

CaSAWS CalWIN
Implementation Support
Services (ISS) Weekly Status
Report

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

CalSAWS – CalWIN ISS Weekly Status Report

Weekly Status Report, December 13, 2023

Period: December 4, 2023 to December 10, 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"> ▶ All BPR activities are complete.
Organizational Change Management (OCM)	<ul style="list-style-type: none"> ▶ Completed Wave 6 OCM retro session.
Training	<ul style="list-style-type: none"> ▶ All Training activities are complete.
Implementation	<ul style="list-style-type: none"> ▶ Wave 6 <ul style="list-style-type: none"> ○ Completed the sixth week of Wave 6 post-Implementation support (onsite, virtual, and communications). ○ Continued to provide resource alignment communications for Wave 6. ○ Continued to facilitate post-Implementation project meetings and collecting/reporting for Wave 6 virtual support interactions and business metrics. ○ Continued working with the CalSAWS Counties for onsite and virtual support for Wave 6 Counties. ○ Continued to create and distribute Fact Sheets to Wave 6 counties. ○ Updated and worked with the CalSAWS Counties, Regional Managers, and Project Team members for the Wave 6 post-Implementation support resource alignment. ▶ Continued to update the Draft CalWIN Final Acceptance Completion Report and incorporate QA feedback. ▶ Worked with CPMO to define the submission deadline with a target of 01/10/24 and final CPMO approval on 01/31/24. <ul style="list-style-type: none"> ○ The 01/10/24 date will provide the opportunity to include the final Monthly Status Report, Work Plan, Requirements Traceability Matrix (RTM), and Del 11 Wave 6 Completion report deliverables. ▶ Developed and submitted content for the December PSC Meeting Materials with a summary of the CalWIN Final Acceptance Completion Report.

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**
 - Work Plan Updates – Continued to facilitate the Work Plan updates for 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:**
 - FDEL 01.35: Work Plan Monthly Updates – November 2023 on 12/07/23.
 - FDEL 02.35: Monthly Status Report - November 2023 on 12/07/23.
 - FDEL 03.11: Requirements Traceability Matrix (RTM) – Q11 on 12/07/23.

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

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 Readiness Surveys**

- Sent the Wave 6 T+6 Change Readiness Survey CIT to CIT/CRFI Review Group.
- Scheduled the Wave 6 Readiness Touch Points with San Luis Obispo and Sacramento Counties.

3.2 Activities for the Next Reporting Period

▶ **Change Network Champions (CNC)**

- N/A

▶ **Change Readiness Surveys**

- Distribute the Wave 6 T+6 Change Readiness Survey CIT to the Counties.
- Scheduled the Wave 6 Readiness Touch Points with San Luis Obispo and Sacramento Counties.

▶ **Newsletter/Infographics**

- N/A

4.0 Training

4.1 Highlights of the Reporting Period

None for the reporting period – Training is complete.

4.1 Activities for the Next Reporting Period

None for the reporting period – Training is complete.

5.0 Implementation

5.1 Highlights of the Reporting Period

- ▶ Continued to update the Draft CalWIN Final Acceptance Completion Report and incorporate QA feedback.
- ▶ Worked with CPMO to define the submission deadline with a target of 01/10/24 and final CPMO approval on 01/31/24.
 - The 01/10/24 date will provide the opportunity to include the final Monthly Status Report, Work Plan, Requirements Traceability Matrix (RTM), and Del 11 Wave 6 Completion report deliverables.
- ▶ Developed and submitted content for the December PSC Meeting Materials with a summary of the CalWIN Final Acceptance Completion Report.
- ▶ **Post-Implementation Support**
 - Completed the sixth 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.

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- o 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.
- o Conducted Wave 6 daily post-Implementation Communications and Reporting meetings and Virtual Interactions reporting, by county.
- o Continued Updating the Wave 6 Master Tracker to fine tune assignments of counties and offices for all county volunteers.
- o 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

- o Complete the seventh week of Wave 6 Onsite/Virtual post-Implementation support.
- o Track the Wave 6 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 Maintain Wave 6 resource assignments and share out changes with the Regional Managers and Wave 6 Counties, daily.
- o Continue to facilitate Fact Sheet meetings to discuss Fact Sheet updates, creation, and distribution.
- o Continue to update the Draft CalWIN Final Acceptance Completion Report.

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
01.34	Work Plan Monthly Updates – October 2023	N/A	N/A	N/A	11/07/23	11/20/23
01.35	Work Plan Monthly Updates – November 2023	N/A	N/A	N/A	12/07/23	12/20/23
02	Monthly Status Report – Initial	12/04/20	12/18/20	01/05/21	01/12/21	05/13/22
02.34	Monthly Status Report – October 2023	N/A	N/A	N/A	11/07/23	11/17/23
02.35	Monthly Status Report – November 2023	N/A	N/A	N/A	12/07/23	12/18/23
03	Requirements Traceability Matrix Initial	12/22/20	01/07/21	02/01/21	02/16/21	02/23/21
03.11	Requirements Traceability Matrix (RTM) – Quarter 11	N/A	N/A	N/A	12/07/23	12/18/23

Figure 6.1-1 – Deliverable Status by Submission

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Upcoming Deliverable Deadlines

DEL #	Deliverable Name	Status	Next Deadline
01.35	Work Plan Monthly Updates – November 2023	On Track	FDEL submitted 12/07/23 FDEL approval 12/20/23
02.35	Monthly Status Report – November 2023	On Track	FDEL submitted 12/07/23 FDEL approval 12/18/23
03.11	Requirements Traceability Matrix (RTM) – Q11	On Track	FDEL submitted 12/07/23 FDEL approval 12/18/23

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
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	Open	5	Medium	05/19/23

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ID	Title	Details	Status	Impact	Risk Level	Date Logged
		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

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 BenefitsCal Contact	Backup BenefitsCal Contact
None.							

Table 6.2-3 – CRFIs

6.3 Appendix C – Project Work Plan Reports

Project Timeline

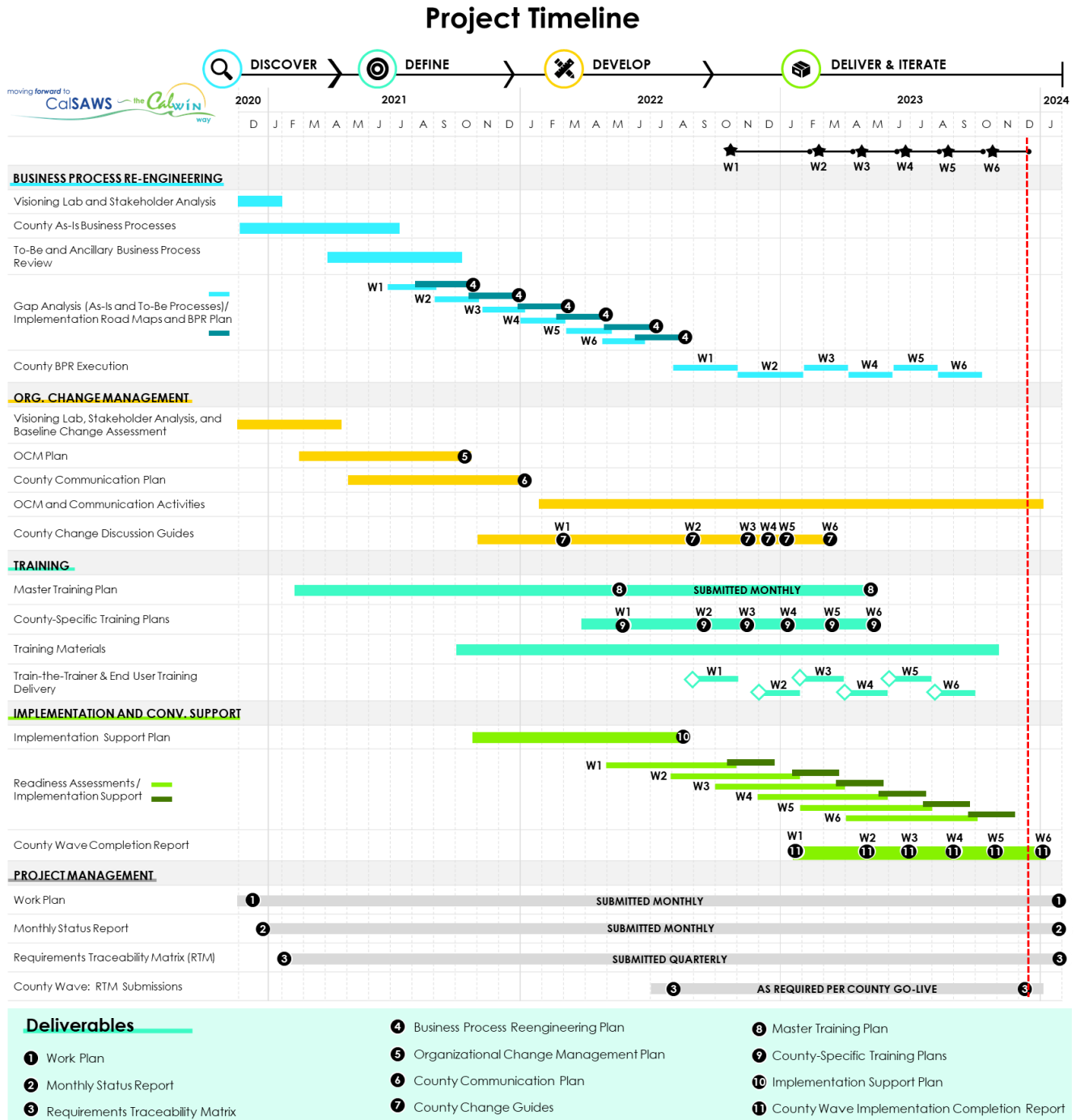


Figure 6.3-1 – Project Timeline

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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