STATE OF CALIFORNIA
Budget Change Proposal - Cover Sheet
DF-46 (REV 07/23)

Fiscal Year	Business Unit Number	Department
2025-26	4300	Department of Developmental Services

Hyperion Budget Request Name	Relevant Program or Subprogram
4300-077-BCP-2025-MR	4140015 Operations 4149001 Program Administration

Budget Request Title
Life Outcomes Improvement System (LOIS)

Budget Request Summary
The Department of Developmental Services (Department) requests $13.3 million ($5.1 million General Fund) for one-year limited-term resources equivalent to 17 positions for the Department, resources for regional centers, and contracted resources in 2025-26 to continue the planning phase of the Project Approval Lifecycle (PAL) process.

Requires Legislation (submit required legislation with the BCP)	Code Section(s) to be Added/Amended/Repealed
☐ Trailer Bill Language ☐ Budget Bill Language ☐ N/A	N/A

Does this BCP contain information technology (IT) components? ☒ Yes ☐ No *If yes, departmental Chief Information Officer must sign.*	Department CIO Jim Switzgable	Date 5/14/2025

For IT requests, specify the project number, the most recent project approval document (FSR, SPR, S1BA, S2AA, S3SD, S4PRA), the approval date, and the total project cost.

Project No. 4300-064 – DSMP, 4300-063 - eHR **Project Approval Document:** DSMP S1BA/ eHR S1BA

Approval Date: 1/10/2025 (DSMP) & 1/09/2022 (eHR) **Total Project Cost:** TBD

If proposal affects another department, does other department concur with proposal? ☒ Yes ☐ No
Attach comments of affected department, signed and dated by the department director or designee.

Prepared By	Date	Reviewed By	Date
John Wood	5/14/2025	Jim Switzgable	5/14/2025
Department Director	**Date**	**Agency Secretary**	**Date**
Pete Cervinka	5/14/2025	Debra Cooper for Kim Johnson, Secretary	5/14/2025

Department of Finance Use Only

Additional Review: ☐ Capital Outlay ☐ ITCU ☐ FSCU ☐ OSAE ☒ Dept. of Technology

Principal Program Budget Analyst	Date submitted to the Legislature
Christopher Odneal	5/14/2025

A. Problem Statement

The Department administers the Lanterman Developmental Disabilities Services Act, supporting nearly 500,000 individuals with intellectual and developmental disabilities (I/DD) who are served through 21 nonprofit regional centers across California.

Individuals who apply for services at regional centers are evaluated for eligibility and supports during the development of their Individual Program Plan (IPP) to determine the necessary services to achieve their personal goals. Regional centers are responsible for providing an array of services including outreach, intake, diagnosis/assessment, preventative services, placement, individual program planning, advocacy, monitoring/evaluation, case management, and other services as required to meet objectives in the individual's IPP. A primary function of regional centers is the purchase of services for individuals from approved service providers. Additional services are available through state-operated programs. Individuals served directly by the Department receive internal clinical and professional services, as well as medical/clinical/ancillary services and supports based on their individual needs. Services may also include the use of local community medical, psychiatric, social services, or specialized acute hospital services for complex medical/surgical needs, clinical laboratory services, and other diagnostic services. All activities are coordinated with decentralized case management systems, a fiscal system that was developed in the 1980s, separate cost recovery systems for regional centers and state-operated programs, and manual coordination of information.

Current Uniform Fiscal System and eBilling:

Current law requires reginal centers to use a uniform accounting system to ensure continuity and standardization of accounting processes. In 1984, the Uniform Fiscal System (UFS) was implemented at each regional center. UFS is a complex legacy accounting system that requires modifications to meet regional centers' business needs. UFS also interfaces with each regional center's case management system to coordinate service authorizations with invoices and payments. The Department maintains fixes and enhancements with a development copy in its headquarters office. Changes then are updated from headquarters to the regional center production copies on a coordinated schedule.

The Department developed the web-based eBilling software used by community vendors to complete and submit invoices for services provided. The data from eBilling flows into UFS for approval and payment. UFS contains more than 2,948 programs and 736,341 lines of code. Data from each regional center instance of UFS is transmitted monthly to the Department where it is used for program monitoring, legislative reporting, and federal reimbursement billing.

Current Case Management System (coordinated through SANDIS):

The San Diego RC created a case management system called SANDIS in the late 1980s using the platform for UFS. Over time, this became the solution that all RCs use to collect and submit required monthly data to the Department. As regional centers identified additional case management needs, several regional centers developed their own case management systems and there now are six of them. All regional centers are required to submit their data to the Department through SANDIS, so other systems have interfaces to transfer required data through SANDIS.

These SANDIS implementations are managed as independent system environments. They do not interface or allow for centralized core business rule management and integration of case management data across all regional centers. Because several regional centers have now implemented alternative case management systems in the past forty years, there are

disparate data sources, poor data integrity, and non-standard data. These are difficult to aggregate or utilize for program and monitoring activities. These systems also lack interfaces for individuals and families and service providers to access and update their own information.

Current Federal Programs Information and Billing System (FPIBS)

The Department performs a monthly reimbursement process, coordinated with the Department of Health Care Services (DHCS), to invoice the federal government for eligible and qualifying expenditures. The Department's existing federal waiver billing system also was built in the 1980s, originally to support less than 3,000 individuals and one reimbursement authority program. Since then, the regional center population has grown to nearly 500,000 individuals, and the Department administers more than seven reimbursement authority programs. The waiver reimbursement focuses on five functional process areas:

- Administration functions – such as rate tables and managing reimbursement programs.
- Data intake and verification – receiving monthly data from regional centers and providing data results.
- Eligibility verification – exchanging consumer data with DHCS to determine Medi-Cal eligibility.
- Invoicing – aggregating and filtering consumer and claims data for each reimbursement program and generating program-specific invoices and detail files.
- Analytics and reporting.

State-Operated Programs

The Department's internal legacy software, developed over 30 years ago, is limited only to individual identifiable data and billing information is input using a paper process. The needs of the programs and individuals have changed over time. For example, the Canyon Springs Community Facility does not have the IT infrastructure for the current custom software for Medicare Part D pharmacy/physician's orders, and must manually process pharmacy orders through an outside vendor each month. The facility is required to scan and fax all orders and new or discontinued orders to the contracted pharmacy. In addition, Stabilization Training Assistance Reintegration (STAR) homes providing crisis stabilization services utilize community providers, such as general practice and specialty physicians, specialty pharmacies, laboratories, and x-ray services. Resources for supporting and maintaining all legacy systems are becoming more difficult to acquire.

Information Technology Division Resource History

(Dollars in thousands)

Program Budget	2020-21	2021-22	2022-23	2023-24	2024-25
Authorized Expenditures	$7,088	$7,649	$8,822	$11,021	$11,025
Actual Expenditures	$6,659	$7,094	$8,110	$10,838	TBD
Revenues	N/A	N/A	N/A	N/A	N/A
Authorized Positions	76.0	77.0	88.0	106.0	104.0
Filled Positions	71.3	64.8	73.7	98.0	TBD
Vacancies	4.7	12.2	14.3	8.0	TBD

B. Justification

The systems described above are mission critical. They also are aging, inflexible, and incapable of meeting modern case management and fiscal tracking, claiming and reporting needs. The developmental disabilities services community has taken exceptional interest in this project, understanding the overwhelming need to modernize these systems and the opportunity to include public-facing capabilities. LOIS is the approved project to replace all case management and fiscal sub-systems with a single modern integrated solution.

Financial Management:

The Uniform Fiscal System (UFS) is a mission-critical fiscal application, used for purchase of services authorizations, tracking, and maintenance. Modernizing the legacy system will accommodate ever-evolving regional center needs, to support multiple service delivery models, new programs, and higher utilization of services. UFS must be replaced to provide the fiscal capabilities to properly implement rate reform; track, claim, and report expenditures; associate expenditures with individual cases; and provide modern reporting and analytics capabilities. Regional centers continue to struggle with inflexible technology; outdated workflows that require inefficient and time-consuming processes; and insufficient system security and accounting controls to adequately safeguard sensitive and confidential information.

Case Management:

The existing case management systems are disparate, making it difficult to collect, aggregate, and utilize data for effective program and outcomes-based monitoring. The systems contain varied and limited data controls, which negatively impacts data quality and integrity. Additionally, without a single system, processes across the State are not standardized, making it difficult to identify and address access or services disparities.

The existing decentralized system can delay information-sharing when individuals move to a new regional center catchment area, disrupting the continuity of services. Sensitive and confidential information that is central to guaranteeing the continued well-being and safety of individuals is shared via mail or e-mail instead of being available within a single statewide system that can be accessed by regional centers, the Department, service providers, and individuals and families.

Modifications are costly and time-consuming as the legacy systems lack the ability to quickly adapt to the changing needs of the Department and the regional centers. Recent examples from late 2024 and early 2025 include difficulty deploying the new Individual Program Plan template and updated demographic data fields. The environment where each case management system is maintained by the host regional center can create errors with individual application updates. This situation hinders the state's ability to have data that is needed to evaluate program success and architect responsive business strategies in real time. Examples include:

- Inaccurate program participation data
- Delayed updates of consumer residential status
- Delayed reporting on equity of services such as by race and ethnicity
- Limited insight into authorized services
- Limited ability for trend analysis
- Inability to tie progress notes to special incident reports
- Delayed enrollment in the federal waiver
- Independent efforts outside the system to collect information for specific needs, without standardized data or security controls.

Additionally, individuals and their families do not have immediate access to information contained in the various case management systems. LOIS will allow individuals, via the web or an app, to access and update their data and information, communicate with their regional center, and see reports. The modernization will provide a high-level of transparency for program monitoring and administration, as well.

Reimbursement System - Federal Programs Information and Billing System (FPIBS):

The mainframe system has outlived its useful life. Staff resources to support and maintain the system are becoming difficult to acquire and retain. The current system is overdue for replacement and decommissioning. The Department experiences a variety of challenges with the current system:

- Claiming over $6 billion annually in federal financial participation (FFP) is dependent on data supplier submissions and UFS. Monthly data transfers do not always meet data quality standards and often require resubmission by the regional centers. In addition, some data sources critical to reimbursement, such as the Medi-Cal match with DHCS, sometimes fail and result in potentially lost FFP reimbursements. In addition, a delay by one regional center causes a delay in reimbursements for the other regional centers.
- Continuing to support FPIBS technology is a risk. FPIBS is maintained by three highly experienced and technical staff in the Information Technology Division (ITD) Waiver Billing Group. These individuals are experts familiar with both the business and technology environment. The Department has found it difficult to recruit staff to support the legacy technology and consulting resources are utilized to support critical business project needs.
- System modifications can be very time consuming. As federal reimbursement guidelines, laws and mandates change over time, the system is difficult to modify.
- Many manual business processes are needed to generate month-to-month and annual comparisons. For example, the Monthly Net Gross Report can be over 140 pages in length with over 2,000 lines that need to be manually corrected to seek the correct reimbursement. These manual processes also include hundreds of spreadsheets, which are stored on shared network folders and shared spreadsheets.
- FFP programs have different system processes. The 1915(i) and EPSDT invoicing process are performed quarterly, while all other FFP programs are invoiced monthly. As federal authority was added, programs are handled differently, and the supporting long-paid claims data is submitted to DHCS in different formats.
- Flexible and ad-hoc management reports and trend analyses capabilities are not available. When ad hoc reports are needed, staff generate service requests and work with the Data Extract team to provide the necessary data/reports. Depending on the complexity of the request and resource availability, this process may take hours or many weeks to fulfill.
- The system was originally designed to support one waiver program (1915c). FPIBS was developed to support a single reimbursement program and has been significantly modified to support other reimbursement programs over the past 40 years. For example, the Master Client component of FPIBS originally was designed to process fewer than 1,000 cases. The Department currently processes millions of claim lines each year.

The system is beyond its maintainable and useful life, and limits the state's ability to enhance existing programs or pursue new federal reimbursements. The Department had been working toward an interim solution for federal reimbursements (known as the Reimbursement System Project), and will use the information from that prior effort within the fiscal and case management modernization.

State-Operated Programs

Following the closure of several state-operated developmental centers, a developmental services safety net system has focused on person-centered and trauma-informed supports to prevent or transition individuals from highly restrictive settings. The Department continues to monitor the changing needs of individuals to support development of services and programs which may require more coordinated clinical services to support individuals. The Department has identified the following challenges with the current legacy clinical record system:

- Current practice tracks an individual's clinical record utilizing a partial electronic and mostly manual process that stores results in a document management system. Staff are required to utilize multiple systems to enter information or view an individual's clinical records, leading to delayed consumer services and treatments.

- Higher risk of increased costs resulting from additional or duplicate tests to determine appropriate medical treatment that could have been avoided if the systems interfaced; and
- An inability to provide secure telehealth as required by state and federal regulations (42 CFR 410.78).

LOIS is being planned to provide the necessary case management and clinical software supports to effectively and fully document the services provided to individuals. Additionally, the solution also would make it easier for programs that provide direct services to be able to electronically transfer an individual's medical records quickly and securely to other medical providers as necessary, thereby complying with critical interoperability capabilities as identified by the Federal Office of the National Coordinator for Health Information and Technology, and improving coordination of care. Overall, the Department seeks a solution that can support the provision of person-centered services where valuable medical and other service data is available to regional center and state-operated staff to best support an individual.

Proposed Resources:

The requested resources will allow the Department to continue the PAL activities, prepare the solicitation, and plan for implementation of the solution provided by the awarded systems integrator. The requested positions include staff that understand case management and fiscal requirements, and can develop detailed requirements/user stories, support organizational change management (OCM), and conduct the procurement, design, development, testing, training and implementation. Each position will perform specific roles and duties on the project. The request also includes resources dedicated to support regional centers for the project. The Department is working with them to assess the quality of their data and help prioritize data clean-up efforts.

Funding also is requested to continue consulting services to assist with the PAL process, OCM, and Data Management services. These consulting services originally were procured in 2023 utilizing 2021 American Rescue Plan Act federal funding. The Project Manager and Business Analysis services develop the documentation and approvals for the PAL. OCM is needed for managing change with department staff, regional centers, vendors, and individuals. Data Management services are required to evaluate the quality of data from the regional centers, determine cleanup strategy and lead the effort for the regional centers to clean up the data.

A Planning Advance Planning Document (PAPD) and Implementation Advance Planning Document (IAPD) manager will provide Certification Consultant Services for LOIS to request approvals of federal advance planning documents and federal financial certification documents to receive enhanced federal funding. The Department has requested funding from the Centers for Medicare and Medicaid Services (CMS) for the planning, development, and implementation of this project. The PAPD was approved by the DHCS Medicaid Information Technology Architecture group in February 2025. It is anticipated that the project may receive federal funding for approximately 90 percent of the planning effort's eligible costs and 75 percent of eligible implementation costs.

The Department requests the following resources:

LOIS	Count	Classifications (or equivalents)	Division
Project Manager	3.0	ITS II	ITD
Business Analyst	3.0	ITS II	ITD
Technical Architect	3.0	ITS II	ITD
Contract Manager	1.0	ITS I	ITD
Project Support	2.0	ITS I	ITD
Software Engineer	1.0	ITS II	ITD
Program Support	1.0	SSM I	CAYAS
Program Support	1.0	CPS III	WARD
Program Support	1.0	CPS III	CSD
Program Support	1.0	CPS III	CSD
Total Positions	**17.0**		
Regional Center			
Data Analysis	$ 7,255,000		
Position and Requirements Management Tool Funding			
Requirements Management Tool	$ 249,000		
Consulting Service			
PM & BA Services (S2AA, S3SD, S4PRA)	$ 900,000		
Organizational Change Management (OCM)	$ 290,000		
Data Management Services	$ 507,000		
Legacy Systems Analyst	$ 175,000		
CMS PAPD & IAPD Manager (CMS Support)	$ 150,000		
CDT & STP Services	$ 520,000		

Given the complexity and size of this project, the Department is requesting resources for the position-equivalent roles listed above, which are currently working on the project. They will provide the necessary support to the Project Management, Business Analysis and Technical teams, and additional project support positions to move from a 40-year-old disparate system architecture to a consolidated and more flexible system. The requested resources will continue the PAL process to assist in requirements gathering, Request for Proposal (RFP) development, data analysis, data cleanup, perform testing, and support organizational change management. Additionally, the Department is requesting $249,000 in total for an IT Requirements Management tool for three years. This tool is used for requirements management, traceability and test case development, review and approval.

C. Departmentwide and Statewide Considerations

The Department is responsible for overseeing the provision of services and supports to individuals with I/DD. The provision of these services in California is supported by information technology systems. Modernizing the 40-year old systems will improve the accuracy of information monitored by the Department and used by regional centers and state-operated programs to support individuals. The modernized system also will allow individuals to access their own information.

The Department is adhering to the state's prescribed PAL process for new information technology projects and is collaborating with the California Health and Human Services Agency, CDT, DHCS, and the Department of Finance.

D. Outcomes and Accountability

With the requested funding and resources, the Department will continue the PAL stages for the LOIS project.

Projected Outcomes

LOIS WORKLOAD MEASURE	2022-23 (Completed)	2023-24 (Completed)	2024-25	2025 - 26	2026 - 27
S1BA Approval	X				
Onboard New staff	X				
Onboard PM & BA Contractors	X				
Complete Mid-Level Requirements	X				
Complete RFI	X				
Complete Market Research		X			
S2AA Approval		X	Updated		
Complete Procurement Profile		X			
Complete Procurement Level Requirements		X			
Complete SOW			X		
S3SD Approval				X	
S3 Required Project Plans		X	Updated		
Solicitation Released				X	
S4 Required Project Plans				X	
S4 PRA Approved					X
Contractor Onboard					X

E. Implementation Plan

- Release RFP – mid 2025/26
- Contract award –2026/27

F. Supplemental Information (If Applicable)

Please see Attachment A - Workload Analysis (Position Equivalency Descriptions)

WORKLOAD ANALYSIS
Information Technology Division
3.0 Information Technology Specialist (ITS) II
Project Manager

Tasks and Activities	Annual Hours	FTE
Define, clarify, and approve business rules, business requirements, and workflows specific to waiver processes. Liaison with existing subject matter experts as needed to refine business documentation. Develop, update, and maintain project documentation: action items, risks and issues, mitigation strategies, project sponsor decisions, project management plans, memos, etc.	900	
Participate in regular staff meetings (Departmental, Division, Section), project meetings (weekly status, weekly data governance, monthly steering committee, agency/CDT updates), and procurement specific meetings (RFP development, evaluation and scoring, confidential discussions and demonstrations). Prepare for assigned agenda items and status updates. Assist with and facilitate project communications via project meetings, presentations, and status reports. Schedule meetings, prepare meeting minutes, prepare and review material, support hiring contractors, staff, budgets, and project expenditures. Work on program specific findings as noted in Oversight and Validation & Verification Findings and Reports.	1,350	
Work with data governance and conversion preparation team(s) to define data element descriptions and business rules specific to legacy data as well as enterprise-wide data governance.	750	
Track and maintain a list of changes, updates, enhancements, and ad-hoc report requests made to the existing system and update the as-is documentation over the course of the procurement.	600	
Support procurement activities: respond to vendor questions, review draft proposals, score, and evaluate final proposals, and attend product demonstrations. Complete assigned project activities, such as procurement activities, adaptive/iterative development assignments, and testing scripts and testing activities.	1,200	
Work with Organizational Change Management team to develop materials and communicate change to stakeholders, including RCs and internal departmental staff.	600	
ITS II Total	**5,400**	**3.0**

WORKLOAD ANALYSIS
Information Technology Division
3.0 ITS II - Business Analyst

Tasks and Activities	Annual Hours	FTE
Perform duties as business information system lead by working with program staff and subject matter experts to capture and document business requirements. Maintain system documentation. Create, maintain, and update analysis documentation. Decompose legacy system job steps and existing program functionality. Create business process workflows and assist with the creation of system documentation. Responsible for defining, clarifying, and approving business rules, business requirements, and workflows specific to waiver processes. Utilize standard iterative project management and systems development lifecycle methodologies, such as Agile Scrum, Kanban product delivery, and iterative development to achieve project objectives and continuously meet customer needs.	1,350	
Coordinate and monitor modification to business practices.	600	
Advise project team on waiver program enhancements/changes. Work with Data Governance on data definitions and data classifications.	1,350	
Schedule meetings, prepare meeting minutes, prepare and review material, support hiring contractors, staff, budgets, and project expenditures. Act as an ongoing point of contact and facilitate communication between business program and technical staff; externally with DGS and DHCS. Participate in on-going project meetings. Work with stakeholders to meet project deliverables and due dates. Report project risks to Project Manager using standard project management methodologies.	1,350	
Complete project management and procurement activities including the creation of project management plans, PAL documents, statements of work, requirements, minimum qualifications, proposal evaluation and scoring, vendor demonstration.	750	
ITS II Total	**5,400**	**3.0**

WORKLOAD ANALYSIS
Information Technology Division
3.0 ITS II - IT Technical Architect

Tasks and Activities	Annual Hours	FTE
Document systems architecture and all interfaces with the system, both internal and external. Create system hardware and software documentation. Produce and maintain technical system documentation. Responsible for defining, clarifying, and approving technical requirements. Work with program on data definitions and data classifications. Advise project team on program enhancements/changes.	1,500	
Act as a lead in identifying and tracking the technical issues and risks associate with the systems. Assist in solving technical issues related to the system. Develop and maintain a thorough knowledge of stakeholder and project business processes and the data created and required. Act as a technical resource for application and data users, developers and system analysts, and other information technology (IT) staff.	1,500	
Provide oversight for the new solution so that it meets the Department's Enterprise Architecture program requirements.	600	
Complete and maintain the Information Systems Security Plan. Assist in information security assessments. Liaison between the Information Security Officer (ISO) and the Privacy officer so that all security aspects for the data and systems comply with the appropriate Departmental, State, or Federal requirements.	300	
Act as the departmental technical liaison to the solution vendor. Provide technical oversight. Assist with and participate in project communications via project meetings, presentations, and status reports.	900	
Administrative duties, such as scheduling meetings, meeting minutes, prepare and review material, hiring contractors, staff, budgets, and project expenditures. Participate in procurement activities including statements of work, requirements, minimum qualifications, proposal evaluation and scoring, vendor demonstration.	600	
ITS II Total	**5,400**	**3.0**

WORKLOAD ANALYSIS
Information Technology Division
1.0 ITS I
IT Contract & Vendor Management Analyst (Contract Manager)

Tasks and Activities	Annual Hours	FTE
Manage contract terms and service delivery for the Project Management/Business Analysis, Organizational Change Management, Data Management Services, SI vendor, including developing and executing contract amendments and work authorizations; processing invoices; managing contract costs and budget appropriation; and coordinating service level agreement reporting and escalation.	1,200	
Provide contract and vendor support for the DDS ITD portfolio of projects and future system replacements or implementations.	400	
Plan and coordinate budget appropriations for the Project Management/Business Analysis, Organizational Change Management, Data Management Services, SI vendor contract.	200	
ITS II Total	**1,800**	**1.0**

WORKLOAD ANALYSIS
Information Technology Division
2.0 ITS I - Project Support

Tasks and Activities	Annual Hours	FTE
Assist PM and BA leads with defining, clarifying, and approving business rules, business requirements, and workflows specific to waiver processes. Liaison with existing subject matter experts as needed to refine business documentation. Develop, update, and maintain project documentation: action items, risks and issues, mitigation strategies, project sponsor decisions, project management plans, memos, etc.	700	
Assist the PM and BA leads with regular staff meetings (Departmental, Division, Section), project meetings (weekly status, weekly data governance, monthly steering committee, agency/CDT updates), and procurement specific meetings (RFP development, evaluation and scoring, confidential discussions and demonstrations). Assist PM assigned agenda items and status updates. Assist with and facilitate project communications via project meetings, presentations, and status reports. Assist PM with administrative duties, such as scheduling meetings, meeting minutes, prepare and review material, hiring contractors, staff, budgets, and project expenditures. Assist PM with work on program specific findings as noted in Oversight and Validation & Verification Findings and Reports.	800	
Assist PM and BA leads with data governance and conversion preparation team(s) to define data element descriptions and business rules specific to legacy data as well as enterprise-wide data governance.	500	
Assist PM and BA leads track and maintain a list of changes, updates, enhancements, and ad-hoc report requests made to the existing system and update the as-is documentation over the course of the procurement.	400	
Assist PM and BA leads support procurement activities: respond to vendor questions, review draft proposals, score, and evaluate final proposals, and attend product demonstrations. Complete assigned project activities, such as procurement activities, adaptive/iterative development assignments, and testing scripts and testing activities.	900	
Assist PM and BA leads with Organizational Change Management team to develop materials and communicate change to stakeholders, including RCs and internal departmental staff.	300	
ITS I Total	**3,600**	**2.0**

WORKLOAD ANALYSIS
Information Technology Division
1.0 ITS I - Software Engineer

Tasks and Activities	Annual Hours	FTE
Perform software engineering activities for the current system and development to transition to the new solution. Perform and maintain subject matter knowledge of current software development, data platform, and infrastructure. Participate with the branch teams in innovative solutions development to implement best practices, ensure the capability of the current system, and transition to new solutions. Develop standards and maintain documentation on software engineering, data, and architecture, including diagrams and models and technical support protocols. Perform analysis and identify potential technical impacts, system deficiencies, and findings not documented or vetted due to exceptions and managing of a distributed system. Develop and maintain a thorough knowledge of business processes and requirements pertaining to software development.	650	
Act as a software engineer for the project team on planning activities, including development, conversation of data, testing, and integration of systems. Advise the project team on ongoing software enhancements or changes that may impact planning activities. Provide guidance and training to analysts and the development team as needed.	350	
Assist in information security assessments. Understand all security aspects for the data and software and comply with the appropriate data and privacy requirements and guidelines for the state, federal, and department.	250	
Participate in project meetings, communications, presentations, and status reports.	250	
Work with technical architect and subject matter experts, program, and stakeholders on data definitions and data classifications.	200	
Administrative Duties as needed.	100	
ITS II Total	**1,800**	**1.0**

WORKLOAD ANALYSIS
Children, Adolescents and Young Adults Services (CAYAS)
1.0 Staff Services Manager I
Program Manager

Tasks and Activities	Annual Hours	FTE
Provide expertise in incorporating a portal for Early Start self-referrals by parents, caregivers, and all other community members. Initiate and lead workgroups to address open issues pertaining to a mobile app as an option for self-referrals.	350	
Serve as the subject matter expert on Early Start statutes, regulations, and monitoring procedures.	550	
Coordinate and participate in stakeholder meetings to obtain input on the development of system functionalities that will address program implementation requirements (Early Start monitoring)	400	
Handle the more complicated, sensitive issues and develop policy recommendations or solutions. Brief division and department leadership on progress and for required federal reporting	200	
Testing/Training • Assist in the development of the test and training plans. • Assist in development of the scenarios and outcome criteria. • Monitoring of test completion and test defect tracking • Monitoring of training activities and attendance from RCs and DDS • Assist in training Q/A responses. • Assist in lessons learned and continuation trainings.	150	
Stakeholder engagement • Monitor mailbox. o Policy questions o Distribution lists and notification emails • Communication o Updates to DDS website information o Creation of Notices and monthly bulletins o Webinar's coordination and content development o Develop content and validate FAQs. o Event coordination, where participants may include RC, ARCA, Service Providers, Consumers and Advocacy Groups. o Escalating issues/tasks • Assist Organizational Change Management (OCM) Team o Assist with surveys. o Assist with presentations. o Assist with change strategy.	150	
SSM I Total	**1,800**	**1.0**

WORKLOAD ANALYSIS
Waiver and Rates Division (WARD)
1.0 Community Program Specialist (CPS) III
Program Staff

Tasks and Activities	Annual Hours	FTE
Monitor state policies including: • Lead in modifying or creating new policies based on to-be analysis outcomes. • Lead in Monitor regulation change for project impacts	100	
Provider and Consumer Updates • Programmatical expert of Case Management processes at the RC, including vendor management. • Interpreting and converting stakeholder concerns into project impacts, risks, issues, or requests for change o Responding to stakeholder concerns with appropriate terminology and 'RC/vendor/consumer speak'.	100	
Understanding business vision for the consumer and DDS • Knowledge of SANDIS and UFS o Define the requirements of the system for business need tied to the regulations. • Develop requirements • Include requirements in the system. o Update regulations and issue directives o Provide guidance documents o Change management o Assist in the Development and review of mid-level and detailed requirements. o Maintain in depth knowledge of mid-level and detailed requirements. • Assist with market research o Assist in development of market research. o Assure programs needs are met. o Evaluate potential solutions. o Assist in development of market research report.	700	
Procurement • Assist in the development of the Scope of Work • Assist in development of the contract. • Assist in pre-solicitation and evaluation. • Assist is Q/A responses. • Assist in evaluation, interview and Best and Final Offer (BAFO)	100	
Data Management • Assist with Data Analysis • Assist with Data validation. • Assist with data cleanup.	500	
Stakeholder engagement • Monitor mailbox.	300	

o Policy questions o Distribution lists and notification emails • Communication o Update website information o Create notices and monthly bulletins o Coordinate webinars o Develop content and validate FAQs. o Event coordination, where participants may include RC, ARCA, Service Providers, Consumers and Advocacy Groups. o Escalate issues/tasks • Assist Organizational Change Management (OCM) Team o Assist with surveys. o Assist with presentations. o Assist with change strategy.		
CPS III Total	**1,800**	**1.0**

WORKLOAD ANALYSIS
Community Services Division (CSD)
2.0 CPS III - Program Staff

=Tasks and Activities	Annual Hours	FTE
Monitor state policies including: • Handle the more complicated, sensitive issues and develop policy recommendations or solutions. Brief division and department leadership on progress • Map requirements to current policy • Identify gaps between policy and current business practices. • Escalate and manage multiple interpretations of a single policy (understanding/operation may differ between RCs) • Modify or create new policies based on to-be analysis outcomes. • Monitor regulation change for project impacts	400	
Provider and Consumer Updates • Serve as the subject matter expert on regional center operations and services. • Expert level programmatical knowledge of Fiscal processes, both at the RC and Department levels • Interpreting and converting stakeholder concerns into project impacts, risks, issues, or requests for change • Responding to stakeholder concerns with appropriate terminology and 'RC/vendor/consumer speak'.	350	
Understanding business vision for the consumer and DDS • Expert knowledge of SANDIS and UFS o Define the requirements of the system for business need tied to the regulations. • Developing requirements • Ensuring requirements are included in the system. o Updating regs and issuing directives o Providing guidance documents o Change management o Assist in the Development and review of mid-level and detailed requirements. o Maintain in depth knowledge of mid-level and detailed requirements. o Maintain in depth knowledge of To-Be workflows. • Assisting with market research o Assist in development of market research. o Ensuring programs needs are met. o Evaluate potential solutions. o Assist in development of market research report	1,400	
Procurement • Assist in the development of the Scope of Work • Assist in development of the contract. • Assist in pre-solicitation and evaluation. • Assist is Q/A responses.	400	

• Assist in evaluation, interview and Best and Final Offer (BAFO)		
Data Management • Data Analysis • Data validation • Assist with data cleanup	800	
Miscellaneous • Tie other State initiatives with system product/design/implementation efforts. • Providing weekly (or as frequent as necessary) updates directly to Manager/Sponsor • Assist in the development of the test and training plans. • Assist in development of the scenarios and outcomes. • Monitoring of test completion and test defect tracking • Monitoring of training activities and attendance from RCs and DDS • Assist in training Q/A responses. • Assist in lessons learned and continuation trainings	250	
CPS III Total	**3,600**	**2.0**

BCP Fiscal Detail Sheet

(Dollars in Thousands)

BCP Title: Life Outcomes Improvement System

BR Name: 4300-077-BCP-2025-MR

Budget Request Summary

Personal Services

Personal Services	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
Positions - Temporary	0.0	17.0	0.0	0.0	0.0	0.0
Total Positions	**0.0**	**17.0**	**0.0**	**0.0**	**0.0**	**0.0**
Salaries and Wages Earnings - Temporary Help	0	1,834	0	0	0	0
Total Salaries and Wages	**$0**	**$1,834**	**$0**	**$0**	**$0**	**$0**
Total Staff Benefits	0	977	0	0	0	0
Total Personal Services	**$0**	**$2,811**	**$0**	**$0**	**$0**	**$0**

Operating Expenses and Equipment

Operating Expenses and Equipment	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
5301 - General Expense	0	34	0	0	0	0
5302 - Printing	0	17	0	0	0	0
5304 - Communications	0	17	0	0	0	0
5306 - Postage	0	17	0	0	0	0
5320 - Travel: In-State	0	51	0	0	0	0
5322 - Training	0	17	0	0	0	0
5324 - Facilities Operation	0	136	0	0	0	0
5340 - Consulting and Professional Services - External	0	2,022	0	0	0	0
5340 - Consulting and Professional Services - Interdepartmental	0	520	0	0	0	0
5346 - Information Technology	0	402	0	0	0	0
54XX - Special Items of Expense	0	7,255	0	0	0	0
Total Operating Expenses and Equipment	**$0**	**$10,488**	**$0**	**$0**	**$0**	**$0**

Total Budget Request

Total Budget Request	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
Total Budget Request	**$0**	**$13,299**	**$0**	**$0**	**$0**	**$0**

Fund Summary

Fund Source

Fund Source	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
State Operations - 0001 - General Fund	0	2,324	0	0	0	0
0995 - Reimbursements	0	3,720	0	0	0	0
Total State Operations Expenditures	**$0**	**$6,044**	**$0**	**$0**	**$0**	**$0**
Local Assistance - 0001 - General Fund	0	2,789	0	0	0	0
0995 - Reimbursements	0	4,466	0	0	0	0
Total Local Assistance Expenditures	**$0**	**$7,255**	**$0**	**$0**	**$0**	**$0**
Total All Funds	**$0**	**$13,299**	**$0**	**$0**	**$0**	**$0**

Program Summary

Program Funding

Program Funding	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
4140015 - Operations	0	7,255	0	0	0	0
4149001 - Program Administration	0	6,044	0	0	0	0
Total All Programs	**$0**	**$13,299**	**$0**	**$0**	**$0**	**$0**

Personal Services Details

Positions

Positions	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
TH00 - Temporary Help (Eff. 07-01-2025)(LT 06-30-2026)	0.0	17.0	0.0	0.0	0.0	0.0
Total Positions	**0.0**	**17.0**	**0.0**	**0.0**	**0.0**	**0.0**

Salaries and Wages

Salaries and Wages	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
TH00 - Temporary Help (Eff. 07-01-2025)(LT 06-30-2026)	0	1,834	0	0	0	0
Total Salaries and Wages	**$0**	**$1,834**	**$0**	**$0**	**$0**	**$0**

Staff Benefits

Staff Benefits	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
5150350 - Health Insurance	0	152	0	0	0	0
5150500 - OASDI	0	140	0	0	0	0
5150600 - Retirement - General	0	483	0	0	0	0
5150800 - Workers' Compensation	0	29	0	0	0	0
5150820 - Other Post-Employment Benefits (OPEB) Employer Contributions	0	55	0	0	0	0
5150900 - Staff Benefits - Other	0	118	0	0	0	0
Total Staff Benefits	**$0**	**$977**	**$0**	**$0**	**$0**	**$0**

Total Personal Services

Total Personal Services	FY25 Current Year	FY25 Budget Year	FY25 BY+1	FY25 BY+2	FY25 BY+3	FY25 BY+4
Total Personal Services	**$0**	**$2,811**	**$0**	**$0**	**$0**	**$0**