

**SACWIS Partnership Forum  
Meeting Minutes  
June 28, 2005**

<b>SACWIS Partnership Forum Meeting</b>			
<b>Participants</b>		<b>Absent</b>	
Terry Adams	Mike Latham	James Beard	James McCafferty
Crystal Allen	Steve Mayo	David Boyer	Julie Mogavero
Cathy Appel	Lynne Monson	Lisa Brenneman	Rhonda Reagh
Kathy Bartlett	Linda Peters	Suzanne Burke	Dean Sparks
Gary Crow	Thomas Roelant	Eric Bush	Robert Suver
Nancy DeRoberts-Moore	John Saros	Katherine Canada	Joan Van Hull
Mary Ann Drewry	Angelo Serra	Mike Gustin	Jim Williams
Tom Heilman	Rick Smith	Sarah Hay	
Cathy Herston	Jeannie Weisbrod	Jann Heffner	
Bob Kacir	Denise Wipert	Helen Jones-Kelley	
Ron Kirkendall		Kelly Lynch	

**MINUTES**

**Opening Remarks/Introductions**

Nancy DeRoberts-Moore, SACWIS Business Project Manager, opened the meeting. The Partnership Forum members provided roundtable introductions and a review of the housekeeping items was conducted by Terry Lee Adams, SACWIS Operations Manager. The members reviewed and approved the April 26, 2005 meeting minutes.

**Quarterly Statewide Briefing Results**

Nancy DeRoberts Moore provided an overview of results for the first Quarterly SACWIS Statewide Briefings conducted June 7 and 8, 2005. Over 225 participants representing 44 counties were in attendance. Participants included county caseworkers, supervisors, administrators, data entry, and information technology staff. Participant evaluations were favorable. The system demonstration was well received and considered very informative by the participants. The next Quarterly Briefing is scheduled for October 13, 2005, at the Montgomery County PCSA located in Dayton.

**SACWIS Looking Forward**

Angelo Serra, SACWIS Technical Project Manager, provided an overview of upcoming phases in SACWIS: SACWIS User Acceptance Testing (UAT); SACWIS Conversion; SACWIS Training; SACWIS Pilot Implementation; and SACWIS Statewide Implementation. Mr. Serra stated UAT is scheduled to begin in late December 2005 or early January 2006.

Mr. Serra provided an update regarding the current status of SACWIS Conversion. Currently, the conversion team is approximately two-thirds through the data mapping process and 40 percent through the script writing process. Mr. Serra noted a sample conversion took place over the past weekend which tested various aspects of the conversion process. During the test, over 29 million rows of SACWIS conversion data were brought in to the SACWIS test database.

During the conversion discussion, Mary Ann Drewry, Deputy Director, Montgomery County Public Children Services Agency (PCSA), as well as Ron Kirkendall, Assistant Director, Hamilton County

PCSA, raised questions regarding the conversion of HostFACSIS data versus conversion of county data. Mr. Serra clarified the county data would be used to convert existing clients, cases, and providers, and HostFACSIS would not be used to convert any existing county data. Mr. Serra also noted as part of the test conversions for each county, a test database would be made available so counties could review test conversions of their county data prior to going live.

The overview of SACWIS training included a review of the SACWIS Web-based training component. Mr. Serra reviewed a paper-based training feedback instrument used for student evaluations during formal training. He noted the SACWIS development team produced the first training database the training team will use to develop and test the training materials. In addition, a post-training practice database will be available for workers throughout the state to practice and test various aspects of SACWIS prior to use in the production environment.

Assistant Director Drewry asked if the SACWIS Training Approach included assessment of worker performance on the system during training. Ms. Drewry explained as part of Montgomery County's WebFACTS system training, a formal test was required at the end of training. A 90 percent score was required prior to a worker moving to full utilization of the system. Lynne Monson, DRC SACWIS Training Manager, explained there are no planned formal tests or testing processes in place to support SACWIS training. She noted SACWIS training will use the detailed classroom training exercises as performance outcome measurements to assist students in their understanding of the SACWIS application.

Mr. Serra also provided an overview of the SACWIS Pilot Implementation phase, noting the SACWIS pilot is planned to begin in the spring of 2006. The pilot county will be the first site to use the SACWIS application. The overview included information regarding the certification process for pilot, HelpDesk preparation to support the pilot, capacity simulation to measure response time, and any final system tuning required prior to statewide rollout and implementation.

An overview of the SACWIS statewide implementation was also provided. Statewide implementation is scheduled to begin immediately following the successful completion of the pilot. The Pilot Operation phase provides the final environment to complete the implementation components, including the final implementation plan, the final implementation schedule, the final check on data conversion, as well as finalization of training and rollout support.

Tom Roelant, Director, Wayne County, PCSA, inquired when the actual training and rollout for SACWIS would occur. Mr. Serra stated training and rollout are currently set to begin in May 2006 and continue through January 2007. As part of the improvement process the training and conversion and will be fine tuned statewide rollout occurs.

### **Implementation Readiness, Data Conversion, and Quality Assurance**

Tom Heilman, SACWIS Implementation Manager, provided an overview of SACWIS implementation readiness. He noted ODJFS sent out a Duplicate Person and a Duplicate Families Report in the past month to all SIS counties. A Duplicate Resource Report will be sent out the week of June 28<sup>th</sup>. A series of questions and answers given to the State regarding the conversion process were distributed. Mr. Heilman noted an issue was identified regarding the initial Duplicate Person Report; it failed to recognize suffixes associated with names (i.e., juniors and seniors) creating inappropriately reported duplicates. As a result, corrective measures would be applied to the program that produced the Duplicate Person Report, and the Reports would be redistributed to the counties.

Mr. Heilman addressed the Organizational Assessment process and that it includes discussion on data cleanup and data cleansing prior to the conversion process. Director Roelant inquired whether or not a worker would be able to change the name of a person in SACWIS if, in fact, he or she went through a

legal name change. Mr. Heilman responded name changes are within the standard capability of the SACWIS system, and SACWIS also supports an a.k.a. name feature to allow counties to store prior formal and/or legal names of client participants in SACWIS.

Partnership Forum Members discussed the SACWIS rollout schedule with regard to the importance of planning and publishing the schedule as early as possible in the SACWIS process. SACWIS Integrated Project Team (IPT) members responded that a first draft of the SACWIS statewide rollout schedule was under development and would be shared with the Forum membership by mid-October.

### **SACWIS User Acceptance Testing**

Mr. Serra presented an overview of SACWIS User Acceptance Test (UAT). UAT, which lasts for 90 days, begins at the successful completion of the formal System Test phase. UAT is currently scheduled for late December 2005 or early January 2006. An overview was provided regarding types of testing, the various facets, the business aspects, as well as the expected outcome and measurements.

As part of the UAT discussion, Ms. Drewry asked if modifications would be made to the system as a result of UAT. Mr. Serra stated UAT was to determine the accuracy of the system performance to its specification, and to measure end user operational capabilities and to ensure user usability were maximized wherever possible. The UAT process will include addressing system defects and deficiencies.

Cathy Herston, Manager, Summit County PCSA, noted she understood the service assignment portion of case management in SACWIS was not user friendly. Ms. Herston provided an example that specified services must be entered for each individual and cannot be entered at a group or family level. She felt this would cause excessive data entry and would be negatively received by workers, therefore, not utilized in the system. The SACWIS project team agreed further research into the issue was required. Kathy Bartlett, SACWIS Requirements Manager, stated SACWIS design was constructed in this manner to support data to support Roe vs. Staples requirements.

Dr. Gary Crow, Director, Lorain County PCSA, inquired if UAT would test the capability of workers to attempt to circumvent various system capabilities and take shortcuts. Ms. Bartlett stated the UAT Team would be testing specific scenarios to ensure all required steps and procedures of the business process are enforced in SACWIS when appropriate.

Cathy Appel, Deputy Director, Clark County, inquired as to whether test scenarios would be provided by the Project team during UAT. Mr. Serra confirmed test scenarios would be provided.

### **Overview of SACWIS Training**

Sharon Griffith, SACWIS Training Supervisor, and Lynne Monson, SACWIS Training Lead, presented an overview of SACWIS training. SACWIS training will be "Just-in-Time, Just Enough", and not a one-time process. Job task-based, hands-on classroom training will be offered to all counties within 30 days of rollout. A suite of tools will support job task performance. Trained support staff will be available to assist users during rollout.

Pre-implementation activities will occur before users attend training. These activities will include Web-based training (WBT), Change Management Training, Train-the-Trainer and Super User training. Post-implementation assistance will include online help, online policies and procedures, WBT, and a practice database.

Paper-based aids, a subset to classroom training, will be available in hard copy and online. Training aids will include a User Guide, cheat sheets, and job aids. Additionally, user support will be available through the Project's Help Desk and by County Super Users.

Ms. Monson noted most of the actual learning takes place after the classroom training. MS. Drewry discussed her county's experience with the learning curve, timing of training, and performance after training. Mike Latham, DRC Project Manager, noted most counties in Ohio are using some type of online system, which should shorten the learning curve. Many of the SACWIS tasks will be similar to the tasks users are completing today in other systems.

Ms. Drewry discussed WebFACTS and her agency's expectations for workers learning the system, challenges with implementing a new technology system and the potential impact SACWIS will have on resources, and Child Protection Oversight and Evaluation (CPOE) outcome indicators.

Ms. Griffith noted a user task analysis has been drafted. Over 500 SACWIS tasks were identified and will be updated periodically.

Ms. Griffith noted classroom training will be held at regional training sites with two trainers per classroom. Users will self-register for the training. The current plan is for a Learning Management System (LMS) to collect training completion information. DRC noted reporting is not included in the current scope of the training. Members inquired if counties will be involved in developing the training. Director Appel emphasized county input is needed. Director Drewry stated counties will need to know 60 days in advance how many county workers will be able to attend training for each county.

Ms. Appel discussed online help, worker skills, and agency budgets. She noted Clark County workers do some work on the computer today; but, they will do everything on the computer with SACWIS. Ms. Appel noted some agencies may not have funds in the budget to cover extra workers.

Rick Smith, OCF Deputy Director, discussed the proposed SACWIS subsidy policy to assist PCSAs with SACWIS implementation. Mr. Smith stated he would share a draft of the cost associated with the statewide policy with Forum members.

Dr. Crow inquired regarding the length of time to enter data in SACWIS as well as how the length of time will impact productivity. He further inquired regarding comparable SACWIS statistics from other states. Forum members discussed the impact of SACWIS on a worker's time with families and children. Ms. Appel noted if data entry in SACWIS takes longer it could impact caseloads. Directors need to be aware of potential impacts so they can factor it into their budgets. Dr. Crow also noted the Comprehensive Assessment and Planning Model Interim Solution (CAPMIS) process appears to be increasing caseloads. Deputy Director Rick Smith committed to look into the issue.

As a follow-up, Mr. Kirkendall suggested a scenario be developed utilizing an average case size and criteria such as intake, investigation and residential treatment. A determination could be made for the length of time to enter data, which would assist counties in determining budgets. It was suggested to time how long it takes for an experienced user and a new SACWIS user to complete tasks using the application. Ms. Monson stated user task analysis may help determine how long it takes to complete tasks.

Director Roelant requested the county reimbursement policy address: contract personnel, new employees (case or support), and overtime of existing personnel.

Ms. Appel inquired regarding remote connectivity to SACWIS. Mr. Serra discussed the technology platform for SACWIS which allows for the use of a tablet device in the field. Under consideration for a pilot are wireless devices such as a cell phone, a cell phone with a camera (not allowed in some courts), or a hand held tool. Mr. Serra noted SACWIS has strong encryption; and, data is secure. In addition to

technical considerations, Mr. Serra stated specialized training will be needed to teach workers how and when to use devices. ODJFS will work in partnership with the counties to pilot potential options.

Deputy Director Smith noted that devices to support remote access will not be 100 percent funded by ODJFS. There are economies of scale considerations. A tablet notebook could take the place of a worker's desktop. Mr. Serra stated there are minimum hardware specifications, and a potential for 50 percent reimbursement on purchases.

Ms. Monson said classroom training will be hands-on to make workers more comfortable with the system. Users will be provided a Student Guide to take with them after class. Core training will be conducted on Day 1. Exercises are the focus of Day 2. Users will have Web access to exercises after training. They will have job aids to take with them. There will also be a feedback survey; at this time, it is a paper survey. Forum members were encouraged to recommend Agency supervisors and caseworkers complete specific job-related exercises once they return to their agencies. Ms. Monson noted online help will be at the screen, field, and task levels. Workers will be able to link to rules and then return to their work.

WBT will be task-based by functional area. The tasks will be linked to the individual task. There will be demonstrations of tasks. All training will be based on an information model with a structure that will be easy to follow as users do their jobs. One hour of WBT will be required prior to classroom training and will be performed on an honor system.

Dr. Crow inquired how new employees will be trained, hired after agency SACWIS classroom training has occurred. Tom Heilman, SACWIS Implementation Manager, stated the training will allow for the new employees to be trained. Mr. Heilman noted some counties have a train-the-trainer option. Ms. Drewry noted Montgomery County conducts WebFACTS new user training periodically; training is usually conducted one-on-one with an experienced user.

Ms. Griffith reviewed types of training, curricula, and duration. Discussion followed regarding SACWIS canned and ad hoc reports. Reports are covered in each module. Ms. Griffith also noted Directors can attend all or some of the training. Ms. Monson explained supervisors are considered "end users"; their training will include exercises that apply to their work. Manager training will also be provided. Super User training includes two days of troubleshooting. Super Users are encouraged to work through all of the exercises for each module.

Capabilities of the practice database and database refreshment were reviewed. The training database will be refreshed prior to a new class; the practice database will be refreshed monthly. End users will be notified before the practice database is refreshed. Ms. Appel responded positively to the idea of the practice database, referred to as the "sandbox".

### **SACWIS Pilot Overview/SACWIS Pilot Implementation**

Muskingum County has been chosen as the SACWIS pilot county. The SACWIS Integrated Project Team (IPT) will initiate kickoff and get the process started. The Initial Task List is included in the county's Organizational Assessment Report.

Bi-weekly planning meetings will begin. Detailed implementation materials will be developed.

Muskingum County SACWIS pilot may be easier because Muskingum is a CAPMIS pilot site. Forum members raised concerns regarding exposure to CAPMIS. Mr. Heilman noted while CAPMIS screens do not look like SACWIS, everyone should have CAPMIS training before SACWIS. Director Appel suggested CAPMIS and SACWIS tools be as similar as possible.

## **Storyboard #2**

Denise Wipert, DRC Change Management Lead, provided an overview of the Storyboard. Storyboard #2 is now available and contains additional screen shots of SACWIS to give people of sense of the system.

## **Organizational Assessments**

Tom Heilman noted the Organizational Assessments are 25 percent complete. The remaining Partnership Forum counties will be scheduled and completed by end of July. All Organizational Assessments will be completed by close of the year. The process has been refined and resources added and the current backlog will be cleared by mid-July.

Mr. Heilman requested the assistance of the Forum members to ensure counties are bringing the right people to the Organizational Assessments. Mr. Heilman requested help to better craft the message regarding who should participate in the Organizational Assessment. Director Roelant suggested a cross-section of the agency, managers, IT, and caseworkers, should be involved as the whole agency, including the receptionist, will be impacted by SACWIS. Agency leadership must be involved.

## **Next Partnership Forum Meeting**

Tuesday, August 30, 10:00am – 3:00pm  
Air Center, 4200 E. 5<sup>th</sup> Avenue

### **Agenda Items to Include:**

- Plan for UAT
- Draft of State-wide Rollout Plan
- Report on Time Study Analysis
- Overview of CAPMIS Policy Training
- Clarification of Federal Funding

## **Adjourn**

Meeting adjourned at 3:00 PM.