Child Welfare IT Managers' Webinar Series: Back to Basics
"A Focus on the End User"
September 27, 2013

Presenters: **Joyce Rose**, ICF International

Tomy Abraham, Director of Business Application, Massachusetts Department of Children and Families

David Ayer, Maryland Department of Human Resources, Social Services Administration

Karen Faulk, Louisiana Department of Children and Family Services

Mary Kernander, Information Technology Manager, New Hampshire

Colleen Mousinho, Director of Federal Regulations and Data, Georgia Department of Human Resources

Coordinator: Welcome and thank you for standing by. At this time participants' lines are in a listen-only mode. To ask a question during the question and answer session, press star 1 on your touchtone phone. Today's conference is recorded. If you have any objections, you may disconnect at this time. And I will now turn the meeting over to Ms. Joyce Rose. You may begin.

Joyce Rose: Thank you. Hello and welcome to the final Webinar, Number 6 of the Back to Basics series brought to you on behalf of the Health and Human Services Administration for Children and Families, Children's Bureau, and it's presented by ICF International. I am Joyce Rose, your host and moderator for today's Webinar, and joining me in a few minutes for a discussion focusing upon the end user will be a distinguished panel of state participants.

Changes in funding availability and priority mean that opportunities for in-person discussions and networking among professionals working on state child welfare IT systems will be limited this year and likely in future years.

Through this Webinar series, the Division of State Systems within the Children's Bureau is offering a venue for information sharing and discussion.

We are offering six Webinars, one per month between April and September, 2013. The Webinars are intended not just for child welfare IT systems managers, but also all the staff involved in getting and keeping child welfare systems up and running.

Although our series theme is Back to Basics, we invite and encourage participation from both experienced and newer managers and staff, recognizing that even the most experienced among us have something new to learn or may need a refresher. All of the Webinars are recorded, and are available online as reference and informational resources for you and your staff. A global notification will be distributed once they are posted and accessible.

As I mentioned previously, today's final Webinar in the Back to Basics series is about the end users, with our guests, state participants talking about how they focus upon their end users of their IT systems, what works well and what doesn't, as well as lessons they have learned and wish to share.

Attendees are encouraged to participate in our Webinar with questions and comments. All of our participant lines are muted now, but we will open them at the end of the presentation for discussion. You also can submit questions through the GoToWebinar chat feature, though we will also save those questions until after the presentation has completed.

Should we run out of time, we will respond to your question via email, and/or should you have additional questions, you may submit those to me at the email address listed on the slide, joyce@kassets.com.

Now, we are very interested in knowing who is attending this Webinar. It is our intent throughout all the Back to Basics Webinars to make the content applicable and attractive for all disciplines participating in a state SACWIS or CWIS effort. We ask that you self-select one of the five categories listed.

Also, recognizing that not all states are SACWIS states, and to be inclusive of everyone, we will use the more generic Child Welfare Information System identifier. My colleague Elizabeth will now conduct the poll.

Elizabeth Mertinko: Okay, Joyce, we have the poll open and people have started to vote, so I'll just give people a minute or so to cast their vote. Okay, and with almost everybody having responded, 95%, we have 15% state child welfare information system project managers, 15% program managers, 10% system technical managers, 50% project staff and 10% ACF Children's Bureau personnel.

Joyce Rose: Fantastic. That's a great representation, and it actually is quite consistent with the previous five Webinars. So I appreciate your attendance, and hopefully towards the end here, when we get to Q&A we have lots of folks to submit some great questions to our wonderful panel.

So let's - very quickly, let's look at today's agenda. The format of today's Webinar is an introduction of our state participants, followed by approximately a 60-minute presentation by our guests, and then we will invite all attendees to participate in a Q&A session with our presenters, ending with a short wrap-up.

So let's now move on to our introductions. Our guest participants are all members of the very new Child Welfare Technical Work Group. And let me briefly introduce and extend a warm welcome to all of them. Tomy Abraham has worked with the Massachusetts Department of Children and Families for those past 13 years, the last seven as Director of Business Applications.

He holds a Bachelor's Degree in Computer Engineering, and his international experience includes consultancies in India, Europe and the Middle East. Currently he is involved in the transition of Massachusetts' SACWIS system from a client-server computing platform to a Java environment.

David Ayer has worked at the Maryland's Governor's Office for children in the early 1990s through 2007, and with DHR Social Services Administration since 2007. His focus throughout these years has been on developing indicators of child and family well-being, performance measures for child and family services programs, and designing, implementing and fixing information systems to help providers and frontline staff do their work, thereby yielding the data needed to measure progress and to be held accountable.

Karen Faulk is a Child Welfare Professional with 19 years of experience with the Louisiana Department of Children and Family Services. She has experience as a child protection investigator, foster care worker and state office program manager in several programmatic areas. She recently ended a two-year assignment as Manager of Child Welfare System Changes and Data, and she is now assigned to Child Welfare Data and Analytics full time.

Karen earned her Bachelor's in Sociology and Master's in Public Administration from the University of South Alabama, and her Master's and PhD in Social Work from the Louisiana State University.

Mary Kernander is an Information Technology Manager for the State of New Hampshire. She has been with the State of New Hampshire for the past 11 years. She and her staff are responsible for all the technical aspects of the state SACWIS from technical design to coding to deployment. While Mary is unable to participate in today's webinar, I do want to acknowledge and thank her for the valuable input which she has provided for this webinar.

Colleen Mousinho, Colleen is no longer the Interim Director of Federal Regulations and Data, but rather the permanent Director. Congrats, Colleen. She has been on the Georgia SACWIS SHINES Project for the last nine years, serving as a Program Manager for five of those years, and then four years as Director for SHINES. Colleen brings more than 20 years of experience in child welfare.

We are very pleased to have these experienced and qualified individuals as our guest participants. And myself, formerly the Project Director for the State of Wisconsin SACWIS, retiring from state service in 2004, and since that time I have been involved with several ACF Children's Bureau sponsored training events.

So now, let's get to the real heart of this Webinar, and that is a discussion by our participants centering around the end users. David and Karen will kick off this segment, and invite our other participants to comment at the end of their presentation. So David and Karen, please start us off.

David Ayer: Yes. Hi everyone, this is David Ayer, and I'll give you a brief overview about Maryland. We have a system called MD CHESSIE. It's a state administered child welfare - I mean, it's a - Maryland is a state administered child welfare agency, and CHESSIE is the system that we use across the state. There are 24 jurisdictions, including Baltimore City and 24 counties.

And it was a transfer from West Virginia. It's a client server system that uses a DB2 database and Power Builder software for the development. And we have implemented CHESSIE as - fully implemented as of January of 2007. And there were quite a few challenges that we had. I guess we - using the child development analogy, we launched CHESSIE as an infant, as it were. There were performance problems, navigation and screen problems.

We had some basic design problems as well. And we were a little bit under-staffed as far as our support was concerned, and we've been working rather hard over the last several years to make CHESSIE more and more responsive to the end users, and we've learned an awful lot in the way. We have, in Maryland, a Social Services Administration. I'm on the operations side, and there's a program side.

There's an Office of Licensing and Monitoring. We have IT folks both in the agency, and a software developer currently at Xerox. Fiscal folks and legal folks also round out the team that work on developing the system and maintaining it, and of course, not to mention - or last or not least to mention, the folks on the front line, supervisors and program administrators in local jurisdictions.

And we are very blessed to have someone who works with me, and I'm going to mention her by name - she gave me the okay. Sheritta Barr-Stanley has worked with me side by side over the years since I stepped on board in 2007 to help with MD CHESSIE development and the use of it.

And that's a little bit of background about CHESSIE. And Karen, you're going to talk a little bit about Louisiana?

Karen Faulk: Sure. Louisiana does not yet have a SACWIS system. We have two major systems that are used for child welfare, and then we have a couple of ancillary systems that are used to collect additional information that are not collected in those two systems.

Our first attempt, I guess, to seriously try to implement a SACWIS system was with implementation of a system called Access, which was implemented in September of 2006. And the Access system is based on a CRM platform, and it is a web-based system, however access to the system is available to staff only through the Intranet via a VPN connection, at this point.

The Access system contains the intake and investigation portion of child welfare services. The other services have not been built out in Access, and the department has made a decision to - well is undertaking the process to make a decision now about how to go forward with one comprehensive child welfare system. And that is possibly not going to be Access. It may be another approach.

So right now we have Access as the front end system, and then a legacy system that was built in 1988 that's a mainframe-based system, TIPS, which is where we store information about foster care, in-home services, and then differential response cases. Both systems are maintained by our internal IT staff, and coding changes are done by internal coding/internal IT staff.

The Access system does - we have to have a couple of upgrades to that platform, and we've contracted that piece out, but the customization, again, remains inside the department. And there was substantial customization of Access because the CRM platform that was available when Access was developed was really more of a financial services eligibility focus application.

It wasn't designed for a child welfare process, so we had to do considerable customization in order to make that work for us. I guess that's about it, so...

David Ayer: All right. And we could...

Tomy Abraham: Good.

David Ayer: Oh, I was...

Tomy Abraham: Would you like us to introduce ourselves now, or...

David Ayer: Yes.

Tomy Abraham: Okay. So, this is Tomy Abraham. I work with Department of Children and Families in Massachusetts, Massachusetts being one of the earlier SACWIS systems in the country. It was built on a client-server platform, with Oracle as the back end database.

It is an end-to-end system, starting from intake to federal claiming is performed through the single system itself. Currently, what we are doing in Massachusetts is to migrate the system functionality from this client-server platform to a Java platform. We do not do it on a big bang approach but rather through multiple releases.

So with the last two years we have moved at least roughly about 30% to 40% of system, and hopefully in the next couple of years, in two to three years, we hope to bring the rest of the systems, rest of the client-server application called i-Family Net into a new Web application called i-Family Net.

Colleen Mousinho: Yes...

Tomy Abraham: Go ahead.

Colleen Mousinho: And this is Colleen in Georgia. Our SACWIS system is called SHINES. It's web-based, it's Java, and it's transferred from Texas. We completed state-wide rollout of SHINES in June of 2008, so we're basically a toddler, a bit late for kindergarten, and we have about 3000 users across 159 counties.

And our system covers the gamut from intake all the way through the adoption process, and payments to our providers and foster parents. We have all of the required interfaces, and in addition to that we have bidirectional interface to our court system, where we share information about case planning, and other - and some demographic information about our children that we work with.

Coming up for us in the next year or two is, we want to do an upgrade to SHINES. We want to move from Oracle 10 to Oracle 11, and upgrade our servers. And we also want to look at how we can get more information about our children from the other systems into our system.

So for example, one of the things we want to do is build an interface to the department of education, so that we can bring in the educational outcomes. We want to look at our department of community health. They can - they have our health information, diagnoses, Medicaid information about our kids. We want to bring that into our system. And we want to continue our work on SACWIS compliance. So that's it for Georgia.

Joyce Rose: Thank you for your introductions of your state SACWIS systems. Now let's move on to the focus of our Webinar, and that's a discussion about our end users. And now, David and Karen, please take it away.

David Ayer: Great. This is David Ayer of Maryland. Karen and I are going to walk through the next couple of slides, involving end users from the beginning. In Maryland, as I mentioned, we had a lot of challenges when we set out in January of 2007, and we involved users in a couple of different ways.

One is to help address the numerous challenges, it was suggested at the highest levels to form what's known as a tiger team, a group of executive level people at the state level as well as local directors in some of the jurisdictions, and as well, front line staff representing the various spectrum of child welfare services, intake, in-home, out-of-home, fiscal.

And we had an opportunity in these monthly meetings to prioritize - identify and prioritize what should be the next immediate steps to really move forward in making improvements to the system. As I mentioned, we had a lot of slowdowns. We had business practice not matching up with how the system worked, and it was a rather difficult time. And with the tiger team folks, we actually were able to get moving on a lot of different projects at different levels, to get the SACWIS system moving along.

We also had at that time, and still is in operation today - because the tiger team has sort of ended its mission after the first few years, there is an MD CHESSIE coordinators group made up of local department staff, one per jurisdiction, and we get them together as well on a monthly or every-other-month basis to help with looking at the direction the system's going and help us to set priorities.

As far as the process of setting out the SDLC process, system development lifecycle process, it is absolutely essential to have the right folks, including local users involved with development. And we try to get - identify different people as we go along. We get different voices. Sometimes we try to get two or three jurisdictions, because they each have different perspectives together when we're focusing in on a different aspect.

And we have them help us walk through, especially on the larger projects or functions that we're trying to build in MD CHESSIE. One last thing I'll say on this first point here in the slide is that prototyping should be an important part of development as - or some might call it proof of concept, so people can get a real feel for how it works or will work before you actually launch forward.

And Karen, any - I'll let you talk about that one and the next ones as well.

Karen Faulk: Okay. When we were implementing Access, one of the, I guess the main method by which end users were involved in the early part of the process was through JAD sessions, and those sessions included members of the child welfare staff, from local and regional offices as well as state office.

And one of the things that was a challenge through that process is that often times local staff or regional staff are experienced at doing things a certain way in their location that may not necessarily be the actual policy of the department, not necessarily that it deviates from the policy that's - but there are sometimes, I guess, requirements that are identified that are really not necessary requirements.

And so while involving local users in that process is important to understand the flow, the business flow at that level, it's also important to be able to distinguish between what is kind of a local practice that has evolved versus what is the actual standard that needs to be applied across the state.

So that is a challenge in that implementation phase when end users are from all different areas of the organization. We did, of course, have - utilize an SDLC process that included test scripts, end use cases and end user acceptance testing. The testing was primarily done at the state level, and there were some field staff and retirees from the field who were brought in to participate in that testing process.

And so that was the main method by which local staff were involved in end user testing, was through the involvement of retirees. And one of the reasons for that is that it's often difficult to bring a staff in from the field and have them spend a lot of time in testing when they have other duties. Now, of course, the team that was developed to help with implementation and to help with JAD were members of child welfare staff from all levels of the organization as well.

But once that process of development begins, those people are kind of out of the field and out of contact with the field for several months or, you know, even possibly a year or two before implementation begins, so some of their field knowledge has become stale. And so the advantage of bringing in retirees to help with testing helps bring some maybe more recent knowledge back into the process.

Regarding the departmental preparation and creating one voice to help synchronize practice and policy, there were several strategies that were employed to help identify the needs of the staff at the local level, and to help prepare them for changes in the computer process that would be in place with Access.

Because as I mentioned earlier, what we had prior to Access was only a mainframe-based green screen system, and Access was a web-based application that requires skills that we kind of take for granted now, I think, but because people are so much more savvy with using Internet and texting and Googling and all of those kinds of things.

But even as recently as 2006, 2005 and 2004, when development was going on, some of those skills were not that - were not necessarily found in our field staff. So there were - parts of the change management process included identifying prerequisite skills that staff needed, including things like how to use the Internet, how to use Word. Again, staff were often more reliant on clerical staff for doing certain types of work, and so identifying skills that front line workers would need to have and to begin to prepare them for that was essential.

The other thing that was done to help with the process of implementation was identifying changes in the computer configuration, screen resolution, things of that nature that might have to be managed to ensure that the application ran correctly on their machines and provided them with the right kind of view to be able to do their work. And pass it back to you, David.

David Ayer: Yes. And for our side in develop - departmental preparation in creating one voice, there are two - a couple of points I wanted to make, very briefly, on this is, we had a history of a lot of folks, program side in SSA being shifted over to the IT department. This is years before CHESSIE actually came along. And that turned out to be quite detrimental to the overall success of developing and bringing MD CHESSIE into being.

Those folks ended up taking on more of an IT orientation. They left, and then people more IT oriented and program oriented were hired in, and that made for a challenge as far as just being able to maintain a consistent message over time about the program's concerns.

The other is within program within social services itself, there needs to be a proper interchange between the policy and program folks on the one side who set the vision, and the operations or tech oriented people at Social Services Administration who can help make the vision happen.

And we've been having, I think, a constructive development in our roles and the communication that we have to help develop new features in MD CHESSIE. And in terms of local office, I already mentioned we had had development of the MD CHESSIE coordinators. They not only have provided guidance over the years, and development, but they've also helped to make it happen on the ground.

These are not full time or even part-time designated positions, locally, except maybe in one jurisdiction. These are part of a job description of the person who's just at that local jurisdiction most enthusiastic about using CHESSIE and helping to develop it further with the statewide team. And so we've had some very good work with them.

And so we'll move on to the next slide now, and catch up on training. And Karen, how about if you start off with that one, and then I'll add a few comments.

Karen Faulk: Our training unit was, of course, involved in developing training for frontline staff, both computer-based training as well as classroom training on how to input cases in Access. There was a sandbox environment set up. There were both training and sandbox environments set up.

The sandbox environment was used to help train staff at all levels of the agency in how to manage, process information through the Access system.

And then the training environment has been an ongoing, you know, maintained environment to support regular training of new staff as they come on board.

The ongoing involvement of the training unit is, you know, primarily around getting, making sure they're aware of changes in the system and so they can integrate those changes into their training unit. And then there's often a person from the child welfare systems unit that will assist with training to help point out some of the subtleties of the system that trainers may not remember or think of to involve staff, or to notify staff about.

So we have a partnering of the systems staff and the training staff as needed, to help ensure that training of new staff is a strong training process.

David Ayer: For our efforts in Maryland, we've been focusing quite a bit - I'm going to lead up to the Just in Time and by job responsibilities and interactive. It wasn't always the case that we had an array of, I think, decent training opportunities for our staff. It's evolved over the years.

And we focus on relevant segments of the system that people are having trouble with, and we try to solicit or get the interest of people who really need help at a certain given point, and then get out of their hair. The old days we had long-standing training sessions that people had to go through. They might actually be interested in a quarter of a training that might be provided.

And it was mostly lab-based, PC lab-based, and we would have not too much interest overall, and not great feedback. And so what we've been able to do over the years is shorten and focus the training sessions that we have on different - as I said, different aspects of the system, because there are a lot of different folks working different areas of the system.

We still have the PC lab-based training, but we've also shifted gears, and we provide WebEx trainings, that's online trainings, both live and Memorex has a - where there are a number of recorded sessions that folks could go to if they said they needed help with something and we've already covered it in a WebEx.

And then we also have bolstered our staff over the years in order to up... services. And we have been able to get a number of people involved locally, at their offices, on the cases... problems that they're having, to show them how different things are to be done.

And so that's been very effective over the years, and we have a number of ways - I'll go into the gauging effectiveness part, and then turn it back to Karen. I think the basic bottom line is gearing yourself up in order to listen to your customers and be responsive to them.

And I do need to hand it to Sheritta over the years. Under her systems development unit here at Social Services in Maryland, we have a call center. We are able to get - take a look at exception reports that get run out monthly, to see where people are having some struggles.

We have the MD CHESSIE coordinators once a month and we get feedback from them. We also have post-build review meetings, so after a build - and we have a build every couple of months or so, a month and three months after the build, we get people together and we ask them how that build went, just from a design perspective. Did we get we had designed, what we had asked for, just to make sure of that.

But we also get feedback that leads to further training opportunities. So through all of those different venues, we - her group is collecting a great set of information about issues and problems and challenges that people are having trouble with right now. And then we can rather quickly move to address those concerns in a number of ways.

And we are - I think we're pretty much on the ball, keeping our fingers on the pulse of where the local staff are at, and the needs that they have, and we're there to assist them in many ways. And Karen, anything more as far as this slide's concerned?

Karen Faulk: Oh yes. I'll have a little bit to add on the - on gauging effectiveness. We - a couple of years ago we did a survey, user survey about Access, because there had been some negative feedback about some of the functionality of that system. And when we - or at least that was the perception of the feedback.

And when we did the survey, we found that while there were some system issues, and one of them, it may be something that other states have experienced, but when - in our IT shop we have a standard - a security standard that allows a screen that is not being used, so the screen is present but no one's doing any input on the screen, it's going to time out after a specified amount of time.

And when someone is entering narrative information into a screen, it's not considered to be interacting with the systems until there's a save to that screen. So that was a major problem, and that was probably the number one system problem that emerged. And it's not a problem that we can actually resolve at this point, because of some of the limitations of CRM.

But beyond that, the main issues that workers were having were around just the process of conducting the work and then even though computer laptops had been issued to staff, being able to use the computer when they're interviewing clients is not necessarily a very smooth process.

And so the main problem that staff have, and I think will continue to have with any system, even a Web-based system like Access, is the issue of needing to have interviews and perhaps take notes about their field work, and then come back and enter that information into a system later.

And so as much as possible, as new systems are developed or as we implement new processes, we need to find ways to allow or provide staff tools to be able to do some kind of speech recordings that can be input into a system so that it reduces some of the redundancy.

But - and then in addition to that, the help desk process that we use does allow us to do a lot of work around, you know, common topics that are - common issues that are reported that help identify what the training needs are, and where they need to be focused, because sometimes it's a certain office or location where some problem is occurring more often than somewhere else.

And so there may be some specific work around some issues with a particular office or a particular set of staff, and then other issues arise that are perhaps state wide. So our help desk process helps us to document not only the types of topics that are problems, but also where we can focus the training to help support staff on that. And I think we're ready for the next slide.

Tomy Abraham: I'm not - and just a - I had one point on the previous slide. We also do computer training, because people - what is less effective now is the tech space to help. What was most useful to people here and people liked was smaller help areas, or with multi-media help inside the application.

So if folks have issues with one area specifically in a screen, you get the multi-media help part of that. It seemed to have helped people more than asking them to go and read a text-based help. And we also did follow-up site visits. The training unit went out into each of the offices after - a month after the implementation, so that people had a chance to - or a month after release, so people had a chance to learn the system. Now they know what they're lacking.

And what we found out was there were users who did not know all the features. And their job was difficult because they simply did not know the new Web - 2.0 modern Web user interface mechanisms. And that's one thing we possibly want to sit with really challenging users and make them understand that there are things that is done slightly differently in Web applications. And that'll go a long way. We can move to the next slide.

Okay. And this is Tomy again. So we'll talk about ticklers. Ticklers are there from early 90s onwards when we defined family that we had many ticklers, because if at the designed time, a tickler is a solution for a lot of problems. But we did not know - or we did not know at the time of design how well they'll be received at the field.

One of the major problems was an abundance of ticklers. So you - what happened with the system, or the tickler system, was a lot of ticklers appeared in their Tickler tab or Tickler area. And users just do not want to visit that area again, because it's too much. They have confusion. There was - even though we tried to group it by time, as well as the category of ticklers, they still were not so enthusiastic about it, because they lost their belief in ticklers.

And when we designed the ticklers in the first place, they were not timed. I mean, they were timed, but they were all appearing at the same time. So one of the things that we do now is not just tickler, because modern systems have something called business process management systems, or word flow systems.

So rather than just creating a tickler itself, we move the work flow through these ticklers. So it is not just the ticklers that people are seeing. What they see is what is pending for them, and they can navigate to the pending work. And from there onwards they can move the work, and the signaling, or the tickler itself moves on.

This seems to be more attractive to people because now there is no tickler area itself that they have to go and work on. And there are many business process management systems. And the one we use here is an open source framework, but you can evaluate your other framework that's available on the market or on the open source community.

It requires some maintenance, and that itself - so just do your due diligence and research before choosing one. And it also depends a great deal on the business analyst who is designing this, because you can make a very long running workflow with all these ticklers and all bells and whistles. But at some point it's a bit difficult to manage.

So there is a balance between how to make life easier for users through the proper use of workflow ticklers to not doing or going back to the old one. And talking about end user needs, obviously it list a couple of things. David talked about the tiger teams, and there are user groups and advisory groups, and all of them essentially have similar functions.

You get feedback from users through multiple forums. What is important here is you have the selection of - the participants in this group should be very representative. Otherwise it is highly likely that it's skewed, based on the geographical area or some other selection method.

And also, rather than one generic group, it is better - in our experience, it was always better to have groups based on job responsibilities. Because people coming from different geographical areas, you know, different field offices, could share more productive discussion about their job, rather than one general group of people talking about their work.

And we also have regular interaction or feedback from the help desk, based on emerging needs that people - I mean, obviously, you have tickets or defects or issues that are recorded at the help desk. But also the help desk analyst, generally if you have a two tier, second tier help desk analyst will have a better understanding of the issues that are coming up in the area offices.

So we - it is better to have, on top of it analyzing the issues or tickets that is coming out of help desk for major problems, you can have a conversation with the help desk, and they will be able to provide you some great input into this.

Surveys. Just make sure the way you design the survey, it has the potential of giving you great feedback, but also that when we design the survey and we send it out, it's about 20% that is the first round survey feedback coming back to us. And that could be either compliments or complaints, but if we have - we follow up on the people who actually make suggestions.

And then as a follow-up to the survey, we elaborate on the specific need that they thought, and we sometimes we focus on the office that put that - that recorded this edition itself, or survey, and then we follow up with them, and see, based on the - and talk about the survey feedback itself. Colleen?

Colleen Mousinho: Yes, I want to talk - thanks Tomy. I want to talk a little bit about the ticklers. You know, in our state - and I think for some it was a blessing. And for others it was not a blessing but a curse. So when we first designed the system, you know, when we brought everybody in the room, everybody was excited about ticklers, and the supervisors, you know, wanted ticklers to be sent.

But what we found is, you know, and we - it goes to a tickler page, a to do page. And what we've found is over the years, it's sandwiched - it sits on the page, and sits on the page, and sits on the page. And so we're at the point where we're looking at how do we manage this? How do we change it?

Because we want our ticklers to be something that's actionable. It's a reminder to do something to the case manager. So they - some looked at it, and some do a very good job of managing using the ticklers, and some not as well. So one of the things we're looking at is creating ticklers that escalate.

We're - we have a SHINES Advisory Board. They've got a work group around ticklers. And that board is comprised of supervisors, case managers and all levels of staff. When it becomes a very much a supervisor-driven request, case managers don't feel like they need to add here to the ticklers or that they're heard about what ticklers are important.

So we're looking at what's important, what needs to be sent as a tickler. And again, if it's not being acted on maybe within a certain period of time, you want to escalate those ticklers up to the supervisor. And then if it's not acted on by the supervisor, we're looking at escalating up to the county director.

So they can work, but I would say, you know, once you've implemented, go back after a couple of years and look and see if it still makes sense to send the same ticklers that you're sending.

Tomy Abraham: Okay.

Colleen Mousinho: That's it.

Tomy Abraham: Moving on to - how are we going on the time? It's almost 50 past 2:00. Okay. Let's move on to the next slide, Slide 12. The change control process. This becomes very important in obviously not all the play stations, but in child welfare, just to make sure that people who have the biggest influence does not write the policy as the system changes.

An IT governance board or a change control board, whatever name you call it, but it is essential to have a committee of program policy and technology folks who decide what should be the priorities for next year, quarter, or next release, based on what, the way you operate in your jurisdictions.

Everyone who is with a - who is bringing their changes should, obviously should have a business case elaborated that should be enough homework, should go behind every proposal that is placed in front of the change control board. And if possible, it is better to have the level of the effort as well as the impact being analyzed prior to change control board meetings itself.

The input the change control board obviously do come from many sources, locally in the system coordinators, these could be the super users or your coordinators, or who are the field officers who are generally very eager to make changes to the system that are inconvenience to them, as far less the front line supervisors and workers.

As I told in the previous slide, we do get help desk incident reports, as well as prioritizations from the help desk. But once this prioritization is done, then the release is defined, and everybody knows that for the next three months, six months, or one year or whatever your time frame - your release time frame is, that's been published to all the stakeholders as well as to generally your agency users itself.

Once this is published, we do get some feedback on what people would like to accomplish in this changes itself. So even though we have a change that is published, people do contribute more ideas, impacting that change itself.

So when we do the changes, obviously that is how the change control board wants, that anybody who is working in IT may know that there'll be a smaller change control board that's inside, who works in the IT shop itself, because without their approval, once the system, the baseline is created, changes don't go to release after that. So there has to be - it's better to have two change control boards, obviously one purely IT change control board as well as the agency change control board.

We have the particular point about a testing group inside help desk. We ask our help desk folks to come and test prior to the user acceptance testing happens. This contributes in two ways. One is similar to the help desk analyst; they have a better grip on the application. They even have additions, also, this access to training for the help desk personnel.

So our help desk personnel is very specialized. They generally take calls early on in the SACWIS system. But based on this testing; now they have a better understanding of the system, and they can contribute better ideas.

And the other point is defining business and technical requirements with the end user focus groups. We - the business requirements does come within the focus groups. But as I said, the focus group needs to be representative of all the field offices because it is quite possible the practices differ from office to office.

When you do focus groups, though the practice, it is better to have - be learn the system, rather than asking the question, what do you want. We sit with a small set of people, identify the requirements, and then we have a straw position form. Sometimes what happens is users are not always - users do not always know about the latest technical abilities of newer technologies.

So we - possibly IT business analysts will be able to project or create some suggestions, and ask the users. This could be done in focus groups, or if you have another mechanism in state, that's also better. So this way, users can go back and think about it.

We do not do focus - back-to-back focus group with the same people. Because what we have seen is people absorption some things, go back, think about it, and come back, generally - not always, generally. So this seems to be more effective than jamming it a couple of days the same people and their entire focus is only on the particular business function.

We also do the post - after the build. We certainly go back and say to the users, and ask - and obviously we send out surveys, but we also sit with them, after a - probably a month afterwards, and get their feedback. This has been very helpful, because you - some themes emerge when you visit a couple of offices, from one of the things that is a major inconvenience, or people are looking at the next set of enhancements to what you released.

If you want to incorporate something in your next major release, this is a good time to do that. So those are the things about change control process that I can talk about. Colleen, would you to add things?

Colleen Mousinho: Yes. Change control process, I think a change control board is very good for big future decisions. I think it's also important to have someone from your lead folks or your leadership team there, because they're the ones that if you're not building the right thing, they're going to ask why aren't you building the right thing, as they define it.

So it's important for them, as much as they can, to be at the table when you're making those decisions about priorities. You know, we make sure that we have somebody from budget there. Budget is important. If you don't have the budget, you can't build the functionality.

And they also have the under - as you said, they also understand the mission or vision of the agency. And when you're making your decisions or you're talking about what to build, you know, that's part of the discussion, and that's a flavor that they bring.

One real challenge, I think, most of the - a lot of the challenge comes around, you know, how do you manage the scope once you start building and designing. And, you know, talking to the folks about this is, well what do you do? And this has been a challenge for us over the years as we moved from implementation to maintenance. And I think we're finally starting to figure out how to do that a little better.

We've always involved the business in the discussions, but what we're doing is we're doing a lot of talking up front. Because what we want to avoid is - and this has happened to us, and I'm sure it's happened to you guys as well, you design something, you're getting it out there, coming to testing, and somebody goes, oops, that's not exactly what I wanted, or you forgot something.

So what do you do at that point? The money may have already been allocated, or what do you do? And it's a major piece of work that impacts the functionality you're about to deploy and they can't use it well without this one piece. So what we're trying is having a lot of conversations up front.

We're having requirements sessions. We're having pre-JAD sessions. We're having JAD sessions. And all of these conversations are occurring with the business owners in the room, and not just business owners that are affected by that one piece of work or, you know, we're - it's almost like a regression testing conversation. So we're bringing in people that are affected, you know, ahead of this piece of work, and downstream from this piece of work.

So we think we're - we struggled with that change control process around that, that piece of when we start implementing the work, and we're hoping that this new approach will get us there where we're on top of what the business needs, and we know earlier and quicker. And we can meet their needs.

Tom mentioned, you know, focus groups and business requirements. I can't - you know, I can't emphasize how critical it is to have that conversation with the folks that are going to be using the application in the room. And this is a struggle for the business owners, because they're trying to do the work.

So we - you know, we continue to send out - get that message out. And we continue to get leadership to send that message out, that you have to be at the table while we're deciding what it is we want to build, because you are going to be using it. So we've gotten, you know, a lot more cooperation with getting people to the table to have those types of conversation.

User groups, we've got - I mentioned the SHINES Advisory Board. One of the things that we utilize them for is to work with us on design, and to gather business requirements. But it's critical that the stakeholders and the end users be involved in the discussion from the beginning.

Tomy Abraham: I think we can move, go to the next slide.

David Ayer: Right. This is David again, in Maryland, and I'll start off on this one and hand it over to Karen. The help desk is obviously a critical aspect to keeping the system moving along and helping people feel that they are being responded to when they have any kind of problem relating to the system.

And over the past years, prior to just maybe a year or so ago, we have a help desk that's set up through the agency's IT department, where a person would call in, get a ticket assigned. They would need to generally wait - need to wait in order to get feedback from somebody who would help them with whatever the issue or question it is.

But - and sometimes that ticket system or response system got a little bit slowed down, backed up a little bit. Sometimes people might be waiting up to a couple of weeks or so before they get any kind of answer, and that's an eternity to someone on the front line who is having some trouble right now.

So that kind of system doesn't engender a relationship-building between the front line staff on the one hand and the people at the state or whether it might be a regional group on the other hand who's trying to provide some help. So one of the things we set up was an - and we're still sort of having some back and forth with our IT folks, our IT department about this.

We've set up sort of an intermediary kind of call center in Maryland. It's staffed, again, with Sheritta's unit. We have five members, a supervisor, two who focus in on the calls relating to front line staff, and the other two staff are addressing questions that come from our providers.

I didn't mention earlier, the CHESSIE system, our SACWIS system went live with payments for foster care and guardianship subsidies, adoption subsidies, back in 2009. And the call center was originally set up for the providers, but we've extended it over the last couple of years to be this intermediary to the formal IT help desk system, so that we really love the way that we're able, with even just a couple of staff at the state level, and to field questions from folks.

Most of the questions that we've found that come up are rather quickly dispensed with. They're answered pretty quickly. A lot of resolutions get taken care of right away because we have found that most of the questions relate to training issues or use issues that can be handled rather easily.

The five staff that we have working in this call center have had - have gone through CHESSIE training. They're becoming more and more familiar with the screens, more and more familiar with the programs and what people are trying to do, so they have a better sense of the business of what we're trying to do in using the system.

And so they're able to get into CHESSIE with the workers sometimes, and really help resolve most of the issues that come up, which is a much better approach, I think, to building a relationship with them over time. So we have - if we have a real problem with the system that we discover with the worker who's called in, we can help write that ticket and put that into the formal process to get resolved over - and that'll take some time.

If there are suggestions, often times suggestions come up. We add that to the list of suggestions that we have, and we start to identify common suggestions or hot topics that come to us that maybe we, in an upcoming build, we might be able to address somehow or another.

So being able to be the intermediary, as it were, before it gets to the formal help desk system, has really given us a whole lot of data, on the one hand, that we can use to improve the system, and it builds relationship with the people on the front line staff.

We also - I mentioned, we have providers, the hotline, that's when they have trouble with their payments, payments are missing, or they got paid and shouldn't have gotten paid. It could be a number of different issues. They call and we work with the local jurisdiction's finance people to help resolve the troubles that are relating to the payment issue that comes up.

And that's been moving along very nicely as well. We actually had a rather smooth transition with the help of that hotline for providers over the years, in addressing payment issues. And so that's basically what we've been able to do. We've been able to focus on helping the providers with their payment issues, and we've been able to help front line staff with much more timely support, for mostly training or use kinds of issues.

And that's where we're at right now, and I'll hand it over to Karen for additional comments on this section.

Karen Faulk: Okay, thanks. We use - our help desk process is a department wide help desk, or at least the Level 1 help desk is department wide, so it's - those staff are dealing with issues for systems, all systems in the department, not just the child welfare system. And they take help desk tickets by phone or by email, and they will deal with, say, issues that are more general in nature.

When it is a more complicated issue, then it will be passed on to second level support, which is the child welfare support help desk. And the staffing of the general help desk, I'm not familiar with how the many staff are used to handle that. And that help desk is staffed primarily during the business day, and not after hours.

And David, you didn't mention if your help desk is more than just a business day time, and that would be something interesting to know, how other states have their help desk, what availability to help desk.

We don't do provider issues through the help desk at this time, but we do have a call center that handles some other types of questions that consumers and providers have. So this help desk is primarily for internal staff who have problems with their system. And when it's a system-specific issue then it comes to the child welfare user support desk.

The system that we use for tracking and managing help desk tickets is a product called Remedy, and so it has specific information that is collected on each call, who is working the tickets, the status of the ticket, and that information is something that can be used to create specific types of management reports around the topics, the users and the location where the issues are arising, so that there can be decisions made about how to address commonly occurring themes in those tickets.

Most of the time, calls are handled the second day that they come in, and sometimes there is a way to prioritize them to do immediate response back to the user for high priority issues. So for example, if there is something that occurs that's a problem for our statewide hotline, that's going to get priority over other things that might be one user has a specific issue. So there is some prioritization that can be done.

One of the things that was recently implemented for our helpdesk process was a method of - and an expectation that SACWIS submit an electronic ticket to the help desk that would come directly to - if it's a system specific issue it will come directly to the second level support.

And it does introduce some efficiency for the help desk staff because they can't handle all the calls, and they may have dropped calls and other issues that cause users to not get the support they need. But what we have found with that is that often users don't provide enough information for their issue to be researched.

And then trying to contact the user back to get additional information can be problematic because often these are users who are working in the field. And so when they have their problem, they're at their desk doing work, and they may only be there for a short time before they're going out into the field to do their work.

And so there is some difficulty with getting back in touch with people when we're using the electronic ticket process and they haven't provided enough specific information for some research to be done. So - but that's fairly new.

That's only been in place for - maybe since summer. And so that's still a - I guess a process that's evolving for us.

I guess that's the main summary of how we have done our help desk, our how our help desk works. Now one other thing I want to mention before we move on is that one of the things we have found is that some of our help desk tickets point to gaps in our policy. And so sometimes when we - I evaluate certain help desk tickets, we can find that oh, the policy is not real clear about how this process should happen, and this is one of the reasons that it's causing a problem.

And so we push that information to the child welfare policy program staff, who look at how they can clarify their policy to help users know how to do the things in the correct order, if that's an issue in the system, so that they do not encounter problems. So there's some feedback back to policy as well, regarding some of the help desk tickets. Okay.

And I'll go ahead and start with the documentation. We do maintain a system user guide that has been updated in complete - a complete update has been done on a couple of occasions. But more often when we implement changes in our system, we will do a change document that identifies the changes that were made in that particular build.

And then - and that change document is issued at the time the build is employed - deployed, and then those changes are then implemented into - or integrated into the user manual. But sometimes there is a little bit of a delay between the build being implemented and the system user manual being updated with those additional changes.

So those change documents stay as part of the online policy management system, and all of the policies, including the system policies, are on the Intranet for users to be able to review and find information there. They're PDF-based documents that people can search the topics through.

David, I'll...

David Ayer: Yes, I'll talk about user documentation types that we have. And with a - pretty much a full complement of MD CHESSIE training staff on the one hand and the support staff, the call center staff on the other hand, in Maryland we've been able to keep up much more easily with document changes. We have detailed user guides, and brief kinds of focused guides that people can make use of, that we use in relation to the various trainings and so forth.

We also, just over the summer, started implementing a weekly, quick one-page tip sheet that is zeroing in on an aspect of usage that seems to be of some issue, or we feel we need to get people's attention a little bit, various nuances around different aspects of the system that we want to point out to them.

And we blast that out across the state to the users. They can choose to take a look at that or not. And we also keep them posted on our Intranet Web site, so they can see what are the different tip sheets that are out there if they wanted to.

We also work with our IT folks in the IT department of the agency on updating the online help that's in MD CHESSIE, and that's quite a task to keep up with, because you have so many screens, and there are so many opportunities to put in some sort of pieces of information, and now with more and more staff on board, we've been able to start catching up a little bit, in terms of the online help that's available in MD CHESSIE.

Sometimes that will include a link, while you're in CHESSIE, to policy and practice documents that help give some background as to why certain things have to be done certain ways, and will help people understand a little bit about the system.

And actually, I'll cross over into the next item on the slide there, tying the why and the how. One of the things that we've been awfully concerned about is that people understand why the system works a certain way. And we go both ways with trying to connect people - in people's minds between the why and the how in using the system.

Policy directives that we issue, that the program side issues, at Social Services Administration, as appropriate, they will include an MD CHESSIE section, usually at the end of the policy or program directive, and it may even include screen shots with instructions, so that people can read through the policy, read through the program guide, and then they can actually see a screen or two in CHESSIE that relates to that, and how to make use of it.

And then the other - going the other way, the training materials that we put together, and in the trainings sessions that we produce, we make reference to relevant policies, general overviews of the policy. We don't dive deeply into that. If a CHESSIE user, during a training, starts asking some questions about policy, and it starts to get a little bit complex, we refer that person to the appropriate program staff member in SSA to help follow through with that.

We avoid very much trying to turn an MD CHESSIE training into a policy training. And in fact we're, you know, try very hard not to do that, in order to let the program and policy staff at SSA follow through with those nuances and those details. And that seems to work the best for us at this point. And Karen, did you have anything more in terms of tying the why and the how, or other aspects?

Karen Faulk: Yes, you're right. And I appreciate what you just said about the policy piece, because even through the help desk tickets, sometimes the issue starts evolving around a policy issue rather than a system issue. And so there does need to be care taken to shift the policy issue back to a policy person when it shifts in that direction.

We also had - or have, online help - a Help button on screens in Access. And one of the things that we've had a problem with is maintaining that information. So there are some screens where that is no longer functioning, or where the information may not have been updated. But where it does still function, it is linked back to policy.

And there's just been some absence of sustainability of that process. And you mentioned that it's a very intense - time intensive, research intensive...

David Ayer: Yes.

Karen Faulk: ...process to maintain that kind of help system within the system. And it's something to consider, whether you have the capacity to maintain that, if you choose to implement that functionality. And I like that functionality and I like for people to have it, but it has to be maintained or it becomes more of a problem than a help.

And then tying the why to the how, we have done work around - even when we have changes, requested changes in the system, from the program policy folks, and they are able to articulate what they want to happen in the system, it is sometimes not clearly outlined in the policy.

And one of the things we've tried to do is we've looked at those things, and to look at them together, so that when we are implementing something in a system, we are not doing it in isolation from the policy, and so we are able to sometimes, by reviewing the policy as part of our change process to give feedback to the program staff about ways to help improve the policy to help match what the changes in the system are that they are requesting.

And so we have tried to make that connection, and make that a regular part of system changes, to review policy along with the system changes. And I think we can go on to the next - oh, one more thing I wanted to say about the how and the why, and what we're doing to help integrate the process between the system and the policy, is through - we have, twice a month, at least twice a month meetings, WebEx's with performance measure consultants.

And each region of the state - Louisiana has nine regions that cover the 64 parishes, and there are about 45 local offices where child welfare services are provided. So some offices cover multiple parishes. And then, so each region has a performance measures consultant that communicates with the regional management as well as the local office managers or supervisors.

And this - sometimes those other folks are involved in the WebEx's as well. And we use those WebEx's to help identify system issues and policy conflicts, and help people understand what the connection is between how information is being collected in the system and the purpose of it, and to help identify areas where either the policy needs to be improved, or the system needs to be considered for an enhancement to assist staff.

And that's been a very effective tool. We implemented that a couple of years ago. And it's not just for child welfare, it is department wide. So we do cover other systems with that process as well, but we do spend - I think a disproportionate amount of time is spent on the child welfare component of that. So next slide, please.

Colleen Mousinho: So, no discussion is complete without some talk about some things that we can do better. And the first one is around program and policy. And Karen just had some great points about why it's important to make sure that program and policy drives the system.

I think if you don't, and they're not at the table, and just isn't - your program or your policy is not reflected in the navigation of your system or anywhere in your system, I think what you end up with is a great paperweight. People are not going to use the system. They're going to have difficulty using the system and, you know, you just spent a lot of money on something that's unusable.

I would add to that, also, to try to update your system as soon as possible when policy changes. And, you know, sometimes you - a lot of times you're playing catch-up, because policy can change pretty quickly. In a little circle of the pen, policy could be disseminated to the field fast. And meanwhile, you know, there's a little system development lifecycle that has to be completed before we can put that policy or program change into the system.

So you're trying to play catch-up. But it's important to keep the policy people as one of your partners, and build a relationship with them, so that they can give you the heads up, to say, hey, we're going to change this policy in a month, or we're looking at changing this policy, and you have the influence at that time to say, you know, kind of slow down a little bit. Can we talk about what that's going to look like?

Clear roles and boundaries, you know, that's important that everybody understand who's responsible for why, because otherwise what you have is, you know, you can't see me now, but everybody's, you know, pointing fingers at each other when something doesn't go the way it needs to, especially when you have a vendor. Because you want to make sure that they understand what they're going to be delivering to you, and that you're getting quality deliverable from them.

It's good for everybody to stay in the lane, but you also got to make sure that you have good communication, and that everybody's working together in their particular roles. End products should be the result of design and evolvement from the year, but we talked a lot about this.

And it's because I think a very critical and very important that we do this. They have to use the system, and they have to have a voice in thus, because they won't use it. And we are building this so that users will utilize the system.

Focus in on supervisors. One of the things that we learned over the years is supervisors are key. They're key to the work in child welfare, and they're very key, they're helping case managers understand how to use the system. They also are key to helping, from a change management perspective, using the system.

Because if they don't accept it, they don't understand it, they don't know how to use it, they're not going to help facilitate the case managers to use the system at all. So make sure that they're well trained. Make sure that they understand how to use the system. Make sure that they have input into how the system is designed.

Special care for technology-challenged users, one of the things we did when we were rolling out is we did an assessment - a computer assessment, a keyboard assessment, of staff to make sure that they know how to use the keyboard.

And of course - not of course, but it kind of fell along age lines. Those over 25 were a little more challenged on how to use the keyboard. So we went back and did some training, so that it could become more comfortable. Some did, some did not. You know, we had folks resign.

But if you don't get them up to speed and support them - again, you have people that don't want to use the system, aren't comfortable using the system. And what you start hearing is, I hate that system. It's terrible. It's not meeting my needs. So you don't want that kind of atmosphere created, which - and it's a simple solution, that by supporting and helping them to improve their skills on how to use the technology, specifically the keyboard. The next page.

Career training opportunities beyond rollout of first exposure. First exposure, to me, I think, is fast and furious. You're a new worker coming in. You're learning about policy and practice and how to actually do the work. And then you're also learning how to do this within the confines of a new system, you know, a new application.

So you've got both of those things that you've got to learn. So one of the things that I think we need to do a better job at is, you know, six months out, a year out, going back to workers and training them again, or reinforcing their training on how to use the application, because they get lost.

And then they also, you know, they turn to their neighbor next to them, who may not, you know, have such a good grasp of how to use it, and they're saying, oh, don't listen to those, you know, to those training people. This is the way to do it. And it's not the way that you want people to use your system.

So it's important to pay attention to what we call the veteran training for staff who are coming out of new worker training and, you know, are in the field actually doing the job.

Engaging super users, you know, if at all possible, have them for as long as you have an application. We got super users engaged and trained during implementation. But what happened was, they went back to their case loads, and I think that left a gap. So we are, you know, trying to fill that gap with other units and regionally based individuals.

But the best thing you can do is once you have those folks identified early on as super users, get them engaged, keep them in that role. And let them be available, you know, for staff in their general regions, to help them when they have questions.

Involve technical staff from the beginning to avoid rework and hashing of the requirements. Yes, because you may have great ideas - you know, I'm on the program side. . You may have great ideas from the program side or the business folks in saying, I want to do this.

But it's not something - you know, it's something that may not even be possible. Or your technical person may have a better solution on how to do this so, you know, anybody that's going to be working on the system, policy, technical, they need to be having conversations together from the beginning of time, from the germ of an idea, from the beginning of the requirements gathering.

Provide end users the ability to track help desk incidents and change requests. I think this keeps them engaged. They feel responded to. They feel heard. We get a lot of, you know, enhancement requests from end users, so you need to be able to respond to them, keep them interested. And keep that communication going with them.

Users become frustrated when the large changes always supersede the smaller changes. Yes, and we know we have to make the big changes. You know, when you've got a big change in program or policy and practice, you've got to get those things out there. And we're finding it you know, only goes so far.

One of the things you can do is, you know, as you work on the big pieces, if it affects some of the small ones, bring that in there as well. That's been an issue for us, and just recently what we've done with this new contract, here it is, I've set aside some capacity, so that we're working not only just on the big pieces but we're also doing, you know, some work on the smaller change requests that may not necessarily fall onto that umbrella of the big piece of work.

So, you know, users are happy when we do that. It may be as small thing as a label change, or a word change. But they're happy to see that happen. So that would be my recommendation. Try to find some capacity to focus on that separate from the big work.

Joyce Rose: This is Joyce, and I think we will - we'll move on to our Q&A session. And as we switch slides, I - the amount of information that you have provided is just overwhelming, and I commend you on your enthusiasm. So Elizabeth, can you conduct the Q&A session, please?

Elizabeth Mertinko: Absolutely, I sure can. So Marcia, if you could just let our attendees know how they can queue up for questions.

Coordinator: Why thank you. At this time we'll begin question and answer session. To ask a question, please press star 1 on your touchtone phone. Please unmute the line and record your first name only. To withdraw the question, please press star 2. Once again, please press star 1 to ask a question for the audio portion. And one moment please.

Elizabeth Mertinko: Okay. And while we're waiting, we do have a question from, I think, way back to - towards the beginning of the Webinar when we were talking about help desk, we had someone ask, what is the ratio of workers to help desk staff in your state? Is your help desk centralized or dispersed throughout the regions?

David Ayer: So this is David in Maryland. We have a centralized call center, five staff, and we have - oh goodness, I know we have several hundred supervisors. I think in all we have 1,300 to 1,500 users, possibly a little bit more. And so, obviously the ratio's rather challenging.

We have hours from 8:00 to 5:00, and we take both email as well as phone calls, and have not seen, I think, too much of a bottle neck in handling at this stage of the game in our development, because we're running much more smoothly now than five years ago.

Elizabeth Mertinko: Okay. Did any of the other speakers want to respond to that?

Karen Faulk: This is Karen. We - the most of our help desk tickets come from users who are having - who have an issue with the Access system. And so our help desk is really more than just for Access, but it is - that is the bulk of our calls. And I think we have around 400 CPI workers in the state that maybe - it may be a little more than that.

And we have one person who is pretty much the person who's managing the help desk, one. But there are a couple of other people who are backup, who are available to assist, but who have primary duties to do other things. But that help desk person is housed within the child welfare systems unit, and so those other systems unit staff can assist if the volume is too high.

But the one person who's been handling it manages it fairly well, without having to call on other staff members for help.

Elizabeth Mertinko: Okay. Marcia, do we have any questions on the line?

Coordinator: I do have one question currently. Rita, your line is open.

Rita: I am wondering about the tickler, and he mentioned the program that he was using. And I was curious to know the name of it again.

Tomy Abraham: Oh okay. This is a business process management system. We currently use something called a JBPM, J-B-P-M. This is a product from Red Hat. It is an open source product, but - it's not from Red Hat, I'm sorry. It's an open source product. But if you want the support, Red Hat does provide that, but there are many systems, many vendors with commercial products who provide this kind of a capability. They are all called business process management systems, BPMS.

Rita: Thank you.

Tomy Abraham: No problem.

Elizabeth Mertinko: Okay. Marcia, do we have other questions on the line?

Coordinator: I do have another question. I am listening to the name real quickly. Chiva, your line is open. Go ahead with the question.

Chiva: Yes. I just wanted to find out, like, when - like, three of the states has reported that they have moved from client-server to web-based system, right. I just wanted to find the major challenge that they had to go through when they moved this client-server to a web-based.

Tomy Abraham: I think one of the - this is Tomy from Massachusetts. I mean, we do not have a vendor. We do it internally. The major challenge - well, there were many challenges, but when we move, obviously policy, there are changes in policy over the last so many years. And you have decisions - or you have metrics feed into other systems.

So in such a situation, it is - the way we take it is, if people want - it's not an inventory computer system anymore. So people always have, you know, there are people - there are normally who knows - who does not know how to use the keyboard or mouse or things like that. Those are gone.

But what people want is a better system than what they are using. And our challenge is that takes time. It's just not data entry screens. What users are comfortable with is much more interactive system, I should say, than just brute force data entry. And in our case, the challenge is designing it.

It takes a little bit of time, than a regular system design, when you have multiple functions and how you can integrate them, and provide user with a productive transactional system rather than, as I say, a brute force data entry system which was the previous generation of our child welfare systems.

Now, but obviously, there are other challenges, which everybody knows is just budget, time constraints. But I, at least from my point, people will have different backgrounds and scenarios to address them. Thank you.

Chiva: Thanks.

Elizabeth Mertinko: All right. Marcia, other questions?

Coordinator: Once again, you may press star1 for questions on the phone.

Elizabeth Mertinko: Okay. I have one question online. Are the states help within a build or release, or can it be updated outside a build/release?

Tomy Abraham: I'm sorry, what was the question?

Elizabeth Mertinko: The question as it was typed in is, are the states help within a build or release or can it be updated outside a separate build/release?

Tomy Abraham: Generally it is better - I mean, in our case, we do inside releases. So we try to do all changes through major releases itself, because there is an overhead for each release. So you try to minimize the number of releases, and try to minimize the changes that is done outside the release itself, even though there are some changes, obviously, based on your architecture that could be done outside the release.

But again, for any change, you have the overhead of coordinating it, testing it, releasing itself. So most of our changes are through the release itself, inside the release.

Karen Faulk: This is Karen, and we do most of our work through releases. There are instances where - well for Access it's a build. And we identify what changes are going to be in a build, and then that work is completed and the build is deployed. There are instances where something needs to be changed outside of a build, and so it is possible to make some changes as a patch process.

And sometimes that can be the regular - that can be the only thing that needs to be done, and other instances, the patch may be temporary until the next build, and then it's implemented through a more traditional method of making the change. At our mainframe system, we don't have to worry about that. We can do changes immediately. And so there's not a time delay in terms of doing a build like there is for the Access web system.

David Ayer: This is David. In Maryland we have builds every other month, generally, and it's been a few years since I can remember having to do a build outside. On rare occasion we may have to do a patch or an update, but we try to get to it in the next month if we really are rather urgently needing that.

Many years ago when we were first starting out, we actually had to undo a build, make some changes and fixes and then re-release that build, but that was probably about five or so years ago. We don't have those kinds of issues right now.

Colleen Mousinho: And this is Colleen. And we do ours usually through the build or release. We make the changes at the same time.

Elizabeth Mertinko: Okay. Marcia, do we have other questions?

Coordinator: Yes, I do have another question. Chiva, your line is open.

Chiva: Yes, this is Chiva again. Actually, just wanted to get the feel of the two systems that - from Georgia and Massachusetts that reported like, you know, they're using the Java base. I really wanted to see, like, what kind of application server, if it's not too technical, if you could share with us that...

Tomy Abraham: We... Sure. This is - ours is a WebLogic server. It's on 11g. That's what the current release. And for - I can certainly share the technology, it's called JSF for the JavaServer Faces that we use front end, and rest of it's all regular Java frameworks and all that. We...

Chiva: And do you...

Tomy Abraham: Go ahead, sorry.

Chiva: Sorry, go ahead.

Tomy Abraham: No, no. You go ahead.

Chiva: Yes, the other thing is, do you guys use web services to, like, you know, you were talking about, like, connecting to a different agencies. Do you guys use the web services to connect to the different agencies to get the information back and forth?

Colleen Mousinho: We use WebLogic, Georgia.

Tomy Abraham: In Massachusetts, we do use web services for all the - well, there are two types of interfaces. There are pure data interfaces, where there is no user interaction from other agencies. For that one, we do not have to use Web service. But there are interfaces that we do use Web services for data exchange. In this case, obviously, the user from external entity is querying our database to see certain information or interact with some information.

Chiva: One final question that I have is, what kind of bug tracking, like is it, like open source Bugzilla that you guys are using to track the bugs, or using like, a proprietary one that you guys use it?

Tomy Abraham: In Massachusetts we have two things, one is for driller production support, we use Ram Ready, because everybody has that, and that's easier. But if a defect or a track has to be cycled through the development team, we transfer that to JIRA, which is an open source, very effective bug tracking - not bug tracking. It's a full cycle management and software cycle management system.

So inside that, we - so we use both, and there is a transfer of an issue from Ram Ready to the JIRA, which is the developer team defect tracking system. So obviously, as you can see, the development team needs to look only at the issues that are coming to JIRA, because that requires further analysis, and possibly a build itself. So that's how we try to segregate from our production support to actual development cycle itself.

Chiva: Oh sorry. One more question, so final...

Tomy Abraham: Sure, sure. I have time. I don't know about others.

Chiva: For the queuing, do you guys have the automated clips that silk run around, like, you know, maybe the Ideal products, or like is it - I know some of the things, we do it manually, from a worker perspective but, yes, just wanted to see whether you guys have an automation into the QA.

Tomy Abraham: We do have - at least in the case of Massachusetts. I'll speak for Massachusetts. The QA automation clips are there, I mean, HP, Mercury, they're still there for our performance tests. We are trying to start with a framework, for testing framework at least, so that our critical test cases could be tested with each of the releases.

Because one of the challenges with a staged migration is you have many - five or six smaller releases rather than a big bang release. So for each of the releases you wanted to make sure that rather than going back and testing the entire application, we would like to see all the test cases, our use cases, are fast.

So we are trying to start at the smaller level, with regular integration test case automation itself. But obviously, all the performance test is (grouped), HP, Mercury or any tool, you can use. I don't think I need to specify a vendor.

Chiva: No - yes. Thanks for the information. Actually, this is from Mississippi. Actually we were trying to get a new system, so I just wanted to see how each and every person I've been, like, you know, every state has been using it so that we'll have some input to go ahead and provide some feedback, so that we'll have, at least a perfect system. Let me put it that way.

Elizabeth Mertinko: Okay, perfect. Okay.

I know we've run a bit over. I'm going to see, Marcia, do we have one more question on the line?

Coordinator: Currently no questions have formed so far. Once again it's star 1.

Elizabeth Mertinko: Okay. Or actually, I think, Joyce, why don't you go ahead and close it up since we are running a little bit long?

Joyce Rose: Okay, and let's move on to the next slide. Let's do a little bit of a conclusion. So what have we accomplished today? Well we certainly have shared with you some terrific insights from five state participants regarding their state focus on and certainly the high regard that they hold for their end users.

We certainly hope all of you who have attended this webinar have found it to be a valuable resource in your day-to-day interaction, communication and concern for your end users. Now if you have any additional questions or would like to contact any of our guest participants, please do not hesitate to contact me at the email listed above. Again, it's joyce@kassets.com.

Again, this webinar has been recorded, and will be made available online. When it is complete and posted, we will send a message via the SACWIS managers' Listserv with the appropriate link. Again, I want to thank our guest participants. You did a marvelous job, and it was terrific working with you. So now I would like to turn this over to my colleague, Elizabeth, to tell you about the next webinar series. Thanks.

Elizabeth Mertinko: Yes, sure. So as Joyce mentioned, this was the sixth of six webinars that we offered in a Back to Basics series over the next - over the last six months. Starting at the end of October 2013, we will begin our next webinar series, which is going to be focused on procurement. And our first topic will be on requirements, and requirements gathering, how to do that well, what some of the best practices and lessons learned are around that subject.

So be watching the SACWIS managers' Listserv for more information about that webinar and that series overall. Again, we are aiming to do the first webinar at the end of October. So Joyce, that's all the information I have to share.

Joyce Rose: Thanks Elizabeth. And again, thank you to our presenters and to our attendees. Goodbye.

Tomy Abraham: Thanks, guys.

Coordinator: Thank you. This concludes today's call. Thank you for participating. You may disconnect at this time.