

CaSAWS CalWIN  
Implementation Support  
Services (ISS) Weekly Status  
Report

**Reporting Period: August 28, 2023 to September 2, 2023**

# CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, September 6, 2023

Period: August 28, 2023 to September 2, 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"> <li>▶ <b>Wave 4</b> <ul style="list-style-type: none"> <li>○ Provided Configuration support for Go-Live activities.</li> </ul> </li> <li>▶ <b>Wave 5</b> <ul style="list-style-type: none"> <li>○ Provided Configuration support for County Prep activities.</li> </ul> </li> <li>▶ <b>Wave 6</b> <ul style="list-style-type: none"> <li>○ Facilitated Configuration Setup for Process Simulation for San Francisco on 08/28/23.</li> <li>○ Completed 50% Process Simulation preparation for the San Luis Obispo County on 09/01/23.</li> <li>○ Completed 45% Process Simulation preparation for the Sacramento County on 09/01/23</li> <li>○ Execution scheduled for San Francisco finalized on 09/1/23.</li> </ul> </li> </ul>
Organizational Change Management (OCM)	<ul style="list-style-type: none"> <li>▶ Continued to develop the September Wave 5 and 6 Change Network Champions (CNC) session materials.</li> <li>▶ Sent the Wave 4 T+6 Change Readiness Survey presentations to the Consortium for review the week of 08/28/23.</li> <li>▶ Conducted the Readiness Check-in with Sacramento County on 08/28/23.</li> <li>▶ Closed the Wave 6 T-3 Change Readiness Survey with San Francisco County on 09/01/23.</li> <li>▶ Continued to develop the September Wave 6 infographic packet.</li> <li>▶ Began to develop the Wave 6 Newsletter #4.</li> </ul>
Training	<ul style="list-style-type: none"> <li>▶ Completed the Wave 5 Counties' Web Based Training for all staff.</li> <li>▶ Completed Instructor-Led Training (ILTs) for all staff in the Wave 5 Counties.</li> <li>▶ Continued the Wave 6 Counties' Web Based Training for all staff.</li> <li>▶ Completed Instructor-Led Training (ILTs) for Early Training and Train the Trainer in the Wave 6 Counties.</li> <li>▶ Hosted Training Touchpoints with San Luis Obispo, Alameda, Sonoma, and Fresno Counties.</li> <li>▶ Completed classroom setup for ILTs for all Wave 6 Counties.</li> </ul>
Implementation	<ul style="list-style-type: none"> <li>▶ <b>Wave 4</b> <ul style="list-style-type: none"> <li>○ Completed the ninth week of Wave 4 post-Implementation support (onsite, virtual, and communications).</li> <li>○ Conducted a Fact Sheet Working Group and developed new Fact Sheets.</li> <li>○ Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.</li> <li>○ Continued to provide resource alignment communications weekly.</li> <li>○ Continued to facilitate Post Implementation project meetings.</li> </ul> </li> </ul>

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STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	<ul style="list-style-type: none"> <li>○ Organized and facilitated meeting with RMs to discuss transition to self-sufficiency when implementation support ends for Wave 4.</li> <li>○ Hosted a Wave 4 County Jira dashboard review with the project team.</li> <li>▶ <b>Wave 5</b> <ul style="list-style-type: none"> <li>○ Continued working with Alameda County for their ancillary applications and communications plan.</li> <li>○ Continued working with the CalSAWS Counties for onsite and virtual support for Wave 5 Counties.</li> <li>○ Conducted Wave 5 Post Implementation support activities, including the second Post Implementation Support Orientation Sessions on 08/17/23.</li> <li>○ Modified the Post Implementation staff alignment based on County feedback and changes.</li> <li>○ Conducted a Meet and Greet to brief the Wave 5 Counties on implementation support models.</li> <li>○ Scheduled Alameda County Protocol meetings with project and county support.</li> <li>○ Communicated onsite support staff list to the Wave 5 Counties for badging and logistics.</li> <li>○ Conducted a brief Meet and Greet for each W5 county on-site county volunteers and project staff and discussed office logistics, trip book, office contact information and virtually “meet” each other prior to Go-Live.</li> <li>○ Distributed final resource assignment list to Primary Points of Contacts (PPOCs) of volunteer counties and RMs on 08/31/23.</li> <li>○ Distributed CalSAWS books on 08/30/23.</li> <li>○ Conducted the Wave 5 Green light meeting on 08/30/23.</li> <li>○ Conducted final week of Wave 5 County Prep Phase Office Hours and Debriefs.</li> </ul> </li> <li>▶ <b>Go-Live Packet (GLP)</b> <ul style="list-style-type: none"> <li>○ Reviewed final GLP for distribution the week of 09/05/23.</li> <li>○ Confirmed availability of teams and logistics for generation and distribution of post-Go-Live data cleanup reports.</li> </ul> </li> <li>▶ <b>Other Implementation Support</b> <ul style="list-style-type: none"> <li>○ Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists.</li> <li>○ Continued updating and tracking checklist items to track each county’s approach to Lobby Management and Contact Center.</li> </ul> </li> </ul>

**Table 1.1-1 – CalSAWS Executive Summary Agenda Topics**

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### 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 5 through Wave 6 – developed weekly summary report and made available for review during the week of 08/28/23.
  - 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:**
  - DDEL 11.04: County Implementation Completion Report – Wave 4 on 08/22/23.

### 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 4–6 County Work Plans for the Implementation Readiness Checklist.
- ▶ **Deliverables and Work Products – Submit the following:**
  - FDEL 01.32: Work Plan Monthly Updates – August 2023 on 09/08/23.
  - FDEL 02.32: Monthly Status Report – August 2023 on 09/08/23.
  - FDEL 03.10: Requirements Traceability Matrix (RTM) – Q10 on 09/08/23.
  - FDEL 11.04: County Implementation Completion Report – Wave 4 on 09/06/23.

## 2.0 Business Process Reengineering (BPR)

### 2.1 Highlights of the Reporting Period

- ▶ **Process Simulation**
  - Kicked off execution for Wave 6 San Luis Obispo and Sacramento Counties on 08/28/23.
  - Completed 50% execution for San Luis Obispo County on 09/01/23.
  - Completed 45% of Sacramento execution on 09/01/23.
  - Completed data request identification for San Francisco County by 09/01/23.
- ▶ **Configuration**
  - Provided Configuration support to the Wave 4 Counties for Go-Live activities.
  - Provided Configuration support to the Wave 5 Counties for County Prep activities.

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- Facilitated Configuration Setup for Process Simulation for San Francisco on 08/28/23.

### 2.2 Activities for the Next Reporting Period

#### ▶ Process Simulation.

- Facilitate execution session for San Luis Obispo and Sacramento Counties from 09/5/23 to 09/8/23.
- Complete 100% execution for SLO and Sacramento county by 9/8/23

#### ▶ Configuration

- Provide Configuration support to Wave 4 Counties for Go-Live activities.
- Provide Configuration support to Wave 5 Counties for Go-Live activities.

## 3.0 Organizational Change Management (OCM)

### 3.1 Highlights of the Reporting Period

#### ▶ Change Network Champions

- Continued to develop the September Wave 5 and 6 CNC session materials.

#### ▶ Change Readiness Surveys

- Sent the Wave 4 T+6 Change Readiness Survey presentations to the Consortium for review the week of 08/28/23.
- Conducted the Readiness Check-in with Sacramento County on 08/28/23.
- Closed the Wave 6 T-3 Change Readiness Survey with San Francisco County on 09/01/23.

#### ▶ Newsletter/Infographics

- Continued to develop the September Wave 6 infographic packet.
- Began to develop the Wave 6 newsletter #4.

### 3.2 Activities for the Next Reporting Period

#### ▶ Change Network Champions

- Continue to develop the September Wave 5 and 6 CNC session materials.

#### ▶ Change Readiness Surveys

- Begin to develop the Wave 6 T-3 Change Readiness Survey presentations.

#### ▶ Newsletter/Infographics

- Send the September Wave 6 infographic packet to the Consortium for review the week of 09/04/23.
- Continue to develop the Wave 6 newsletter #4.

## 4.0 Training

### 4.1 Highlights of the Reporting Period

#### ▶ Training Advisory Council

- Started preparing for Training Advisory Council (TAC) Meeting on 09/20/23.

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- ▶ **Wave 5: Alameda, Fresno, and Sonoma County Training**
  - Completed WBTs for all staff.
  - Completed ILTs for all staff.
  - Hosted Training Touchpoint with Alameda County on 08/30/23.
  - Hosted Training Touchpoint with Sonoma County on 08/30/23.
  - Hosted Training Touchpoint with Fresno County on 08/31/23.
- ▶ **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
  - Continued WBTs for all staff.
  - Hosted Training Touchpoint with San Luis Obispo County on 08/29/23.
  - Completed classroom setup for ILTs for all Wave 6 Counties.

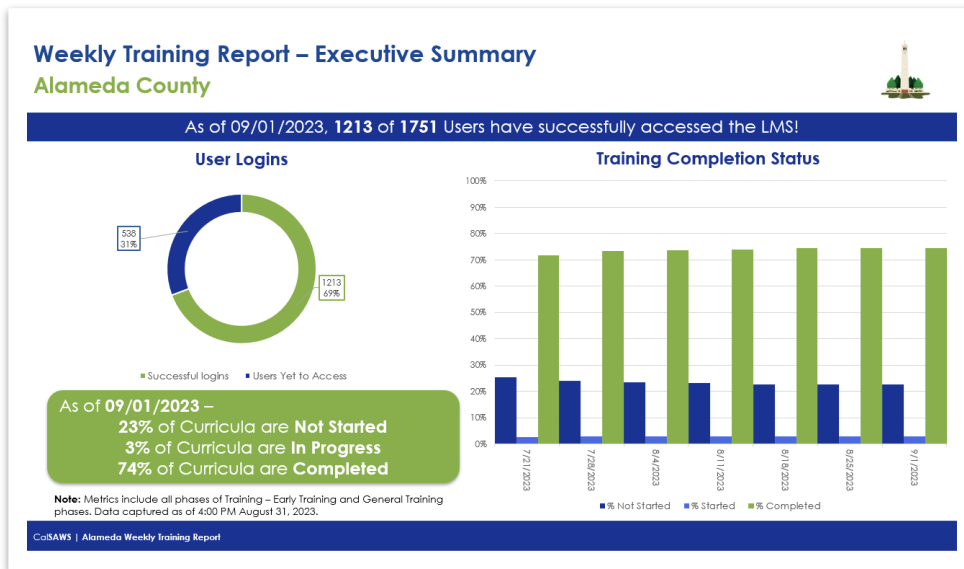


Figure 4.1-1 – Weekly WBT Training Report – Alameda County

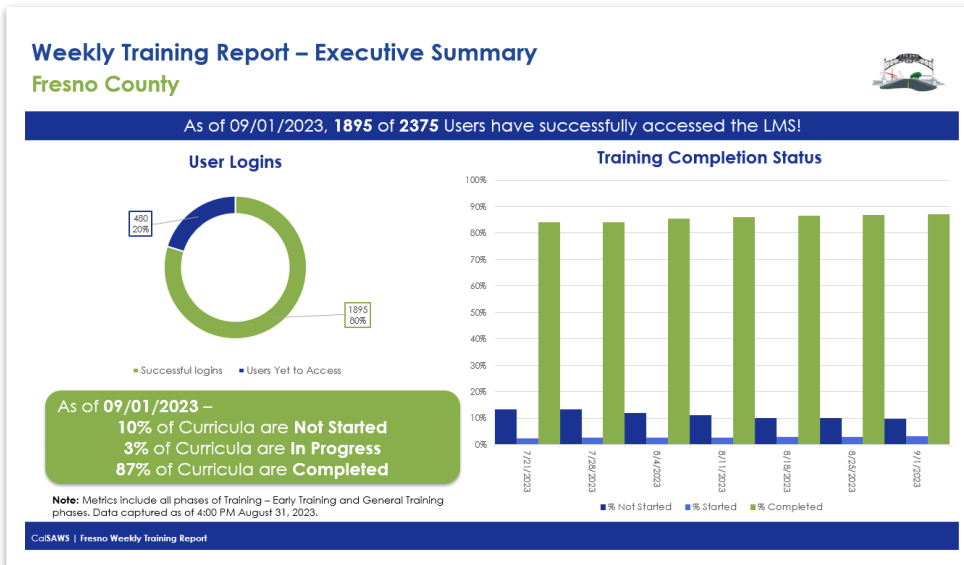


Figure 4.1-2 – Weekly WBT Training Report – Fresno County

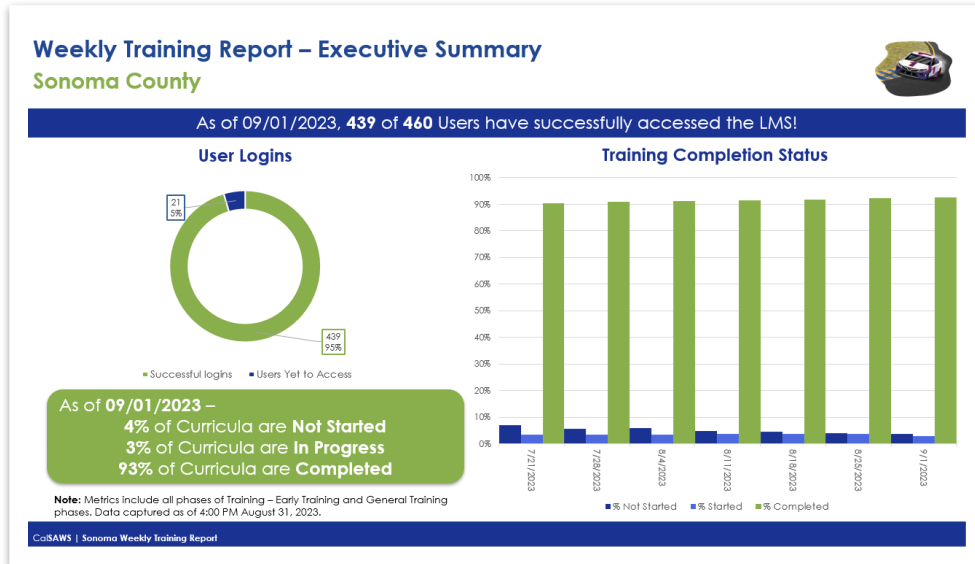


Figure 4.1-3 – Weekly WBT Training Report – Sonoma County

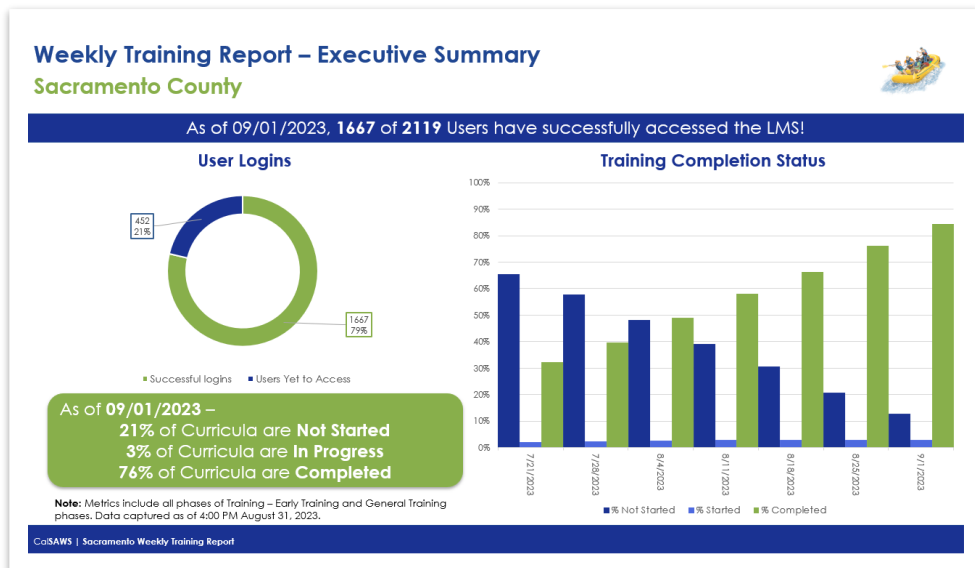


Figure 4.1-4 – Weekly WBT Training Report – Sacramento County



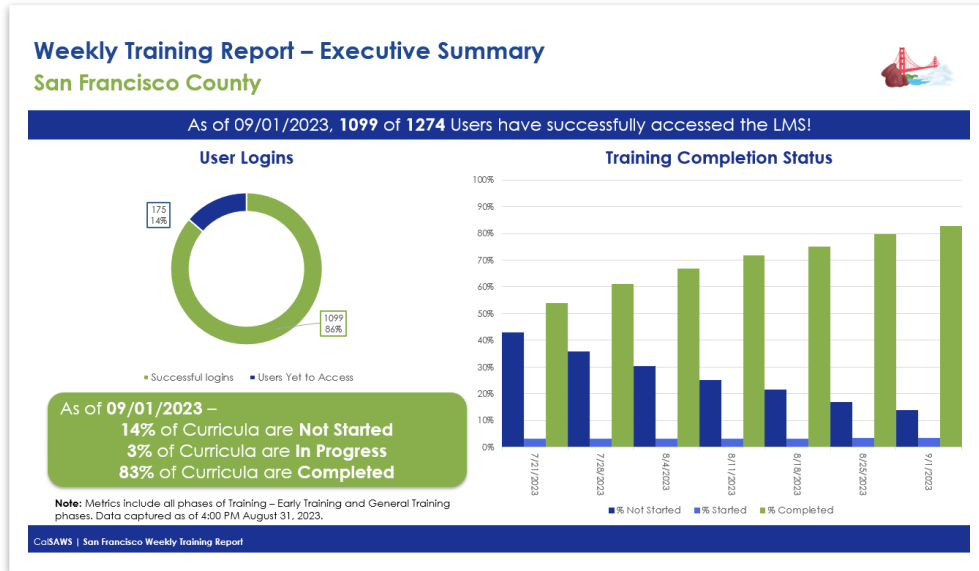


Figure 4.1-5 – Weekly WBT Training Report – San Francisco County

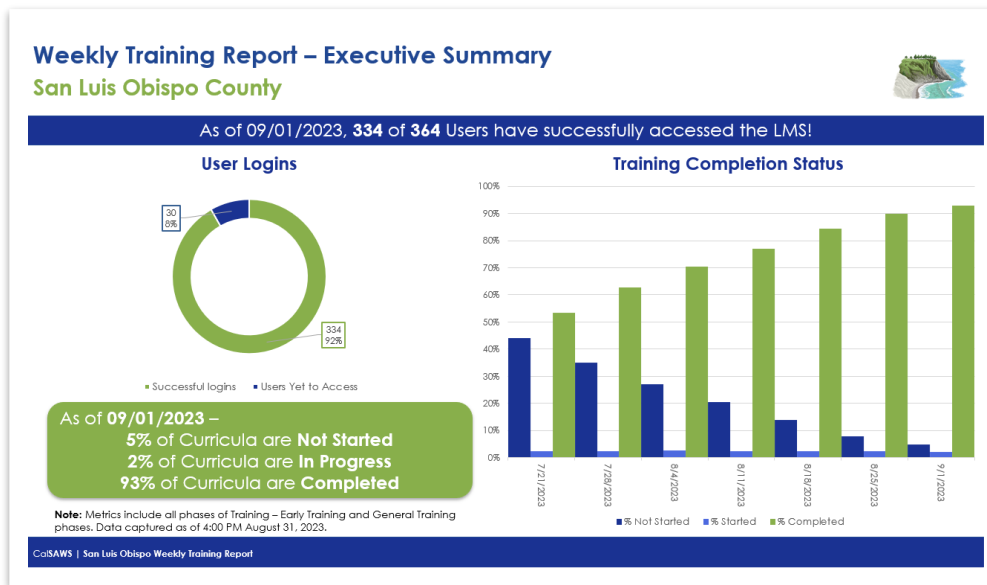


Figure 4.1-6 – Weekly WBT Training Report – San Luis Obispo County

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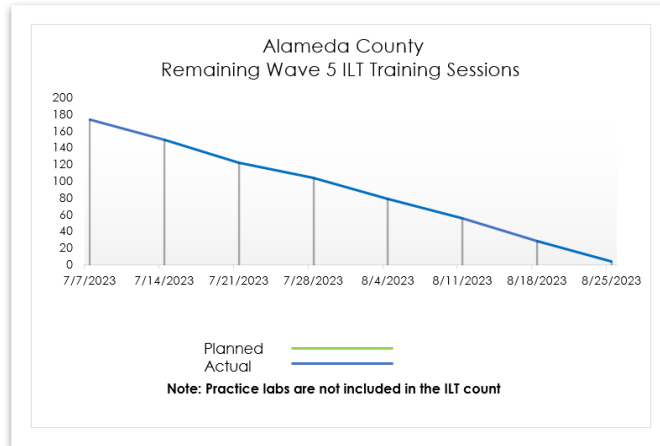


Figure 4.1-7 – Weekly ILT Training Report – Alameda County

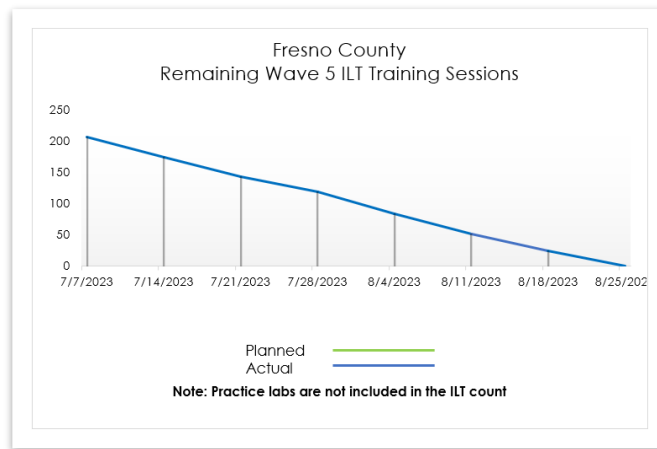


Figure 4.1-8 – Weekly ILT Training Report – Fresno County

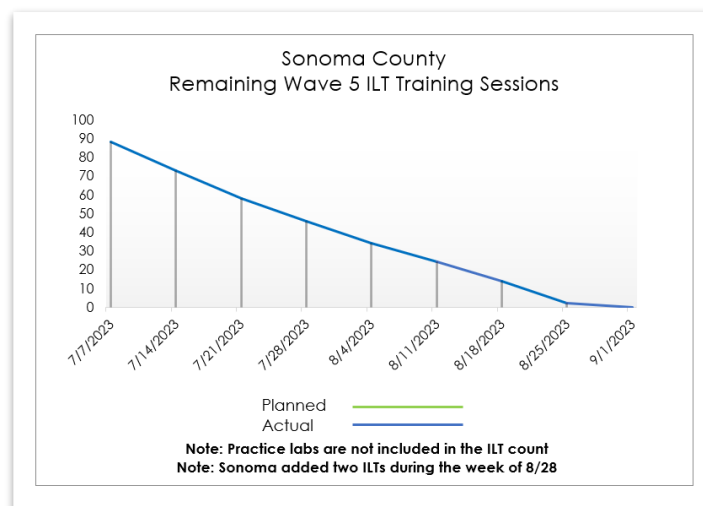


Figure 4.1-9 – Weekly ILT Training Report – Sonoma County

## **4.2 Activities for the Next Reporting Period**

- ▶ **Training Advisory Council**
  - Continue preparing for Training Advisory Council (TAC) meeting on 09/20/23.
- ▶ **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
  - Continue WBTs for all staff.
  - Start ILTs for all staff.
  - Host Training Touchpoint with Sacramento on 09/05/23.
  - Host Training Touchpoint with San Francisco on 09/06/23.

## **5.0 Implementation**

### **5.1 Highlights of the Reporting Period**

- ▶ **Readiness Dashboard and Packet**
  - Continued collecting updates for the Wave 5 and Wave 6 Readiness Packets.
- ▶ **Lead TOSS/IPOC Meetings**
  - Conducted TOSS/IPOC checklist review for Alameda (08/29/23), Sonoma (08/29/23), and Fresno (08/30/23).
- ▶ **County Prep Phase**
  - Conducted final week of Wave 5 County Prep Phase Office Hours and Debriefs.
- ▶ **Go-Live Packet (GLP)**
  - Reviewed and prepared the final Wave 5 GLP for distribution the week of 09/05/23.
- ▶ **Other Implementation Activities**
  - Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists.
  - Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
  - Conducted Wave 5 Green Light meeting on 08/30/23.
  - Reviewed and updated the DEL 11.04 comments and prepared for resubmission.
- ▶ **Post-Implementation Support**
  - Completed the final week of Wave 4 post-Implementation support (onsite, virtual, and communications).
  - Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
  - Continued working with the CalSAWS Counties for onsite and virtual support for the Wave 5 Counties; continued to update the master tracker and associated documentation.
  - Distributed the Wave 5 County Onsite Resource alignment spreadsheet to Wave 5 county leadership on 8/30/23.
  - Distributed the Wave 5 County Trip Books on 08/30/23.
  - Conducted Alameda Safety Protocols meeting with project and County volunteers on 8/30/23.

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### 5.2 Activities for the Next Reporting Period

- ▶ **Post-Implementation Support**
  - Complete the first week of Wave 5 Onsite/Virtual post-Implementation support.
  - Track the Wave 5 interactions and ServiceNow ticket reporting for daily meetings.
  - Observe and document post-Implementation metric trends and issue resolutions.
  - Conduct post implementation support communications.
- ▶ **Readiness Dashboard and Packet**
  - Continue collecting updates for the Wave 6 Readiness Packets.
- ▶ **Wave 5 Go-Live Packet**
  - Issue the revised CIT for the Wave 5 GLP the week of 09/05/23.
- ▶ **Other Implementation Support**
  - Continue working with San Francisco County on their TOSS concerns.
  - Continue supporting multiple Contact Center Model Office and Lobby Hardware deployment planning sessions.
- ▶ **County Prep Phase**
  - Conduct the Wave 6A County Prep Pre-Green Light on 09/06/23.
- ▶ **TOSS/IPOC Meetings**
  - Conduct TOSS/IPOC checklist review for San Luis Obispo (09/05/23) and Sacramento (09/07/23) Counties.
  - Conduct Wave 6 IPOC meeting on 09/06/23.

## 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
01.31	Work Plan Monthly Updates – July 2023	N/A	N/A	N/A	08/07/23	08/21/23
01.32	Work Plan Monthly Updates – August 2023	N/A	N/A	N/A	09/08/23	09/22/23
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	05/13/22
02.31	Monthly Status Report – July 2023	N/A	N/A	N/A	08/07/23	08/16/23
02.32	Monthly Status Report – August 2023	N/A	N/A	N/A	09/08/23	09/19/23
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
03.10	Requirements Traceability Matrix – Q10	N/A	N/A	N/A	09/08/23	09/19/23
11	County Implementation Completion Report	09/15/22	09/27/22	N/A	N/A	N/A
11.04	County Implementation Completion Report – Wave 4	N/A	N/A	08/22/23	09/06/23	09/15/23

Figure 6.1-1 – Deliverable Status by Submission

#### Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
01.32	Work Plan Monthly Updates – August 2023	On Track	FDEL submission 09/08/23 FDEL approval 09/22/23

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DEL #	Deliverable Name	Status	Next Deadline
02.32	Monthly Status Report – August 2023	On Track	FDEL submission 09/08/23 FDEL approval 09/19/23
11.04	County Implementation Completion Report – Wave 4	On Track	DDEL submitted 08/22/23 FDEL submission 09/06/23 FDEL approval 09/15/23

**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 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 1–4: Closed Wave 5–6: 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	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	Wave 1–4: Closed Wave 5–6: Open	2	Medium	12/13/21

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ID	Title	Details	Status	Impact	Risk Level	Date Logged
		<p>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.</p>				
269	<p>CalWIN Counties may not have enough development and testing timeline to Refactor their Ad-hoc Reports and Ancillary System before Go-Live</p>	<p>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.</p>	<p>Wave 1–4: Closed Wave 5–6: Open</p>	3	Medium	01/12/22
279	<p>CalWIN Counties may not be prepared to reconcile Fiscal and submit State Reports, timely, as they Migrate to CalSAWS</p>	<p>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)</p>	<p>Wave 1–3: Closed Wave 4–6: Open</p>	4	Medium	09/14/22
285	<p>Preparing CalWIN counties to operationalize CalSAWS after their Go-Live</p>	<p>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</p>	<p>Wave 3–4: Closed Wave 6: Open</p>	3	Low	02/08/23

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ID	Title	Details	Status	Impact	Risk Level	Date Logged
		<p>day Post Implementation support period, migrating CalWIN counties must have available resources and volunteers appropriately allocated for post implementation support, and plan for a gradual transition to self-sufficiency. Success relies on migrating CalWIN Counties demonstrating self-sufficiency at the end of the support period by self-serving and using tools such as the Go-Live Packet and Fact Sheets. It also depends on a collective effort of staff from Deloitte, the Consortium, Accenture, Gainwell, ClearBest, and Counties who can commit to providing a hybrid of virtual and onsite support during the first 60 days after each Wave's Go-Live. CalSAWS Production Counties have knowledge, experience, and use of CalSAWS. However, it is unknown how many support volunteers will be received for each Wave. Migrating CalWIN counties must have internal 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/BenefitsCa I/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	Open	3	Low	04/24/23

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ID	Title	Details	Status	Impact	Risk Level	Date Logged
		<p>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 written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions</p>	Open	5	Medium	05/19/23



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		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
None.						

**Table 6.2-2 – CITs**

The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period.

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary Contact	Backup Contact
None.							

**Table 6.2-3 – CRFIs**

### 6.3 Appendix C – Project Work Plan Reports

#### Project Timeline

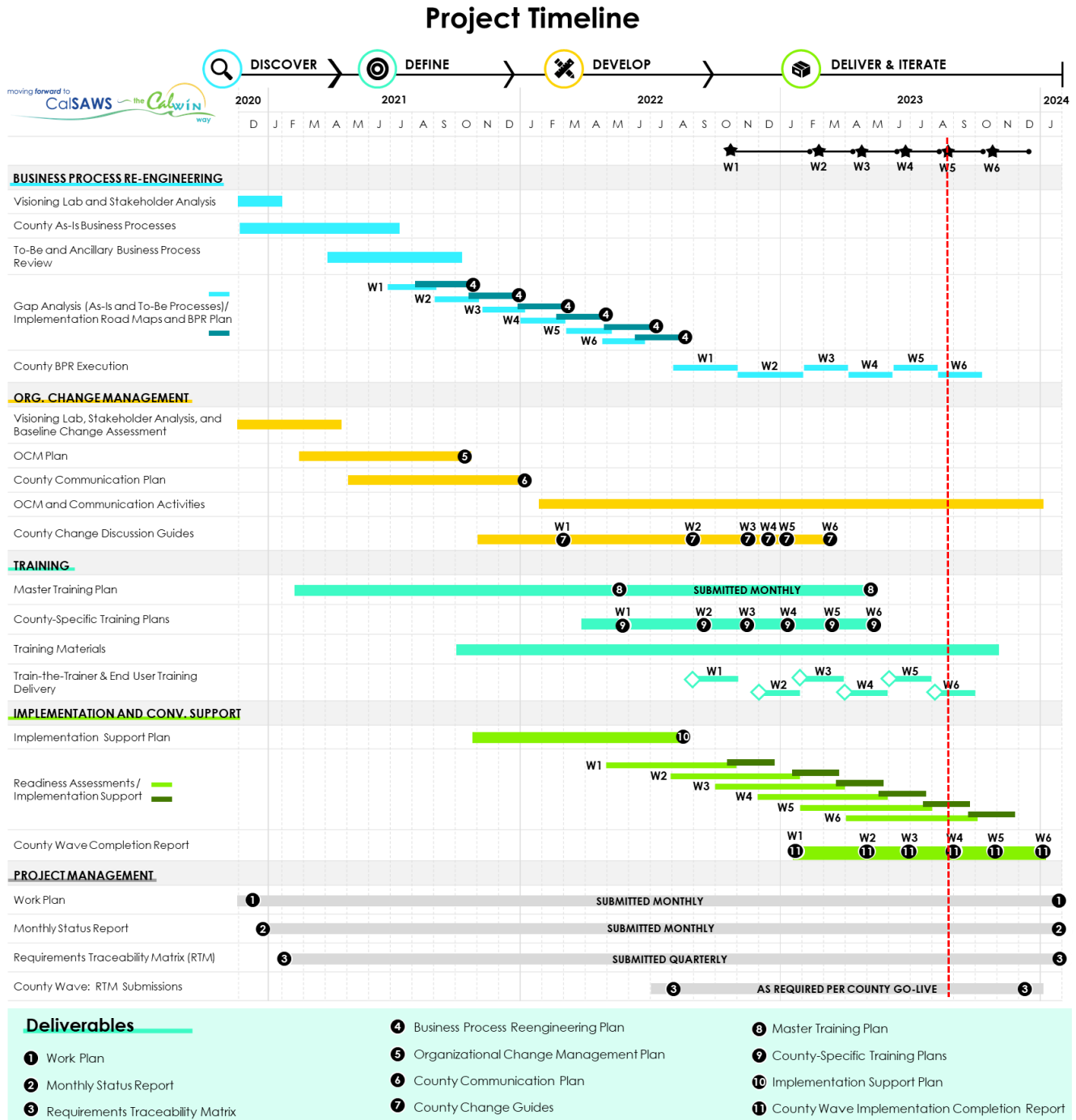


Figure 6.3-1 – Project Timeline

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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**