

CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting 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 working session with Sonoma County 06/19/23 through 06/23/23. ○ Provided Configuration support for Process Simulation scenario review for Alameda County and Fresno County. ○ Completed Process Simulation scenario and assignment finalization for Alameda County on 06/21/23. ○ Completed Process Simulation scenario and assignment finalization for Alameda County on 06/19/23. ▶ Wave 6 <ul style="list-style-type: none"> ○ Scheduled the kickoff session for the Wave 6 San Francisco County Process Simulation for 06/28/23.
Organizational Change Management (OCM)	<ul style="list-style-type: none"> ▶ Wave 6 Change Discussion Guides <ul style="list-style-type: none"> ○ Continued to conduct the Weekly PPOC Touchpoints with the Wave 6 Counties. ○ Sent the Change Discussion Feedback Form to San Francisco County and San Luis Obispo County the week of 06/19/23. ○ Monitored the Feedback Form Responses with San Francisco County and San Luis Obispo County. ▶ Change Network Champions (CNC) <ul style="list-style-type: none"> ○ Sent the Wave 4, Wave 5, and Wave 6 CNC Session materials to the counties. ○ Started developing the July CNC Session materials. ▶ Change Readiness Surveys <ul style="list-style-type: none"> ○ Analyzed the Wave 5 T-3 Readiness Surveys and started developing the presentation materials. ○ Analyzed the Wave 3 T+6 Readiness Surveys and started developing the presentation materials. ○ Reviewed the Wave 6 T-6 Readiness Surveys with the Consortium the week of 06/19/23. ▶ Newsletter/Infographics <ul style="list-style-type: none"> ○ Sent the June Infographics Packet for Wave 4, Wave 5, and Wave 6 to the CIT/CRFI Review Group on 06/27/23. ○ Sent the Wave 6 Newsletter #3 to the CIT/CRFI Review Group for a review the week of 06/19/23.

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STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Training	<ul style="list-style-type: none"> ▶ Continued the Wave 4 Counties' Web Based Training for all staff. ▶ Continued Instructor Led Training in the 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 for all staff. ▶ Continued tailoring Instructor Led Training materials for the Wave 6 Counties. ▶ Hosted ILT Walkthroughs with San Luis Obispo County. ▶ Hosted Training touchpoints with San Luis Obispo County, San Diego County, Solano County, Sonoma County, San Mateo County, Santa Cruz County, and Fresno County.
Implementation	<ul style="list-style-type: none"> ▶ Wave 3 <ul style="list-style-type: none"> ○ Completed the ninth 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"> ○ The Wave 4 GLP strike team completed their second/final review of changes on 06/08/23, 06/13/23, and 06/15/23, with additional feedback requested/received via email through 06/22/23. ○ The updated GLP was sent out for internal review on 06/22/23. ▶ Future Waves <ul style="list-style-type: none"> ○ Supported Model Office activities for Wave 4 and Wave 5 Counties. ○ Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center. ○ Started drafting customer/county process flows for Alameda County ancillary systems, tracking to complete and distribute to county/project by 06/26/23 for initial review. ○ Conducted the Wave 4 County Prep Office hours and Daily Debrief, including metrics review on 06/22/23. ○ Continued updates to the Readiness Dashboards and Packets for Wave 4, Wave 5, and Wave 6 Counties. ○ Distributed Readiness Dashboard and Packet to Wave 5 and Wave 6 Counties. ○ Distributed ICT Conversion CIT to Wave 5 Counties. ○ Prepared CIT for review for applicable Wave 4 Fact Sheets at Go-Live. ○ Distributed Wave 4 Virtual Support Zoom invites and Virtual Infographics. ○ Distributed Wave 4 Trip Books to onsite post-implementation county teams. ○ Conducted Wave 5 site visit to Alameda County to assess post-Implementation support from 06/21/23 – 06/22/23.

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 06/25/23.
 - 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 11.03: County Implementation Completion Report – Wave 3 (Part 2) on 06/20/23.

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 3–6 County Work Plans for the Implementation Readiness Checklist.
- ▶ **Deliverables and Work Products – Submit the following:**
 - No scheduled deliverables for this reporting period (FDEL 11.03: County Implementation Completion Report – Wave 3 (Part 2) due on 06/26/23 was submitted on 06/20/23).

2.0 Business Process Reengineering (BPR)

2.1 Highlights of the Reporting Period

► Process Simulation

- Completed preparation activities with the Wave 5 Alameda County, Fresno County, and Sonoma County to define Process Simulation scenarios and assignments.
- Initiated data review for Wave 5 Process Simulation on 06/19/23.
- Kicked off Wave 5 Process Simulation preparation activities on 06/19/23 to create scenario packets and verification documents and to capture data.
- UAT2, Jira access process initiated on 06/19/23 for Alameda County, on 06/20/23 for Fresno County, and on 06/21/23 for Sonoma County.
- Updated county comments for Sonoma County scenarios on 06/22/23.

► Configuration

- Provided Configuration support to Wave 4 Counties for County Prep activities.
- Provided Configuration support for Alameda County Process Simulation scenario review.
- Facilitated Configuration setup for Process Simulation with Alameda County 06/22/23.
- Provided Configuration support for Fresno County Process Simulation scenario review.
- Facilitated a Configuration working session with Sonoma County from 06/19/23 to 06/23/23.

2.2 Activities for the Next Reporting Period

► Process Simulation

- Complete Process Simulation preparation activities for Sonoma County on 06/28/23.
- Complete Process Simulation scenario assignment and execution plan for Fresno County and Sonoma County by 06/29/23.
- Facilitate San Francisco County Process Simulation kickoff meeting on 06/28/23.
- Facilitate San Luis Obispo County Process Simulation kickoff meeting on 06/30/23.
- Complete data identification and setup for Alameda County process simulation execution by 06/29/23.

► Configuration

- Provide Configuration support to Wave 4 Counties for County Prep activities.
- Facilitate the Configuration Verification session with San Luis Obispo County 06/28/23 through 06/29/23.
- Facilitate Configuration setup for Process Simulation with Fresno County 06/27/23.

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

► **Wave 6 Change Discussion Guides**

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

► **Change Network Champions**

- Sent the Wave 4, Wave 5, and Wave 6 CNC Session Material to the counties.
- Started developing the July CNC Session Deck.

► **Change Readiness Surveys**

- Analyzed the Wave 5 T-3 Readiness Surveys and started developing the presentation materials.
- Analyzed the Wave 3 T+6 Readiness Surveys and started developing the presentation materials.
- Reviewed the Wave 6 T-6 Readiness Surveys with the Consortium the week of 06/19/23.

► **Newsletter/Infographics**

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

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.
- Continue to monitor the Feedback Form Responses from San Francisco County and San Luis Obispo County.

► **Change Network Champions**

- Review the July CNC Session Deck for Waves 5 & Wave 6 with the Consortium.

► **Change Readiness Surveys**

- Continue to develop the Wave 5 T-3 Readiness Surveys.
- Review the Wave 3 T+6 Readiness Surveys results with the Consortium on the week of 06/26/23.
- Present the Wave 6 T-6 Readiness Surveys results to the Wave 6 Counties on the 06/28/23 and 06/30/23.

► **Newsletter/Infographics**

- Send the June Infographics Packet for Waves 4, Wave 5, and Wave 6 to the Counties on the week of 06/26/23.
- Send the Wave 6 Newsletter #3 to the Counties on the week of 06/26/23.

4.0 Training

4.1 Highlights of the Reporting Period

- **Training Advisory Council**
 - Started planning for Training Advisory Council (TAC) Meeting on 07/19/23.
- **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 on 06/22/23.
 - Hosted Training Touchpoint with Santa Cruz County on 06/22/23.
 - Hosted Training Touchpoint with Solano County on 06/21/23.
- **Wave 5: Alameda, Fresno, and Sonoma County Training**
 - Continued WBTs for all staff.
 - Started ILTs for Early Training in Fresno County and Sonoma County.
 - Continued 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 Luis Obispo County from 06/19/23 through 06/22/23.
 - Hosted Training Touchpoint with San Luis Obispo County on 06/20/23.

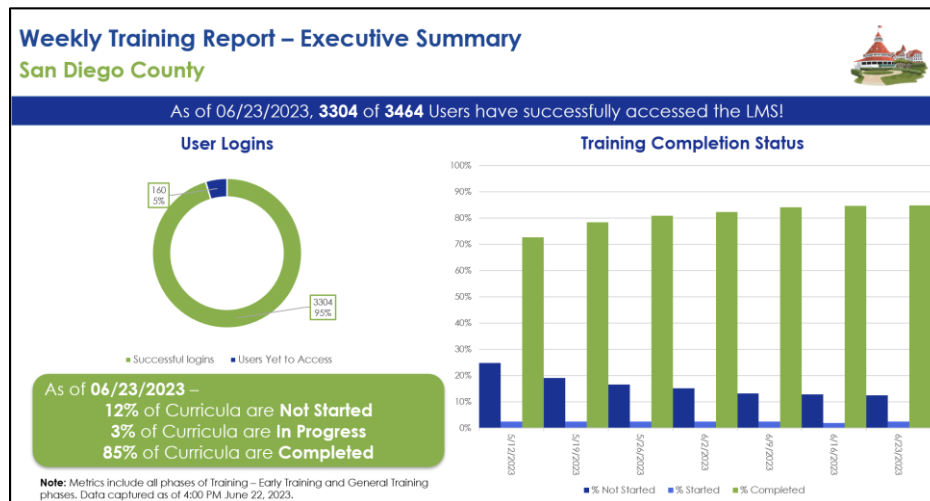


Figure 4.1-1 – Weekly WBT Training Report – San Diego County

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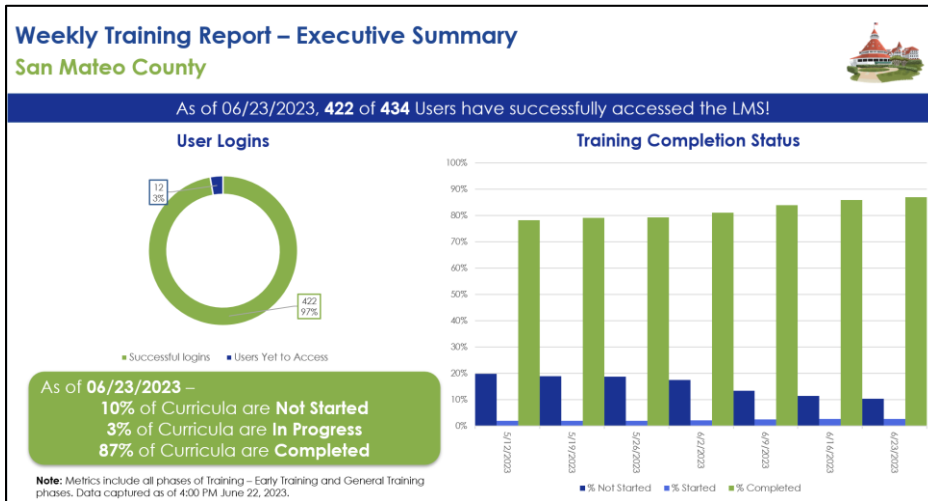


Figure 4.1-2 – Weekly WBT Training Report – San Mateo County

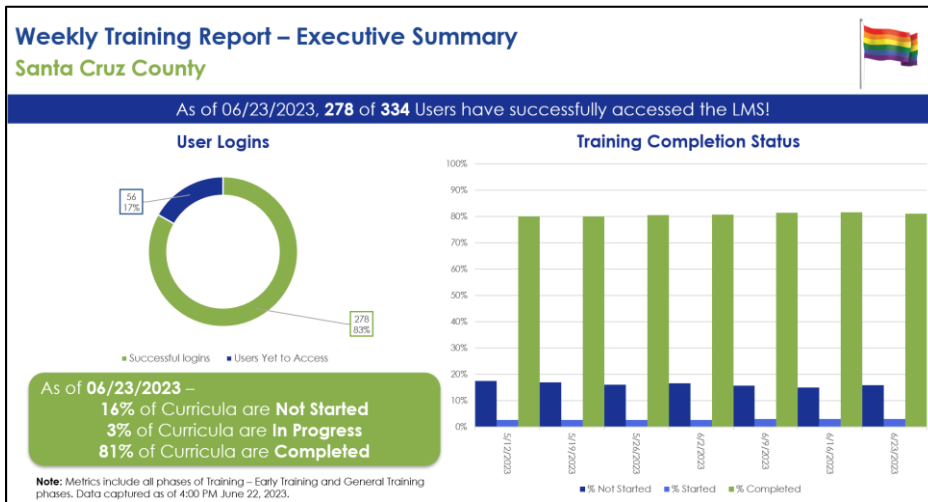


Figure 4.1-3 – Weekly WBT Training Report – Santa Cruz County

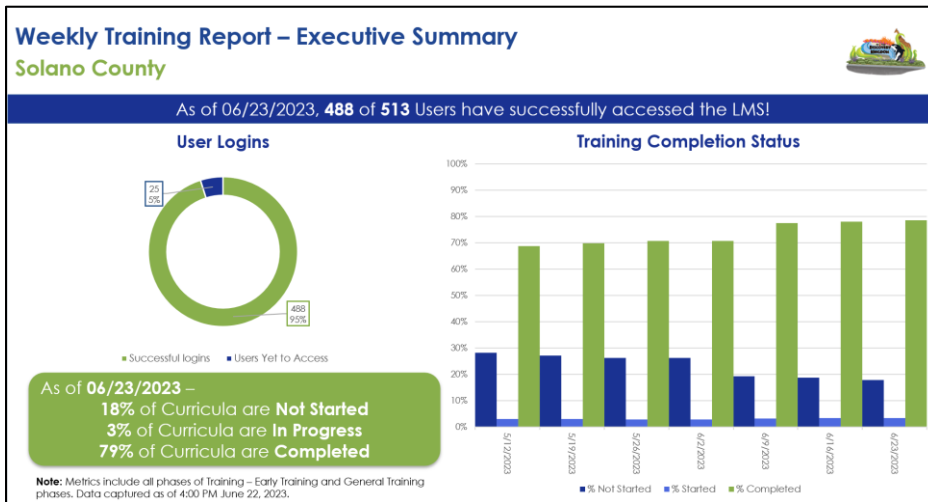


Figure 4.1-4 – Weekly WBT Training Report – Solano County

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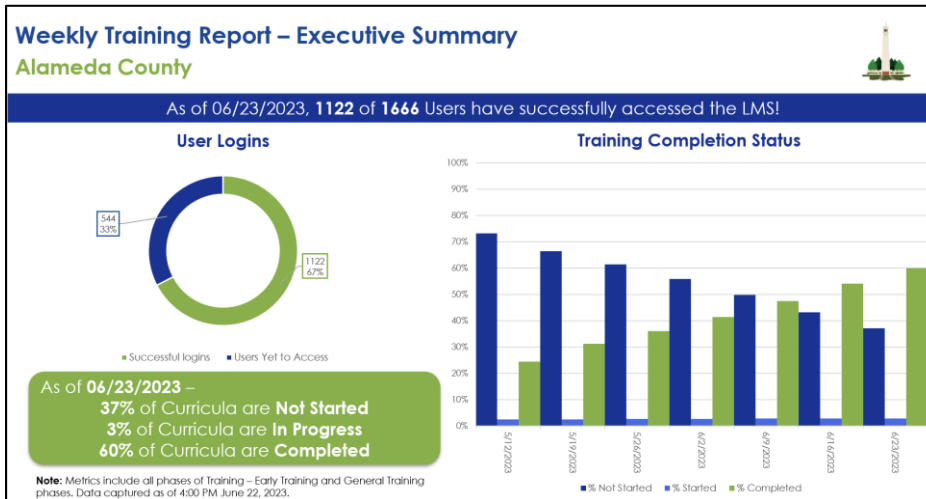


Figure 4.1-5 – Weekly WBT Training Report – Alameda County

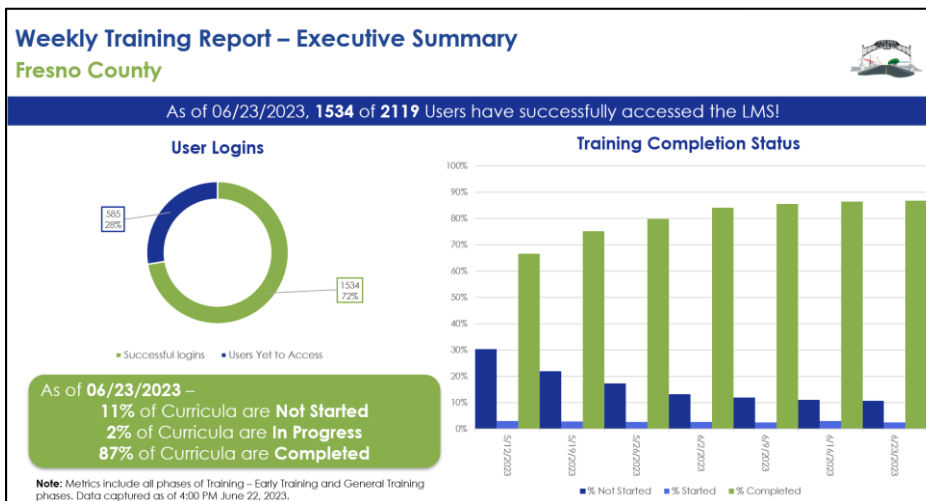


Figure 4.1-6 – Weekly WBT Training Report – Fresno County

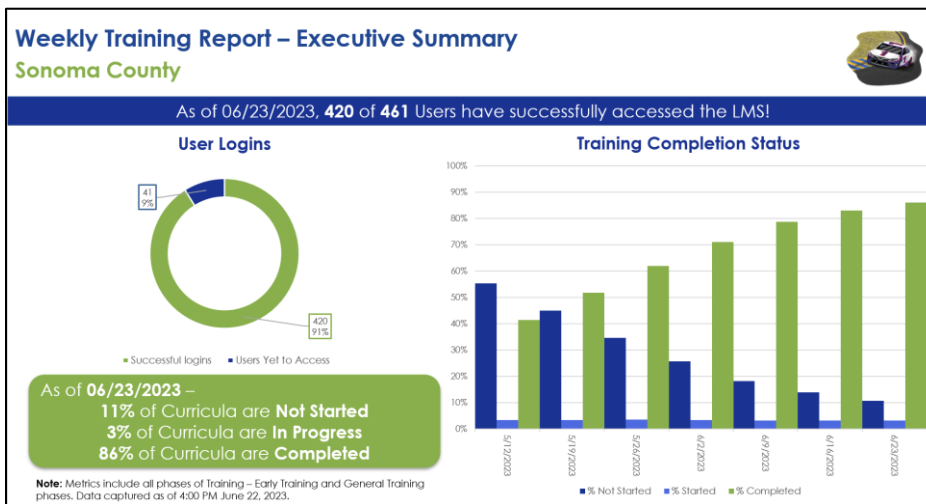


Figure 4.1-7 – Weekly WBT Training Report – Sonoma County

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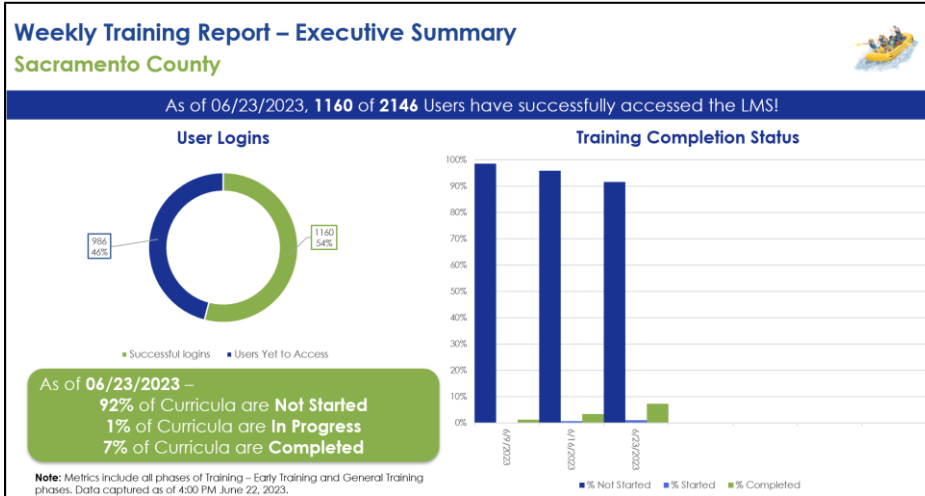


Figure 4.1-8 – Weekly WBT Training Report – Sacramento County

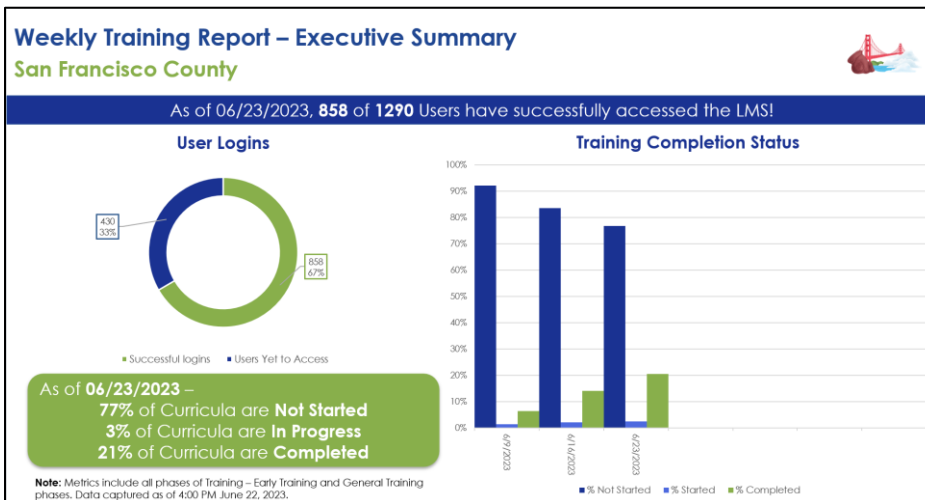


Figure 4.1-9 – Weekly WBT Training Report – San Francisco County

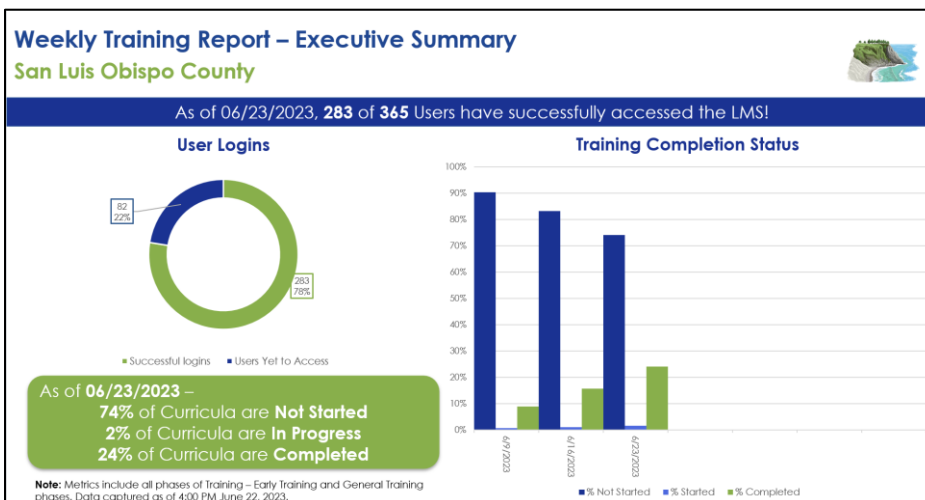


Figure 4.1-10 – Weekly WBT Training Report – San Luis Obispo County

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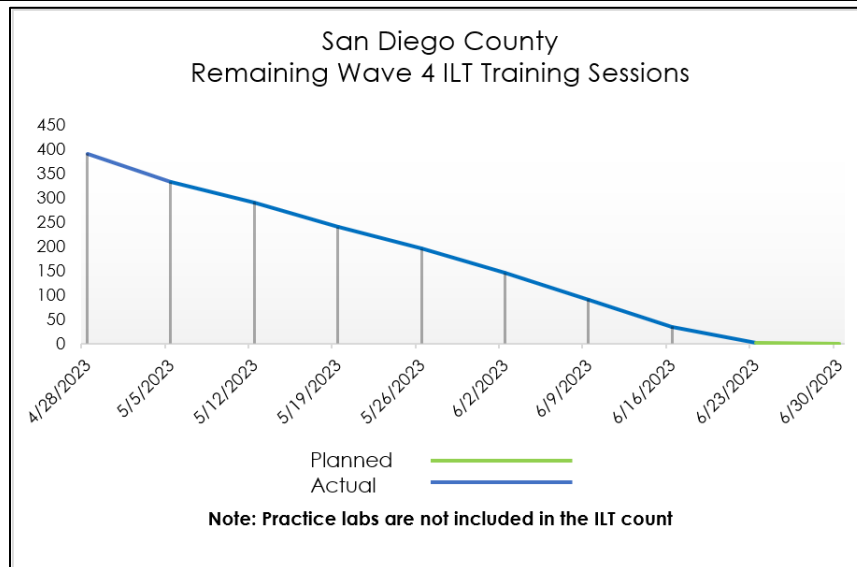


Figure 4.1-11 – Weekly WBT Training Report – San Diego County

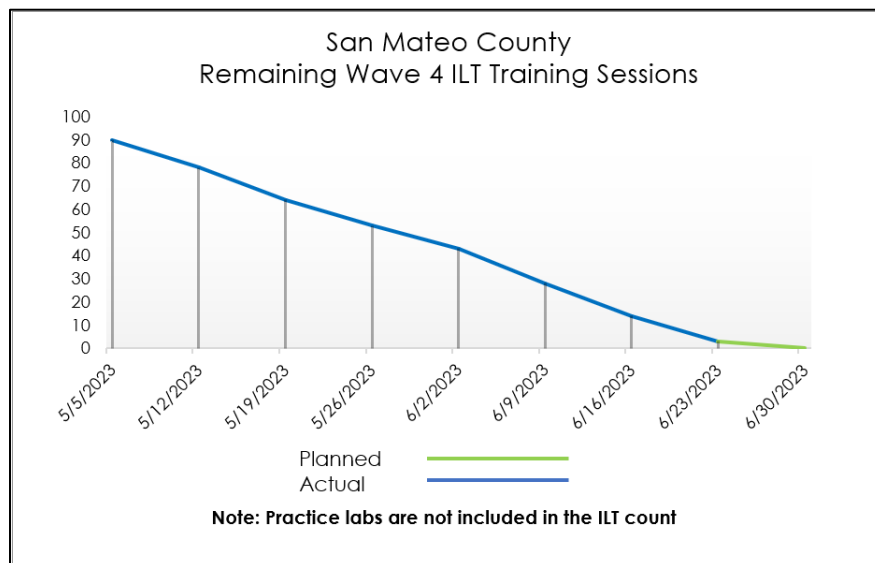


Figure 4.1-12 – Weekly WBT Training Report – San Mateo County

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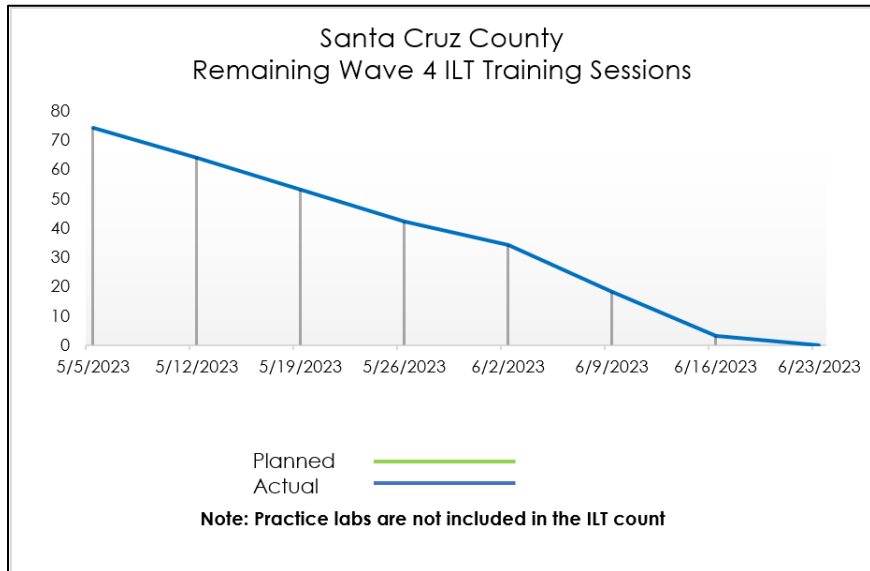


Figure 4.1-13 – Weekly WBT Training Report – Santa Cruz County

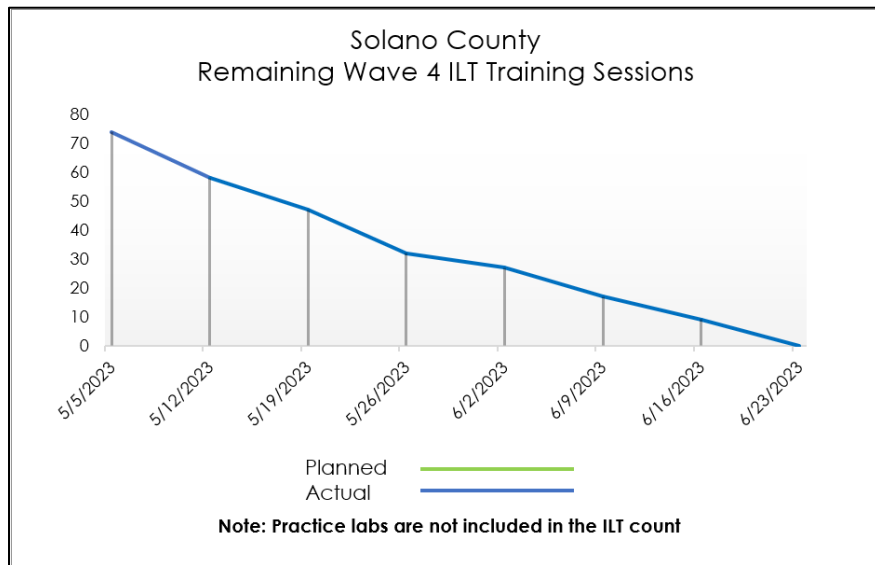


Figure 4.1-14 – Weekly WBT Training Report – Solano County

4.2 Activities for the Next Reporting Period

► Training Advisory Council

- Continue planning for Training Advisory Council (TAC) meeting on 07/19/23.

► Wave 4: San Diego, San Mateo, Santa Cruz, and Solano County Training

- Complete WBTs for all staff.
- Complete ILTs for all staff in all Wave 4 Counties.
- Host Training Touchpoint with San Diego County on 06/27/23.
- Host Training Touchpoint with San Mateo County on 06/29/23.
- Host Training Touchpoint with Santa Cruz County on 06/29/23.
- Host Training Touchpoint with Solano County on 06/28/23.

- ▶ **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 on 06/28/23.
- ▶ **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
 - Continue WBTs for all staff.
 - Continue updating ILT materials based on input from ILT Walkthroughs.
 - Host Training Touchpoint with San Francisco County on 06/27/23.
 - Host Training Touchpoint with Sacramento County 06/30/23.

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.
 - Distributed Readiness Dashboard and Packet for Wave 5 and Wave 6 Counties.
- ▶ **Lead TOSS/IPOC Meetings**
 - Conducted 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 County, (06/15/23) Solano County (06/23/23), and San Mateo County (06/23/23).
- ▶ **County Prep Phase**
 - Conducted the Wave 4 County Prep Phase Office Hours and Debriefs including metrics review and individual county progress checkpoint on 06/22/23.
- ▶ **Go-Live Packet (GLP)**
 - Wave 4 GLP strike team completed their second/final review of changes on 06/08/23, 06/13/23, and 06/15/23, with additional feedback requested/received via email through 06/22/23.
 - The updated GLP was sent out for internal review on 06/22/23.
- ▶ **Future Waves**
 - Supported Model Office activities for Wave 4 and Wave 5 Counties.
 - Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
 - Started drafting customer/county process flows for Alameda County ancillary systems, tracking to complete and distribute to county/project by end of day 06/26/23 for initial review.
 - Distributed ICT Conversion CIT to Wave 5 Counties on 05/22/23.
- ▶ **Post-Implementation Support**
 - Completed the ninth 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.
 - Distributed Wave 4 Virtual Support Zoom invites and accompanying Infographics.
 - Updated Wave 4 onsite resource materials including CalSAWS/Trip Books.
 - Facilitated Wave 5 command center overview discussion with leadership.

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- Distributed Wave 4 Trip Books to onsite post-implementation county teams.
- Conducted Wave 4 help desk meet and greets with virtual coordinators.
- Conducted Wave 5 site visit to Alameda County to assess post-implementation support.

5.2 Activities for the Next Reporting Period

- ▶ **Post-Implementation Support**
 - Finalize Wave 4 onsite and virtual support and lock in team office assignments.
 - Distribute Wave 4 Fact Sheet CIT for Fact Sheets applicable at Go-Live.
 - Conduct Wave 4 county help desk meet and greets with virtual coordinators.
 - Distribute Wave 4 CalSAWS Books with onsite resource names and team pictures.
 - Conduct Sonoma County and Fresno County Wave 5 office site visits for post-implementation support.
- ▶ **Readiness Dashboard and Packet**
 - Continue collecting updates for the Wave 4 through Wave 6 Readiness Packets.
- ▶ **Wave 4 Go-Live Packet**
 - Distribute CIT# 0200-23 update for CIT review.
 - Finalize topics and dates for Wave 4 cleanup reports.
- ▶ **Other Implementation Support**
 - ALA/Project to review and provide input on draft documentation of process flows involving Alameda County's Ancillary systems from 06/27/23 – 06/29/23. Finalize document by 06/30/23.
 - Continue activities in support of Wave 5 and Wave 6 Counties' requests.
 - Continue supporting Wave 4 County model office sessions.
- ▶ **County Prep Phase**
 - Conduct the Wave 4 County Prep Phase Office Hours and Debriefs including metrics review, individual county progress checkpoint and final check in.
 - Conduct Wave 5 County Prep Kickoff.
- ▶ **TOSS/IPOC Meetings**
 - Conduct TOSS/IPOC checklist review for Santa Cruz County (06/27/23), Sonoma County (06/27/23) San Francisco County (06/2/23), San Diego County (06/28/23), Fresno County, (06/28/23), and Solano County (06/30/33).
- ▶ **Lead Wave IPOC Meetings**
 - Conduct the Wave 5 IPOC meeting on 06/28/23.

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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
11.03	County Implementation Completion Report - Wave 3 (Part 2)	On Track	FDEL submitted 06/20/23 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

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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 timelines for what is needed to be	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
		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 1–3: Closed Wave 4–6: Open	Wave 1: 3 Wave 2–6: 4	Medium	09/14/22
285	Preparing CalWIN counties to operationalize CalSAWS after their Go-Live	If CalWIN counties are not prepared to operationalize CalSAWS after their Go-Live, timely and effective delivery of services could be impacted. During the 60-calendar day Post Implementation support period, migrating CalWIN counties must have available resources and volunteers	Wave 3–4: Closed Wave 4–6: Open	3	Medium	02/08/23

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Period: June 12, 2023 to June 18, 2023

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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.				
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	Open	3	Low	04/24/23

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		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				
290	Recently released ROI policy lacks clarity which may create privacy and liability exposure for counties and customers	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 written does not give clear direction on	Open	5	High	05/19/23

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ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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
0223-23	PPOCs (Alameda, Fresno, Sonoma); Regional Managers; IPOCs (Wave 5); TPOCs (Wave 5)	CalWIN Wave 5 Readiness Dashboard and Packet – Monthly June 2023	CalWIN Migration	06/19/23	Jennifer Carpenter	Mara Jennings
0225-23	PPOCs (San Diego, San Mateo, Santa Cruz, Solano); Regional Managers	General Assistance / General Relief Automated Solution Instructions to Connect to	CalWIN Migration	06/20/23	Frederick Gains	N/A

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CIT ID	To	Subject	Category	Distribution Date	Primary CalSAWS Contact	Backup CalSAWS Contact
		CalSAWS Exstream Designer – Wave 4				
0226-23	PPOCs (Sacramento, San Francisco, San Luis Obispo, Solano); Regional Managers; IPOCs (Wave 6); TPOCs (Wave 6)	CalWIN Wave 6 Readiness Dashboard and Packet - Monthly June 2023	CalWIN Migration	06/20/23	Jennifer Carpenter	Mara Jennings
0228-23	PPOCs (All); ICT Committee; IPOCs (All)	CA-xxx-23 Wave 5 ICT Records in Progress	CalWIN Migration	06/22/23	John Pratt	Jennifer Carpenter
0229-23	PPOCs (All); CalWORKs Committee; CalFresh Committee	ACL 23-48 Lists for Income In-Kind COLA	CalWIN M&E	06/22/23	Sarah Rich	Committee. CalWORKs_CalFresh.Facilitator@CalSAWS.org
0232-23	PPOCs (48); Regional Managers; Self Service Portal Committee	BenefitsCal Document Upload Fact Sheet	CalWIN M&E	06/26/23	Marsale Eramya	Carlos Zepeda

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
23-081	PPOCs (Fresno, Alameda, Sonoma); Regional Managers (R1, R4); IPOCs (Wave 5)	CalWIN Wave 5 Counties – Verify Number of Imaging Office Queues	06/01/23	Closed	06/22/23	Innez Finnigan	Rhiannon Chin
23-083	PPOCs (Alameda, Fresno, Sonoma, CalWIN Conversion); Regional Managers (R1, R4); IPOCs (Wave 5); TPOCs (Wave 5)	Wave 5 Application Security Conversion: Security Roles – Sync-Up	06/06/23	Closed	06/21/23	Mike Tombakian	Christy Sharma

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CRFI ID	To	Subject	Distributi on Date	Status	Response Due Date	Primary Contact	Backup Contact
23-087	PPOCs(Alameda, Fresno, Sonoma); Regional Managers	Wave 4 Counties – BenefitsCal Features Training – Request to Identify Participant Information	06/21/23	Open	07/06/23	Marsale Eramya	Carlos Zepeda

Table 6.2-3 – CRFIs

CalSAWS – CalWIN ISS Weekly Status Report

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6.3 Appendix C – Project Work Plan Reports

Project Timeline

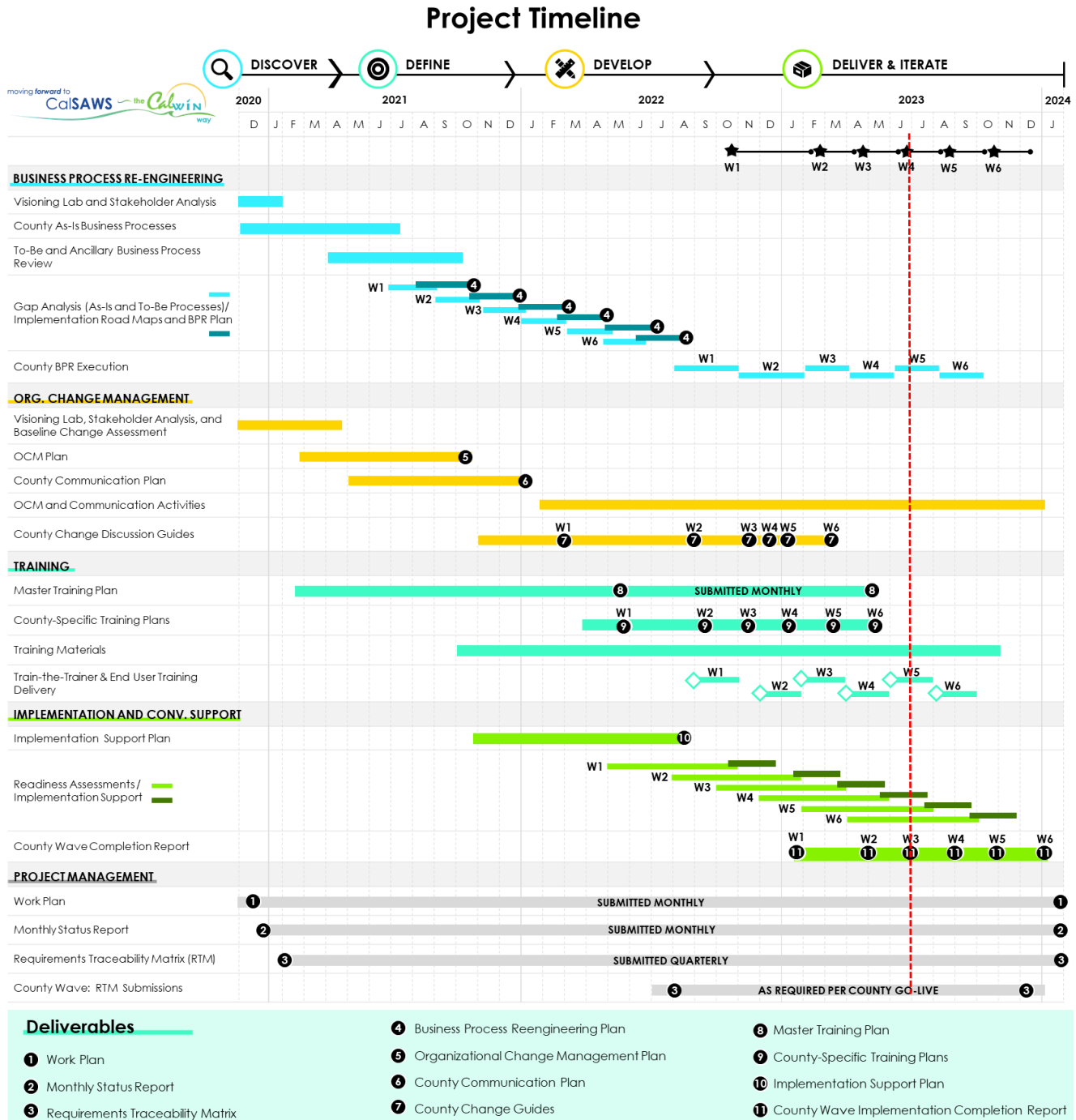


Figure 6.3-1 – Project Timeline

CalSAWS – CalWIN ISS Weekly Status Report

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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