California Automated Response and Engagement System (CWS-CARES) Supervisor Go-Live Huddle Tool

Go-Live Huddle Tool: How to Conduct the Huddle and Document Issues for Escalation

This Go-Live Huddle Tool supports supervisors during the first critical weeks of CWS-CARES go-live, starting December 7, 2026. It provides structure for conducting daily huddles, surfacing issues, and documenting items for escalation through organization support pathways.

Purpose of the Go-Live Huddle

The Go-Live Huddle is a short, structured touchpoint (10-15 minutes) designed to:

- Identify barriers preventing staff from completing required work.
- Provide clarity and reassurance during stabilization.
- Surface issues proactively before they become widespread.
- Reinforce approved workflows and discourage workarounds.
- Capture and escalate patterns, questions, or system concerns.

When to Hold Huddles

Supervisors are encouraged to conduct huddles daily for the first two to three weeks after go-live, with flexibility to increase frequency as needed.

Below are some recommended times:

- **Beginning-of-day/shift huddle:** identify overnight/last shift issues and set the tone for the day.
- **End-of-day/shift huddle**: capture issues encountered throughout the day.

How to Conduct the Huddle

Step 1: Open the Huddle (1 Minute)

Welcome the team and emphasize the purpose of a go-live huddle. For example, *"We are here to surface issues, share what is working, and ensure everyone has what they need to complete required work."* This is the perfect opportunity for supervisors to normalize the learning curve.

Step 2: Check on Status of Staff (4-6 Minutes)

This is the chance to check in to see how staff are experiencing work in CWS-CARES. Redirect any complex discussions to follow-up conversations. Consider asking short, direct questions such as:

- Is anyone blocked from completing a task in CWS-CARES?
- What workflows felt unclear or took longer than expected today?

- What's working well that you would like to share with others?
- Would anyone benefit from Super User support today?

Step 3: Reinforce Key Messages (2-3 Minutes)

Spend a few minutes highlighting the following to team members:

- Correct workflows to follow.
- Updated job aids or training reminders.
- Known fixes, clarifications or updates from your SPOC, Implementation Coordinator, or OCM Coordinator.

Step 4: Provide Immediate Support Direction (2-4 Minutes)

Use this time to ensure every issue has a clear next step and owner.

- Confirm what can be resolved right now.
- Assign a point person for follow-up.
- Clarify the expected timeline for follow-up.
- Identify which issues require escalation beyond the team.
- Ensure the issue is captured in the Issue Log with enough detail for effective triage.

Step 5: Close the Huddle (1 Minute)

Conclude the huddle by thanking everyone for raising issues and contributing success stories. Reiterate the importance of transparency and teamwork during the stabilization period, and finally, share when they can expect updates on any reported issues.

Optional Daily Huddle Notes Template

Supervisors should follow their organization's protocols to document daily go-live huddles and record issues. The template below is an example that can be used if the organization does not have one.

Date / Time of Huddle	Key Messages Shared	Issues Raised	Issue Description & Steps Taken	Impact	Owner of Follow-Up	Date of Issue Submission to Tier One Support
Ex. 9:00 AM	*Ex. Reminder to use updated Contact Notes and avoid old workarounds*	*Ex. Maria unable to save Safety Assessment*	*Ex. Receiving "permission denied" error. Refreshed system, reviewed job aid, supervisor verified permissions*	*Ex. Work delayed*	*Ex. Maria's Supervisor*	*Ex. Today at 3:00 PM*

Key Takeaway

The Go-Live Huddle is one of the most effective tools supervisors have during the transition to CWS-CARES. By creating a predictable space to raise concerns, share success stories, and receive clear direction, staff will experience reduced uncertainty and feel a sense of alignment during the go-live period. Consistent documentation and follow-up support ensure issues are surfaced early and resolved effectively. Most importantly, these huddles reinforce that no one team member is navigating the change alone.