CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting Period: September 4, 2023 to September 10, 2023

09/13/23

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC

Business Process Reengineering (BPR)	► **Wave 5**
	  o Provided Configuration support for Go-Live activities.
	► **Wave 6**
	  o Facilitated meetings with Sacramento and San Francisco Counties regarding Max Caseload Split requirements.
	  o Provided Configuration support for Process Simulation activities.
	  o Completed 100% Process Simulation preparation for San Luis Obispo County on 09/08/23.
	  o Completed 100% Process Simulation preparation for Sacramento County on 09/08/23.
	  o Finalized the Process Simulation Execution schedule for San Francisco County on 09/07/23.

Organizational Change Management (OCM)	► Continued to develop the September Wave 5 and 6 CNC session materials. ► Finalized the Wave 4 T+6 Change Readiness Survey presentations. ► Began to develop the Wave 6 T-3 Change Readiness Survey presentations. ► Sent the September Wave 6 infographic packet to the Consortium for review the week of 09/04/23. ► Continued to develop the Wave 6 newsletter #4.
Training	► Completed classroom deinstallation in the Wave 5 Counties. ► Continued the Wave 6 Counties' Web Based Training for all staff. ► Started Instructor-Let Training (ILTs) for all staff in the Wave 6 Counties. ► Hosted Training Touchpoints Sacramento, San Francisco, and San Luis Obispo Counties.

Implementation	► **Wave 5**
	  o Completed the first week of Wave 5 post-Implementation support (onsite, virtual, and communications).
	  o Conducted a Fact Sheet Working Group and developed new Fact Sheets.
	  o Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
	  o Continued to provide resource alignment communications weekly.
	  o Continued to facilitate Post Implementation project meetings.
	  o Continued working with the CalSAWS Counties for onsite and virtual support for Wave 5 Counties.
	  o Distributed Wave 5 post-Go-Live clean reports – Yellow Banner, CRG, and discrepant data reports to all Wave-5 counties on 09/05/23.
	  o Support counties with post-Go-Live activities and questions.

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
	► **Wave 6**
	o Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists.
	o Conducted the Wave 6A Pre-Green Light meeting on 09/07/23.
	o Created and updated Wave 6 Master Tracker to begin resource assignments.
	o Scheduled meeting with Regional Managers to discuss preliminary resource information for the Wave 6 Counties and office assignments.
	o Reviewed Wave 6 County profiles and contact sheets for additional updates needed to begin resource alignments.
	o Continued to facilitate post-Implementation project meetings.
	o Facilitated daily executive post-Implementation calls.
	► **Go-Live Packet (GLP)**
	o Updated and distributed updated Wave-5 Go-Live Packet (GLP) on 09/05/23.
	► **Other Implementation Support**
	o Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 Highlights of the Reporting Period

► **Staff Onboarding**
  o Continued onboarding and offboarding of 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 09/04/23.
  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 FDEL 01.32: Work Plan Monthly Updates – August 2023 on 09/08/23.
  o FDEL 02.32: Monthly Status Report – August 2023 on 09/08/23.
  o FDEL 03.10: Requirements Traceability Matrix (RTM) – Q10 on 09/08/23.
  o FDEL 11.04: County Implementation Completion Report – Wave 4 on 09/06/23.

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 None for the reporting period.

2.0 Business Process Reengineering (BPR)

2.1 Highlights of the Reporting Period

- ► **Process Simulation**
  - o Completed 100% execution for Wave 6 San Luis Obispo and Sacramento Counties on 09/08/23.
  - o Completed data request identification for San Francisco County by 09/08/23.
- ► **Configuration**
  - o Provided Configuration support to the Wave 5 Counties for Go-Live activities.
  - o Provided Configuration support to the Wave 6 Counties for Process Simulation activities.
  - o Facilitated meetings with Sacramento and San Francisco Counties regarding Max Caseload Split requirements on 09/06/23.

2.2 Activities for the Next Reporting Period

- ► **Process Simulation**.
  - o Facilitate execution session for San Francisco County from 09/11/23 to 09/15/23.
- ► **Configuration**
  - o Provide Configuration support to Wave 5 Counties for Go-Live activities.
  - o Provide Configuration support for Wave 6 Process Simulation activities.

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

- ► **Change Network Champions**
  - o Continued to develop the September Wave 5 and 6 CNC session materials.
- ► **Change Readiness Surveys**
  - o Finalized the Wave 4 T+6 Change Readiness Survey presentations.
  - o Began to develop the Wave 6 T-3 Change Readiness Survey presentations.
- ► **Newsletter/Infographics**
  - o Sent the September Wave 6 infographic packet to the Consortium for review the week of 09/04/23.
  - o Continued to develop the Wave 6 newsletter #4.

3.2 Activities for the Next Reporting Period

► **Change Network Champions (CNC)**
  o Send the September Wave 5 and 6 CNC session materials to the Consortium for review.
► **Change Readiness Surveys**
  o Continue to develop the Wave 6 T-3 Change Readiness Survey presentations.
  o Conduct the Wave 4 T+6 Weeks Change Readiness Survey presentations from 09/13/23 – 09/14/23.
► **Newsletter/Infographics**
  o Continue to review the September Wave 6 infographic packet.
  o Send the Wave 6 newsletter #4 to the Consortium for review the week of 09/11/23.

4.0 Training

4.1 Highlights of the Reporting Period

► **Training Advisory Council**
  o Continued preparing for Training Advisory Council (TAC) Meeting on 09/20/23.
► **Wave 5: Alameda, Fresno, and Sonoma County Training**
  o Completed classroom deinstallation in the Wave 5 counties.
► **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
  o Continued WBTs for all staff.
  o Started ILTs for all staff.
  o Hosted Training Touchpoint with Sacramento County on 09/05/23.
  o Hosted Meet and Greet for CalSAWS Trainers and San Francisco County Training Assistants on 09/05/23.
  o Hosted Training Touchpoint with San Francisco County on 09/07/23.
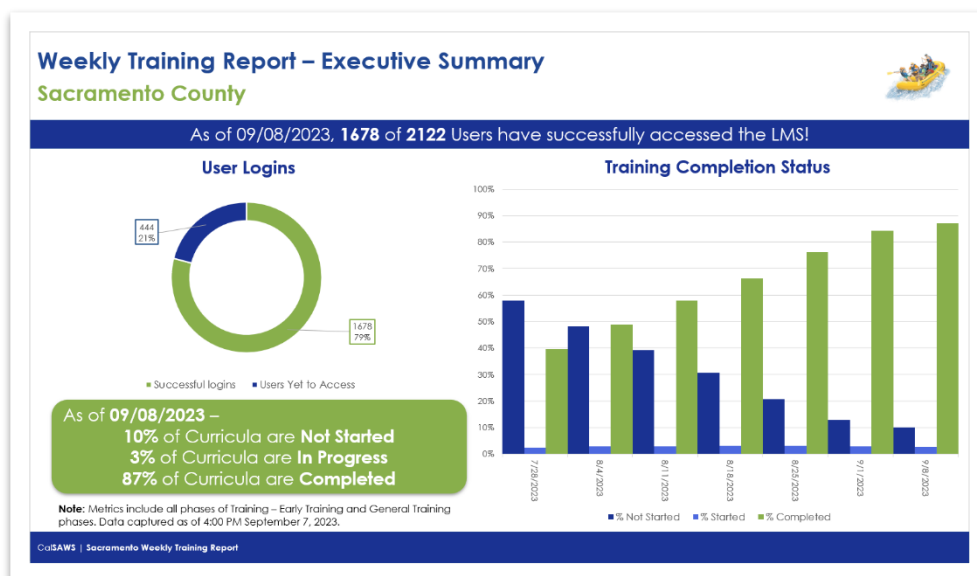 o Hosted Training Touchpoint with San Luis Obispo County on 09/08/23.

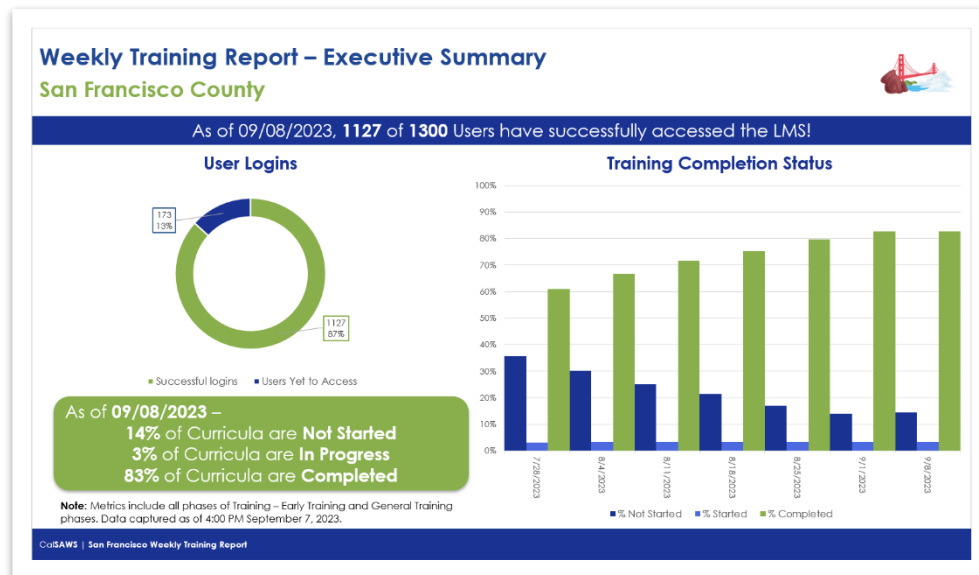**Figure 4.1-1 – Weekly WBT Training Report – Sacramento County**

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

Figure 4.1-3 – Weekly WBT Training Report – San Luis Obispo County

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

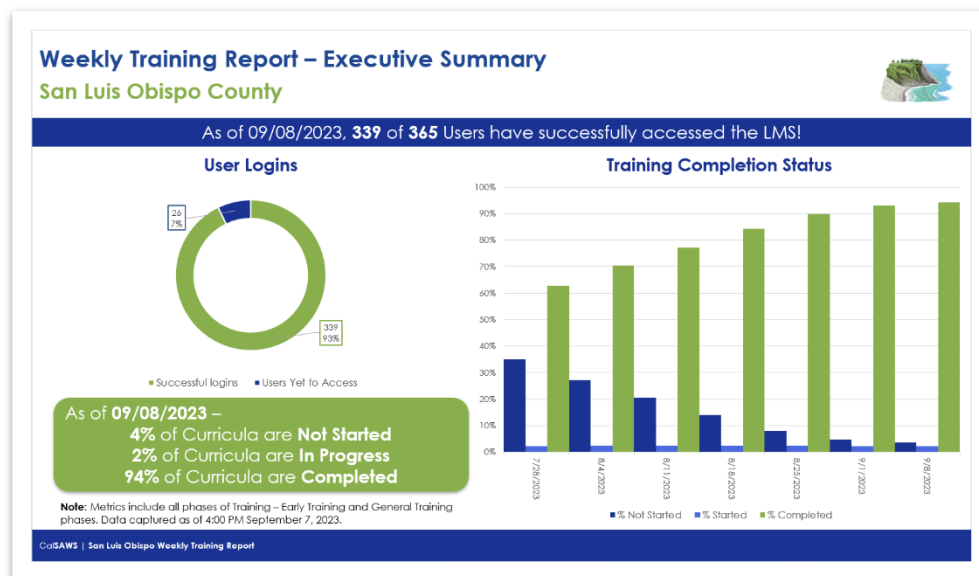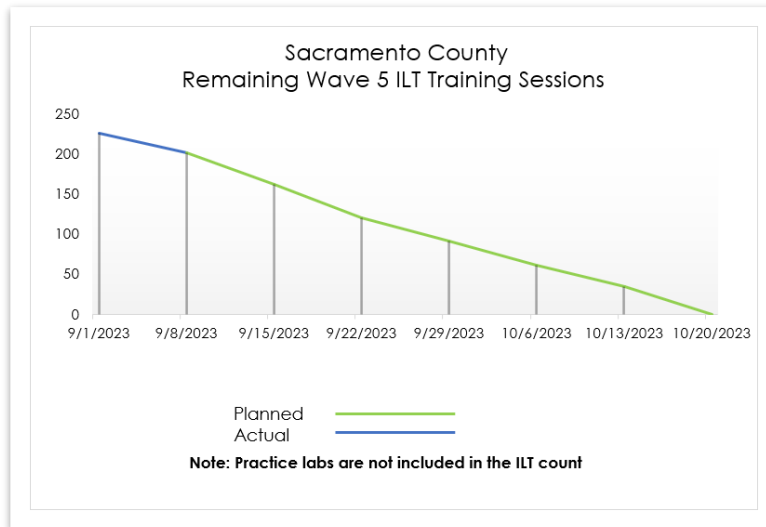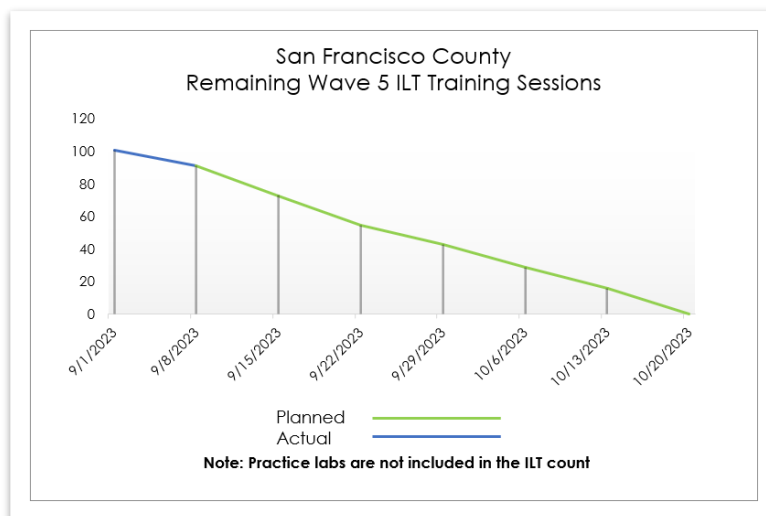**Figure 4.1-5 – Weekly ILT Training Report – San Francisco County**
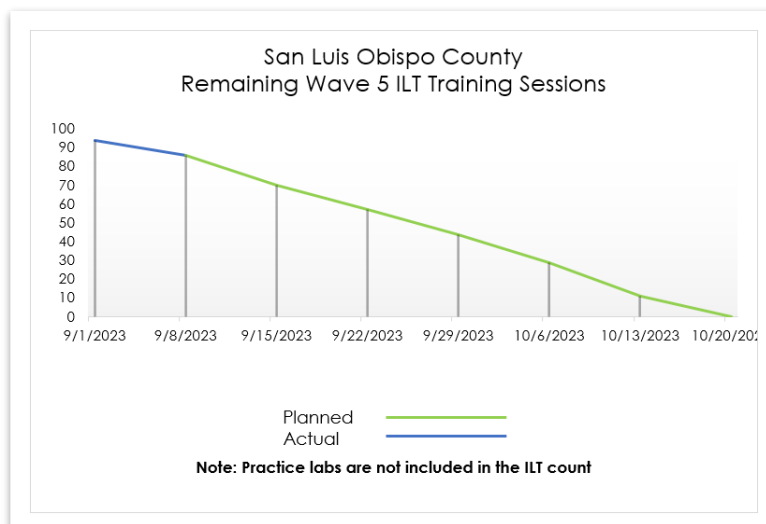

Figure 4.1-6 – Weekly ILT Training Report – San Luis Obispo County

4.2   Activities for the Next Reporting Period

► **Training Advisory Council**
   o   Continue preparing for Training Advisory Council (TAC) meeting on 09/20/23.
► **Wave 6: Sacramento, San Francisco, and San Luis Obispo County Planning**
   o   Continue WBTs for all staff.
   o   Continue ILTs for all staff.
   o   Host Training Touchpoint with Sacramento on 09/12/23.
   o   Host Training Touchpoint with San Francisco on 09/13/23.
   o   Host Training Touchpoint with San Luis Obispo County on 09/15/23.

5.0 Implementation

5.1   Highlights of the Reporting Period

► **Readiness Dashboard and Packet**
   o   Continued collecting updates for the Wave 5 and Wave 6 Readiness Packets.
► **Lead TOSS/IPOC Meetings**
   o   Conducted TOSS/IPOC checklist review for San Luis Obispo (09/05/23) and Sacramento (09/07/23).
► **County Prep Phase**
   o   Completed County Prep Metrics materials for Wave 6 County Prep Phase
   o   Conducted Wave 6A County Prep Pre-Green Light meeting on 09/16/23.
   o   Created County Prep Metrics documents for Wave 6 Counties.
► **Go-Live Packet (GLP)**

   o   Distributed the final Wave 5 GLP for distribution on 09/06/23.
   o   Finalized schedule for creating the GLP for Wave 6.

► **Other Implementation Activities**

   o   Distributed cleanup reports (CRGs, Yellow Banner report, and data discrepancies) to each Wave 5 County on 09/05/23
   o   Generated and distributed Go-Live Navigator that aggregated cases across all cleanup reports on 09/05/23.
   o   Supported Wave 5 Counties with various questions and help around use of the artifacts shared.
   o   Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists.
   o   Continued updating and tracking checklist items to track each county's approach to Lobby Management and Contact Center.
   o   Responded to comments received for DEL 11.04: County Implementation Completion Report – Wave 4 and submitted Final Deliverable (FDEL) on 09/05/23.
► **Post-Implementation Support**
   o   Completed the first week of Wave 5 post-Implementation support (onsite, virtual, and communications).
   o   Continued working with the CalSAWS Counties for onsite and virtual support for the Wave 5 Counties; continued to update and realign the master tracker and associated documentation.

- o Updated Wave 6 master tracker and assignment of county volunteer staff based on CRFI 23-108 responses. Some county responses are still pending receipt.
- o Distributed the Wave 5 County Onsite Resource update/realignment email for week 2 to Regional Managers.
- o Created post-Implementation Support information to be included in CalSAWS Newsletter.
- o Continue to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.

5.2   Activities for the Next Reporting Period

► **Post-Implementation Support**
- o Complete the second week of Wave 5 Onsite/Virtual post-Implementation support.
- o Track the Wave 5 interactions and ServiceNow ticket reporting for daily meetings.
- o Observe and document post-Implementation metric trends and issue resolutions.
- o Conduct post implementation support communications.
- o Facilitate post implementation project and county production calls.
- o Meet with Regional Managers and discuss Wave 6 resources (9/12).
- o Continue to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.

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

► **Wave 6 Go-Live Packet**
- o Reconfigure GLP Strike team composition and send invites out for strike team meetings.
- o Send invites out for Wave-6 GLP Orientation sessions.

► **Other Implementation Support**
- o Continue working with San Francisco County on their TOSS concerns.
- o Continue supporting multiple Contact Center Model Office and Lobby Hardware deployment planning sessions.

► **County Prep Phase**
- o Conduct the Wave 6A County Prep Green Light on 09/13/23.
- o Create County Prep support documentation materials for Wave 6 County Prep Phase.

► **TOSS/IPOC Meetings**
- o Conduct TOSS/IPOC checklist review for San Francisco County (09/13/23).
- o Conduct Wave 6 IPOC meeting on 09/13/23.

6.0 Appendices

6.1   Appendix A – Deliverable Summary

Deliverable Status by Submission

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
01.32	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
02.32	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 submitted 09/08/23 FDEL approval 09/22/23
02.32	Monthly Status Report – August 2023	On Track	FDEL submitted 09/08/23 FDEL approval 09/19/23
11.04	County Implementation Completion Report – Wave 4	On Track	FDEL submitted 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 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 1–4: Closed Wave 5–6: Open	2	Medium	12/13/21
269	CalWIN Counties may not have enough development and testing timeline to Refactor their Ad-hoc Reports and Ancillary	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	Wave 1–4: Closed Wave 5–6: Open	3	Medium	01/12/22

ID	Title	Details	Status	Impact	Risk Level	Date Logged
	System before Go-Live	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.				
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	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 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.	Wave 3–4: Closed Wave 6: Open	3	Low	02/08/23

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

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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
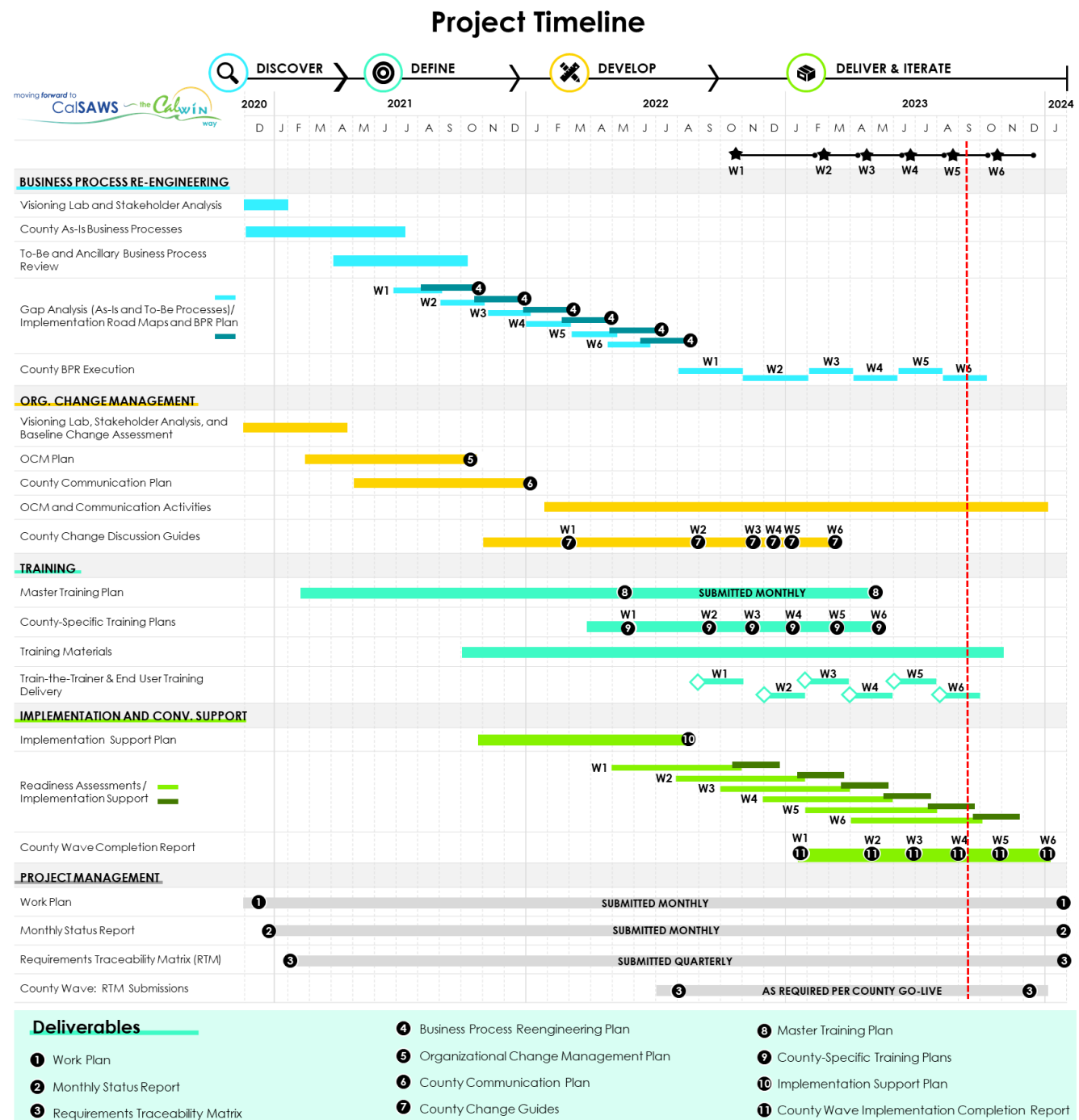
Figure 6.3-1 – Project Timeline

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