



# CalSAWS CalWIN Implementation Support Services (ISS) Weekly Status Report

**Reporting Period: October 30, 2023 to November 5, 2023**

## CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, November 8, 2023

Period: October 30, 2023 to November 5, 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>▶ All BPR activities are complete.</li> </ul>
Organizational Change Management (OCM)	<ul style="list-style-type: none"> <li>▶ Prepared for the Wave 6 Change Network Champions (CNC) Session for November.</li> <li>▶ Prepared for San Luis Obispo County's post-Go-Live check-in in November.</li> <li>▶ Reviewed the Wave 5 T+6 Change Readiness Survey Results presentations with the Consortium on 10/31/23.</li> <li>▶ Drafted the Wave 6 Special Edition Scoop Newsletter.</li> </ul>
Training	<ul style="list-style-type: none"> <li>▶ Completed classroom deinstallation in all Wave 6 Counties.</li> </ul>
Implementation	<ul style="list-style-type: none"> <li>▶ <b>Waves 5 and 6</b> <ul style="list-style-type: none"> <li>○ Completed the ninth and final week of Wave 5 post-Implementation support (onsite, virtual, and communications).</li> <li>○ Completed the first week of Wave 6 post-Implementation support (onsite, virtual, and communications).</li> <li>○ Continued to provide resource alignment communications daily for Wave 6 and weekly for Wave 5.</li> <li>○ Continued to facilitate post-Implementation project meetings and collecting/reporting on Wave 5 and Wave 6 virtual support interactions and business metrics.</li> <li>○ Continued working with the CalSAWS Counties for onsite and virtual support for Wave 6 Counties.</li> <li>○ Continued to create and distribute Fact Sheets to Wave 6 counties.</li> <li>○ Updated and worked with CalSAWS Counties, Regional Managers, and Project Team members for Wave 6 post-Implementation support resource alignment.</li> <li>○ Worked with project teams on creation of new Family Stabilization cleanup report for Sacramento County.</li> </ul> </li> <li>▶ <b>Go-Live Packet (GLP)</b> <ul style="list-style-type: none"> <li>○ The final version of the Wave 6 GLP was distributed to counties via CIT 0344-23 on 10/30/23.</li> <li>○ The post-migration case lists and the GLP Navigator were prepared and distributed to counties on 10/30/23.</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/Offboarding**
  - Continued 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 10/30/23.
  - 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:**
  - FDEL 11.05: County Wave Implementation Completion Report – Wave 5 on 11/01/23 (FDEL due date 11/06/23).

### 1.3 Activities for the Next Reporting Period

- ▶ **Staff Onboarding/Offboarding**
  - Continue offboarding of 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:**
  - FDEL 01.34: Work Plan Monthly Updates - October 2023 on 11/07/23.
  - FDEL 02.34: Monthly Status Report - October 2023 on 11/07/23.

## 2.0 Business Process Reengineering (BPR)

### 2.1 Highlights of the Reporting Period

- ▶ **Process Simulation**
  - None for the reporting period – Process Simulation is complete.
- ▶ **Configuration**
  - None for the reporting period – Configuration is complete.

### 2.2 Activities for the Next Reporting Period

- ▶ **Process Simulation**
  - None for the reporting period – Process Simulation is complete.
- ▶ **Configuration**
  - None for the reporting period – Configuration is complete.

## **3.0 Organizational Change Management (OCM)**

### **3.1 Highlights of the Reporting Period**

► **Change Network Champions (CNC)**

- Prepared for the Wave 6 CNC Session for November.
- Prepared for San Luis Obispo County's post-Go-Live check-in in November.
- Prepared for the Sacramento County's post-Go-Live CNC Check-in on November 8<sup>th</sup>.

► **Change Readiness Surveys**

- Reviewed the Wave 5 T+6 Change Readiness Survey Results decks with Consortium on 10/31/23.

► **Newsletter/Infographics**

- Draft the Wave 6 Special Edition Scoop Newsletter.

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

► **Change Network Champions (CNC)**

- Continue to prepare for the Wave 6 CNC Session for November.
- Continue to prepare for San Luis Obispo County's post-Go-Live check-in in November.
- Conduct Sacramento's post Go-Live CNC Check-in on November 8<sup>th</sup>.

► **Change Readiness Surveys**

- Present the Wave 5 T+6 Change Readiness Survey Results to the Counties on 11/6/23-11/7/23.

► **Newsletter/Infographics**

- Continue to draft the Wave 6 Special Edition Scoop.

## **4.0 Training**

### **4.1 Highlights of the Reporting Period**

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

- Completed classroom deinstallation in all Wave 6 Counties.

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

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

- None – All Training activities are complete.

## **5.0 Implementation**

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

► **Wave 6 Go-Live Packet (GLP)**

- Final version of Wave 6 GLP was distributed to counties via CIT 0344-23 on 10/30/23.

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- Executed and finalized delivery of Go-Live Packet (GLP) navigator materials and supporting case lists to counties on 10/30/23.

### ► Other Implementation Activities

- Continued tracking and monitoring progress on resolution of GA/GR (CAAP) rules issues identified by San Francisco County during County Prep Phase.
- Validated Wave 6 public-facing websites for links/references to BenefitsCal, and shared findings with Regional Managers for communication to County Primary Points of Contact (PPOCs) for further review/correction.
- Continued to work with project teams on creation of new Family Stabilization cleanup report for Sacramento County.

### ► Post-Implementation Support

- Completed the ninth and final week of Wave 5 post-Implementation support (onsite, virtual, and communications).
- Completed the first week of Wave 6 post-Implementation support (onsite, virtual, and communications)
- Continued to coordinate with Regional Managers to refine alignment of resources to county based on need.
- 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.
- Continued working with the CalSAWS Counties for onsite and virtual support for the Wave 6 Counties; continued to update and realign the master tracker and associated documentation.
- Conducted Wave 5 and 6 daily post-Implementation Communications and Reporting meetings and Virtual Interactions reporting, by county.
- Continued Updating the Wave 6 Master Tracker to fine tune assignments of counties and offices for all county volunteers.
- Continued to update and work with the CalSAWS Counties, Regional Managers, and Project Team members to incorporate changes and requested adjustments to Wave 6 post-Implementation support resource alignment.

## 5.2 Activities for the Next Reporting Period

### ► Post-Implementation Support

- Complete the second week of Wave 6 Onsite/Virtual post-Implementation support.
- Track the Wave 6 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 projects and county production calls.
- Maintain Wave 6 resource assignments and share out changes with RMs and W6 counties daily.
- Continue to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.

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### ► Other Implementation Activities

- Continue supporting San Francisco County on implementation of Money Management functionality in the context of their GA/GR (CAAP) program vendors, including Tenderloin Housing Clinic (THC).

## 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
01.33	Work Plan Monthly Updates – September 2023	N/A	N/A	N/A	10/06/23	10/20/23
01.34	Work Plan Monthly Updates – October 2023	N/A	N/A	N/A	11/07/23	11/22/23
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	05/13/22
02.33	Monthly Status Report – September 2023	N/A	N/A	N/A	10/06/23	10/17/23
02.34	Monthly Status Report – October 2023	N/A	N/A	N/A	11/07/23	11/17/23
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
11	County Implementation Completion Report	09/15/22	09/27/22	N/A	N/A	N/A
11.05	County Implementation Completion Report – Wave 5	N/A	N/A	10/23/23	11/06/23	11/15/23

Figure 6.1-1 – Deliverable Status by Submission

#### Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
11.05	DEL 11.05: County Implementation Completion Report – Wave 5	On Track	DDEL submitted 10/19/23 FDEL submitted 11/01/23 FDEL approval 11/15/23
01.34	Work Plan Monthly Updates – October 2023	On Track	FDEL submission 11/07/23 FDEL approval 11/22/23
02.34	Monthly Status Report – October 2023	On Track	FDEL submission 11/07/23 FDEL approval 11/17/23

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

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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 1–5: Closed Wave 6: Open	4	Medium	03/03/21
269	CalWIN Counties may not have enough development and testing timeline to Refactor their Ad-hoc Reports and Ancillary System before Go-Live	The CalWIN Counties need time in the schedule, leading up to their respective Go-Live, to Refactor Ad-hoc Reports and/or Ancillary Systems. To do so, the Counties need connectivity and access to CalSAWS environments, data model (and definitions), as well as data. The current CalSAWS delivery schedule (of these) is compressing the CalWIN Counties Design, Development, and Testing timelines (i.e., schedule) and putting their County Readiness for Go-Live at-risk.	Wave 1–5: Closed Wave 6: Open	3	Medium	01/12/22
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	Open	5	Medium	05/19/23



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ID	Title	Details	Status	Impact	Risk Level	Date Logged
		functionality in BenefitsCal and CalSAWS, counties have not had sufficient time to assess the ROI functionality with the high-level policy and to be able to determine impacts to their county operations and the associated alignment with the existing BenefitsCal/CalSAWS design. The policy as written does not give clear direction on County responsibilities associated with the establishment of CBO agreements, provisions of those agreements and monitoring of CBO compliance with the agreements. Counties also have not had sufficient time to be able to determine if their current CBO agreement language is adequate and includes provisions and protections to further protect customer information when being accessed by CBOs via BenefitsCal. BenefitsCal/CalSAWS initial design and implementation has been postponed until final/revised policy is issued by both CDSS and DHCS and there is operational clarity agreed to by all parties				

**Table 6.2-1 – Project Risks and Issues**

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### 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 Wave 6)	Wave 6 CalWIN County Go-Live Packet	CalWIN Migration	10/02/23 Revised 10/30/23	Kishan Mallur	Rachel Frey Duncan Gilliam

**Table 6.2-2 – CITs**

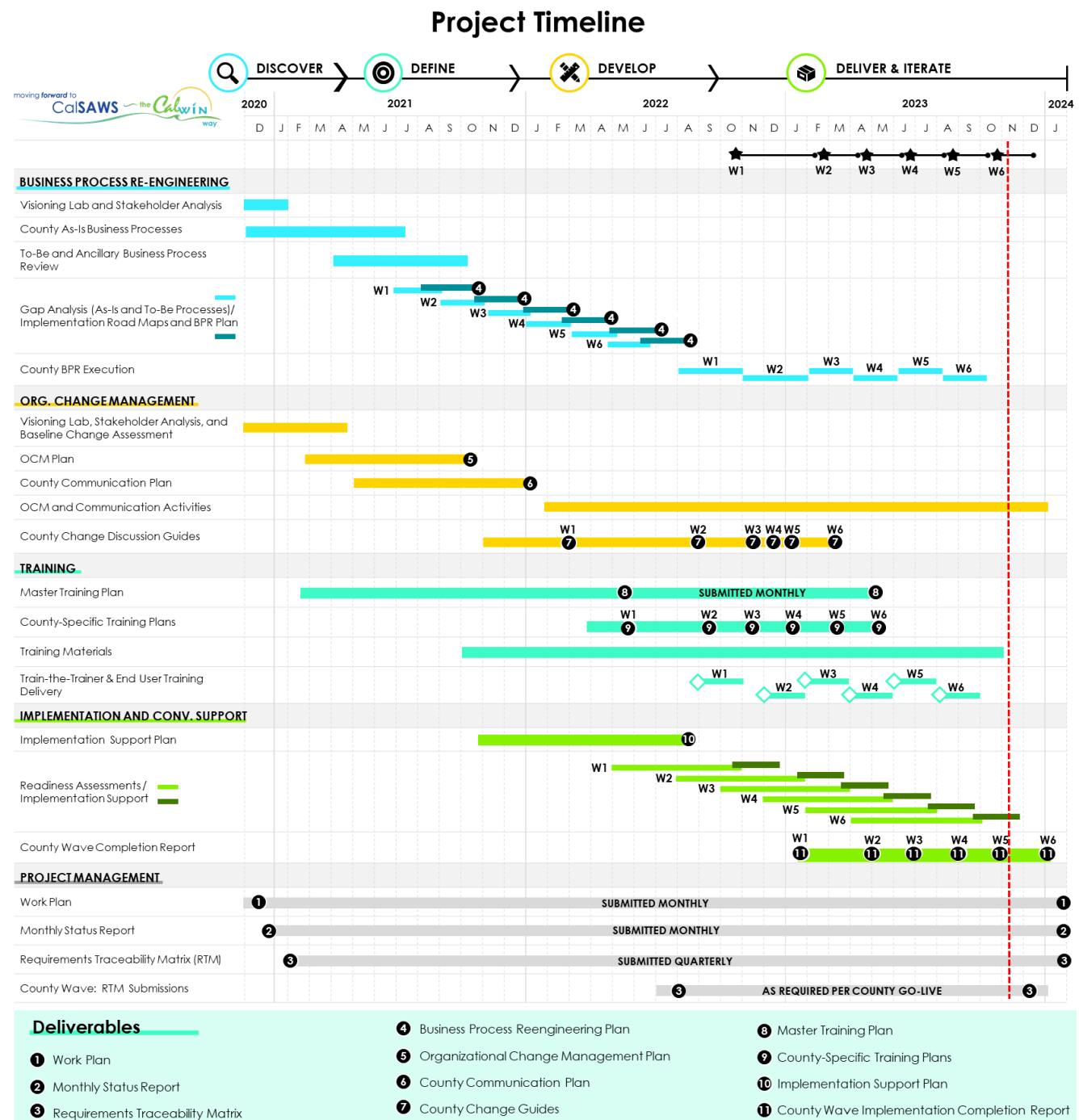
The following table outlines CalSAWS Requests for Information (CRFIs) sent for the reporting period.

CRFI ID	To	Subject	Distribution Date	Status	Response Due Date	Primary BenefitsCal Contact	Backup BenefitsCal 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**