Training Module:
Introduction

County APD Process Training
November 16, 2007

Welcome and Thank You

- Welcome to the County APD Reengineered Process Training sponsored by the Office of Systems Integration (OSI).

- Thanks to all staff who are able to participate at ISAWS building in Sacramento and via webcast conference across the state.

- Huge thanks to Adobe and their partners for support of today's session.

APD Training Agenda

9:30a	Introduction	Tiffany Rolston
9:40	Keynote	Carlos Ramos Meg Sheldon
10:00	Summary of County APD Reengineering Process Project Results and Session Objectives	Tiffany Rolston
10:15	APD Workflow Overview of Template	Jo Anne Takashima Kristine Dudley
11:30	APD Section 2: Business Justification	Terry Patton Yvonne Lee
12:00p	Lunch	
1:00	APD Section 4: Benefiting Programs and APD Section 5: Cost Allocation	Doug Park
2:00	APD Section 6: Method of Procurement	Pat Cruz
3:00	Q & A	Tiffany Rolston and Presenters
3:20	Wrap Up	Tiffany Rolston
3:30	Session Complete	

Date: 11/16/2007

GROUND RULES

- Please be mindful that this session is being recorded – these presentations are broadcast over the web and recorded for repeated use.

- Ideas, questions and suggestions are welcome – please use your comment cards and/or survey options.

- Avoid side conversations as they may affect the quality of the audio recording.

- Respect everyone's time by using the Q & A process offered today.

- Turn off or silence cell phones.

Housekeeping On and Off the Web

- Today's modular training approach is designed to accommodate live webcast and recording for future use.

- No scheduled breaks are set in the agenda before or after lunch due to timekeeping constraints on the webcast.

- Online banners will be displayed during pauses or breaks in webcast.

- Please be patient during module transitions–-the webcast display takes a little time to load with updated presentation.

- Lunch: ISAWS participants have a handout with local map.

- Restrooms are across the foyer down the hall here at ISAWS.

And now, a word from some very special guests…

Keynote Speaker

Carlos Ramos

Director

Office of Systems Integration (OSI)

Keynote Speaker

Meg Sheldon

Information Technology Associate

California Welfare Directors Association (CWDA)

APD Training
Module Presenters

Presenters (in order of appearance)

Tiffany Rolston
Continuity Consulting, Inc.

Jo Anne Takashima
Manager, Administration Services Unit, Office of Systems Integration, Child Welfare Services Case Management System (CWS/CMS)

Kristine Dudley
Manager, Consortia Management Unit, Office of Systems Integration, Statewide Automated Welfare System (SAWS)

Terry Patton
Manager, Administrative Services Unit, CDSS CMS Support Branch

Yvonne L. Lee
Chief, Program Technology Bureau, CDSS Welfare to Work Division

Douglas Park
Chief, CDSS Fiscal Systems and Accounting Branch

Pat Cruz
Staff Counsel III, CDSS Legal

The Q & A Challenge:

Handling Audience Questions in a Webcast Environment

Questions & Answers Overview

- Question and Answer priority for today's session will emphasize changes or enhancements related to the Reengineered County APD Process.

- Questions from onsite and web audience will be recorded via *APD FAQs* document. This document is stored on the APD website and will be maintained on an ongoing basis.

- *APD FAQs* is essential to continue support and maximize available web technology.

Q. Where do I submit CWS APDs?

A. CWS APDs should be submitted to the CWS Mailbox at CWS_APD@OSI.CA.GOV

Q. Where do I submit SAWS APDs?

A. SAWS APDs should be submitted to the SAWS Mailbox at Project. Approvals@osi.ca.gov

Q. How do I complete an APD for the various types, i.e. an APD that benefits SAWS, CWS/CMS, both CWS/CMS and SAWS, or one that contains Generic Costs?

A. The State has provided guidance on the completion and submission of these types of APDs. There are four types of APDs; CWS/CMS, Dual Approval, Generic, or SAWS. To find details on a specific types of APDs and further details on the requirements and submissions, etc. go the OSI website @ http://bestpractices.osi.ca.gov/countyapd/countyapd.aspx .

Q. What is the definition of "Generic"?

A. The same definition applies to the APD process as is found in the CWDA CEC Workgroup County Expense Claim Guidelines and Procedures Manual where Generic is described as follows:

The "Generic" function allows casework staff to time study to generic, or administrative non-casework activities. This allows the County Agencies the organizational flexibility to utilize casework staff to provide such generic administrative support services, without having to reassign them to an administrative arm of the department. The CEC allows for expanded use of generic as an interim "function" for the charging of support operation costs, such as space, travel, etc. Please note that general administrative costs, including staff costs that time study to generic activities, do appear as generic costs on the CEC. These costs should not be confused with the generic (casework) activities.

Q & A Format for Webcast

- Web audience has an online Q & A function available in the Adobe Conference Room.

- Q & A time has been built into the modules. At the conclusion of the structured module presentation, each presenter will verbally answer questions received from our web audience.

- All verbal Q & A will be recorded using session audio equipment. This requires careful attention so all verbal interaction is captured for the broadcast.

Q & A Format for Onsite

- Onsite audience may submit written questions on FAQ cards included in the handout packets.

- Questions cards will be collected at the end of each module.

- At the end of the day, question cards will be used to conduct a standalone Q & A module.

- Question cards will be read out loud by the facilitator for module presenters to answer, again relying on audio equipment for the web audience.

County APD Reengineering Process Project

Results

Goals of the County APD Process Reengineering Project

Charter for APD Process reengineering results:

- – *Timely decisions*

- – *Reduced escalations*

- – *Single consistent, understandable, and auditable approach*

Results of
County APD Process Reengineering

The following benefits will be realized:

1. Overall time savings for counties.

2. Better information from the counties allowing OSI and CDSS to perform timely reviews and approvals.

3. Transparency of process to all stakeholders.

4. Involvement of all stakeholders throughout the project for consensus and understanding.

5. Development of an expedited review and approval.

6. Improve OSI/CDSS credibility with Federal Funding Partners.

APD Training Session

Goals and Objectives

APD Training Session Goals

Participants will understand the following:

1. The goals of the County APD redesigned process.
2. How the process has changed.
3. When new procedures need to occur during the APD process.

Participants will be familiar with both:

1. APD enhancements
2. How to access and use on-line tools

Participants will be able to act as a resource to other staff.

APD Training Objectives

1. Provide an overview of the Reengineered APD Process by describing:

- New templates, tools, development aids and training

- Service Level Agreements

- Increased approval authority for Project Office and Project Approvals

- Counties can self-certify on Cost Allocation and Procurement

- Limitations to new findings on *Repeated* APD submissions

- Online APD Tracking Log and new OSI APD Website

APD Training Objectives

2. Describe specific changes to the APD process.

- Project-related changes are summarized in the Introduction Module.

- Specific changes of process are described in each module of the APD Training Session.

APD Training Objectives

3. Introduce new APD tools.

- Each module will reference any new tools or procedures that are applicable to that topic.

APD Training Objectives

4. Educate counties about new APD Template.

- A separate training module follows that describes the new APD Template and APD reengineered workflows.

APD Training Objectives

5. Provide training that enables counties to access resources available for developing conforming APDs.

- All newly developed content and resources described today are accessible on the web via:

http://bestpractices.osi.ca.gov/countyapd/countyapd.aspx

APD Training Session

Turning to the Onsite Handouts…

Contents of Onsite Handouts

AGENDA
LUNCH MAP
TABLE OF CONTENTS
PRESENTATION SLIDES FROM EACH MODULE

TAB: Introduction
Goals and Results of Project (Slide)
Tracking Log (example)
Best Practices URL (Slide)
APD FAQs

TAB: County APD Workflow
Color Work flow diagrams (8)

TAB: APD Template
Templates in order
      Standard
      SAWS/Generic
      CWS/CMS
      Dual (Both CWS/CMS and SAWS)
"Is an APD Necessary?" Checklist
OSI APD Review Checklist
APD Content Development Aid

`

TAB: Business Justification
The Don't of Business Justification (Slide)
Documentation of Program Need (SAWS)

TAB: Benefiting Programs and Cost Allocation
Cost Allocation Self-Certification Forms
See Tab for Other References

TAB: Method of Procurement
Procurement Pre-review Checklist
APD Procurement Pre-review Checklist
Procurement Self-Certification Form

TAB: Other References Posted to the OSI Web Site
URL for Best Practices.
Include Reference slide from the Business Justification module.
OMB A-87
"Other References" slide from the Procurement module
Division 28 URL

TAB: Contacts
From all modules.

APD Training Session

APD Website and Tracking Log

County APD Website

County APD Website

County APD Tracking Log

County	APD Type (CWS, SAWS, Dual, Generic)	Review Level (1-4)	APD Tracking #	Submission #	APD Title	Total APD Cost ($)	APD Received from County Date	Admin APD Review Completed Date	Admin APD Review Sent to County Date	State Review Completed Date	Findings Sent Date	Escalated to Mgmt Date	Federal Sent Date	Federal Response Date	APD Disposition Letter Sent Date	Approved (A) / Not Approved (N)	Claim #	Comments
Sacramento							MM-DD-YYYY	MM-DD-YYYY	MM-DD-YYYY	MM-DD-YYYY	MM-DD-YYYY	MM-DD-YYYY	MM-DD-YYYY	MM-DD-YYYY	MM-DD-YYYY			

End of Introduction Module

Next Presenter
Jo Anne Takashima

Administration Services Manager

Office of Systems Integration

CWS/CMS Project