

CaSAWS CalWIN
Implementation Support
Services (ISS) Weekly Status
Report

Reporting Period: June 12, 2023 to June 18, 2023

CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, June 22, 2023

Period: June 12, 2023 to June 18, 2023

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Business Process Reengineering (BPR)	<ul style="list-style-type: none"> ▶ Wave 4 <ul style="list-style-type: none"> ○ Provided Configuration support for County Prep activities. ▶ Wave 5 <ul style="list-style-type: none"> ○ Facilitated a Configuration Verification Session with Sonoma County 06/14/23 through 06/15/23. ○ Provided Configuration support for Process Simulation scenario review for Alameda County and Fresno County. ○ Conducted the Wave 5 Process Simulation preparation session with Alameda County on 06/13/23 and 06/18/23. ○ Conducted in-person Wave 5 Process Simulation preparation for Fresno County from 06/13/23 to 06/15/23. ○ Finalized and updated Process Simulation scenarios for Alameda County and Fresno County. ▶ Wave 6 <ul style="list-style-type: none"> ○ Facilitated CalSAWS Configuration Kickoff meeting with San Luis Obispo County on 06/12/23. ○ Facilitated CalSAWS Configuration Kickoff meetings with Sacramento County and San Francisco County on 06/13/23. ○ Kicked off the Wave 6 Process Simulation schedule and planning efforts.
Organizational Change Management (OCM)	<ul style="list-style-type: none"> ▶ Wave 5 Change Discussion Guides <ul style="list-style-type: none"> ○ Closed out the Feedback Form and completed the Change Discussions for Alameda County on 06/09/23. ▶ Wave 6 Change Discussion Guides <ul style="list-style-type: none"> ○ Continued to conduct the Change Discussion Office Hours with Wave 6 Counties through the week of 06/15/23. ○ Continued to conduct the Weekly PPOC Touchpoints with the Wave 6 Counties. ▶ Change Network Champions <ul style="list-style-type: none"> ○ Conducted the Waves 5 and Wave 6 CNC Session on 06/13/23. ○ Conducted the Wave 4 CNC Session on 06/15/23. ○ Started to prepare to send the Waves 4, Wave 5, and Wave 6 CNC Session Materials to the counties. ▶ Change Readiness Surveys <ul style="list-style-type: none"> ○ Closed the Wave 3 T+6 Change Readiness Survey on 06/12/23 and begin to analyze the survey. ○ Continued to develop the Wave 6 T-6 Change Readiness Survey presentation.

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	<ul style="list-style-type: none"> ○ Monitored the Wave 5 T-3 Readiness Surveys and closed the survey on 06/16/23. ○ Scheduled to review the Wave 6 T-6 Change Readiness Survey results with Consortium. ○ Analyzed the Wave 3 T+6 Change Readiness Survey and began to develop the presentation deck. ▶ Newsletter/Infographics <ul style="list-style-type: none"> ○ Sent the June Infographics Packet for Waves 4-6 to the CIT/CRFI Review Group on the week of 06/12/23. ○ Sent the Wave 6 Newsletter #3 to the Consortium for a review on the week of 06/12/23.
Training	<ul style="list-style-type: none"> ▶ Continued the Wave 4 Counties' Web Based Training for all staff. ▶ Continued Instructor Led Training in all Wave 4 Counties. ▶ Continued the Wave 5 Counties' Web Based Training for all staff. ▶ Continued Instructor Lead Training for Early Training and Train the Trainer participants in the Wave 5 Counties. ▶ Continued the Wave 6 Counties' Web Based Training all staff. ▶ Continued tailoring Instructor Led Training materials for the Wave 6 Counties. ▶ Hosted ILT Walkthroughs with San Francisco County. ▶ Hosted Training Advisory Council (TAC) meeting. ▶ Hosted Training touchpoints with San Francisco County, Solano County, San Mateo County, Santa Cruz County, and Sacramento County.
Implementation	<ul style="list-style-type: none"> ▶ Wave 3 <ul style="list-style-type: none"> ○ Completed the eighth week of Wave 3 post-Implementation support. ○ Conducted daily business metrics review and Implementation Team calls. ○ Managed onsite resource tracker and provided daily resourcing needs. ○ Conducted Fact Sheet Working Group to develop new Fact Sheets. ▶ Go-Live Packet (GLP) <ul style="list-style-type: none"> ○ Wave-4 GLP Orientation Sessions completed on 06/12/23, 06/15/23, and 06/16/23. ○ Presented update on GLP at the CNC meeting on 06/14/23. ○ Distributed updated CIT# 0200-23 to include new appendix with GLP links, and location of Orientation session recording. ○ Restarted second round of GLP review sessions and completed 3 sessions reviewing 26 Conversion, 18 Contact Center, and over 60 operational defects. ▶ Future Waves <ul style="list-style-type: none"> ○ Supported Model Office activities for Wave 4 Counties. Continue updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center. ○ Internally reviewed presentation that aggregates all RDB documentation by audience for distribution to counties.

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	<ul style="list-style-type: none"> ○ Conducted the Wave 4 County Prep Office hours and Daily Debrief, including metrics review on 06/15/23. ○ Continued updates to the Readiness Dashboards and Packets for Wave 4, Wave 5, and Wave 6 Counties. ○ Distributed Readiness Dashboard and Packet to Wave 4 counties. ○ Conducted W4 Full Orientation Option 2 for County Volunteers on 06/14/23. ○ Updated Wave 4 onsite resource materials including CalSAWS/Trip Books. ○ Facilitated Wave 5 command center overview discussion with leadership. ○ Scheduled Wave 5 site visits to assess post-implementation requirements.

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 06/18/23.
- 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 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.

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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 3–6 County Work Plans for the Implementation Readiness Checklist.
- ▶ **Deliverables and Work Products – Submit the following:**
 - No scheduled submissions during reporting period.

2.0 Business Process Reengineering (BPR)

2.1 Highlights of the Reporting Period

- ▶ **Process Simulation**
 - Continued preparation activities with the Wave 5 Alameda County, Fresno County, and Sonoma County to add detailed scenario steps, security roles and execution assignments.
 - Submitted Wave 5 data request for process simulation scenario execution.
 - Updated county comments for Alameda County scenarios on 06/13/23 and 06/16/23.
 - Reviewed and updated county comments for Fresno County scenarios from 06/13/23 – 06/15/23.
- ▶ **Configuration**
 - Provided Configuration support to Wave 4 Counties for County Prep activities.
 - Provided Configuration support for Alameda County Process Simulation scenario review.
 - Provided Configuration support for Fresno County Process Simulation scenario review.
 - Facilitated Configuration Verification session with Sonoma County from 06/14/23 – 06/15/23.
 - Facilitated CalSAWS Configuration Kickoff meetings with Wave 6 Counties.

2.2 Activities for the Next Reporting Period

- ▶ **Process Simulation**
 - Complete Process Simulation scenario finalization for Alameda County by 06/20/23.
 - Complete Process Simulation scenario level 2 updates for Fresno County by 06/19/23.
 - Finalize and schedule Wave 6 kick off and preparation sessions by 06/23/23.
 - Review and close scenario finalization for Sonoma county by 06/23/23.
- ▶ **Configuration**
 - Provide Configuration support to Wave 4 Counties for County Prep activities.

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- Facilitate the Configuration Working Session with Sonoma County 06/19/23 – 06/23/23.
- Facilitate Configuration Set-Up for Process Simulation with Alameda County 06/22/23.

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

▶ Wave 5 Change Discussion Guides

- Closed out the Feedback Form and completed the Change Discussions for Alameda County on 06/09/23.

▶ Wave 6 Change Discussion Guides

- Continued to conduct the Change Discussion Office Hours with Wave 6 Counties through the week of 06/15/23.
- Submitted the FDEL signoff to the Wave 6 Counties on 06/13/23.
- Continued to conduct the Weekly PPOC Touchpoints with the Wave 6 Counties.

▶ Change Network Champions

- Conducted the Waves 5 & Wave 6 CNC Session on 06/13/23.
- Conducted the Wave 4 CNC Session on 06/15/23.
- Prepared to send the Waves 4, Wave 5 and Wave 6 CNC Session Material to the counties.

▶ Change Readiness Surveys

- Closed the Wave 3 T+6 Change Readiness Survey on 06/12/23 and begin to analyze the survey results.
- Continued to develop the Wave 6 T-6 Change Readiness Survey presentation.
- Monitored the Wave 5 T-3 Readiness Surveys and closed the survey on 06/16/23.
- Scheduled to review the Wave 6 T-6 Change Readiness Survey results with Consortium.
- Analyzed the Wave 3 T+6 Change Readiness Survey and began to develop the presentation deck.

▶ Newsletter/Infographics

- Sent the June Infographics Packet for Waves 4, Wave 5, & Wave 6 to the CIT/CRFI Review Group on the week of 06/12/23.
- Sent the Wave 6 Newsletter #3 to the Consortium for a review on the week of 06/12/23.

3.2 Activities for the Next Reporting Period

▶ **Wave 6 Change Discussion Guides**

- Continue to conduct the Weekly PPOC Touchpoints with the Wave 6 Counties.
- Send the Change Discussion Feedback Form to San Francisco County and San Luis Obispo County on the week of 06/19/23.
- Monitor the Feedback Form Responses with San Francisco County and San Luis Obispo County.

▶ **Change Network Champions**

- Prepare to send the Waves 4, Wave 5 & Wave 6 CNC Session Material to the counties.
- Begin to develop the July CNC Session Deck.

▶ **Change Readiness Surveys**

- Analyze the Wave 5 T-3 Readiness Surveys and begin to develop the presentation materials.
- Review the Wave 6 T-6 Readiness Surveys with Consortium on the week of 06/19/23.

▶ **Newsletter/Infographics**

- Send the June Infographics Packet for Waves 4, Wave 5, and Wave 6 to the Counties on the week of 06/19/23.
- Send the Wave 6 Newsletter #3 to the CIT/CRFI Review Group for a review on the week of 06/19/23.

4.0 Training

4.1 Highlights of the Reporting Period

▶ **Training Advisory Council**

- Hosted 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.
- Started ILTs for Train the Trainer in Alameda County.

▶ **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**

- Continued WBTs for all staff.
- Continued tailoring ILT materials for the Wave 6 Counties.
- Hosted ILT Walkthroughs for San Francisco County.
- Hosted Training Touchpoint with San Francisco County.
- Hosted Training Touchpoint with Sacramento County.

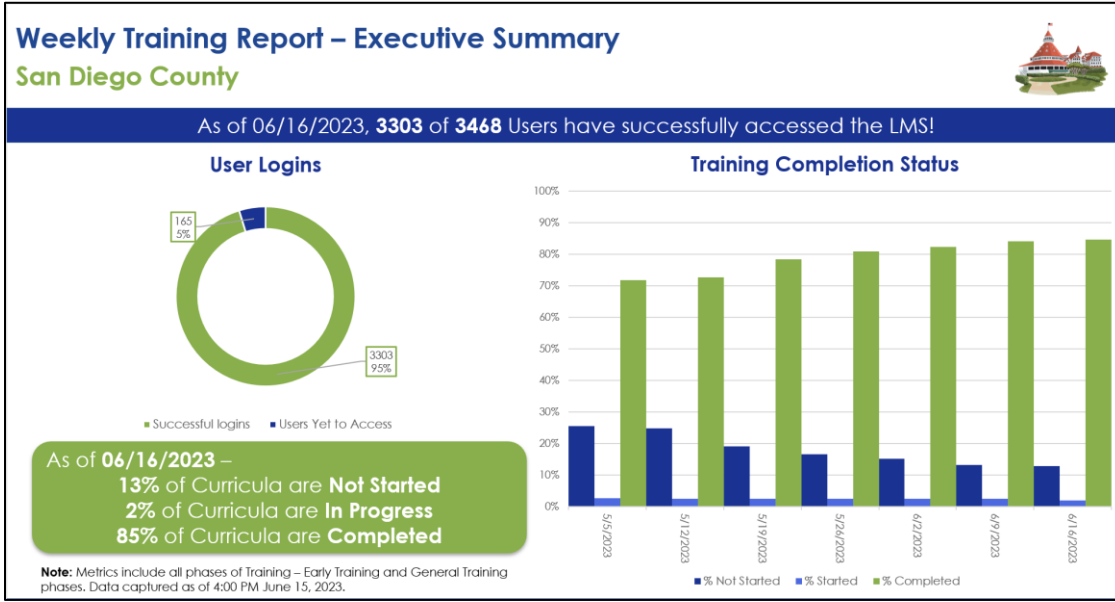


Figure 4.1-1 – Weekly WBT Training Report – San Diego County

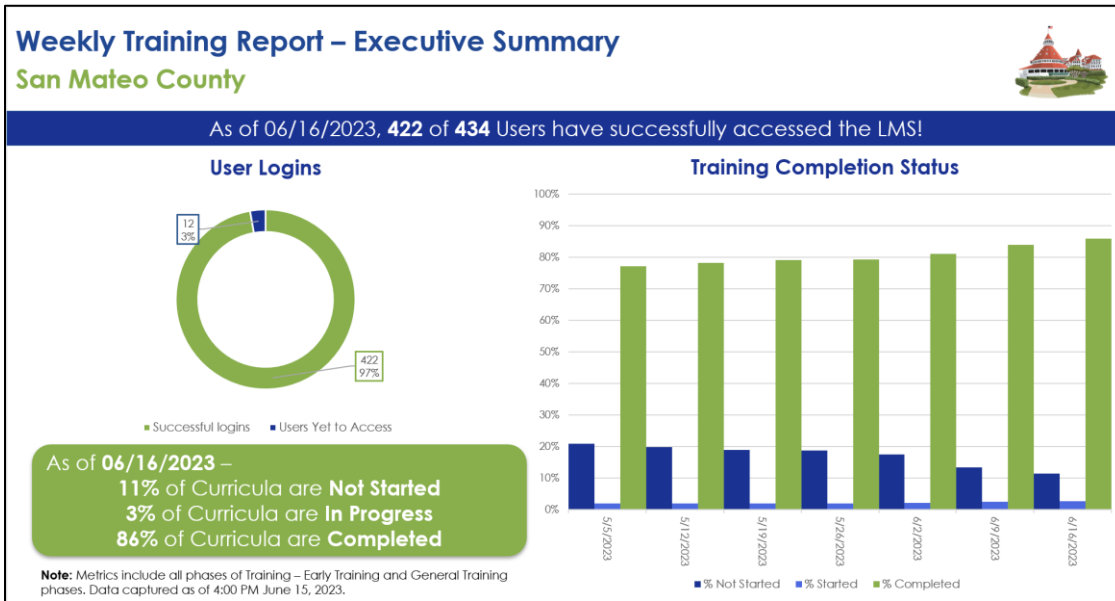


Figure 4.1-2 – Weekly WBT Training Report – San Mateo County

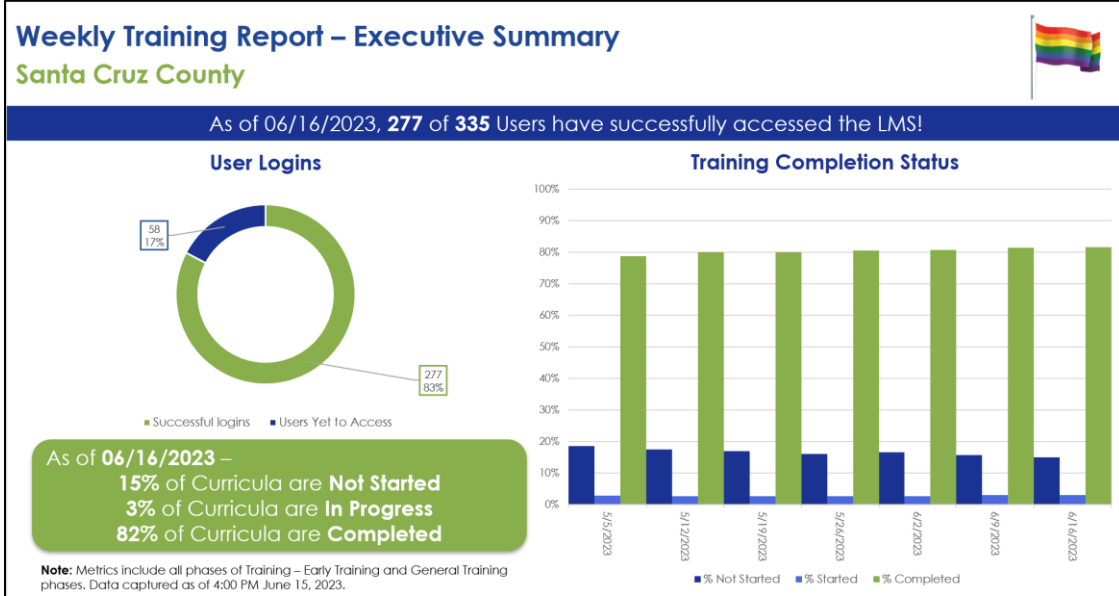


Figure 4.1-3 – Weekly WBT Training Report – Santa Cruz County

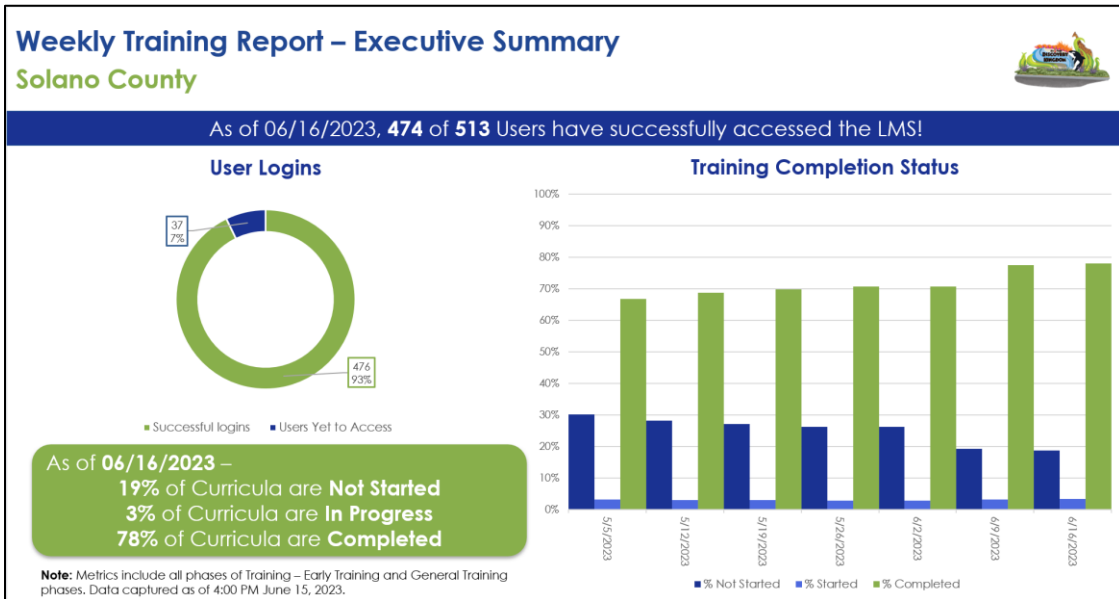


Figure 4.1-4 – Weekly WBT Training Report – Solano County

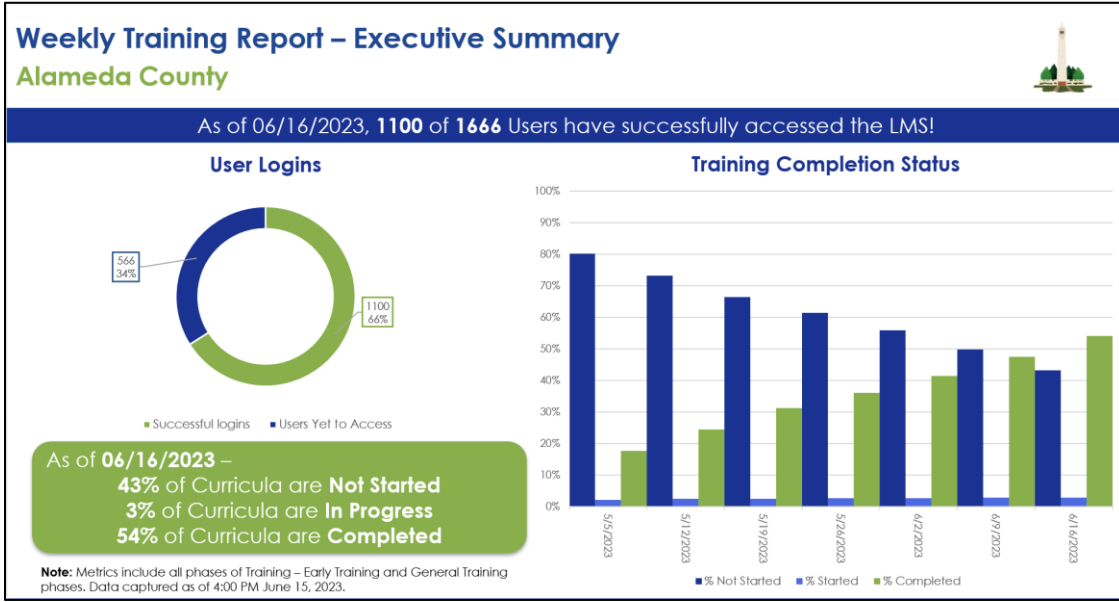


Figure 4.1-5 – Weekly WBT Training Report – Alameda County

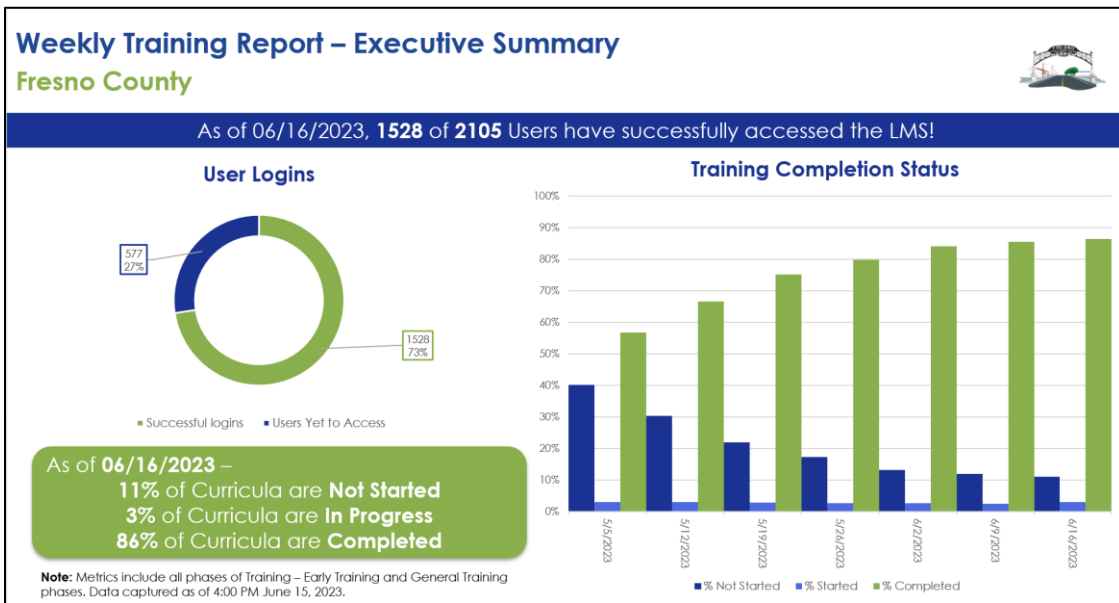


Figure 4.1-6 – Weekly WBT Training Report – Fresno County

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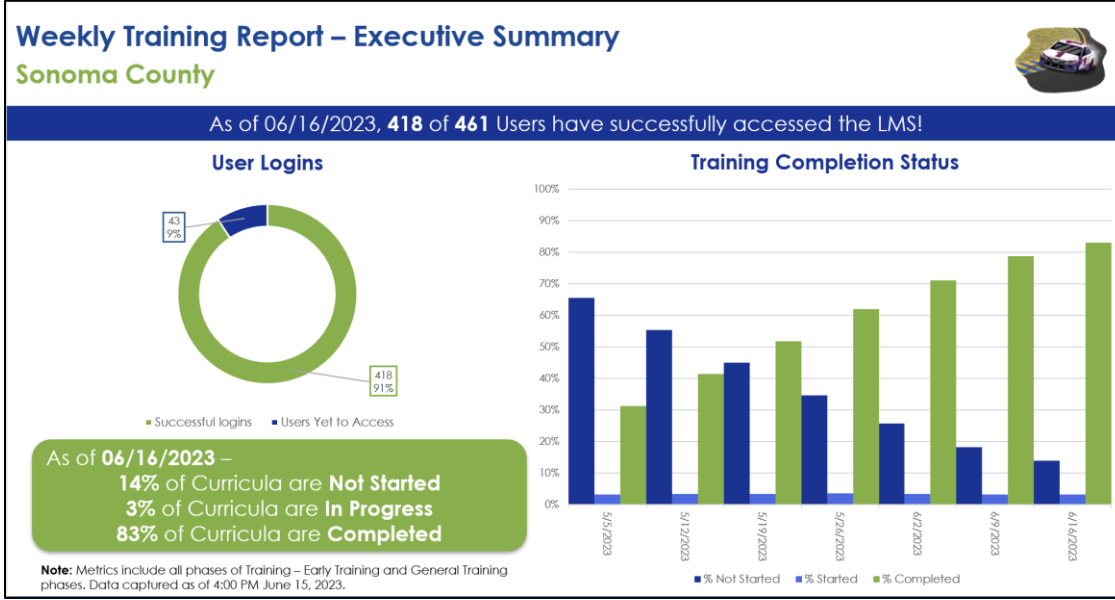


Figure 4.1-7 – Weekly WBT Training Report – Sonoma County

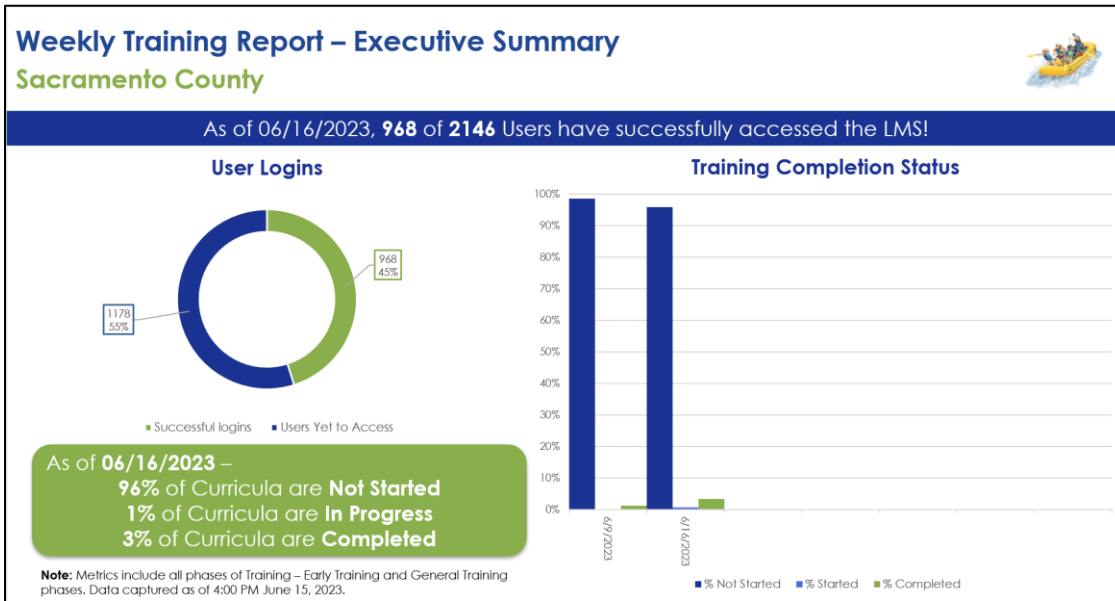


Figure 4.1-8 – Weekly WBT Training Report – Sacramento County

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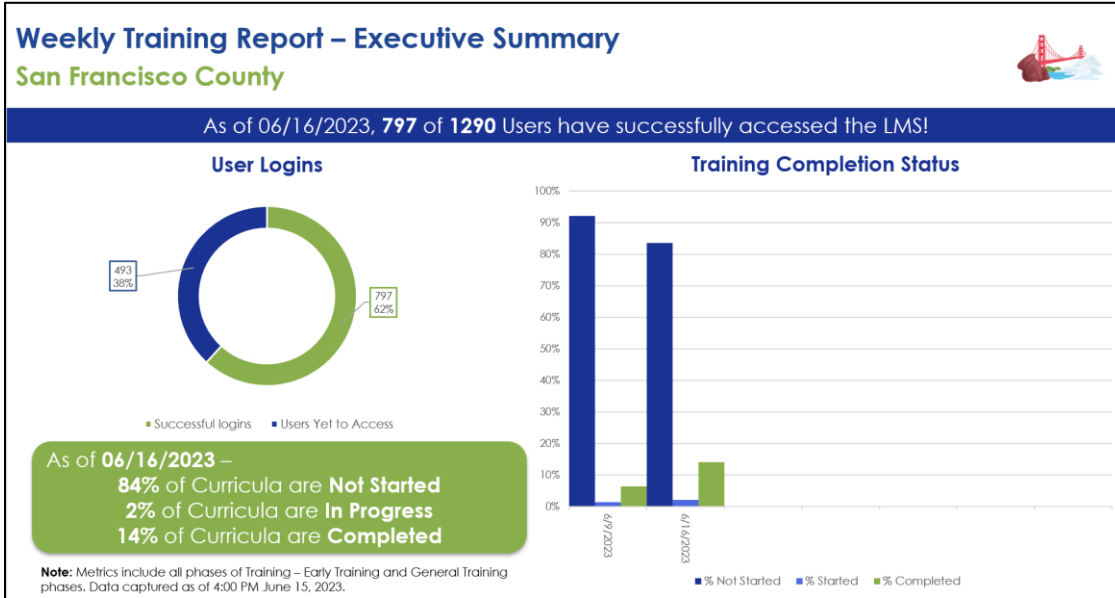


Figure 4.1-9 – Weekly WBT Training Report – San Francisco County

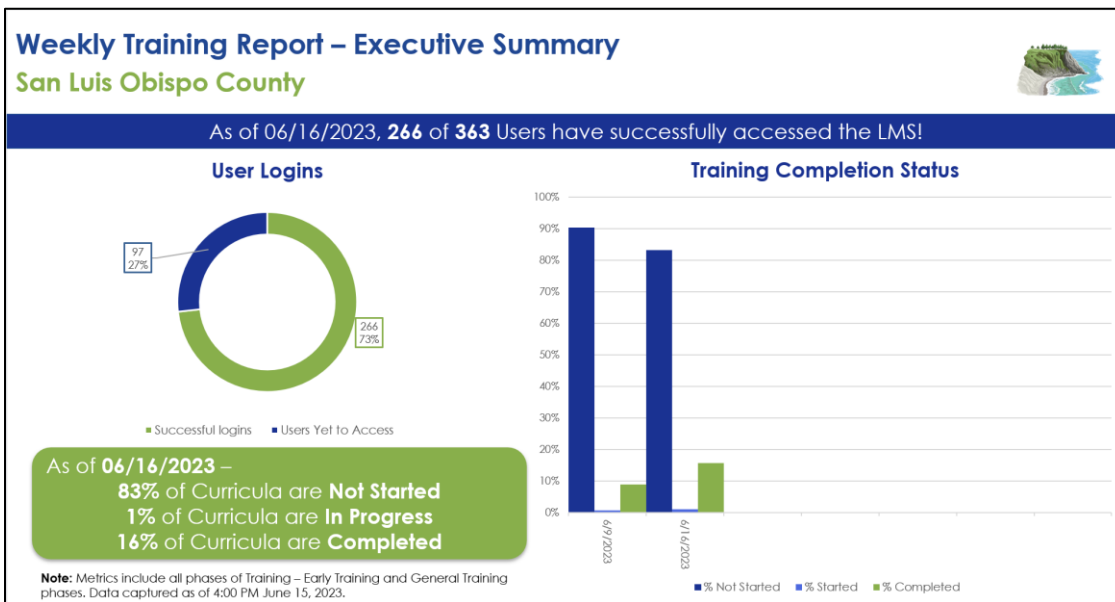


Figure 4.1-10 – Weekly WBT Training Report – San Luis Obispo County

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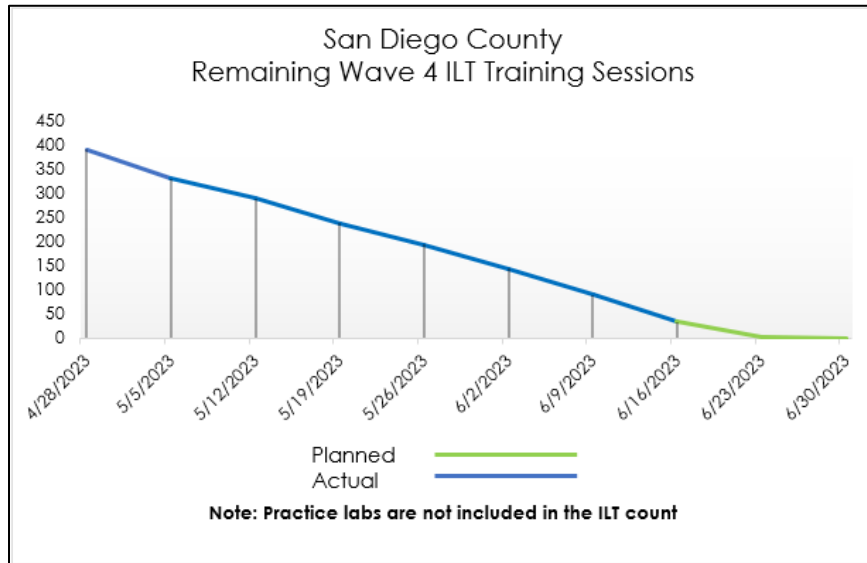


Figure 4.1-11 – Weekly WBT Training Report – San Diego County

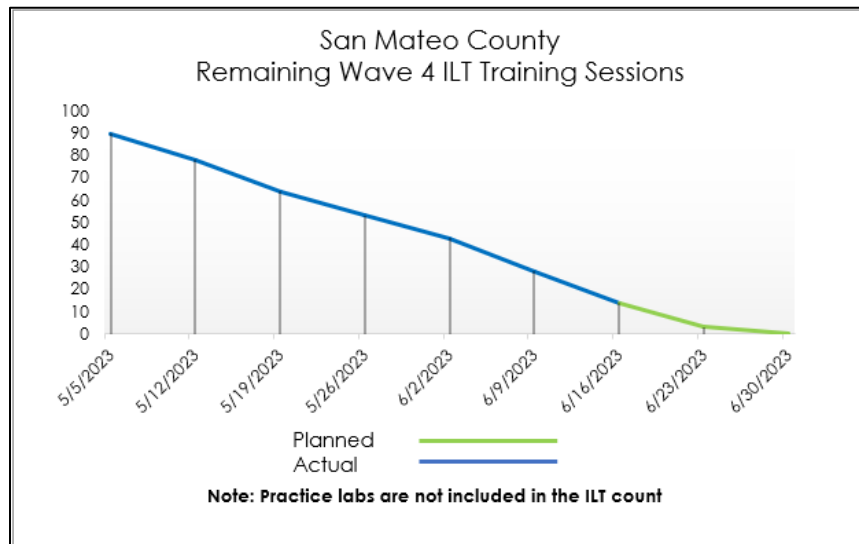


Figure 4.1-12 – Weekly WBT Training Report – San Mateo County

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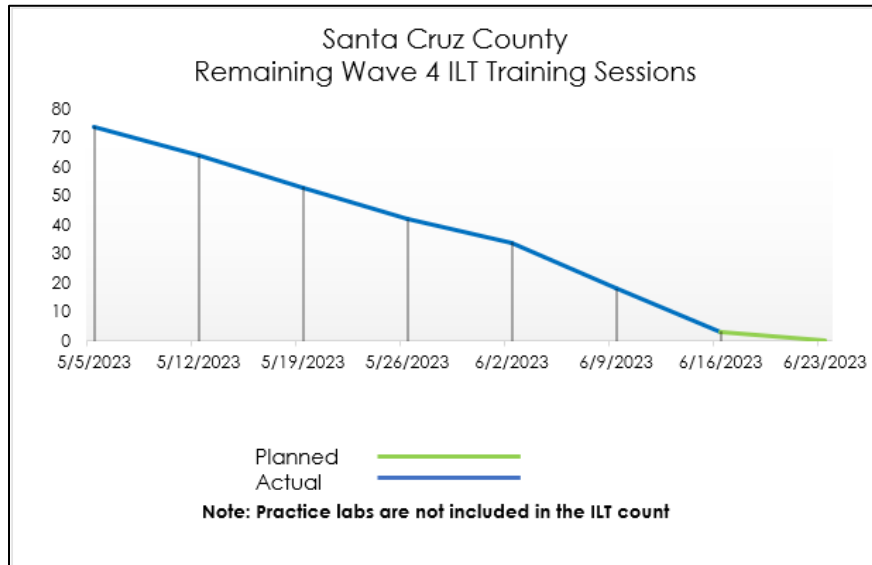


Figure 4.1-13 – Weekly WBT Training Report – Santa Cruz County

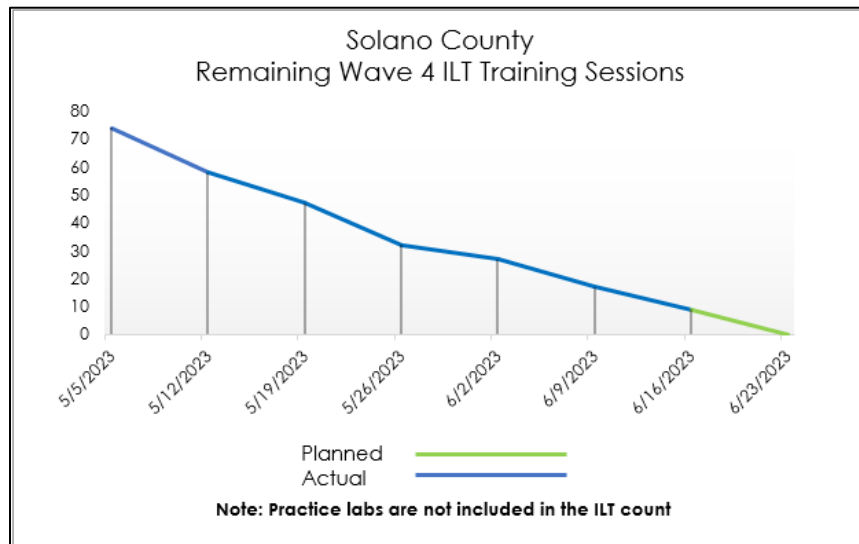


Figure 4.1-14 – Weekly WBT Training Report – Solano County

4.2 Activities for the Next Reporting Period

- ▶ **Training Advisory Council**
 - Begin preparing for Training Advisory Council (TAC) meeting on 07/19/23.
- ▶ **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.

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- Host Training Touchpoint with Sonoma County.
- Host Training Touchpoint with Fresno County.
- ▶ **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
 - Continue WBTs for all staff.
 - Host ILT Walkthroughs for San Luis Obispo County.
 - Continue updating ILT materials based on input from ILT Walkthroughs.
 - 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 the Wave 4 through Wave 6 Readiness Packets.
 - Finalized Readiness Dashboards and Packets for Waves 4, Wave 5, and Wave 6 Counties.
 - Distributed Readiness Dashboard and Packet for Wave 4 Counties.
- ▶ **Lead TOSS/IPOC Meetings**
 - Conducted TOSS/IPOC checklist review for Santa Cruz County (06/13/23), Sonoma County (06/23/23), San Diego County (06/14/23), Sacramento County, (06/15/23) Solano County (06/16/23), and San Mateo County (06/16/23).
- ▶ **Lead Wave IPOC Meetings**
 - Conducted the Wave 4 IPOC meeting on 06/14/23.
- ▶ **County Prep Phase**
 - Conducted the Wave 4 County Prep Phase Office Hours and Debriefs including metrics review and individual county progress checkpoint on 06/15/23.
- ▶ **Go-Live Packet (GLP)**
 - Wave-4 GLP Orientation Sessions completed on 06/12/23, 06/15/23, and 06/16/23.
 - Presented update on GLP at the CNC meeting on 06/14/23.
 - Distributed updated CIT# 0200-23 to include new appendix with GLP links, and location of Orientation session recording.
 - Restarted second round of GLP review sessions and completed 3 sessions reviewing 26 Conversion, 18 Contact Center, and over 60 operational defects.
- ▶ **Future Waves**
 - Supporting Model Office activities for Wave 4 Counties.
 - Continue updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
 - Internally reviewed presentation that aggregates all RDB documentation by audience for distribution to counties.
 - Finalized and Distributed OCAT Conversion CIT to Wave 5 Counties.
 - Submitted ICT Conversion CIT for final review.
- ▶ **Post-Implementation Support**
 - Completed the eighth week of Wave 3 post-Implementation support to counties.

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- Conducted daily business metrics reviews and standing Implementation Team calls.
- Conducted Fact Sheet Working Group to develop new Fact Sheets.
- Delivered Wave 4 Full Orientation Option 2 for County Volunteers on 06/14/23.
- Updated Wave 4 onsite resource materials including CalSAWS/Trip Books.
- Facilitated Wave 5 command center overview discussion with leadership.
- Scheduled Wave 5 site visits to assess post-implementation requirements.

5.2 Activities for the Next Reporting Period

► Post-Implementation Support

- Complete the ninth week of W3 Onsite / Virtual post-Implementation support.
- Track Wave 3 interactions and ServiceNow ticket reporting for daily meetings.
- Observe and document post-Implementation metric trends and issue resolutions.
- Deliver Wave 4 Full Orientation Option 2 for County Volunteers on 06/14/23.
- Prepare Wave 4 Virtual Support Zoom invites and accompanying Infographics.
- Facilitate Fact Sheet Review meetings and develop Fact Sheets for distribution.
- Conduct Wave 4 help desk meet and greets for virtual coordinators.
- Distribute Wave 4 onsite resource materials including CalSAWS/Trip Books.
- Conduct Alameda office site visits for post-implementation on 06/21/23 – 06/22/23.

► Readiness Dashboard and Packet

- Continue collecting updates for the Wave 4 through Wave 6 Readiness Packets.
- Distribute Readiness Dashboards for Waves 5 and 6 Counties.

► Wave 4 Go-Live Packet

- Distribute CIT# 0200-23 update.
- Publish RDB material review document.
- Complete GLP review sessions with Strike Team and distribute updates for review.

► Other Implementation Support

- Continue activities in support of Waves 5 & Wave 6 counties' requests.
- Continue supporting Wave 4 county model office sessions.
- Finalize and Distribute ICT Conversion CIT to Wave 5 Counties.

► 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 Alameda County (06/20/23), Santa Cruz County (06/20/23), San Luis Obispo County (06/21/23), San Diego County (06/21/23), Sacramento, (06/15/23) Solano County (06/23/23), and San Mateo County (06/23/23).

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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
07.16	County Change Guide - Wave 6 (Sacramento)	On Track	FDEL submitted 06/13/23 FDEL approval 06/22/23
07.17	County Change Guide - Wave 6 (San Francisco)	On Track	FDEL submitted 06/13/23 FDEL approval 06/22/23
07.18	County Change Guide - Wave 6 (San Luis Obispo)	On Track	FDEL submitted 06/13/23 FDEL approval 06/22/23

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

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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 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	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

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ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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.				
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 State reports to CDSS on a monthly basis (and timely)	Wave 1–2: 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	Wave 3: Closed Wave 4–6: Open	3	Medium	02/08/23

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		<p>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 processes, escalation procedures, and strong support systems in place to ensure staff adoption and sustainment of CalSAWS and minimize business disruptions.</p>				
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	Open	3	Low	04/24/23

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		<p>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</p>				
290	<p>Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers</p>	<p>Recently issued Release of Information (ROI) policy is not detailed enough, nor is it consistent between the two state Departments (CDSS and DHCS). The policy as written may create customer information privacy/security, safeguard and county operations concerns, and liabilities. As the policy was released after the completion of ROI design, development, and testing of the functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as</p>	Open	5	High	05/19/23

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		written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties				

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
0217-23	PPOCs (All); MEDS Committee (All); CalSAWS Duplication POC	Monthly CalSAWS De-Duplication Report Posted	CalWIN Migration	06/12/23	Elizabeth Dessert	Cristy Sharma
0218-23	PPOCs (Alameda, Fresno, Sonoma); Regional Managers (R1, R4); IPOCs (Wave 5)	CalWIN Wave 5 – Imaging Prep Activities	CalWIN Migration	06/12/23	Rhiannon Chin	Inez Finnigan

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CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
0219-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers; IPOCs (Wave 4); TPOCs (Wave 4)	Technical Contact List for CBO Support	CalWIN M&E	06/14/23	Marsale Eramya	Carlos Zepeda
0220-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers; IPOCs (Wave 4); TPOCs (Wave 4)	CalWIN Wave 4 Readiness Dashboard and Packet – Monthly June 2023	CalWIN Migration	06/14/23	Jennifer Carpenter	Mara Jennings

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
23-071	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	Closed	06/16/23	Lloyd Rankine	Matt Zior
23-075	PPOCs (18)	Opt-in to blank interface files	05/19/23	Closed	06/12/23	Sheryl Eppler	Claudia Pinto
23-079	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers (R1, R5)	Wave 4 - Request for Counties to Identify Point of Contact for CBO Support	05/30/23	Closed	06/13/23	Marsale Eramya	Carlos Zepeda
23-080	PPOCs (All except LA); Regional Managers; CalWORKs Committee; CalFresh Committee	Opt-In to CW CF RE Regular or Flexible Auto-Scheduling Batch Jobs for Migration Counties	05/31/23	Closed	06/16/23	Sarah Cox	Committee.CalWORKs_CalFresh.Facilitator@CalSAWS.org
23-082	PPOCs (All); Regional Managers; Section Directors	Identification of Point of Contact (POC) and SFTP Server Details for New CalSAWS DE 542 Data File	06/02/23	Closed	06/16/23	Prem Venugopalan	Claudia Pinto

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CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary Contact	Backup Contact
23-084	PPOCs (Fresno, Sonoma, Alameda); IPOCs (Fresno, Sonoma, Alameda); Regional Managers (R1, R2, R3, R4)	Request for CalSAWS Training Staging Environment Access (Wave 5)	06/14/23	Open	06/28/23	Ashley Arnold	Cristina Garcia

Table 6.2-3 – CRFIs

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6.3 Appendix C – Project Work Plan Reports

Project Timeline

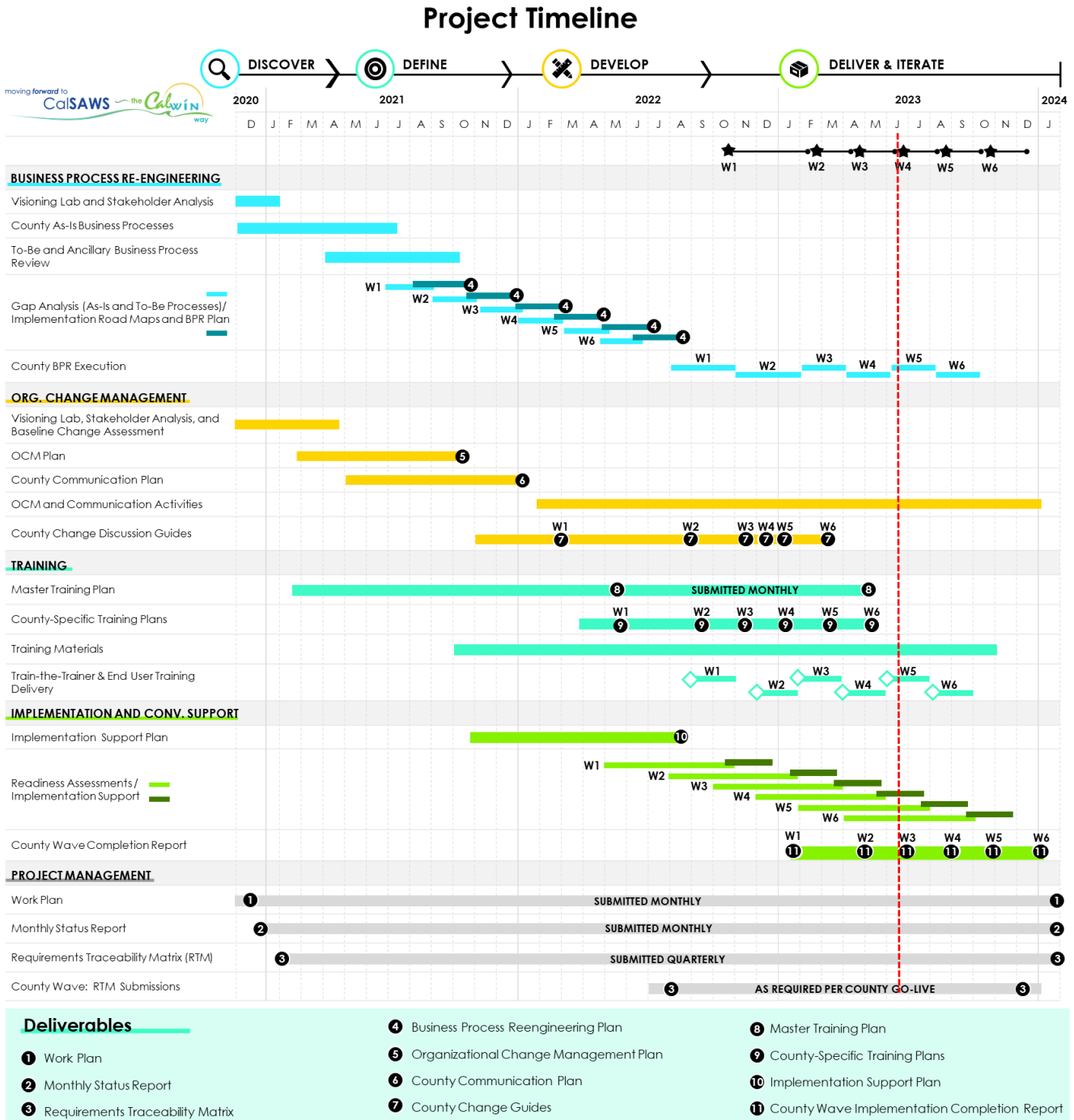


Figure 6.3-1 – Project Timeline

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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