



# CWS/Web Town Hall Meeting



CWS/CMS  
New System Project



- Introductions
- Confidentiality
- Objectives:
  - Update counties on the CWS/Web project
  - Present opportunities for county involvement
  - Provide a forum to elicit county input
- Content of Presentation:
  - Project Overview/ Organization of Project / Work Completed
  - RFP Business Requirements & RFP Technical Requirements
  - Interfaces / Policy Decisions / Schedule /
  - Next Steps in CWS/Web Project

*(please remember to sign-in)*

2004

2005

2006

2007

2008



*Missing SACWIS functionality, county expanding business needs, and child safety prompt analysis of solutions for a new system*

CWS/CMS

**Go Forward  
Plan**  
*August 2004*

**Technical Architecture  
Alternatives Analysis  
(TAAA)**

**New System Project**  
*(RFP Process Initiated)*

**CWS/Web  
Project**  
*(new system named)*

**April 2004:** Go Forward Plan receives ACF approval

**Early 2005:** TAAA completed and recommends the development of a new SACWIS compliant Web based system

**April 2006:** Planning Advance Planning Document (PAPD) for the CWS/Web Project approved by Department of Finance (DOF).

**June 2007:** Administration for Children and Families (ACF) Visit.

**November 2007:** New System Project renamed to CWS/Web Project

- **Aug 2006: Recruitment Initiated For County Consultants**
- **Oct 2006: CWS/Web Kick-Off Meeting**
- **Feb 2007: Oversight Committee Visioning Meeting**
- **Feb – April 2007: 12 County Workshops held in Sacramento**
  - Counties and State staff attended to identify county needs for the new system
- **April – June 2007: 12 County Just In Time (JIT) meetings**
  - County and State staff participated to refine documented needs resulting from each of the workshops

## June 2007 – Present

9 Reviews and JIT meetings to develop and verify content of RFP:

- NSP Team - Section Peer Reviews
- NSP Team & SME - Full Review
- PMDG - Full Review (Scope Validation)
- Vendor - Traceability Review
- Vendor Community – Request for Information
- Stakeholder (County & State) - Full Review
- Second Vendor - Full Review
- CDSS / DTS - Full Review
- Verification & Validation (V&V) - Full Review
- *(Two additional Full Reviews Scheduled)*

## 58 California Counties

### CWDA:

Meg Sheldon (Information Technology Associate)

### CDSS

**Project Sponsor:** Greg Rose

**Office of Systems Oversight (OSO):** Don Richards

**Program Manager:** Tom Burke

**Program Specialist:** Matthew Engel

### OSI

**Project Director:** John Lane

**Project Manager:** Rebecca Skarr

**Solution Engineer:** Cynthia Hayden

### **County Consultants (Region Represented):**

Debra Oliveira: Northern

Luis Bu: Bay Area

Bruce Conroy: Mountain Valley

Sylvia Wall (CWDA): Central

George Tocher: Southern

*7 Additional County Consultant & 12 County Program Subject Matter Experts  
(Future Planned Positions beginning 2009)*

# Project Governance

## Project Control Board (PCB)

- OSI Director
- CDSS Chief Deputy Director
- CDSS Deputy Director Administration
- CDSS Deputy Director Information Systems Division
- County Director
- County Director
- CWDA Representative

## Project Management Decision Group (PMDG)

- OSC Co-Chairs
- PIAC Co-Chairs
- TAC Co-Chairs
- CWS/Web Project Management Team
- Deputy Director for CDSS Children and Family Services Division
- CWDA Representative

Resolves 95% of  
Project Issues/Problems

## CWS/Web Project

CDSS Program Manager & OSI Project Manager

CDSS & County Consultants

# Role of County Consultant



- Act as a liaison between State and counties
- Provide the State with consulting services relating to county CWS business practices
- Attend county regional or CWDA meetings to seek input and/or provide feedback on decision and resolutions to issues
- Assist the State in the development of system requirements and their implementation in the SACWIS solution

## Total number of changes to RFP sections as result of Stakeholder's comments: 1,455

- *This number does not represent a total of all comments received by all county participants. A number of comments were duplicative, which was observed to be positive by the project; as this indicates that counties are on the same page and observed the same errors, or had the same questions.*
- **Bottom Line:** County participation in the CWS/Web Project is both necessary and extremely helpful to assist in clearly identifying **your** needs.

## Most significant changes since Stakeholder Review :

- **Section IV** (*Proposed Future Environment*)
- **Section VI** (*System Requirements*) - Introduced General Requirements
- **Appendix B** (*System Requirements: Detailed*)
  - Financial Management
  - Quality Assurance
  - Adoptions
  - Independent Living Program Services
  - Resource Management
- **Appendix D** : (*Service Level Agreement*)
- **Appendix F** (*Use Cases* – section describes process of each major CWS function)
  - Financial Management
  - Quality Assurance
  - Adoptions
  - Independent Living Program Services
  - Resource Management
- **Appendix X** (*Demonstration* was removed based on decision not to include bidder demonstrations as part of this solicitation, and reused/replaced by model to compensate the vendor, and is now titled *Compensation Model* )

# CWS/Web Project Vision

*“To enhance the safety, well-being, and permanence of at-risk children by improving the ability of Child Welfare Services (CWS) staff to provide services in an effective and efficient manner.”*

*Implement a web services-based technical architecture for a CWS case management system supporting County and State program practice requirements, including data management, outcome measures and reporting solutions, consistent with Federal SACWIS requirements.*

# Project Parameters

- SACWIS compliant
- One system of record statewide
- The CWS/Web will support current practice delivery
- Current utilized CWS/CMS business functionality will be carried forward into the CWS/Web
- The system delivered will enable efficient automation of future changes to practice/program
- Ability for State & community partner interfaces
- Web-based solution

- Practice will drive system, system will not drive Practice
- Policy will drive the system, system will not drive Policy
- System will support flexibility in service delivery approach
- Automation - just because we can, doesn't mean we should
- Information how you need it, when you need it, and where you need it
- System changes will be made timely
- Support comprehensive service delivery through access to and exchange of information across systems

*Oversight Committee, February 7, 2007*

## **The purpose is to acquire and implement a statewide SACWIS compliant system that supports**

- Adoption Case Management
- Title IV-E Eligibility Determination
- Financial Management Functionality
- Implementation of Promising Practices (i.e., Differential Response, Safety/Risk Assessment)
- Standardized Reporting
- Timely System Updates
- Multiple Assigned Users, Working on a Case Simultaneously (i.e., the elimination of Optimistic Concurrency)
- Improved Remote Access Methods
- Document Storage
- Improved Data Entry to Support Workflow
- Reduction of Time Spent Using the System
- External System Access and Information Exchange (i.e., ILP Providers, Courts)
- Interfaces for Information Exchange: CalWORKS, Child Support, Foster Care, and Medi-Cal

**The State envisions a system that provides the following capabilities for the support of Intake, and the processes associated with receiving reports of abuse/neglect:**

- Automated Search Functions that more accurately identify clients
- Integration of Safety/Risk Assessment; Information entered throughout the life of a child's case (including data from prior cases) will populate and/or adjust the assessment.
- Eliminate duplication with single data entry for new referrals.
- Identification of existing referrals with the same allegations, and linking referrals to multiple children related to the referral.
- Improved tracking and recording of referral information, such as contacts and relationships.

## **The State envisions a system that provides the following capabilities for the support of investigating allegations:**

- Dynamically guide the collection of data depending on the previous inputs and choices already made
- The ability to display a risk profile and risk assessment at any time
- The ability to support the creation of a Safety Plan and automatically populate critical data fields with existing data from the database
- The ability to create a Child Abuse Investigation Report and automatically populate all required fields

## **The State envisions the system to provide computer based decision making support to assist the CWS Worker by:**

- Tracking all risks and making sure that there are objectives and services defined for each
- Providing integrated case management to allow data and information to seamlessly follow the case as it may move between program components
- Offering collaboration and team decision-making capabilities
- Supporting concurrent work by multiple workers on the same case
- Eliminating Optimistic Concurrency
- Notifying CWS workers if there is missing information needed to meet required county, state, and federal standards.
- Tracking, monitoring and triggering notifications and reports that critical milestones are pending
- Concurrent planning and support for multiple concurrent plans
- Sophisticated Placement matching algorithms

## **The Adoption Case management functionality should support the following processes and activities during the Adoption Case Life Cycle:**

- Conduct Adoptability Assessments
- Schedule and Conduct Interviews with Prospective Adoptive Parents and Other Parties Involved
- Prepare Court Hearings
- Match Children with Potential Adoptive Parents
  - Conduct Home Study
  - Select Prospective Adoptive Family
- Initiate Adoption Assistance Program (AAP) Eligibility applications
- Perform Adoptive Placement
- Provide Post-placement Supervision
- Finalize Adoption
- Initiate AAP Payments
- Provide Post-adoption Services
- Reassess AAP Periodically

- The State envisions the process for placement to be improved by implementing tools for managing the pool of placement homes and sophisticated computer-based tools for matching placement homes with the needs of the child.
- The State envisions the system to assist with the creation of all required documents and the capability to auto-populate mandatory fields from the database. The State envisions a system that can track all communication to and from all critical stakeholders involved in the placement process.

## The State's vision for eligibility includes:

- Capability of the system to track all information required for an eligibility determination and prompt the CWS workers for missing information throughout the process
- Capability to assist workers to ensure that eligibility applications comply with federal, State and county guidelines and requirements by ensuring proper language is used and criteria for documentation are met
- Capability of the system to support automated population of eligibility forms to reduce work
- Integration and interfaces between CWS/Web system and the SAWS systems to automatically flow the applications for eligibility to the SAWS systems
- Integration and interfaces between CWS/Web system and SAWS to capture and communicate changes in placement that impact payment and eligibility to minimize risks for overpayment and ensure payments are received by the proper persons
- Reducing overpayments by allowing multiple ways to verify services including foster parent self reporting service via the web

**The State envisions the CWS/Web system to support enhanced Resource Management and Administration functions that include the following programs/processes:**

- Manage Service Providers
- Manage Foster Care Facilities/Adoptive Homes
- Manage Offices and Workers
- Manage Online Accounts

## **A fully Statewide Automated Child Welfare Information System (SACWIS) compliant system using a web services-based technical architecture will provide:**

- The best solution to meet current and future needs for delivery of child welfare services
- A technology direction to meet the needs of county, State, and federal stakeholders
- Automation of routine activities (documenting actions/activities, reporting)
- Support for complex tasks (decision support, foster care placements, case planning)

**The State envisions a system that allows CWS workers to spend more time in the field and less time on the computer as a result of:**

- Simplified data entry
- Integrated document management and workflow Mobility
- More effective search capabilities and reduced efforts in cleaning up duplicate entries
- Integration with external systems to automatically capture Health and Education Passport information
- Interfaces and access roles

- The CWS/CMS system should replace/enhance existing data warehouse and reporting capabilities.
- Reporting on case load and performance down to worker level. The CWS/CMS system should include a reporting capability that enables managers to analyze and report case related volume and key quality metrics.
- The reporting capability should provide CWS with the opportunity to further improve business processes by providing better information on process quality and transaction volumes.

# QUALITY ASSURANCE

- The State envisions the system will meet federal SACWIS requirements for quality assurance. The system ensure that important data elements are collected and recorded and calendar alerts, business rules and automated data entry tools guide the user to enter needed data.
- The State envisions the system will have a variety of tools and techniques that will enforce specified processes are followed, data quality and integrity are at a high level and that tasks are completed on time. In addition, the CWS/Web should assist CWS workers in achieving quality through field-level context instructions, which guide user input to enhance data quality, data integrity, and timely task completion.

- All current California SAWS systems, potentially including, but not limited to C-IV, CalWIN, ISAWS and LEADER
- DHCS Medical Management Information
- LEXIS-NEXIS (web-based search tools)
- California Department of Education (CDE)
- Department of Justice (DOJ)
- Local Law Enforcement Agencies
- Bureau of Vital Statistics (State and National Repositories)
- Social Security Administration (SSA)
- California Statewide Court System (new initiative)
- County Specific Court Systems (if still needed)

**Note:** *In the event a department is unable to meet our need there may be a delay in establishing the interface till sufficient services are enabled by that department.*

- California Child Support Automated System (CCSAS)
- Licensing Information System (LIS)
- Veterans Affairs (VA)
- In Home Support Services (CMIPS I – legacy - and II)
- Adult Protection Services
- Women Infants and Children System (WIC)
- Department of Motor Vehicles (DMV)
- California Department of Corrections and Rehabilitations (CDCR)
- County Payment Systems and Financial Integration
- Employment Development Department (EDD)
- Department of Mental Health
- Welfare Case Management Information System (WCMIS – If still needed)

- The State envisions a system that assists the CWS Worker in preparing the appropriate court documents, sending out notifications and court documents, and entering/tracking the outcome of the hearings in the system, including hearing types, dates and attendance.
- The State envisions the CWS/CMS system to be integrated with the new statewide court system and facilitate efficient and paperless communication between CWS, attorneys, and the courts.

## **The CWS Web will provide an interface for financial management features, and will provide the ability to:**

- Request a service
- Have a mechanism to Authorize the service
- Verify receipt of service/Request payment from provider
- Provide payment information to County accounting/payment system in standard format useable in a manual or automated interface The system should have the capability to establish an audit trail that links the following elements:
  - Child/Case
  - Justification of need for payment/service (e.g., court order)
  - Authorization of a payment/service
  - Identification of payment recipient/service provider
  - Verification of service delivery
  - Receipt of invoice
  - Issuance of Payment

- Total of 31 PMDG decisions made for CWS/Web Project to date (As of July 2008)

## **PMDG Decision Highlights:**

- Safety/Risk Assessment (SRA)
- Licensing Information System (LIS)
- Training
- County specific reports
- County external systems
- Interface scope
- Reporting tool standard
- California Department of Corrections and Rehabilitations (CDCR) Access

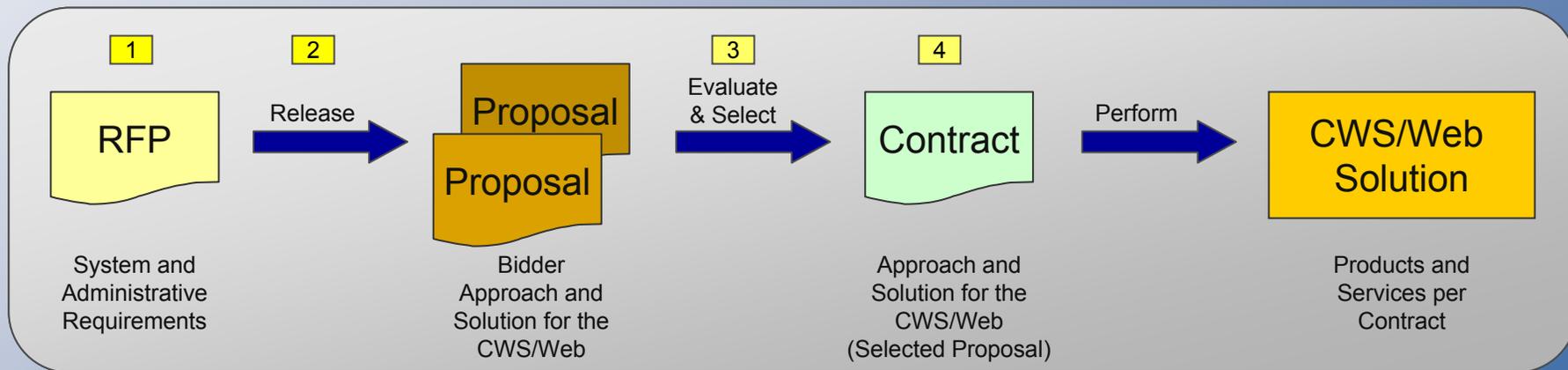
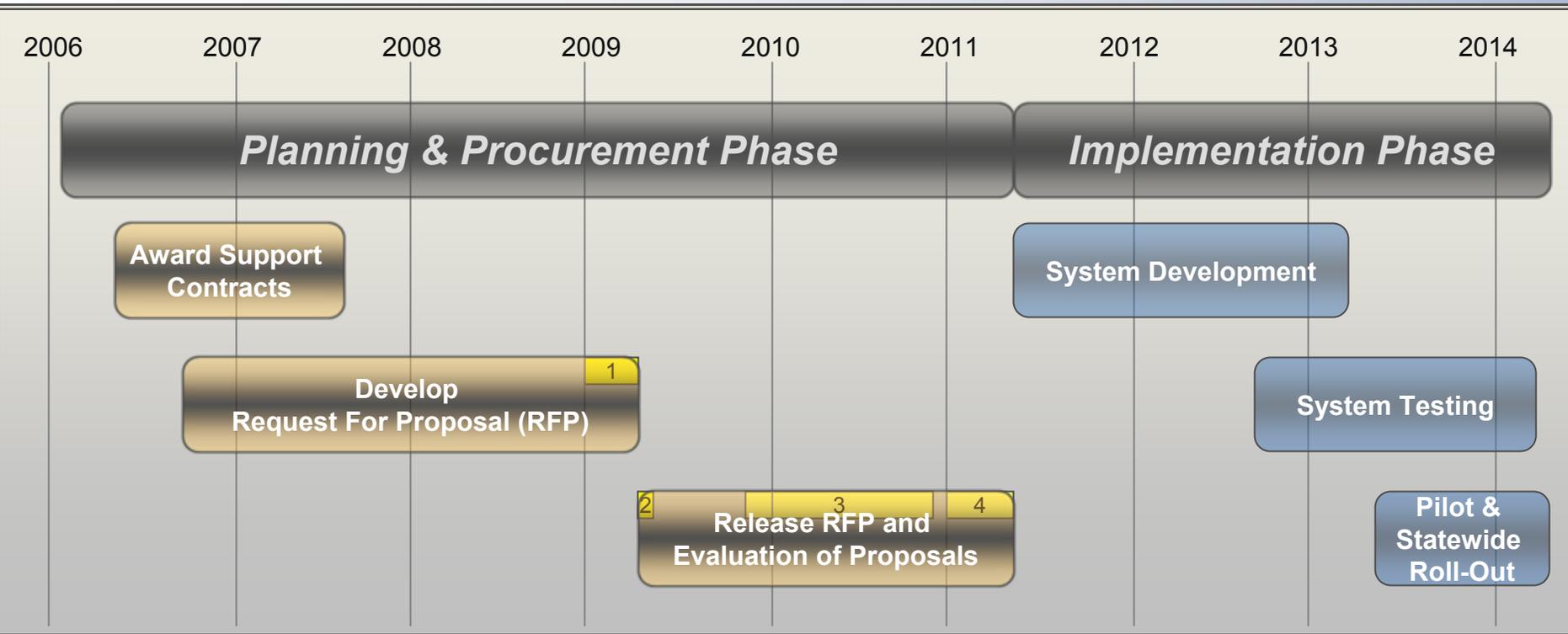
❖ *Please see attached for more complete listing of PMDG decisions  
(NOTE: Some issues and/or decisions can not be discussed as they are  
procurement confidential)*

- Total of 2 project issues required PCB decision
  - Training
  - Safety/Risk Assessment

*1) Financial Management*

*2) Foster Care Eligibility Determination*

# CWS/Web Project Schedule



# Questions and Answers



- Town Hall Meeting(s)
- Final County RFP Review
- Infrastructure Support Workshop
- Evaluation Criteria Workshop
- Recruitment of 7 additional County Consultants in 2009
- Evaluation of Draft Proposals
- Ongoing Subject Matter Experts (SME)
- Evaluation of Final Proposals
- Design of System
- Test of System
- Implementation of System

*In these three areas combined,  
over 700,000 hours of county  
staff time has been scheduled !*

# Conclusion

- Future meetings with counties will be scheduled
- Newsletter in progress (limited at first, and will become more regular as release of CWS/Web nears)

**Thank you for your participation and support in the CWS/Web Project !!!**

**Without your assistance, this project would not be possible!**



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