Quarterly Stakeholder Meeting/Webinar

July 17, 2018
Welcome and Introductions

- New Team Members
  - Navya Doddipatla and Jaimin Upudhyay, Testers
- Returning Member
  - Taylor Stout
Agenda

- Report of Recent and Current Activities
  - Including a view of some features of the CECRIS Application
- Current CECRIS Product Roadmap
- Schedule of Upcoming Events
- Questions and Answers
Recent Project Activities

- Launched the first CECRIS Product on June 29, 2018: The County Administrative Expense Claim (CEC) Program Request Form (PRF)
Recent Project Activities (cont.)

- The Administrative PRF:
  - Replaces an existing, fragile database application
  - Is used by ~ 80 state users
  - Serves as the foundation for the County Expense Claim by defining the claiming rules
A Look at the CECRIS PRF Application (1 of 5)

- Users have the ability to customize their CECRIS dashboard or landing page and their report views.
A Look at the CECRIS PRF Application (2 of 5)

- CECRIS allows users to track the status of any form.

<table>
<thead>
<tr>
<th>Control Number</th>
<th>PRF Status</th>
<th>Effective Quarter Date</th>
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<tbody>
<tr>
<td>PRF-2158</td>
<td>Fiscal Policy - Pending Manager Approval</td>
<td>10/1/2018</td>
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<tr>
<td>PRF-2157</td>
<td>Fiscal Policy</td>
<td>10/1/2018</td>
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<td>ASRB</td>
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<td>PRF-2143</td>
<td>Complete Pending CFL Number</td>
<td>10/1/2018</td>
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<td>PRF-2142</td>
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<tr>
<td>PRF-2141</td>
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<tr>
<td>PRF-2127</td>
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</table>
One can easily view the history of the form’s development.
A Look at the CECRIS PRF Application (4 of 5)

- Required fields are identified and locked when not available to the user.
Other features include:

- **Links, tips and other tools to help users with their work**

- **Ability to add notes and attachments to support user decisions.**
Current Project Activities

- We are in process of developing the 2nd product: *Prepare County Allocations*, which we demonstrated for the customer yesterday, and
- We have also started building the *Administrative (CEC) Claim*.
CECRIS Product Roadmap

Release 1 – State Only

- Program Request Form (PRF)
  - CEC PRF

Release 2

- Administrative Claim (CEC)
  - Allocations
  - Build Claim Template
  - Adjustment Claim Template
  - Prepare & Submit Claims
  - Audit

Release 3

- Audit Appeal
  - Payment - Claims
  - Payment - Advances
  - Closeout

Release 4

- Assistance PRF
  - Allocations
  - Build Claim Template
  - Prepare & Submit Claims
  - Audit
  - Audit Appeal

Release 5

- Payment - Claims
  - Payment - Advances
  - Closeout

⚠️ Release must go live at the beginning of the State Fiscal Year.

★★ Optimally, go-live will occur at the beginning of the State Fiscal Year.
Upcoming Events

- CECRIS Quarterly State SME and Manager Project Update
  - Wednesday, September 6, 2018, 1:30 PM

- CECRIS Quarterly County SME Meeting
  - Monday, September 11, 2018, Sacramento (changed from Sept. 10, 2018)

- CECRIS Quarterly Stakeholders Meeting/Webinar
  - Tuesday, October 16, 2018, 11 AM
Questions?

After the meeting, contact CECRISInfo@dss.ca.gov