CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

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

07/26/23

Table of Contents

1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC

Business Process Reengineering (BPR)	► **Wave 4**
	   o Provided Configuration support for Go-Live activities.
	► **Wave 5**
	   o Provided Configuration support for County Prep activities.
	   o Completed 50% Process Simulation execution for Fresno County on 07/23/23.
	   o Completed 62% Process Simulation execution for Fresno County on 07/23/23.
	► **Wave 6**
	   o Facilitated Configuration Working sessions with San Luis Obispo County 07/17/23 through 07/21/23.
	   o Continued wave 6 preparation activities for Sacramento, San Francisco, and San Luis Obispo County from 07/17/23 to 07/23/23.

Organizational Change Management (OCM)	► Wave 6 Change Discussion Guides
	   o Continued to monitor the Feedback Form Responses from San Luis Obispo County.
	   o Continued to send the Feedback Form reminder emails to San Luis Obispo County and send the results to the County's PPOCs.
	► Began to develop the August Change Network Champions (CNC) session for Waves 5 and 6.
	► Sent the Wave 4 T+6 Readiness Survey CIT to the Wave 4 Counites on 07/20/23.
	► Presented the Wave 5 T-3 Readiness Survey Results to the Wave 5 Counties from 07/18/23 – 07/20/23.
	► Sent the Wave 4 Post Go-Live Special Edition Newsletter to the Consortium for review the week of 07/17/23.
	► Distributed the July Infographics Packet for Waves 5-6 to the Counties on 07/17/23.
	► Developed the Wave 5 Newsletter #4.

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Training	► Completed classroom deinstallation in San Diego, Santa Cruz, and Solano Counties. ► Continued the Wave 5 Counties' Web Based Training for all staff. ► Continued Instructor-Led Training (ILTs) for all staff in the Wave 5 Counties. ► Continued the Wave 6 Counties' Web Based Training for all staff. ► Completed connectivity testing for Early Training and Train-the-Trainer ILTs Sacramento and San Luis Obispo Counties. ► Hosted Webinars for the Wave 6 Counties. ► Hosted Training Touchpoints with Fresno, San Luis Obispo, Alameda, and Sonoma Counties. ► Hosted Training Advisory Council meeting on 07/19/23.

Implementation	► **Wave 4**
	  o Completed third week of Wave 4 post-Implementation support.
	  o Tracked daily interactions and ServiceNow ticket reporting and led standing Implementation Team calls.
	  o Observed and documented post-Implementation metric trends and issue resolutions.
	  o Monitored virtual support usage and adjusted resources in real-time to minimize or eliminate waiting times and enhance customer experience.
	  o Implemented virtual consolidation plan for Santa Cruz and Solano Counties.
	  o Conducted Fact Sheet Working Group and developed one Fact Sheet.
	  o Coordinated interaction between Consortium Conversion and QA to author and distribute fact sheets requested
	  o Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
	  o Enhanced focus on ALA and FRS IPT testing completion - done
	  o Planning BPR of new ALA ancillary applications discovered
	► **Go-Live Packet (GLP)**
	  o Reconfigured the membership and composition of the GLP Strike Team
	  ◦ The team met on 07/18/23, 07/20/23 to review all open Conversion and Production defects. Reviewed all 27 open conversion defects.
	  o Updated GLP documents by removing items to be deleted, updating JIRA IDs, and adding a new sub-section reminding counties to review skipped issuances after go-live.
	► **Future Waves**
	  o Conducted Fresno office site visits for post-Imp support on 07/20/23.
	  o Collected Wave 5 Onsite & Virtual Volunteer CRFI responses from counties.
	  o Conducted Wave 5 County Prep Office hours and Daily Debriefs.
	  o Finalized updates to the Readiness Dashboards and Packets for Wave 5 and Wave 6 Counties.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 Highlights of the Reporting Period

- ► **Staff Onboarding**
  - o Continued planning for and onboarding staff resources.
- ► **Information Coordination for CalWIN Counties**
  - o Continued to collaborate with other teams to coordinate information for the CalWIN Counties.
- ► **County Work Plans**
  - o Critical Path Reporting Waves 5 through Wave 6 – developed weekly summary report and made available for review during the week of 07/16/23.
  - o Work Plan Updates – Continued to facilitate the Work Plan updates for Wave 4 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:**
  - o No scheduled deliverables for this reporting period.

1.3 Activities for the Next Reporting Period

- ► **Staff Onboarding**
  - o Continue planning for and onboarding staff resources.
- ► **Information Coordination for CalWIN Counties**
  - o Continue to collaborate with other teams to coordinate information for the CalWIN Counties.
- ► **County Work Plans**
  - o Continue updating Waves 4–6 County Work Plans for the Implementation Readiness Checklist.
- ► **Deliverables and Work Products – Submit the following:**
  - o FDEL 01.31: Work Plan Monthly Updates – July 2023 on 08/04/23.
  - o FDEL 01.31: 02.31: Monthly Status Report – July 2023 on 08/04/23.

2.0 Business Process Reengineering (BPR)

2.1   Highlights of the Reporting Period

► **Process Simulation**
  o   50% execution completion for Wave 5 Fresno County on 07/23/23.
  o   Process Simulation preparation sessions scheduled for San Luis Obispo County on 07/19/23.
  o   62% execution completion for Wave 5 Sonoma County on 07/23/23.
  o   Facilitated all-day virtual execution sessions for Fresno and Sonoma County from 07/17/23 to 07/23/23.
► **Configuration**
  o   Provided Configuration support to Wave 4 Counties for Go-Live activities.
  o   Provided Configuration support to Wave 5 Counties for County Prep activities.
  o   Facilitated a Configuration Working session with San Luis Obispo County from 07/17/23 to 07/21/23.

2.2   Activities for the Next Reporting Period

► **Process Simulation**
  o   Complete 100% Process Simulation execution for Sonoma and Fresno County on 07/28/23.
  o   Facilitate execution sessions for Sonoma and Fresno County from 07/24/23 to 07/28/23.
  o   Schedule in person process simulation preparation sessions for Sacramento and San Francisco County by 07/28/23.
► **Configuration**
  o   Provide Configuration support to Wave 4 Counties for Go-Live activities.
  o   Provide Configuration support to Wave 5 Counties for County Prep activities.
  o   Participate in Process Simulation preparation meetings to discuss documented Configuration for San Luis Obispo County 07/25/23.
  o   Participate in Process Simulation preparation meetings to discuss documented Configuration for Sacramento County 07/26/23.

3.0 Organizational Change Management (OCM)

3.1   Highlights of the Reporting Period

► **Wave 6 Change Discussion Guides**
  o   Continued to monitor the Feedback Form Responses from San Luis Obispo County.
  o   Continued to send the Feedback Form reminder emails to San Luis Obispo County and send the results to the County's PPOCs.
► **Change Network Champions**
  o   Began to develop the August Change Network Champions (CNC) session for Waves 5 and 6.

► **Change Readiness Surveys**
  o Sent the Wave 4 T+6 Readiness Survey CIT to the Wave 4 Counites on 07/20/23.
  o Presented the Wave 5 T-3 Readiness Survey Results to the Wave 5 Counties from 07/18/23 – 07/20/23.
► **Newsletter/Infographics**
  o Sent the Wave 4 Post Go-Live Special Edition Newsletter to the Consortium for review the week of 07/17/23.
  o Distributed the July Infographics Packet for Waves 5-6 to the Counties on 07/17/23.

3.2   Activities for the Next Reporting Period

► **Change Network Champions**
  o Continue to develop the Wave 5 and 6 CNC session materials.
► **Change Readiness Surveys**
  o Validate the stakeholder list for the Wave 4 T+6 Change Readiness Survey with the Wave 4 Counties.
  o Send the Wave 5 T-3 Readiness Survey CIT to the Consortium for review the week of 07/24/23.
► **Newsletter/Infographics**
  o Send the Wave 4 Post-Go-Live Special Edition Newsletter to the CIT/CRFI Review Group for review the week of 07/24/23.
  o Send the Wave 5 Newsletter #4 to the Consortium for review the week of 07/24/23.

4.0 Training

4.1   Highlights of the Reporting Period

► **Training Advisory Council**
  o Hosted Training Advisory Council (TAC) Meeting on 07/19/23.
► **Wave 4: San Diego, San Mateo, Santa Cruz, and Solano County Training**
  o Completed classroom deinstallation in San Diego, Santa Cruz, and Solano Counties.
► **Wave 5: Alameda, Fresno, and Sonoma County Training**
  o Continued WBTs for all staff.
  o Continued ILTs for all staff.
  o Hosted Training Touchpoint with Fresno County on 07/17/23.
  o Hosted Training Touchpoint with Alameda County on 07/19/23.
  o Hosted Training Touchpoint with Sonoma County on 07/19/23.
► **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
  o Continued WBTs for all staff.
  o Completed room setup and connectivity testing for Early Training and Train-the-Trainer ILTs in Sacramento and San Luis Obispo Counties.
  o Hosted Clerical Webinars on 07/18/23 and 07/19/23.
  o Hosted Clerical Supervisor Webinars on 07/19/23 and 07/20/23.
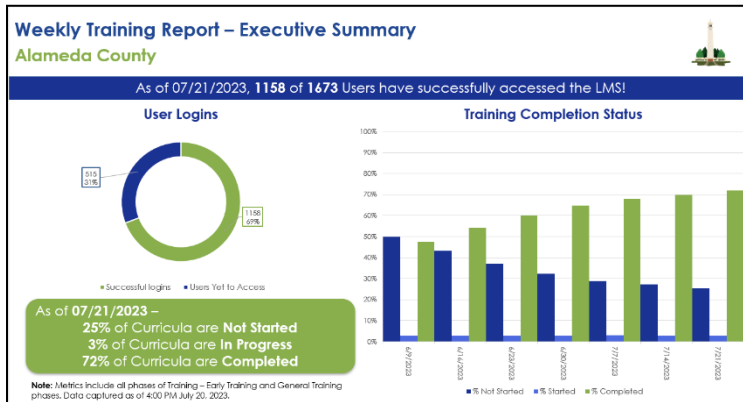 o Hosted Training Touchpoint with San Luis Obispo County on 07/18/23.

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

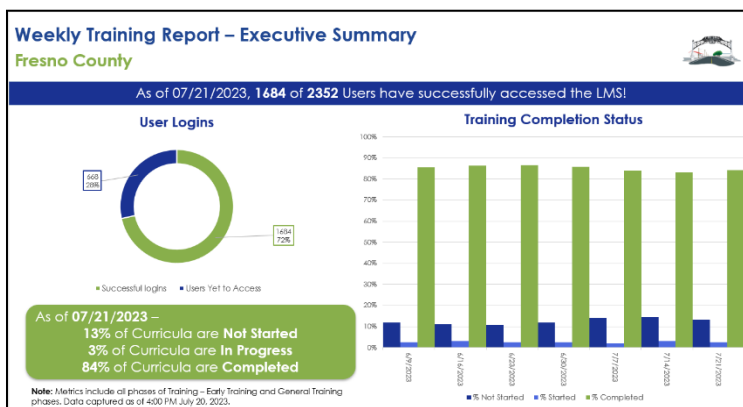**Figure 4.1-2 – Weekly WBT Training Report – Fresno County**
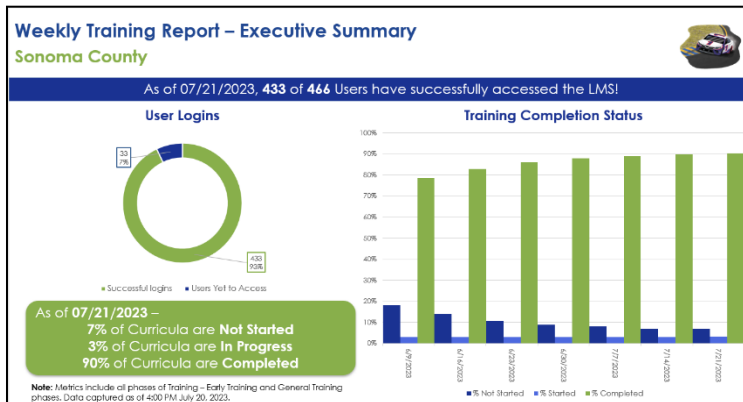
Figure 4.1-3 – Weekly WBT Training Report – Sonoma County
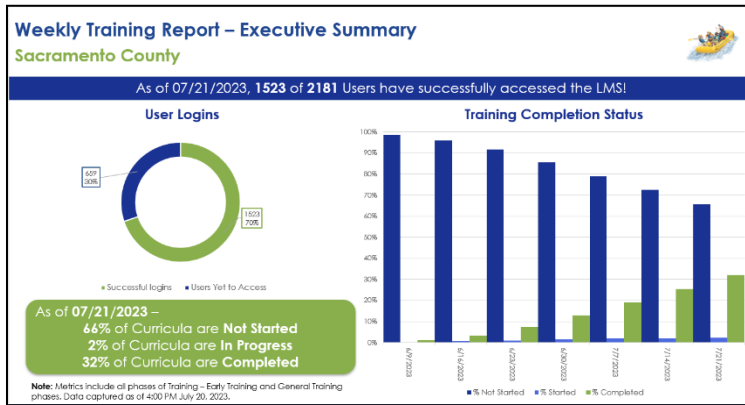
Figure 4.1-4 – Weekly WBT Training Report – Sacramento County
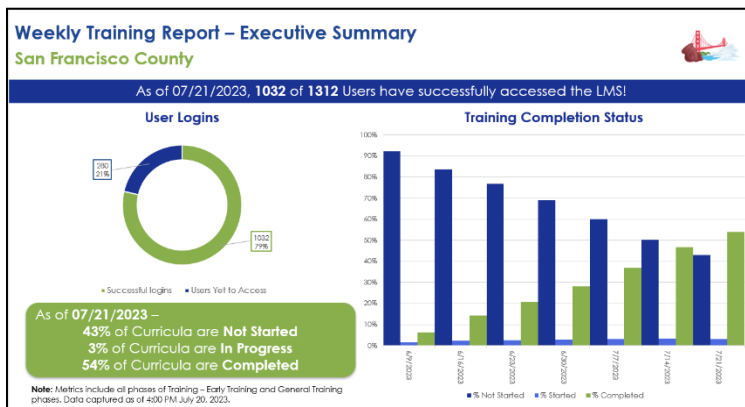
Figure 4.1-5 – Weekly WBT Training Report – San Francisco County
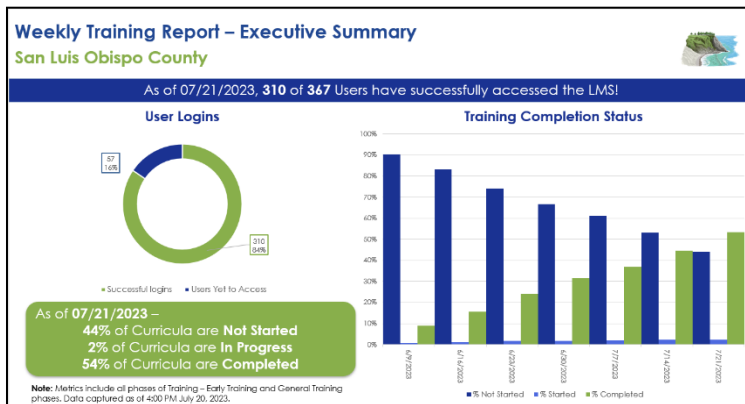
Figure 4.1-6 – Weekly WBT Training Report – San Luis Obispo County

Figure 4.1-7 – Weekly ILT Training Report – Alameda County

Figure 4.1-8 – Weekly ILT Training Report – Fresno County

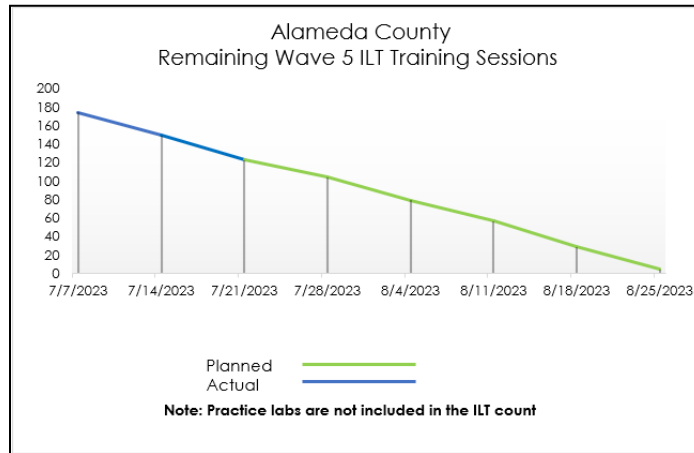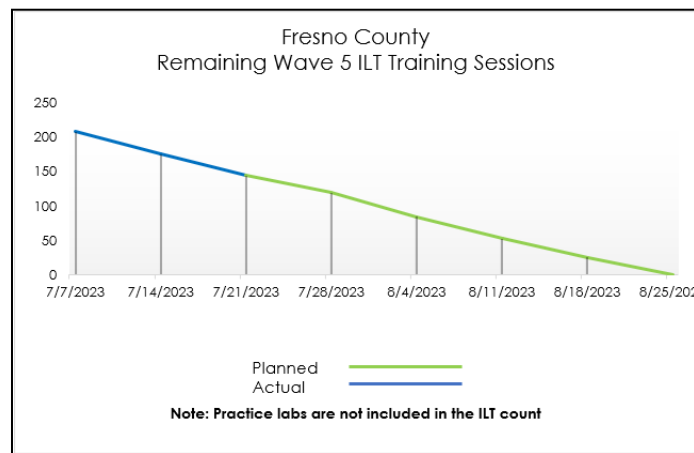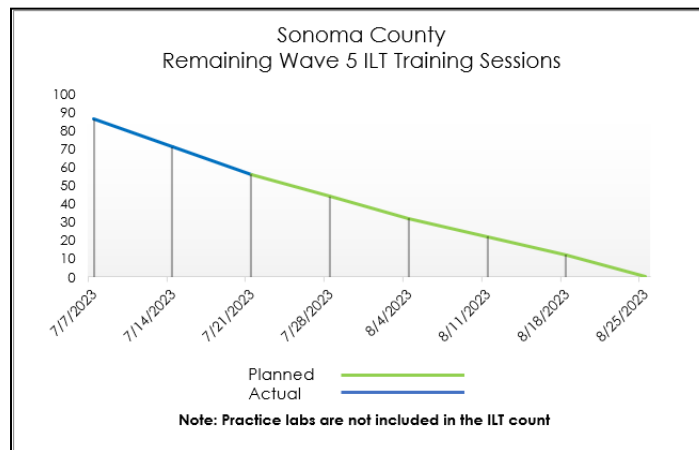**Figure 4.1-9 – Weekly ILT Training Report – Sonoma County**

4.2   Activities for the Next Reporting Period

► **Training Advisory Council**
  o   Begin preparing for Training Advisory Council (TAC) meeting on 08/16/23.

- ► **Wave 5: Alameda County, Fresno County, and Sonoma County Training**
  - o Continue WBTs all staff.
  - o Continue ILTs for all staff.
  - o Host Training Touchpoint with Fresno County on 07/25/23.
  - o Host Training Touchpoint with Sonoma County on 07/27/23.
  - o Attend Alameda County Leadership Meeting for CalSAWS on 07/24/23.
  - o Attend CalSAWS Leadership Meeting with Sonoma on 07/25/23.
  - o Attend Fresno in Person Leadership Meeting with CalSAWS on 07/26/23.
- ► **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
  - o Continue WBTs for all staff.
  - o Complete room setup and connectivity testing for Early Training and Train the Trainer ILTs in San Francisco County.
  - o Start Early Training ILTs in Sacramento and San Luis Obispo Counties.
  - o Start Train the Trainer ILTs in San Francisco County.
  - o Host Employment Services Webinars on 07/25/23 and 07/26/23.
  - o Host Eligibility Supervisor Webinars on 07/26/23 and 07/27/23.
  - o Host Training Touchpoint with Sacramento County on 07/25/23.
  - o Host Training Touchpoint with San Francisco County on 07/25/23.

5.0 Implementation

5.1 Highlights of the Reporting Period

- ► **Readiness Dashboard and Packet**
  - o Finalized updates for the Wave 5 and Wave 6 Readiness Packets.
- ► **Lead TOSS/IPOC Meetings**
  - o Conducted TOSS/IPOC checklist review for Alameda County (07/18/23) and Sacramento County (07/20/23).
- ► **County Prep Phase**
  - o Conducted Wave 5 County Prep Phase Office Hours and Debriefs.
- ► **Go-Live Packet (GLP)**
  - o Reconfigured the membership and composition of the GLP Strike Team
  - o The team met on 07/18/23 and 07/20/23 to review all open Conversion and Production defects. Reviewed 27 open conversion defects.
  - o Updated GLP documents by removing items to be deleted, updating Jira IDs, and adding a new sub-section reminding counties to review skipped issuances after Go-Live.
- ► **Future Waves**
  - o Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
  - o Completed ALA and FRS IPT testing.
  - o Planning of BPR for the newly discovered ALA ancillary applications.
- ► **Post-Implementation Support**
  - o Completed third week of Wave 4 post-Implementation support to counties.
  - o Tracked daily business metrics and led standing Implementation Team calls.
  - o Observed and documented post-Implementation metric trends and outcomes.

- o   Monitored virtual support usage and adjusted resources to minimize wait times.
- o   Conducted a Fact Sheet Working Group and developed one new Fact Sheet.
- o   Implemented virtual consolidation plan for Santa Cruz and Solano Counties.
- o   Conducted Fresno office site visits for post-Implementation support on 07/20/23.

5.2   Activities for the Next Reporting Period

► **Post-Implementation Support**
  - o   Complete the fourth week of Wave 4 Onsite/Virtual post-Implementation support.
  - o   Track Wave 4 interactions and ServiceNow ticket reporting for daily meetings.
  - o   Deploy Wave 5 Observers to onsite offices to confirm/finalize escalation models.
  - o   Observe and document post-Implementation metric trends and issue resolutions.
  - o   Conduct Wave 5 Leadership Touchpoint meetings with county leadership teams.
  - o   Confirm Wave 5 onsite and virtual support resource allocation for post-Imp.

► **Readiness Dashboard and Packet**
  - o   Distribute Dashboards and Packets for Wave 5 and 6 counties.
  - o   Continue collecting updates for the Wave 5 and Wave 6 Readiness Packets.

► **Wave 5 Go-Live Packet**
  - o   Strike team to meet on 07/25/23 and 07/27/23 (if needed).
  - o   Complete updates to GLP and internal review

► **Other Implementation Support**
  - o   Develop draft flow based on ALA's PPJHC application
  - o   Continue activities in support of Wave 5 and Wave 6 Counties' requests.

► **County Prep Phase**
  - o   Conduct the Wave 5 County Prep Office hours and Daily Debrief.
  - o   Update County Prep Materials for Wave 6.

► **TOSS/IPOC Meetings**
  - o   Conduct TOSS/IPOC checklist review for Sonoma County (07/25/23) and San Francisco County (07/26/23) Fresno County (07/26/23) and Sacramento County (07/27/23).
  - o   Conduct the Wave 5 IPOC meeting on 07/26/23.

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
01.30	Work Plan Monthly Updates – June 2023	N/A	N/A	N/A	07/10/23	07/24/23
01.31	Work Plan Monthly Updates – July 2023	N/A	N/A	N/A	08/04/23	08/18/23
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	05/13/22
02.30	Monthly Status Report – June 2023	N/A	N/A	N/A	07/10/23	07/19/23
02.31	Monthly Status Report - July 2023	N/A	N/A	N/A	08/04/23	08/15/23
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
11	County Implementation Completion Report	09/15/22	09/27/22	N/A	N/A	N/A

Figure 6.1-1 – Deliverable Status by Submission

Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
01.31	Work Plan Monthly Updates – July 2023	On Track	FDEL Submission 08/04/23 FDEL Approval 08/18/23
02.31	Monthly Status Report – July 2023	On Track	FDEL Submission 08/04/23 FDEL Approval 08/15/23

Table 6.1-2 – Upcoming Deliverable Deadlines

Upcoming Work Product Deadlines

WP #	Work Product Name	Status	Next Deadline
	There are no more scheduled submissions for County Work Products.		

Table 6.1-3 – 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	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	Wave 1–3: Closed Wave 4–6: Open	4	Medium	03/03/21

ID	Title	Details	Status	Impact	Risk Level	Date Logged
	the multi-County and multi-vendor CalSAWS ecosystem may impact business operations	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 1–4: 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 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 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
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	Wave 1–3: Closed Wave 4–6: Open	3	Wave 1: Low Wave 2–6: Medium	01/12/22

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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 1–3: 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 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	Wave 3–4: Closed Wave 4–6: Open	3	Medium	02/08/23

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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
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,	Open	5	High	05/19/23

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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 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
0259-23	PPOCs (Sacramento, San Francisco, San Luis Obispo; Regional Managers (R1, R4, R2); Section Directors	Wave 6 CalSAWS Infographics #9	CalWIN Migration	07/17/23	Helen Cruz	Araceli Gallardo
0260-23	PPOCs (Alameda, Fresno, Sonoma); Regional Managers (R1, R4); Section Directors; Julie Conwell; Bobbi Wibbenhorst	Wave 5 CalSAWS Infographics #9	CalWIN Migration	07/17/23	Helen Cruz	Araceli Gallardo
0264-23	PPOCs (San Mateo, Santa Cruz, Solano); Directors (San Mateo, Santa Cruz, Solano); Regional Managers (R1, R3); Section Directors	Wave 4 Counties T+6 Weeks Change Readiness Survey	CalWIN Migration	07/20/23	Helen Cruz	Araceli Gallardo

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
23-090	PPOCs (48, San Diego, San Mateo, Santa Cruz, Solano); Regional Managers	CalWIN Migration Wave 5 – CalSAWS County On-Site & Virtual Support	06/26/23	Open	07/14/23	Jeffery Fuller	Michael Gates
23-095	PPOCs (R1, R2, R3, R4, R5); Regional Managers; Section Directors; Committee	Technical Point of Contact (TPOC) Identification	07/07/23	Open	07/21/23	Melanie Gines Shannon Williams	Uzair Syed Naveed

Table 6.2-3 – CRFIs

6.3   Appendix C – Project Work Plan Reports

Project Timeline
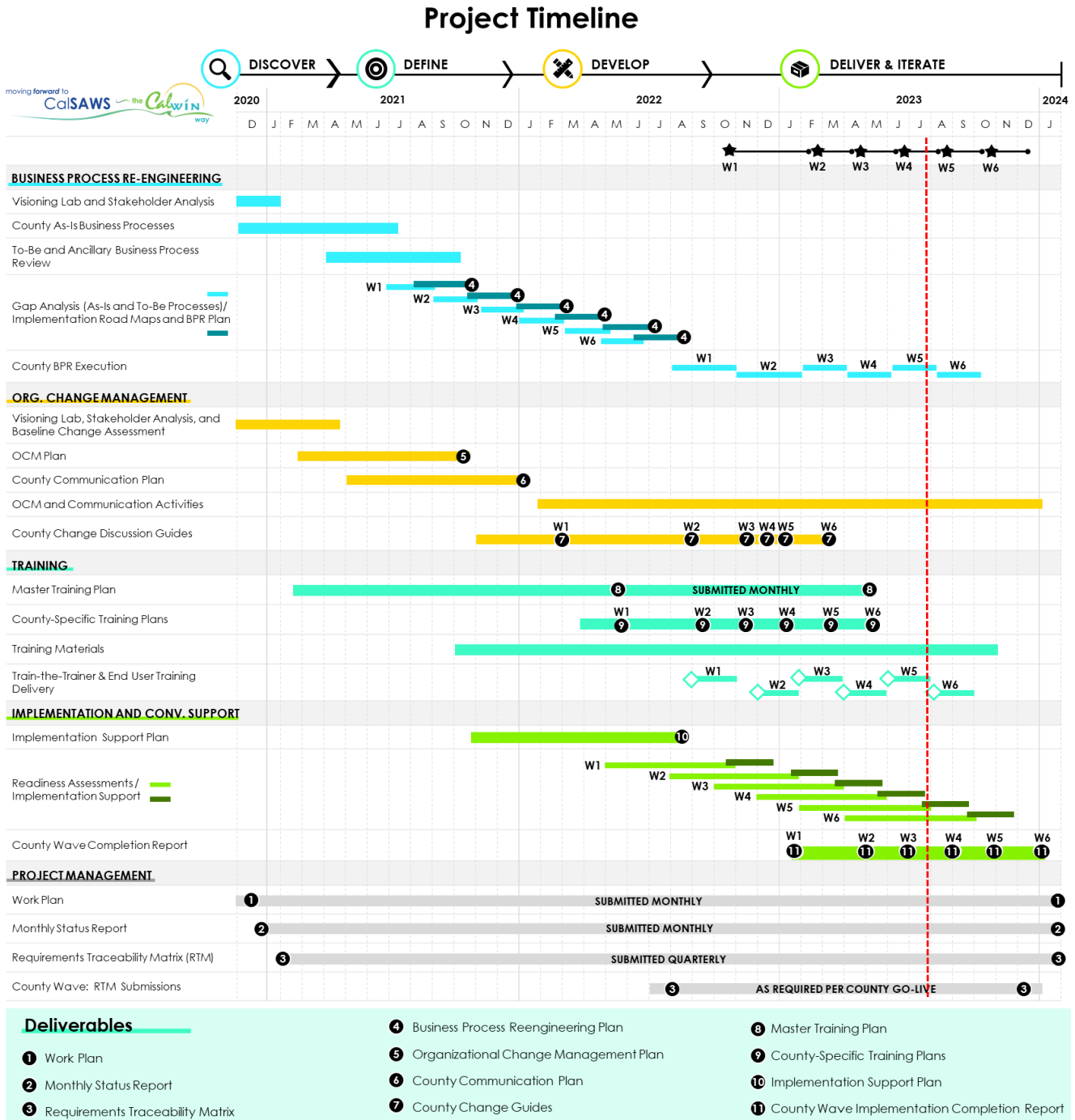
Figure 6.3-1 – Project Timeline

Project Action Items – Overdue

This table lists overdue action items, including the owner and due date.

ID	Description	Owner	Due Date
None.			

Table 6.3-1 – Overdue Action Items