CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

Reporting Period: October 2, 2023 to October 8, 2023

10/11/23

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1.0 Project Management

1.1 Executive Summary

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC
Business Process Reengineering (BPR)	► **Wave 6** o Provided Configuration support for County Prep activities.
Organizational Change Management (OCM)	► Prepared for the Wave 5 and 6 Change Network Champions (CNC) session for October. ► Sent a Test survey to all Wave 5 Counties for the T+6 Change Readiness Survey. ► Sent the Wave 5 Special Edition Scoop to CIT/CRFI review group. ► Sent the Wave 6 October Infographics to Consortium for review.
Training	► 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. ► Attended CalSAWS/San Luis Obispo County Leadership meeting on 10/02/23.

Implementation	► **Wave 5**
	   o Completed the fifth week of Wave 5 post-Implementation support (onsite, virtual, and communications).
	   o Continued to provide resource alignment communications weekly.
	   o Continued to facilitate post-Implementation project meetings and collecting/reporting on Wave 5 virtual support interactions and business metrics.
	   o Continued working with the CalSAWS Counties for onsite and virtual support for Wave 5 Counties.
	   o Meet with Regional Manager to coordinate alignment of resources to county based on need.
	   o Supported Alameda County diagnose and mitigate impact of General Assistance (GA) defects.
	   o Customized reports for Alameda County, where possible.
	   o Continue to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.
	► **Wave 6**
	   o Updated and worked with CalSAWS Counties, Regional Managers, and Project Team members for Wave 6 post-Implementation support resource alignment.
	   o Met with Wave 6 Counties and provide Implementation Support Resource information.
	   o Facilitated the first post-Implementation Support Orientation session for county volunteers.

STATUS REPORT SUB-SECTION	STATUS AGENDA TOPIC

	o Extended discussions with San Francisco County to recommend appropriate model for setting up payment processing for all vendors shared and testing solution end-to-end.
	   o Conducted Wave 6 County Prep activities and reporting.
	► **Go-Live Packet (GLP)**
	   o Distributed the Wave 6 GLP on 10/02/23.

Table 1.1-1 – CalSAWS Executive Summary Agenda Topics

1.2 Highlights of the Reporting Period

► **Staff Onboarding**
  o Continued 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 for Wave 6 – developed weekly summary report and made available for review during the week of 10/02/23.
  o Work Plan Updates – Continued to facilitate the Work Plan updates for Wave 5 and 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 01.33: Work Plan Monthly Updates - September 2023 on 10/05/23.
  o FDEL 02.33: Monthly Status Report - September 2023 on 10/05/23.

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 5–6 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   None for the reporting period – Process Simulation is complete.
► **Configuration**
  o   Provided configuration support to the Wave 6 Counties for County Prep activities.

2.2   Activities for the Next Reporting Period

► **Process Simulation**
  o   None for the reporting period – Process Simulation is complete.
► **Configuration**
  o   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)**
  o   Prepared for the Wave 5 and 6 CNC session for October.
► **Change Readiness Surveys**
  o   Sent a Test survey to all Wave 5 Counties for the T+6 Change Readiness Survey.
► **Newsletter/Infographics**
  o   Sent the Wave 5 Special Edition Scoop to CIT/CRFI review group.
  o   Sent the Wave 6 October Infographics to Consortium for review.

3.2   Activities for the Next Reporting Period

► **Change Network Champions (CNC)**
  o   Prepare for the Wave 5 and 6 CNC session for October.
► **Change Readiness Surveys**
  o   Open the Wave 5 T+6 Change Readiness on 10/10/23.
  o   Schedule the Wave 5 T+6 Change Readiness Survey Walkthrough with the Consortium.
► **Newsletter/Infographics**
  o   Distribute the Wave 5 Special Edition Scoop to all Counties.
  o   Send the Wave 6 October Infographics to CIT/CRFI review group.

4.0 Training

4.1   Highlights of the Reporting Period

► **Training Advisory Council**
  o   Continued preparing for Training Advisory Council (TAC) Meeting on 10/17/23.
► **Wave 6: Sacramento, San Francisco, and San Luis Obispo Planning**
  o   Continued Web Based Trainings (WBTs) for all staff.
  o   Continued ILTs for all staff.
  o   Attended CalSAWS/San Luis Obispo County Leadership meeting on 10/02/23.
  o   Hosted Training Touchpoint with Sacramento County on 10/03/23.
  o   Hosted Training Touchpoint with San Francisco County on 10/04/23.
  o   Hosted Training Touchpoint with San Luis Obispo County on 10/06/23.
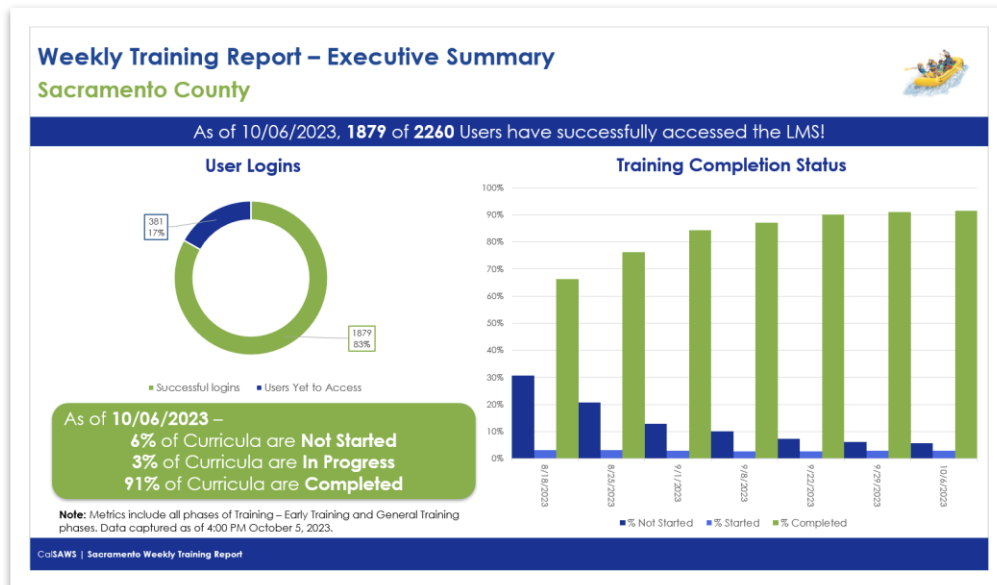

Figure 4.1-1 – Weekly WBT Training Report – Sacramento County

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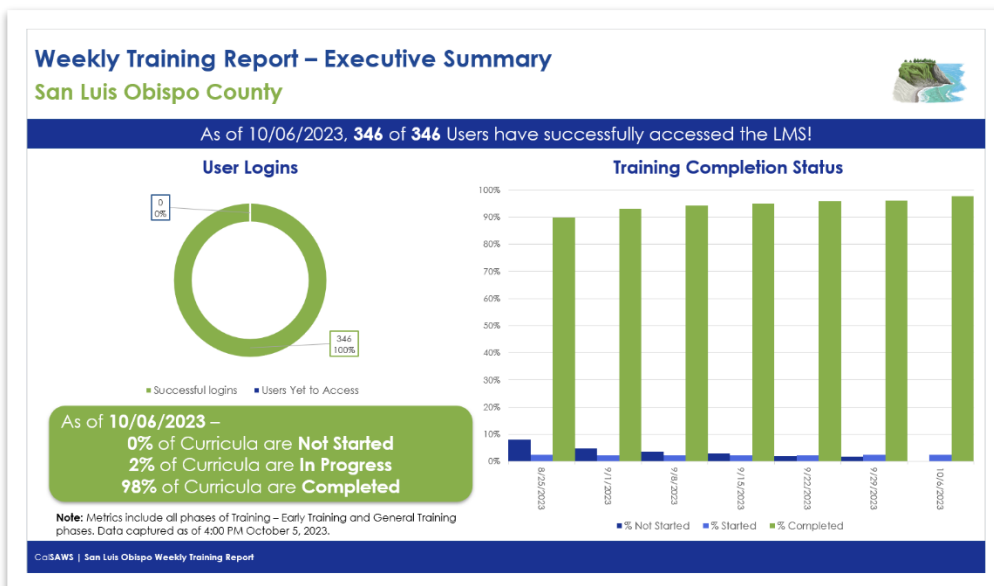
Figure 4.1-3 – Weekly WBT Training Report – San Luis Obispo County
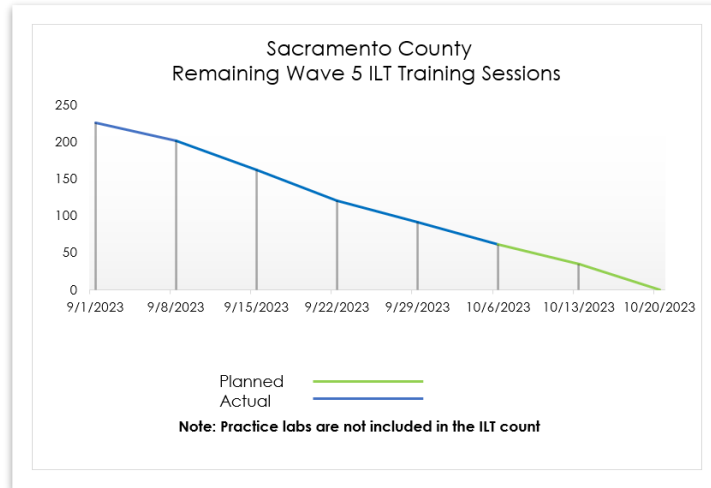
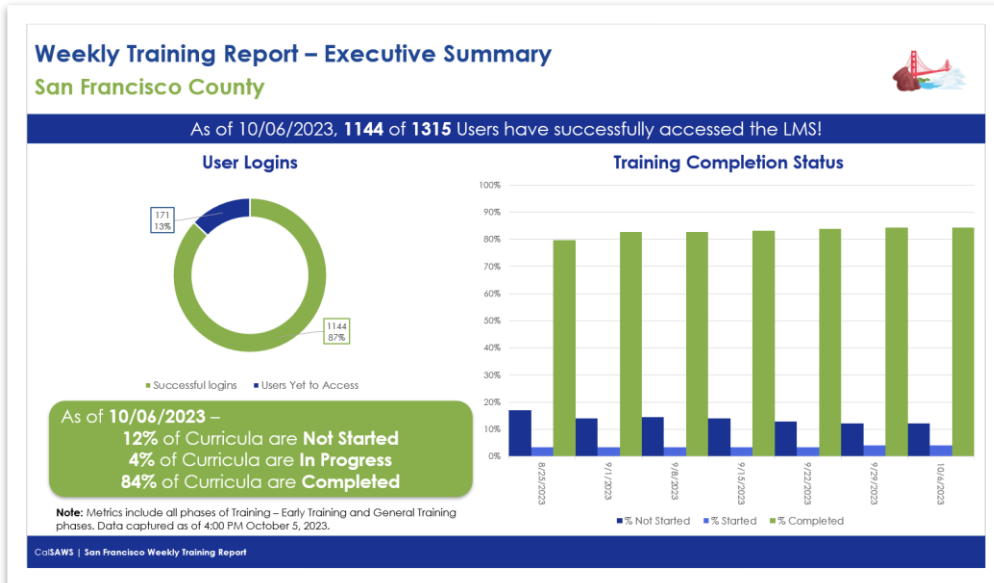**Figure 4.1-4 – Weekly ILT Training Report – Sacramento County**
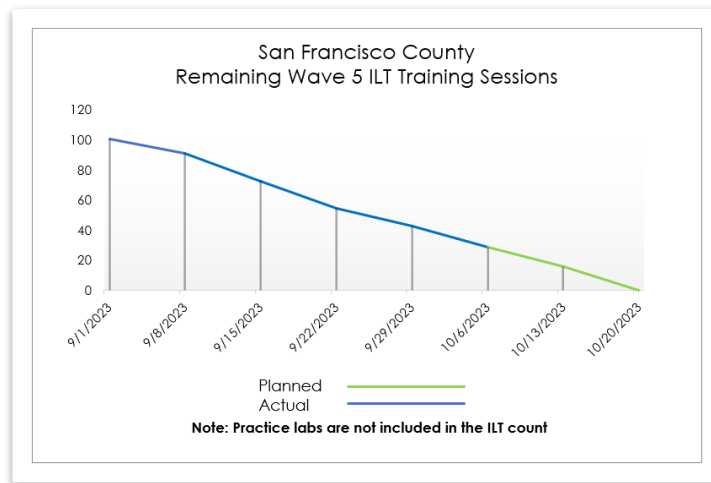
Figure 4.1-5 – Weekly ILT Training Report – San Francisco County
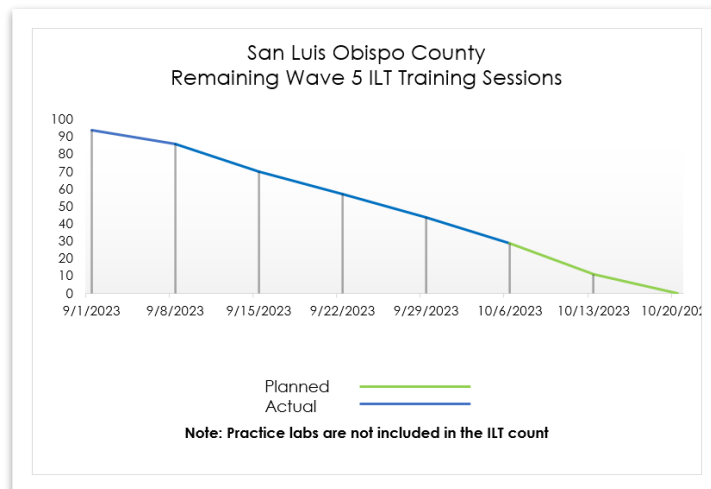
Figure 4.1-6 – Weekly ILT Training Report – San Luis Obispo County

4.2   Activities for the Next Reporting Period

► **Training Advisory Council**
  o Continue planning for Training Advisory Council (TAC) meeting on 10/17/23.
► **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 CalSAWS Long Term Care Webinar for San Luis Obispo County on 10/09/23.
  o Host CalSAWS Long Term Care Webinar for San Francisco County on 10/10/23.
  o Host CalSAWS Long Term Care Webinar for Sacramento County on 10/10/23.
 o Host CalSAWS Cal-Learn Webinars for all Wave 6 Counties on 10/12/23.
  o Host Training Touchpoint with Sacramento County on 10/10/23.
  o Host Training Touchpoint with San Francisco County on 10/10/23.
  o Host Training Touchpoint with San Luis Obispo County on 10/13/23.

5.0 Implementation

5.1   Highlights of the Reporting Period

► **Readiness Dashboard and Packet**
  o Continued collecting updates for the Wave 6 Readiness Packets.
► **Lead TOSS/IPOC Meetings**
  o Conducted TOSS/IPOC checklist reviews for San Luis Obispo (10/03/23), Sacramento (10/05/23), and San Francisco (10/04/23) Counties.
► **County Prep Phase**
  o Conducted Wave 6 County Prep daily office hours and debrief meetings.
► **Wave 6 Go-Live Packet (GLP)**
  o Distributed the Wave 6 GLP on 10/02/23.
► **Other Implementation Activities**
  o Continued updating and tracking the checklist items and impact on county internal checklists for San Francisco, San Luis Obispo, and Sacramento Counties.
  o Completed factsheet for San Francisco County for use after Go-Live to set up payment for the Tenderloin Housing Clinic (THC).
  o Completed review of all other vendors listed out by San Francisco County for payment processing.
  o Met with and shared steps the Project could take to reduce volume of work San Mateo and Sacramento Counties would assume to address Cash Assistance Program for Immigrants (CAPI) needs.
  o Completed factsheet for Sacramento County's NoHo process.
  o Continued supporting multiple Contact Center Model Office and Lobby Hardware deployment planning sessions.
► **Post-Implementation Support**
  o Completed the fifth week of Wave 5 post-Implementation support (onsite, virtual, and communications).
  o Met with Regional Manager to coordinate alignment of resources to county based on need.

- o Continued to facilitate post-Implementation project meetings and collecting/reporting on Wave 5 virtual support interactions and business metrics.
- 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 Conducted Wave 5 daily post-Implementation Communications and Reporting meetings and Virtual Interactions reporting, by county.
- o Met multiple times with Alameda County to diagnose and mitigate impact of GA-related issues.
- o Provided Alameda County with five (5) additional Lobby resources to assist with the increased traffic due to GA issues.
- o Worked to expedite data corrections and system fixes to eliminate Alameda County's GA problems.
- o Provided Alameda Counties with templates for collateral to communicate issue to the impacted groups.
- o Provided updates to Alameda County's leadership on history, cause, and remediation of the GA issues.
- o Customized reports for Alameda County, where possible
- o Continued to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.
- o Conducted a post-Implementation approach walkthrough with the post-Implementation team leads.
- o Created a post-Implementation presentation for the Wave 6 Counties, including resources available by county and office.
- o Updated the Wave 6 Master Tracker and assigned counties and offices for all county volunteers.
- o Updated and worked with the CalSAWS Counties, Regional Managers, and Project Team members for Wave 6 post-Implementation support resource alignment.

5.2 Activities for the Next Reporting Period

► **Post-Implementation Support**
- o Complete the sixth 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 and facilitate post-Implementation projects and county production calls.
- o Meet with Regional Managers and discuss Wave 6 resources.
- o Create Virtual Support rooms for Wave 6 Counties.
- o Continue to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.
- o Facilitate second post-Implementation Support Orientation session for county volunteers.

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

► **Wave 6 Go-Live Packet (GLP)**
  o Publish the Wave 6 Go-Live Packet.
► **Other Implementation Activities**
  o Continue updating and tracking the San Francisco, San Luis Obispo, and Sacramento County checklist items and impact on county internal checklists.
  o Monitor last system update to address Alameda County's GA issues to be deployed on 10/10/23.
  o Track deployment of alternate options for Alameda County's lobby management.
  o Continue working through next steps for San Francisco County's payment process testing.
  o Work with internal teams to ease Sacramento County's workload related to processing CAPI cases before December (the Cost-of-Living Adjustment (COLA) run).
  o Continue supporting multiple Contact Center Model Office and Lobby Hardware deployment planning sessions.
► **County Prep Phase**
  o Continue to conduct the Wave 6 County Prep Office Hours and Daily Debriefs.
► **TOSS/IPOC Meetings**
  o Conduct TOSS/IPOC checklist review for San Luis Obispo (10/10/23), Sacramento (10/12/23), and San Francisco (10/11/23) Counties.

6.0 Appendices

6.1 Appendix A – Deliverable Summary

Deliverable Status by Submission

DEL ID	Deliverable Name	DDED	FDED	DDEL	FDEL	Final Approval
			Complete		Coming Soon	WAC Approval Pending
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
01.33	Work Plan Monthly Updates – September 2023	N/A	N/A	N/A	10/06/23	10/20/23
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
02.33	Monthly Status Report – September 2023	N/A	N/A	N/A	10/06/23	10/17/23
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
01.33	Work Plan Monthly Updates – September 2023	On Track	FDEL submitted 10/05/23 FDEL approval 10/20/23

DEL #	Deliverable Name	Status	Next Deadline
02.33	Monthly Status Report – September 2023	On Track	FDEL submitted 10/05/23 FDEL approval 10/17/23

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 1–3: 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	Wave 1–5: Closed Wave 6: Open	2	Low	12/13/21

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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.				
269	CalWIN Counties may not have enough development and testing timeline to Refactor their Ad-hoc Reports and Ancillary System before Go-Live	The CalWIN Counties need time in the schedule, leading up to their respective Go-Live, to Refactor Ad-hoc Reports and/or Ancillary Systems. To do so, the Counties need connectivity and access to CalSAWS environments, data model (and definitions), as well as data. The current CalSAWS delivery schedule (of these) is compressing the CalWIN Counties Design, Development, and Testing timelines (i.e., schedule) and putting their County Readiness for Go-Live at-risk.	Wave 1–4: Closed Wave 5–6: Open	3	Wave 5: Low Wave 6: Medium	01/12/22
279	CalWIN Counties may not be prepared to reconcile Fiscal and submit State Reports, timely, as they Migrate to CalSAWS	As CalWIN migrates to CalSAWS, Counties may need assistance (from the project) on how to reconcile Fiscal reports as they prepare to submit State reports to CDSS on a monthly basis (and timely)	Wave 1–3: Closed Wave 4–6: Open	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	Wave 3–4: Closed Wave 5–6: Open	3	Wave 5: Low Wave 6: Medium	02/08/23

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		and onsite support during the first 60 days after each Wave's Go-Live. CalSAWS Production Counties have knowledge, experience, and use of CalSAWS. However, it is unknown how many support volunteers will be received for each Wave. Migrating CalWIN counties must have internal processes, escalation procedures, and strong support systems in place to ensure staff adoption and sustainment of CalSAWS and minimize business disruptions.				
289	Transition from CalWIN Lite to CalSAWS/BenefitsCal/Child Care Portal for external partners	CalWIN Counties have been given background on the differences between the features and functions of their existing CalWIN Lite application and the features and 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	Open	5	Medium	05/19/23

ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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
0344-23	Regional Managers (All); PPOCs (San Francisco, Sacramento, San Luis Obispo); IPOCs (CalWIN Wave6)	Wave 6 CalWIN County Go-Live Packet	CalWIN Migration	Kishan Mallur	Rachel Frey Duncan Gilliam	Kishan Mallur

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
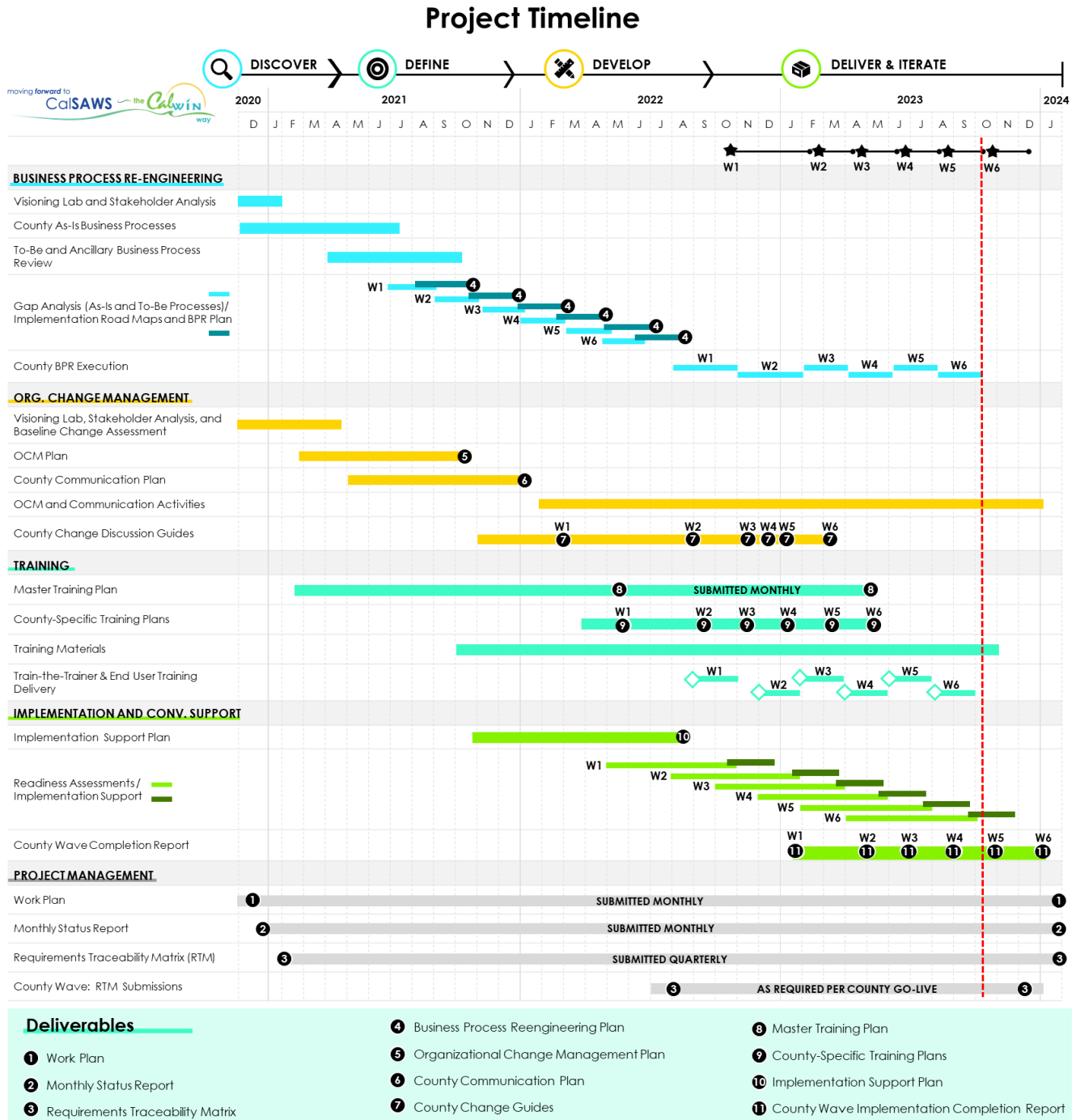
Figure 6.3-1 – Project Timeline

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