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ISAWS Consortium ISAWS MCR Workload Approach and Recommendations

Background

In May 2001, the Consortium made four assumptions with regard to workload prioritization.

- ✓ All ISAWS application maintenance change requests (MCR) recommended for completion were a priority to the Consortium because of an extensive MCR backlog.
- ✓ The WTW application required completion of the November 2000 WTW Summit Findings and completion of the majority of those items would eliminate any WTW backlog.
- ✓ An aggressive strategy to minimize the backlog of ISAWS system MCRs was required, while the WTW system would continue to receive a prioritized list of work from the Consortium following completion of the November 2000 WTW Summit items.
- ✓ Following implementation of MCR 1629, *First Phase 1931-B Medi-Cal*, all application resources would be available for new work assignments.

Initial Approach

The Consortium modified the approach to promoting ISAWS maintenance change requests to gain efficiencies in working through the ISAWS MCR backlog. Rather than promote a single list of ranked MCRs, the Consortium recommended an initial two quarters of ISAWS MCRs. These ISAWS MCRs were representative of all committees and task forces, and a balance of program types and estimated sizes. The vendor was charged with assigning an appropriate resource, based upon that resource's expertise and availability.

The Consortium also committed to maintaining an additional list of workload recommendations. This workload could be promoted as work from the initial two quarters was completed or as a resource became available and work in the initial list did not match that resource's expertise. The vendor, Consortium staff and committees would continue to approve the assignments while allowing the vendor some flexibility in managing the workload and keeping resources fully tasked.

Current Approach

The Consortium Project Manager monitors the application workload and ensures an equitable representation of all program types are in the workload and work queue. Each committee keeps approximately two quarters worth of workload recommendations prepared for the vendor at all times.

The work is grouped by program and assigned an approximate size (small/medium/large), by the Consortium staff based upon their system and development background. Each committee works with the Consortium Specialists to monitor their respective work in progress and promote new work recommendations to the Consortium Application Manager on a flow basis. **In some instances, items in the workload are assigned a specific priority when they are recommended; in other instances work not previously assigned a priority, is later**

escalated. In those instances, the respective committee and Consortium office staff work with the ISS Project staff to reassess the work in the queue and, if necessary, renegotiate either the work in progress or work waiting in the queue. Each committee is also responsible for promoting and monitoring any workload recommendation from their individual task forces.

Previously, the Consortium's Technical Committee did not recommend technical change requests. Technical changes to the software or hardware were recommended and approved by the vendor. The Technical Committee and the Consortium staff are now working with the ISS Technical Manager in much the same way as application committees work with the vendor Application Manager and may make future workload recommendations based upon the findings of the 2002 Eclipse Report, the System Improvement Team (SIT) monthly reports, etc. Whenever efficient and/or effective, Eclipse Report changes and/or SIT recommendations will be included in the application requirements.

The current approach also includes utilization of the MCR Evaluation and Prioritization Process dated November 2006, when promoting recommended work into the Work in Progress queue. This ensures that the timeframes associated with the migration of the ISAWS Counties to the C-IV System are considered prior to commencement of work on an MCR.

In addition, effective June 26, 2008, CMC authorized the creation of work efforts to be referred to as Discretionary which are not critical to Migration efforts, but may be beneficial to Counties during their preparation for Conversion and subsequent Migration to the C-IV System.

Description of Terms

Work in Progress (WIP) – Work assigned to a resource by the vendor Application Manager and actively being worked upon.

Work Recommended but Not Assigned – Work recommended by the Consortium, but not assigned to a resource by the vendor Application Manager.

Discretionary Work – Work recommended by the Consortium/Committees that can be assigned at the discretion of the vendor Application Manager when appropriate resources are available and schedules permit.

Minor Maintenance – Work that is either a quick fix or a recurring event that is calendar controlled. If a new MCR is required, the vendor will complete it and it will not require the Consortium's prioritization. This work includes recurring cost of living adjustments (COLAs). *Note to reader:* The definition of minor maintenance may be expanded and is currently undergoing minor revisions.

Interface Maintenance – Work that is performed on an ongoing basis, to keep the automated ISAWS/WTW interfaces working as required. If a new MCR is required, the vendor will complete it and, depending upon the scope and complexity of the change, it may require the Consortium's prioritization. *Note to reader:* The Consortium has requested the vendor explore a staffing approach flexible enough to respond to ongoing interface maintenance requests, without avoidable interruption to work in progress or work in the queue.

ISAWS Workload Recommendations – 3rd and 4th Quarter 2009

Unless otherwise noted, the MCRs are not listed in the sections below in any specific order of priority. This document is an update to the Migration ISAWS Vendor Workload 1st and 2nd Quarter 2009, published, November 30, 2008. Welfare to Work workload recommendations will be provided under separate cover.

The ISAWS workload is categorized into the following eight sections:

Section I	Work in Progress (WIP)
Section II	Work Recommended but Not Assigned
Section III	Discretionary Work Medical Committee*
Section IV	Discretionary Work CW/FS Committee*
Section V	Discretionary Work Fiscal Committee*
Section VI	Discretionary Work HD/ADHOC Committee*
Section VII	Minor Maintenance
Section VIII	Interface Maintenance

***Sections III to VI have been removed due to Migration to C-IV timelines established June 27, 2008.**

Section I – Work in Progress (WIP)

MCR#	Title	Committee	Analyst	Implementation Date
M&O				
2426	MediCal NOA Stuffer	Medical	Hank	6/4/09
2433	MC DRA CHIPRA Changes	Medical	Hank	8/30/09
2414	Add Aid Codes to the Override Tables (Includes CR 775 and CR 779)	Medical	TBD	TBD
Premise				
2389	Be Vu Lawsuit Part 2	CalWORKs/FS	Suresh	6-18-09
2409	EBT Transition	Fiscal	Hari	9/30/09
Migration				
2381	Migration Work Activities	All	Sean/Kim	Current through 4/2010
2405	Post Conversion Support – FSR	CMC	Anand	7/15/08 First Phase 9/30/09 Second Phase
2415	Cutover Activities	CMC	Kim	5/2010
2412	Mock Conversion Activities - All Waves	CMC	Sean	5/2010
2421	WTW NOAs to PDF	CMC	Hank	4/30/09
Discretionary				
1839	Aid Warrants/FS fields on INMENU	Fiscal	Hari	TBD

Section II – Work Recommended but Not Assigned

MCR#	Title	Committee	Comments
M&O			
	None		
Mandated (Pending 2009/2010 State Budget)			
TBD	Eliminate CalWORKs Program	CalWORKs	Medium
Discretionary			
2416	FC Payment Table and Regional Center Code	Medical	Small
CR 746	AAP Rates Tables	Fiscal/Medical	Small
Migration			
	None		

Sections III to VI have been removed due to Migration effort

Section VII – Minor Maintenance

MCR#	Title	Committee	Comments
TBD	CalWORKs COLA	CalWORKs/FS	Recurring/Calendar Control
TBD	FS COLA	CalWORKs/FS	Recurring/Calendar Control
TBD	IRT	CalWORKs/FS	Recurring/Calendar Control
TBD	IIK COLA	CalWORKs/FS	Recurring/Calendar Control
TBD	SSA Cola	Medical	Recurring/Calendar Control
TBD	FPL Cola	Medical	Recurring/Calendar Control
TBD	Foster Care Rate Table Changes	Medical	Recurring/Calendar Control
TBD	LTC Maximum	Medical	Recurring/Calendar Control
TBD	Annual School Report	Fiscal	Recurring/Calendar Control

Section VIII – Interface Maintenance

MCR#	Title	Committee	Comments
TBD	WDTIP	CalWORKs/FS	
TBD	Child Support	CalWORKs/FS	
TBD	EBT	Fiscal	
TBD	Direct Deposit	Fiscal	
TBD	Tax Intercept	Fiscal	
TBD	IEVS/PVS	HD/ADHOC	
TBD	SAVE	HD/ADHOC	
TBD	SCI	Medical	
TBD	MEDS	Medical	
TBD	E2LITE	CalWORKs/FS	