

CaSAWS CalWIN
Implementation Support
Services (ISS) Weekly Status
Report

Reporting Period: September 18, 2023 to September 24, 2023

CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, September 27, 2023

Period: September 18, 2023 to September 24, 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 5 <ul style="list-style-type: none"> ○ Provided Configuration support for Go-Live activities. ▶ Wave 6 <ul style="list-style-type: none"> ○ Provided Configuration support for County Prep activities. ○ Provided Configuration support for Process Simulation activities. ○ Completed 100% Process Simulation preparation for San Francisco County on 09/22/23. ○ Provided added support to San Francisco County for requested configurations and scenarios.
Organizational Change Management (OCM)	<ul style="list-style-type: none"> ▶ Sent the Wave 6 T-3 Change Readiness Survey presentations to the Consortium for review the week of 09/18/23. ▶ Conducted the Wave 6 T-3 Presentation for San Francisco on 09/18/23. ▶ Sent the Wave 5 T+6 Weeks Change Readiness Survey CalSAWS Information Transmittal (CIT) to the CIT/CRFI Review Group for review the week of 09/18/23. ▶ Sent the September Wave 6 infographic packet to the CIT/CRFI Review Group for review the week of 09/18/23. ▶ Sent the September Wave 6 Newsletter #4 to the CIT/CRFI Review Group for review the week of 09/18/23.
Training	<ul style="list-style-type: none"> ▶ Continued the Wave 6 Counties' Web Based Training for all staff. ▶ Continued Instructor-Led Training (ILTs) for all staff in the Wave 6 Counties. ▶ Hosted Training Touchpoints Sacramento, San Francisco, and San Luis Obispo Counties.
Implementation	<ul style="list-style-type: none"> ▶ Wave 5 <ul style="list-style-type: none"> ○ Completed the third week of Wave 5 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 to provide resource alignment communications weekly. ○ Continued to facilitate post-Implementation project meetings and collecting/reporting on Wave 5 virtual support interactions and business metrics. ○ Continued working with the CalSAWS Counties for onsite and virtual support for Wave 5 Counties. ▶ Wave 6 <ul style="list-style-type: none"> ○ Conducted Post Implementation approach walkthrough with Sacramento and San Francisco Counties. ○ Continued updating and tracking the San Francisco County checklist items and impact on county internal checklists.

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	<ul style="list-style-type: none"> ○ Working through County Adult Assistance Program (CAAP) payment process with all stakeholders. ○ Updated and worked with CalSAWS Counties, Regional Managers, and Project Team members for Wave 6 post implementation support resource alignment. ○ Conducted Wave 6 County Prep activities and reporting. ○ Distributed finalized Readiness Dashboard and Packet to Wave 6 counties. ▶ Go-Live Packet (GLP) <ul style="list-style-type: none"> ○ Conducted GLP Strike team meetings on 09/19/23. ○ GLP Orientation meetings scheduled.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 Highlights of the Reporting Period

- ▶ **Staff Onboarding**
 - Continued onboarding and offboarding of 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 for Wave 6 – developed weekly summary report and made available for review during the week of 09/18/23.
 - Work Plan Updates – Continued to facilitate the Work Plan updates for Wave 5 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:**
 - None for the reporting period.

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 5–6 County Work Plans for the Implementation Readiness Checklist.
- ▶ **Deliverables and Work Products – Submit the following:**
 - None for the reporting period.

2.0 Business Process Reengineering (BPR)

2.1 Highlights of the Reporting Period

▶ **Process Simulation**

- Completed process simulation execution for Wave 6 Counties on 09/22/23.

▶ **Configuration**

- Provided configuration support to the Wave 5 Counties for Go-Live activities.
- Provided configuration support to San Francisco County for process simulation activities.
- Provided configuration support to the Wave 6 Counties for County Prep activities.

2.2 Activities for the Next Reporting Period

▶ **Process Simulation.**

- Complete finding disposition for San Francisco County by 09/28/23.
- Support configuration updates on the county prep document based on execution findings.

▶ **Configuration**

- Provide configuration support to Wave 5 Counties for Go-Live activities.
- Provide configuration support for Wave 6 County Prep activities.

3.0 Organizational Change Management (OCM)

3.1 Highlights of the Reporting Period

▶ **Change Network Champions (CNC)**

- Prepare for the September Wave 5 and 6 CNC session.
- Reviewed the Wave 5 and 6 CNC session presentation with the Consortium.

▶ **Change Readiness Surveys**

- Sent the Wave 6 T-3 Change Readiness Survey presentations to the Consortium for review the week of 09/18/23.
- Conducted the Wave 6 T-3 Presentation for San Francisco County on 09/18/23.
- Sent the Wave 5 T+6 Weeks Change Readiness Survey CIT to the CIT/CRFI Review Group for review the week of 09/18/23.

▶ **Newsletter/Infographics**

- Sent the September Wave 6 infographic packet to the CIT/CRFI Review Group for review the week of 09/18/23.
- Sent the September Wave 6 Newsletter #4 to the CIT/CRFI Review Group for review the week of 09/18/23.

3.2 Activities for the Next Reporting Period

▶ **Change Network Champions (CNC)**

- Conduct the September Wave 5 and 6 CNC session.

▶ **Change Readiness Surveys**

- Develop the Wave 5 T+6 Week Survey.

► **Newsletter/Infographics**

- Distribute the Wave 6 Infographic Packet and Wave 6 Newsletter #4.
- Send the Wave 5 Special Edition Scoop to Consortium for review.

4.0 Training

4.1 Highlights of the Reporting Period

► **Training Advisory Council**

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

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

- Continued Web Based Trainings (WBTs) for all staff.
- Continued ILTs for all staff.
- Hosted Training Touchpoint with Sacramento County on 09/12/23.
- Hosted Training Touchpoint with San Francisco County on 09/13/23.
- Hosted Training Touchpoint with San Luis Obispo County on 09/15/23.

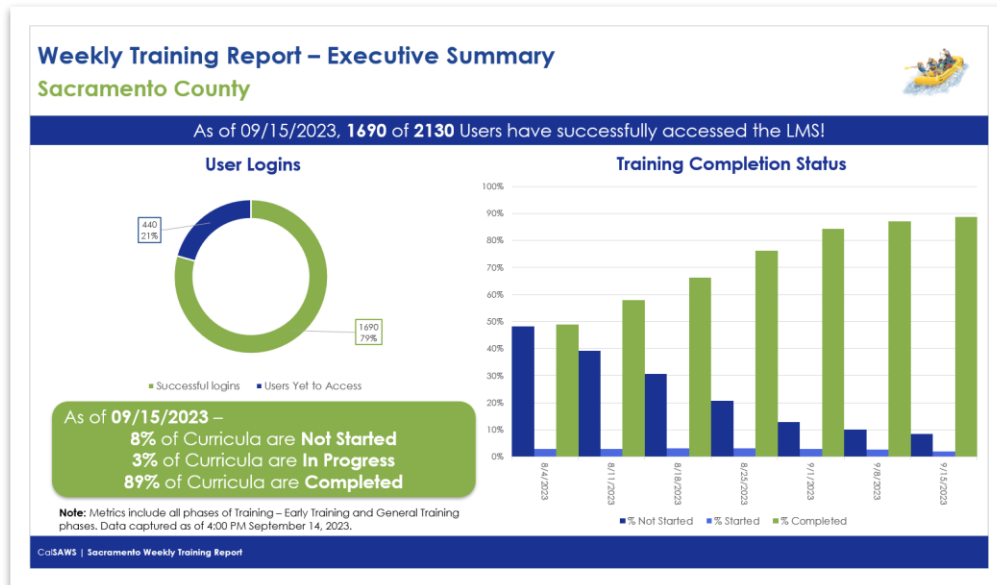


Figure 4.1-1 – Weekly WBT Training Report – Sacramento County

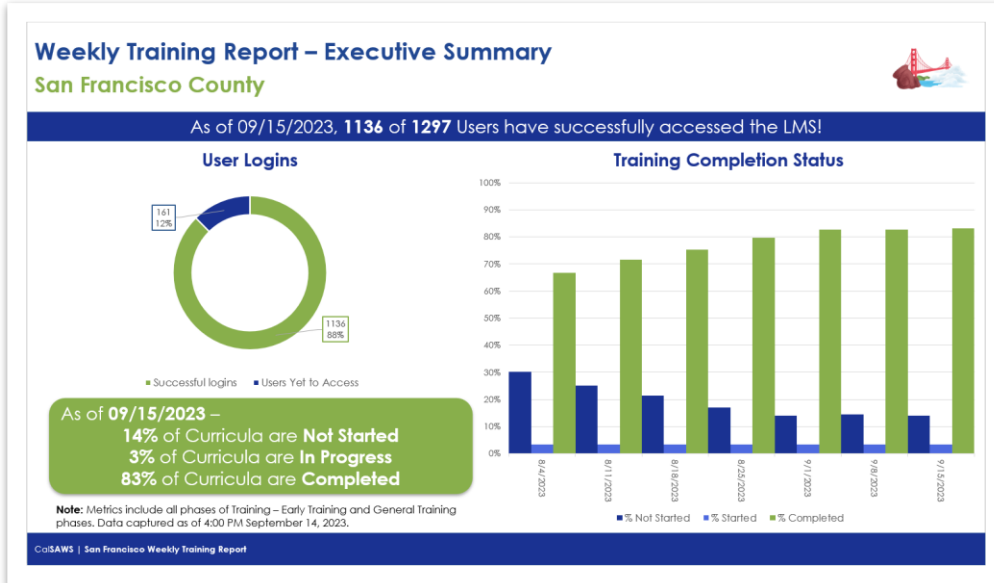


Figure 4.1-2 – Weekly WBT Training Report – San Francisco County

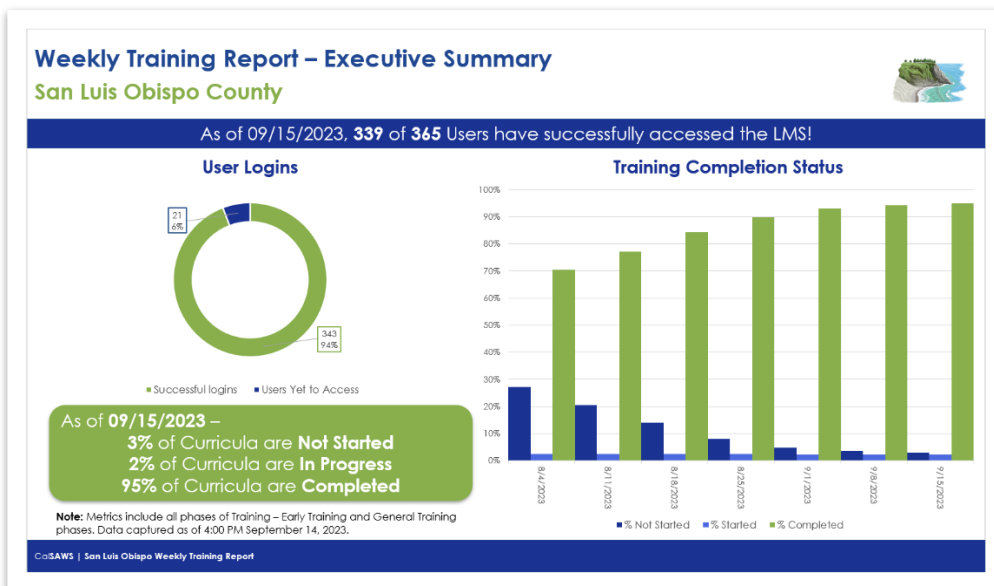


Figure 4.1-3 – Weekly WBT Training Report – San Luis Obispo County

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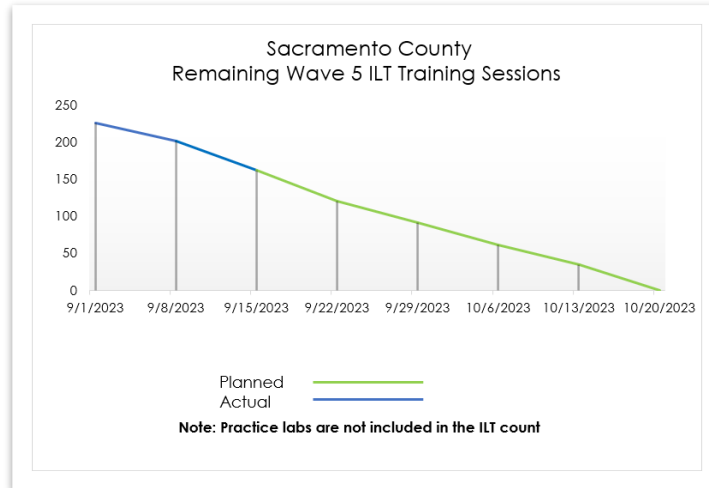


Figure 4.1-4 – Weekly ILT Training Report – Sacramento County

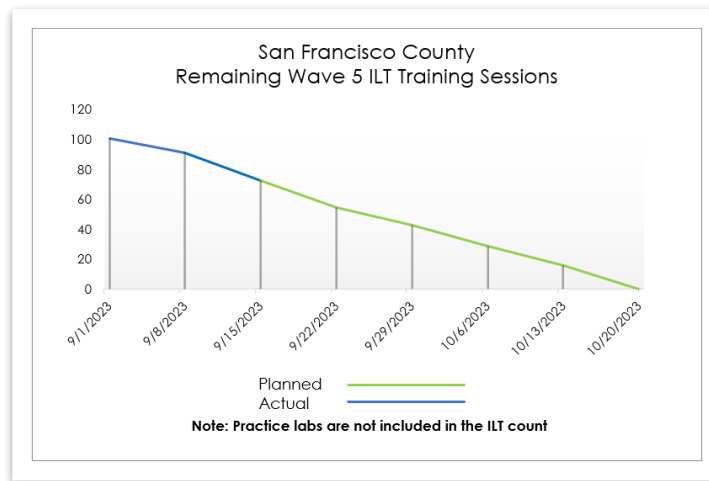


Figure 4.1-5 – Weekly ILT Training Report – San Francisco County

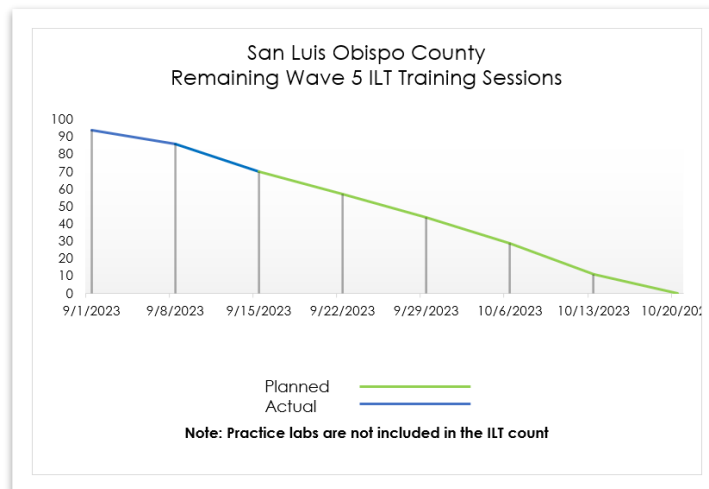


Figure 4.1-6 – Weekly ILT Training Report – San Luis Obispo County

4.2 Activities for the Next Reporting Period

- ▶ **Training Advisory Council**
 - Host 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.
 - Continue ILTs for all staff.
 - Host Training Touchpoint with Sacramento on 09/19/23.
 - Host Training Touchpoint with San Francisco on 09/20/23.
 - Host Training Touchpoint with San Luis Obispo County on 09/22/23.

5.0 Implementation

5.1 Highlights of the Reporting Period

- ▶ **Readiness Dashboard and Packet**
 - Continued collecting updates for the Wave 6 Readiness Packets.
 - Finalized and distributed the Wave 6 Readiness Dashboard and packet to the Wave 6 Counties.
- ▶ **Lead TOSS/IPOC Meetings**
 - Conducted TOSS/IPOC checklist reviews for San Luis Obispo (09/19/23) and San Francisco (09/20/23) Counties.
- ▶ **County Prep Phase**
 - Conducted Wave 6 County Prep daily office hours and debrief meetings from 09/18/23 – 09/22/23.
- ▶ **Wave 6 Go-Live Packet (GLP)**
 - The GLP Strike team met on 09/19/23 and 09/21/23 to review Jira items for inclusion in the Wave 6 GLP.
 - The team reviewed 67 Conversion defects (38 P2, 26 P3, and 3 P4s). Nine (9) were tagged for inclusion in the GLP.
 - Rejected (“Change Management”) defects were also reviewed, and the team decided to add two (2) of them to the GLP.
 - RMs asked for additional details for one of the Data Discrepancy Guides and a fact sheet for Sacramento County's NoHo processing needs.
- ▶ **Other Implementation Activities**
 - Continued updating and tracking the checklist items and impact on county internal checklists for San Francisco, San Luis Obispo, and Sacramento Counties.
 - Continued working with CalWIN, CalSAWS, Regional Managers (RMs), and Consortium Business Analysts (BAs) to propose options to meet San Francisco County's CAAP needs. Met multiple times with the various teams each day to pull together a justification for the change and a clear description of the recommendation, long-term solution, and next steps.
 - Met with San Francisco County on 09/22/23 to recommend a change to their CAAP process in CalSAWS.
 - Met with QA and the Consortium Conversion team to initiate creation of a factsheet for Sacramento County's NoHo process.

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- Continue supporting multiple Contact Center Model Office and Lobby Hardware deployment planning sessions.

► **Post-Implementation Support**

- Completed the third week of Wave 5 post-Implementation support (onsite, virtual, and communications).
- 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.
- Conducted Wave 5 daily Post Implementation Communications and Reporting meetings and Virtual Interactions reporting, by County.
- Continued to update the Wave 6 master tracker and assignment of county volunteer staff based on CalSAWS Requests for Information (CRFI) 23–108 responses.
- 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**

- Complete the fourth 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 and facilitate post-Implementation project and county production calls.
- Meet with Regional Managers and discuss Wave 6 resources.
- Continue to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.

► **Readiness Dashboard and Packet**

- Continue collecting updates for the Wave 6 Readiness Packets.

► **Wave 6 Go-Live Packet (GLP)**

- Submit GLP for internal review on 09/25/23.
- Submit GLP for CIT review on 09/26/23.
- Finalize GLP for distribution on 09/29/23.
- Complete drafts for Data Discrepancy Guide to be updated and fact sheet for Sacramento County's NoHo processing by 09/29/23.

► **Other Implementation Activities**

- Continue updating and tracking the San Francisco, San Luis Obispo, and Sacramento County checklist items and impact on county internal checklists.
- Follow up on action items and next steps for San Francisco's CAAP process changes.
- Continue supporting multiple Contact Center Model Office and Lobby Hardware deployment planning sessions.

► **County Prep Phase**

- Continue to conduct the Wave 6 County Prep Office Hours and Daily Debriefs.

► **TOSS/IPOC Meetings**

- Conduct TOSS/IPOC checklist review for Sacramento (09/25/23) and San Francisco (09/27/23) Counties.

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
01.32	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

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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	Wave 4: Low Wave 5–6: 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 1–5: Closed Wave 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 1–5: Closed Wave 6: Open	2	Low	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	Wave 5: Low Wave 6: Medium	01/12/22

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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 5–6: Open	3	Wave 5: Low Wave 6: Medium	02/08/23

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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

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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
0337-23	PPOCs (Sacramento, San Francisco, San Luis Obispo); Regional Managers (All); IPOCs (CalWIN Wave 6); TPOCs (CalWIN Wave 6)	CalWIN Wave 6 Readiness Dashboard and Packet – Monthly September 2023	CalWIN Migration	09/21/23	Jennifer Carpenter	Mara Jennings

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

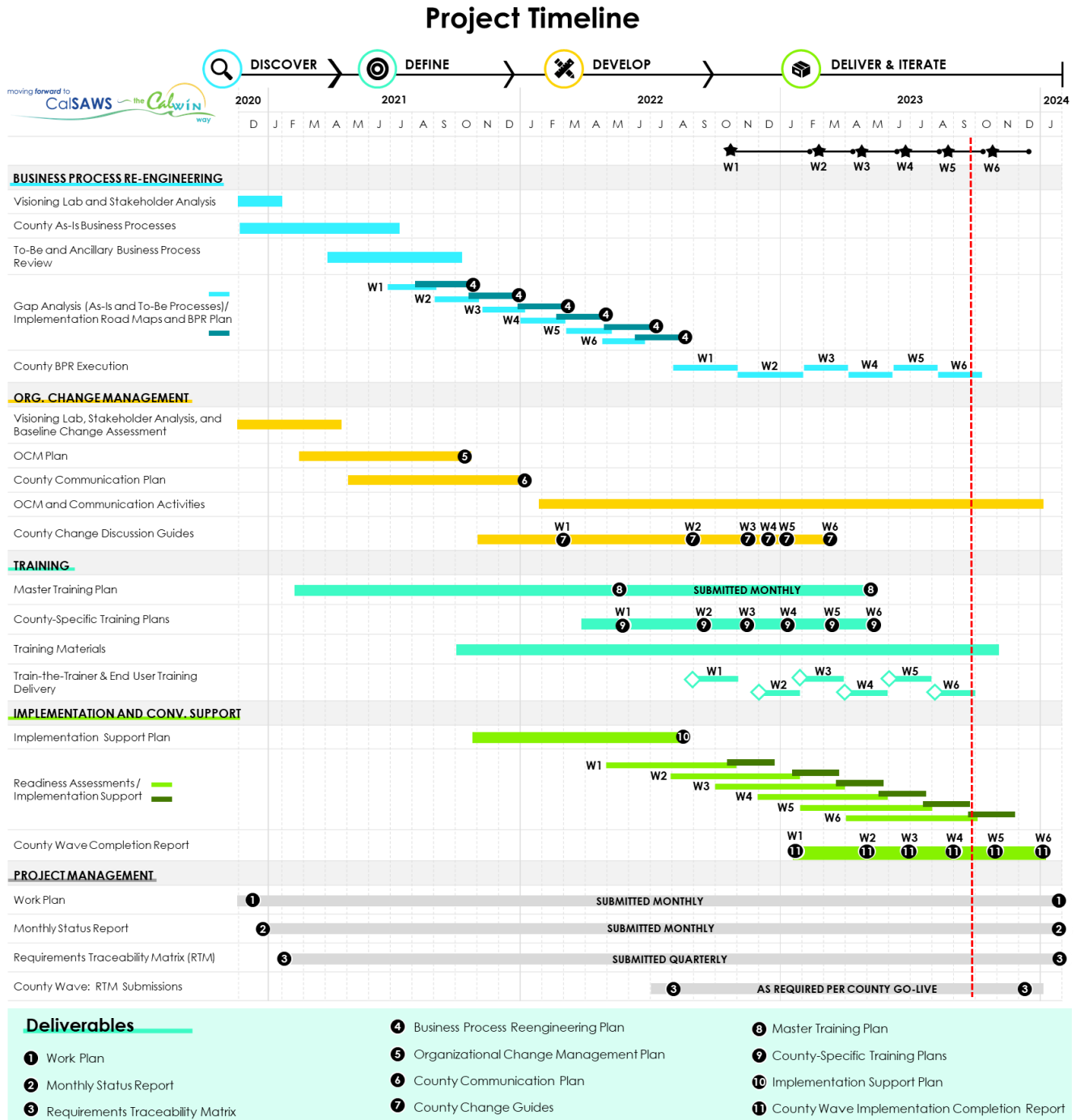


Figure 6.3-1 – Project Timeline

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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