



The Employment Training Panel

Cal-E-Force External Stakeholder Needs Session Focus: ETMS Contracts Migration

Sessions:

April 25, 2019 - 1:30 PM – 3:00 PM

April 26, 2019 - 10:00 AM – 11:30 PM

May 20, 2019 – 2:00 PM – 3:30 PM

Welcome

Welcome to the External Stakeholder Needs Sessions for ETMS Contracts to be migrated

Session Narrator: Kristin Centanni from Guidehouse

Note taker: Kelsey Oehrke from ETP

Executive Representatives: Jill McAloon and/or Michael Cable

Facilitator: Babette Davis

Format

Presentation and discussion of ETMS Contracts and data to be collected and migrated.

Allow 1.5 hours

Webinar with muted mike – use the “raise a hand” function

Meeting Structure

The first 3 meetings will use GoToWebinar – instructions for access were sent when you registered.

Designated Q&A throughout presentation

“Raise a hand” through GoToWebinar

Ask a question through GoToWebinar

Session Goals

Capture the ETMS migrated contract support needs.

Address your inputs/needs/requests, with resolutions being:

Addressed in current system

Not part of ETMS Migration solution – Future considerations

ETP Policy related and referred to management

Your inputs will be the basis for the External Stakeholder screen(s) and report prototypes that will be shared in another series of meeting (May 2019)

The first phase of the project (and the only phase being addressed) is the migration of ETMS contracts.

This will be done in June 2019

This means we need to have current ETMS data and out of ETMS and in Cal-E-Force

Mirroring the legacy business process where possible

Why Salesforce & Cal-E-Force

The benefits of the Salesforce technology:

Is scalable and provides full cloud-computing capability

Supports fully customized applications

Provides necessary features required of a State of California IT System

Has built in infrastructure for security, hardware and connectivity

Salesforce provides a flexible platform for us to move ETMS contract data to in a short timeframe

Cal-E-Force will be delivered over time based on external stakeholder and internal staff needs

Key Functions for ETMS Contracts

Pre-Application and Eligibility, Application Development, Panel Proposal and Contract:

To be designed or developed

Not part of the current efforts to Migrate ETMS contracts

Contract Management, Financial Execution and Close Out:

Focus is on contract execution

Ability to continue managing ETMS contracts. Processes are:

Enrollments

Hours Tracking

Invoicing

Revisions

Modifications in this area can be made prior to full launch

How Will I Get Into Cal-E-Force?

We need to develop a landing page for External Stakeholders to access the Migrated ETMS contracts

Would you like to see a prototype developed?

What would you like on the page?

Do you think a link from the ETP website would be good?

There is no reason with Salesforce that the screens and pages have to be the same as staff-allow for lots of flexibility

What Do You Need for Contract Management?

Must haves:

See Contract Summary Information

Get Status on current progress

Way to submit revision requests

Way to check status of revision requests

What would you like?

Would you like a prototype of a screen to comment on?

Contract Summary

Contract Revision Request

What data would you like to retrieve pertaining to contract status?

What Do You Need for Enrolling?

Must haves:

Have a screen to enroll trainees

Ability to enroll using Excel based uploads

Reduce the amount of data required to enroll

Partial upload success and error management

What would you like?

Removing some of the requirements from ETMS

Such as associating the enrollees to the occupation

Would you like a prototype of a screen to comment on?

Single (manual) enrollment

Upload Template

Upload Process

What data would you like to retrieve pertaining to enrollments?

What Do You Need for Hours Tracking?

Must haves:

Have a screen to track training hours

Ability to track hours using Excel based uploads

Reduce the amount of data required to track hours

Partial upload success and error management

What would you like?

Simplifying some of the process from ETMS?

Such as removal of class titles (except for CBT hours)

Simplified Curriculum Structure

Would you like a prototype of a screen to comment on?

What data would you like to retrieve pertaining to hours tracking?

What Do You Need for Invoicing?

Must haves:

Have a screen to enter invoice requests

Provide Excel based uploads

What would you like?

Greater transparency around invoice adjustments?

System provided editable default values on final invoice?

Would you like a prototype of a screen to comment on?

What data would you like to retrieve pertaining to invoicing?

What Else Do You Need?

What do you want to see?

We will be using prototyping so you can “see” what could be in the system

This allows for quick review and iterative development

Salesforce provides for rapid deployment which means we can have prototypes ready in about 2 weeks

What metrics would be valuable to you?

We are assuming Excel CSV formatted uploads and outputs are the desired method?

Are there other reports you would like?

Next Steps

April 2019 Introduction Sessions: 3 working sessions completed.

May 2019 Prototype Walkthrough Sessions

June 2019 Move to Cal-E-Force and Training & Tailored Support

Keep an eye out for training communications!

Thank You!

Executive-Level Contact, Jill McAloon, Chief Deputy Director will address concerns:

Jill.McAloon@etp.ca.gov

Ideas or Comments:

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