post-Implementation metric trends and issue resolutions.
- Facilitate Fact Sheet Review meetings and develop Fact Sheets for distribution.

### ► **Readiness Dashboard and Packet**

- Continue collecting updates for the Wave 4 through 6 Readiness Packets.
- Finalize and Distribute Readiness biweekly Dashboard and Packet for Wave 4.

### ► **Wave 4 Go-Live Packet**

- Distribute Wave 4 GLP for CIT review.

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- Close out review of open items (awaiting development team analysis) from current discussions.
- **Other Implementation Activities**
  - Present volume analysis and county workload forecasts to remaining Wave 4 Counties.
  - Work with the TOSS Team to incorporate various checklists – Payment processing for Central Print, Lobby Management, Contact Center, User Access, etc.
- **County Prep Phase**
  - Conduct the Wave 4 County Prep Phase Office Hours and Debriefs including metrics review and individual county progress checkpoint.
- **Wave IPOC Meetings**
  - Conduct the Wave 5 IPOC meeting on 05/24/23.
- **TOSS/IPOC Meetings**
  - Conduct TOSS/IPOC checklist review for Santa Cruz County (05/23/23), Sonoma County (05/23/23), San Francisco County (05/24/23), Fresno County (05/24/23), and Solano County (05/26/23).

## 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       |
| 01.28  | 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         | 06/02/23             | 06/05/23 | 06/13/23       |
| 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 – 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  |
|-------|---|----------|--|
| 07.16 | County Change Guide – Wave 6 (Sacramento) | On Track | DDEL submission 05/22/23<br>FDEL submission 06/05/23<br>FDEL approval 06/13/23 |

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| DEL # | Deliverable Name  | Status   | Next Deadline  |
|-------|---|----------|--|
| 07.17 | County Change Guide – Wave 6 (San Francisco)              | On Track | DDEL submission 05/22/23<br>FDEL submission 06/05/23<br>FDEL approval 06/13/23 |
| 07.18 | County Change Guide - Wave 6 (San Luis Obispo)            | On Track | DDEL submission 05/22/23<br>FDEL submission 06/05/23<br>FDEL approval 06/13/23 |
| 11.03 | County Implementation Completion Report – Wave 3 (Part 1) | On Track | DDEL submission 05/24/23<br>FDEL submission 06/05/23<br>FDEL approval 06/09/23 |

**Table 6.1-2 – Upcoming Deliverable Deadlines**

| <div>Complete</div> <div>Coming Soon</div> <div>County Sign-Off Pending</div> |   |          |          |                |
|---|---|----------|----------|----------------|
| 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 |
|------|---|--------|---------------|
|      | 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 | 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 | Wave 1–2: Closed<br>Wave 3–6: Open | 4      | Medium     | 03/03/21    |



## CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, May 24, 2023

Period: May 15, 2023 to May 21, 2023

| ID  | Title   | Details  | Status                             | Impact                                  | Risk Level   | Date Logged |
|-----|---|--|------------------------------------|---|--|-------------|
|     | multi-vendor CalSAWS ecosystem may impact business operations   | magnifies the potential impact to business operations and benefits to the participants.  |                                    |   |  |             |
| 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 1–3: Closed<br>Wave 4–6: Open | 5                                       | Wave 1: Low<br>Wave 2–5: High<br>Wave 6: Low                     | 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 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 1–3: Closed<br>Wave 4–6: Open | Wave 1: 4<br>Wave 2–4: 3<br>Wave 5–6: 2 | Wave 1: Low<br>Wave 2: Medium<br>Wave 3: Low<br>Wave 4–6: Medium | 12/13/21    |
| 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 1–3: Closed<br>Wave 4–6: Open | 3                                       | Wave 1: Low<br>Wave 2–6: Medium                                  | 01/12/22    |

## CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, May 24, 2023

Period: May 15, 2023 to May 21, 2023

| 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.  |                                    |                          |            |             |
| 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 1–2: Closed<br>Wave 2–6: Open | Wave 1: 3<br>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 | Wave 3: Closed<br>Wave 4–6: Open   | 3                        | Medium     | 02/08/23    |

## CalSAWS – CalWIN ISS Weekly Status Report

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Period: May 15, 2023 to May 21, 2023

| ID  | Title  | Details   | Status | Impact | Risk Level | Date Logged |
|-----|--|---|--------|--------|------------|-------------|
|     |  | 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.   |        |        |            |             |
| 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**

**CalSAWS – CalWIN ISS Weekly Status Report**

Weekly Status Report, May 24, 2023

Period: May 15, 2023 to May 21, 2023

**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 |
|---------|---|---|---|-------------------|-------------------------|------------------------|
| 0184-23 | PPOCs (48); Regional Managers; Self Service Portal Committee  | BenefitsCal<br>CalSAWS Features<br>Status for<br>Counties   | CalSAWS<br>M&E,<br>CalSAWS<br>Migration | 05/15/23          | Marsale<br>Eramya       | Carlos<br>Zepeda       |
| 0185-23 | PPOCs (48, San Diego, San Mateo, Santa Cruz, Solano); Regional Managers; Help Desk                                | Wave 3C Cutover<br>Weekend<br>Calendar<br>Infographic   | CalSAWS<br>M&E,<br>CalSAWS<br>Migration | 05/17/23          | Anand<br>Kulkarni       | Cathryn<br>van Namen   |
| 0186-23 | PPOCs (48); Regional Managers; Help Desk  | CalSAWS Reports,<br>Enhanced Data<br>Reporting (EDR)<br>and Dashboards<br>Availability Post<br>Wave 3C Cutover<br>Go-Live | CalSAWS<br>M&E,<br>CalSAWS<br>Migration | 05/17/23          | Claudia<br>Pinto        | Cathryn<br>van Namen   |
| 0187-23 | PPOCs (Orange, Santa Barbara, Ventura); Directors (Orange, Santa Barbara, Ventura); Regional Managers (R5)        | Wave 3 Counties<br>T+6 Weeks<br>Change<br>Readiness Survey  | CalWIN<br>Migration                     | 05/18/23          | Helen Cruz              | Araceli<br>Gallardo    |
| 0188-23 | PPOCs (Sacramento, San Francisco, San Luis Obispo); Regional Managers (R1, R2); Section Directors; IPOCs (Wave 6) | CalSAWS LMS<br>Access Guide for<br>General Training –<br>CalWIN Wave 6  | CalSAWS<br>Migration                    | 05/18/23          | Ashley<br>Arnold        | Renee<br>Carter        |

**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   |
|---------|---|---|-------------------|--------|-------------------|-------------------|------------------|
| 23-064  | PPOCs (45, Orange, Santa Barbara, Ventura); Regional Managers | CalWIN Migration<br>Wave 4 – CalSAWS<br>County On-Site &<br>Virtual Support | 04/19/23          | Closed | 05/18/23          | Jeffrey<br>Fuller | Michael<br>Gates |
| 23-065  | PPOCs (Alameda, Fresno, Sonoma); Regional Managers            | CalWIN Migration<br>Wave 4 –<br>Observers From<br>Wave 5 CalWIN<br>Counties | 04/19/23          | Closed | 05/18/23          | Jeffrey<br>Fuller | Michael<br>Gates |

**CalSAWS – CalWIN ISS Weekly Status Report**

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| CRFI ID | To   | Subject  | Distribution Date | Status | Response Due Date | Primary Contact | Backup Contact |
|---------|--|--|-------------------|--------|-------------------|-----------------|----------------|
| 23-066  | PPOCs (Alameda, Fresno, Sonoma); Regional Managers   | CalWIN Migration Wave 4 –On-Site Support From Wave 5 CalWIN Counties | 04/19/23          | Closed | 05/18/23          | Jeffrey Fuller  | Michael Gates  |
| 23-067  | PPOCs (Alameda, Fresno, Sonoma); Regional Managers (R1, R4)  | CalWIN Wave 5 Pre-Migration Regression Testing                       | 04/21/23          | Closed | 05/19/23          | Lloyd Rankine   | Matt Zior      |
| 23-069  | PPOCs (Alameda, Fresno, Sonoma); Regional Managers (R1, R3, R4); Section Directors                               | CalWIN Tech Enablement and Security Compliance Wave 5                | 05/01/23          | Closed | 05/19/23          | Lloyd Rankine   | Matt Zior      |
| 23-070  | PPOCs (Alameda, Fresno, Sonoma); Regional Managers (R1, R3, R4);   | CalWIN Wave 5 Counties - Request to Identify/Review Portal CBO Data  | 05/04/23          | Closed | 05/18/23          | Marsale Eramya  | Uzair Naveed"  |
| 23-071  | PPOCs (Sacramento, San Francisco, San Luis Obispo); Regional Managers R1, R2, R4); IPOCs (Wave 6);TPOCs (Wave 6) | CalWIN Wave 6 Pre-Migration Regression Testing                       | 05/15/23          | Open   | 06/16/23          | Lloyd Rankine   | Matt Zior      |
| 23-072  | PPOCs (Alameda, Fresno, Sonoma); Regional Managers (R1, R4)  | CalWIN Wave 5 Counties - Central Print Portal Users                  | 5/16/2023         | Open   | 6/2/2023          | Julie Holmes    | Geoff Cosner   |
| 23-073  | PPOCs (Alameda, Fresno, Sonoma); Regional Managers (R1, R4)  | CalWIN Wave 5 Counties: Project-Maintained Worker IDs                | 05/17/23          | Open   | 06/01/23          | Darcy Alexander | Dymas Pena     |

**Table 6.2-3 – CRFIs**

## CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, May 24, 2023

Period: May 15, 2023 to May 21, 2023

### 6.3 Appendix C – Project Work Plan Reports

#### Project Timeline

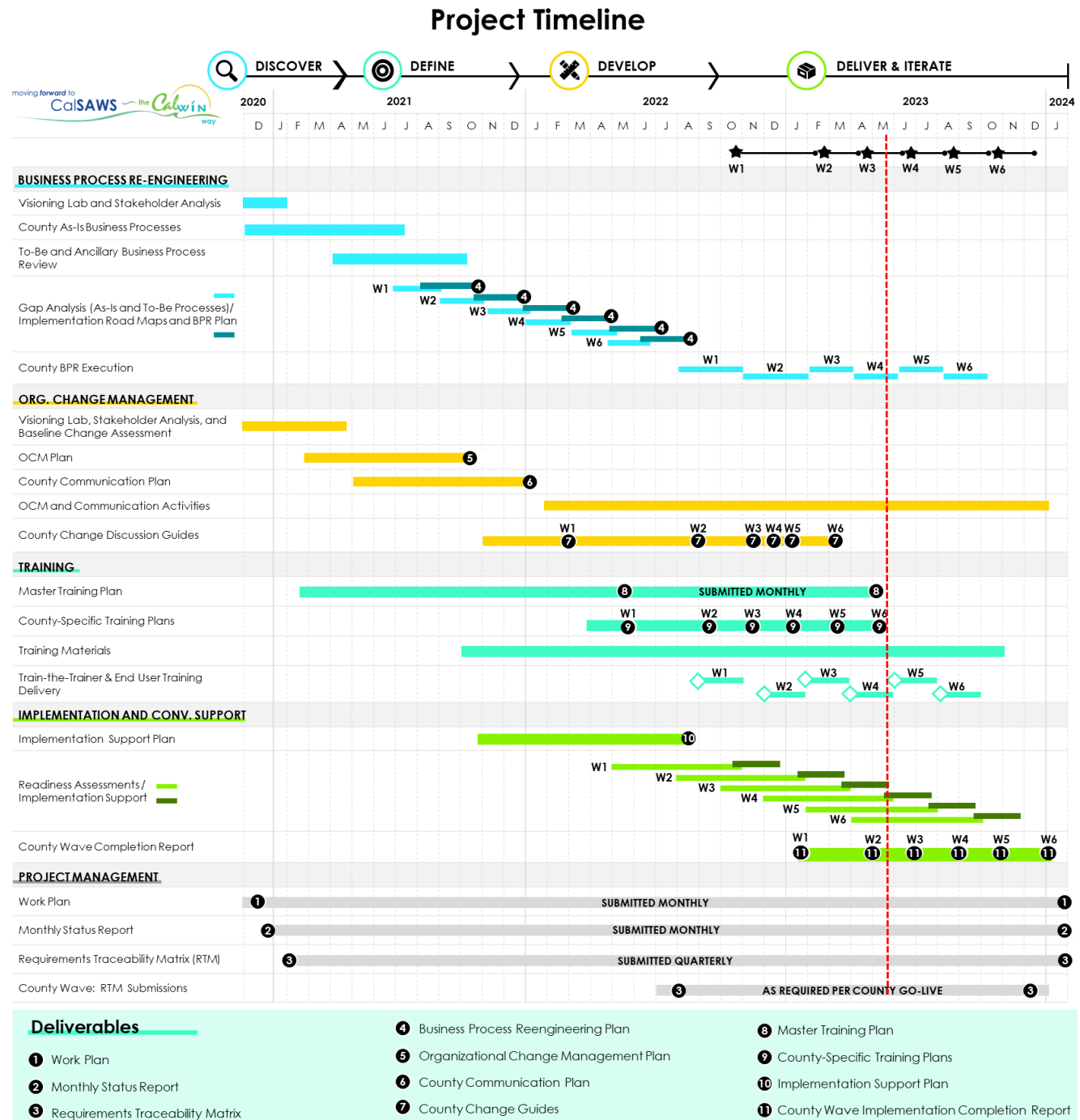


Figure 6.3-1 – Project Timeline

## CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, May 24, 2023

Period: May 15, 2023 to May 21, 2023

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### 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**