Quarterly Stakeholder Meeting

July 12, 2017
CECRIS Quarterly Stakeholder Meeting Tues, July 12, 11:00 – 11:30 AM Pacific Time
  
  - Meeting starts at 11:00; we recommend you sign on to conference at least 5 minutes ahead
  - Register for the meeting and then select “Join the webinar”.

When you are ready to join the meeting, log into GoToWebinar using link below
  
  - https://attendee.gotowebinar.com/register/6650308503311328259
  - This may require downloading a small application to enable you to participate if you do not already have this on your computer.
    - Chrome is ideal for this but Internet Explorer should be fine also

- Join the audio portion of the meeting by choosing the phone call audio option and dial the number below from your cell or desk phone
  
  - 1-888-251-2909
    Participant code: 906288
Meeting Agenda

- Welcome
- Recap of our last Stakeholder call
- CECRIS Project Update
- Looking Ahead
- Questions
Recap of April 11, 2017 Call

- Introduction to CECRIS
- Project Update
- Project Schedule
- Upcoming Activities

See Appendix for project description, schedule, key Agile terms, and CECRIS Team contact information.
CECRIS Project Update

- Project procurements and hiring complete
  - IT solution vendor to be on board by August
  - Agile coach added to the team: Vardhan Godavari
  - Final technical team member added: Ron Jones

- Agile adoption in full swing
  - Core CECRIS team trained
  - Product vision refined
  - Product roadmap being developed
May 17th we convened CECRIS county SMEs to:

- Develop the initial product roadmap, which defines the product development sequence and priorities
  - County SMEs recommended the development of the Assistance Claim first, followed by County Expense Claim
- Begin exploring the impacts of changing the program code structure for County Expense Claims
The CECRIS Product Roadmap includes groupings of functionality related to:

- Preparing the Program Request Form (business rules)
- Preparing County Allocations
- Building the Claim Template
- Preparing and Submitting Submit Claims
- Receiving, Auditing and Approving Claims (including Appeals)
- Processing Payments (Advances and Reimbursements)
- Conducting State and Federal Fiscal Year Close Out
Emerging Issue: Change to the Program Code Structure

- The program code is the basis for the County Expense Claim.
- There are challenges with the current coding structure that put excessive burden on the state to meet federal reporting requirements.
- A CECRIS objective is to develop a flexible, expandable system that could address challenges like this program code structure limitation.
- Changing the program code structure could impact counties.
How we are addressing the need to change the program code structure:

◦ We are working with CECRIS county SMEs to evaluate alternatives and develop a preferred solution.

◦ The proposed solution will be presented to all counties - via a survey.

◦ The survey will include the rationale for the recommended solution and will be used to collect information on the potential impacts of the proposed change on the counties in the state.
Other Recent CECRIS Project Activities

- DHCS Interagency Agreement (IAA) – the project finalized the draft DHCS IAA for Title XIX federal funds reimbursement

- Annual Advance Planning Document Update (APDU) is currently in CDSS management review and is due to the Administration for Children, Youth and Families (ACYF) by August 1, 2017
Looking ahead...

- Develop recommended solution to the program code challenge, in partnership with state and county SMEs and CWDA
- Further develop CECRIS product roadmap
- Onboard IT solution vendor
- Next Quarterly Stakeholder Conference Call planned for Wednesday, October 11, 2017, 11 AM
Questions?

Contact: CECRISInfo@dss.ca.gov
Appendix
CECRIS Background Information
The CECRIS Project

- The County Expense Claim Reporting Information System (CECRIS) will:
  - Provide a single integrated system that supports end-to-end processing of county expense and assistance claims, replacing 6 current state applications
  - Create a flexible and expandable system to meet current and future federal and state reporting requirements
  - Comply with standard accounting principles and state information technology and security standards
  - Utilize the Agile development approach, which is becoming the new state and CDSS standard
## Major Milestones

<table>
<thead>
<tr>
<th>Major Milestone</th>
<th>Completion Date</th>
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<tbody>
<tr>
<td>SPR 2 Approval</td>
<td>April 2016</td>
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<tr>
<td>IAPD Approval</td>
<td>December 2016</td>
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<tr>
<td>Business Process Reengineering</td>
<td>January 2017</td>
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<tr>
<td>Solution Vendor Onboard</td>
<td>August 2017</td>
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<tr>
<td>System Design and Development</td>
<td>December 2018</td>
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<tr>
<td>System Testing and Rollout</td>
<td>October 2019</td>
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<tr>
<td>Concept</td>
<td>Definition</td>
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<tr>
<td>1. Theme</td>
<td>A logical group of features</td>
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<td>2. Product Owner</td>
<td>Identifies product vision, roadmap and release schedule; is responsible for the product backlog</td>
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<td>3. Sprint</td>
<td>A time period of one month or less during which a useable, and potentially releasable product increment is created</td>
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<td>4. Product Roadmap</td>
<td>A high level view of product requirements; defines sequence and priorities</td>
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<td>5. Customer</td>
<td>Who will use the product</td>
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<td>6. User Story</td>
<td>Describes what a customer needs or user must do to achieve a certain outcome</td>
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<td>7. Epic</td>
<td>Very large requirements that support a feature</td>
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<tr>
<td>8. Product Vision</td>
<td>Describes what the product is, who will use it, and how it supports the organization’s strategies</td>
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<td>9. Feature</td>
<td>A group of epics that describes a capability for the customer once the functionality is developed</td>
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<td>10. Product Backlog</td>
<td>A compilation of all user stories and requirements associated with the product</td>
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<td>11. Pain Point</td>
<td>A business or technical problem or need that annoys customers or causes a loss in productivity</td>
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Contact the CECRIS Team at CECRISInfo@dss.ca.gov

- Project Sponsor: Kären Dickerson
- Business Manager: Didi Okamoto
- Product Owner: Martha Arana
- Project Manager/Scrum Master: Steven Li
- Business Team: Martha Arana, Taura O’Lariscy and Ray Chow
- Technical Team: John Cocke, Balakrishna (Krishna) Dhulipala, Ron Jones, Khalid Siddiqui
- Organizational Change Management: Dorothy Meehan and Randy Triezenberg
- Financial Auditor: Les Lombardo
- Agile Coach: Vardhan Godavari