Quarterly Stakeholder Meeting

October 11, 2017
GoToWebinar Tips

- CECRIS Quarterly Stakeholder Meeting - Wednesday, October 11, 2017, 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 the link below:**
  - [https://attendee.gotowebinar.com/register/5289866275471626243](https://attendee.gotowebinar.com/register/5289866275471626243)
  - 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.

- **NOTE: PLEASE JOIN THE AUDIO PORTION OF THE MEETING BY CHOOSING THE “PHONE CALL” OPTION AND DIALING THE NUMBER BELOW FROM YOUR CELL OR DESK PHONE:**
  - 1-888-251-2909
    - Participant code: 906288
Meeting Agenda

- Project Update
- Proposed Changes to the Expense Claim Program Code Format
- Product Development Roadmap
- Upcoming Activities
- Questions
Project Update

- Key CECRIS development staff and vendors on board: solution vendor, organizational change management consultant and financial systems auditor.

- Product development priorities and sequencing have been identified, with help from state and county SMEs.
  - We are beginning with the County Assistance Claim and then will move on to the County Expense Claim.
  - We will begin with less complicated process to solidify our Agile approach and then move on to the more complex ones.
Working collaboratively with state and county SMEs in product development

- With Assistance Claim we will utilize the CECRIS state and county SMEs on a regular basis.

- Additionally, due to the complexity of the County Expense Claim we are working with CWDA to identify a CEC county SME that will work full-time with the Development Team, beginning around 7/2018.
Addressing data migration needs

- Related to advance payments, adjustment claims and mock claims

An extension to the initial August 1, 2017 annual Advance Planning Document Update (APDU) submission date was approved.

- APDU was updated and submitted September 29th to the Administration for Children and Families (ACF).
Current system constraint with the implementation of CECRIS:

- There is a chance we could run out of available County Expense Claim Program Codes about the time CECRIS is implemented.
- Changing the Program Code format in CECRIS will ensure we have sufficient available Program Codes for the life of CECRIS.
Proposed Changes to the Expense Claim Program Code Format

To address CEC program code format constraint, CECRIS County SMEs recommended an expansion of the existing Program Identification Number (PIN).

- PIN currently consists of 6 digits: a 3-digit program code, followed by a 1-digit time-study code, and a 2-digit type-of-expense code.
Current Program Code Format

<table>
<thead>
<tr>
<th>Program Code</th>
<th>Time Study Code</th>
<th>Type Of Expense Code</th>
</tr>
</thead>
</table>

Program Code: 3 1 5
Time Study Code: 3 1 5 1
Program Identification Number: 3 1 5 1 2 4
# Recommended Program Code Format: Changing from 6 to 12 Digits

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Function Code</strong></td>
<td><strong>Program Code</strong></td>
<td><strong>Time Study Code</strong></td>
<td><strong>Type Of Expense Code</strong></td>
<td></td>
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</tr>
</tbody>
</table>

1 = Function code, such as CalWORKS or Social Services, is a pre-existing field but will be made visible to users of CECRIS

2-6 = Expanded Program Code

7-8 = Expanded Time Study Code

9-12 = Expanded TOE (type of expense) Code
## Current vs. Proposed Program Code Format

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Upcoming Activities

- Distribution of information regarding changes to the CEC program code format to CWDA fiscal committee
- Distribution of a survey to all counties to get feedback on the implications of the proposed program code change on them, as well as data migration needs.
  - This survey scheduled to go out in October.
Upcoming Activities (Cont.)

- Preparation of SPR 3 reflecting a change in the project schedule and budget due to the delay in procuring the technical solution vendor
  - To be submitted in early 2018

- Continued onboarding of the CECRIS Development Team

- Continued refinement of product roadmap and commencement of the first sprint
CECRIS Product Development Roadmap
Next Quarterly Stakeholder Conference Call is planned for Wednesday, January 17, 2018, 11 AM
Questions?

Contact:  CECRISInfo@dss.ca.gov