



**Department of Job
and Family Services**

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Office of Fiscal & Monitoring Services

Business Process &
Application Integration



CFIS Web

Webinar

April 11, 2013

Agenda

- CFIS Web – Production
 - Recent Fixes
- CFIS Web – WIA Project Updates
 - Project Overview
 - Schedule
 - Requirements
 - High-Level Concepts
 - Upcoming Activities
- Question & Answer Session

CFIS Web – Production

4/9 - v1.3.12A Fix Release

- Report fixes
 - CR514 Admin and Training Costs
 - CR512 Certification of Funds
- Functionality Fix
 - Timeout Notification Pop-up



CFIS Web – Production

- Timeout Notification Pop-up:
 - Should now pop-up in front of *any* open screens

The screenshot shows the CFIS Web interface. At the top, there is a navigation bar with links for Security, Admin, Master, State Functions, and Reports. Below this is a search bar and a table of budget items. A 'Budget Distribution' form is open in the foreground, and a 'Timeout Notification' pop-up is displayed over it. The pop-up message reads: 'Timeout Notification: Your session is about to expire, any unsaved data will be lost. Please press OK to extend your session. Your session will be timed out in 15 second(s)'. The form in the background includes fields for Budget Type, Budget Name, SL Type, Budget Year, Budget Config, Distribution Type, State Wide Amount, and Do Not Send Budget Notice. There are also fields for Speed Chart Key, Budget Reference, and PO Number. The form has 'Save' and 'Cancel' buttons at the bottom.

CFIS Web – WIA Project

- Project Objectives
 - Expand CFIS Web to allow WIA Financials to be managed by a Fiscal Agent by issuing sub-area budgets and allowing sub-areas to report all financials.
 - Provide accurate and complete reporting on WIA Financials at the State Level for ROI and Performance Metrics
 - Leverage investment & success of CFIS Web and achieve the same improvements for the WIA Program and WIA Area Fiscal Agents and Sub-Areas
- Phases
 - Phase 1 - Financials from the Sub-Area/County in CFIS Web
 - Phase 2 - Pairing Financials with Program Data (SCOTI)

CFIS Web – WIA Project

- Project Schedule ~ Phase 1
 - ~~November 2012 – January 2013 – Kickoff & Requirements Sessions~~
 - ~~February & March – Design Sessions~~
 - **March & April – Development**
 - **April & May – Screen Reviews**
 - June & July – User Acceptance Testing
 - August & September – Training
 - September - Conversion
 - October 1 – Go Live

Functional Requirements Document

- Capturing requirement changes from design sessions.
- BCFTA review and approval.
- Distribution to Project Team for review and approval.
- Distribution to WIB Directors & Fiscal Agents.

High-Level Concepts

- Budget Change Notices to Sub-Areas
- Grouping of Funding (i.e. PY/FY) at Sub-Area
- Automatic/System FIFO of Grouped Funding
- Draw Change Notification to Sub-Areas
- Quarterly Reconciliation by Fiscal Agent

Upcoming Activities

- April/May Screen reviews
- July UAT
- August Training
- Sept. Conversion Activities



Screen Reviews

Date	Time	Location	Attendees
April 23	9:00 AM – 3:30 PM	Rhodes State Office Tower 30 E. Broad Street Room 3801	BCFTA, Monitoring, OIS WIA Fiscal Agents & Subs OWD
April 24	9:00 AM – 3:30 PM	Rhodes State Office Tower 30 E. Broad Street Room 3801	BCFTA, Monitoring, OIS WIA Fiscal Agents & Subs OWD
April 25	9:00 AM – 1:00 PM	Rhodes State Office Tower 30 E. Broad Street Room 3801	BCFTA, Monitoring, OIS WIA Fiscal Agents & Subs OWD
May 7	9:00 AM – 3:30 PM	Rhodes State Office Tower 30 E. Broad Street Room 3801	BCFTA, Monitoring, OIS WIA Fiscal Agents & Subs OWD
May 8	9:00 AM – 3:30 PM	Rhodes State Office Tower 30 E. Broad Street Room 3801	BCFTA, Monitoring, OIS WIA Fiscal Agents & Subs OWD
May 9	9:00 AM – 1:00 PM	Rhodes State Office Tower 30 E. Broad Street Room 3801	BCFTA, Monitoring, OIS WIA Fiscal Agents & Subs OWD

WIA Areas UAT

- When: Friday July 19th - Tuesday July 23rd
- Where: AirCenter, 4020 E. Fifth Ave
- High-Level Activities include:
 - Fiscal Agent reconciliation of Sub-Area Budgets
 - Sub-Area Draw Request submittals
 - Fiscal Agent Draw Request submission
 - Fiscal Agent loading of Sub-Area Expenditure information
 - Sub-Area approval of Expenditure information

WIA Areas UAT

- Expectations of participants
 - Come prepared with necessary data
 - Simulate Go-Live activities by loading SFY13 Jan-Mar Quarter Budget and Expenditure information
- Prepare now for UAT Activities by collecting:
 - Budget Details as of March 31st for Areas *and* Sub-Areas
 - Draw Submission Details for Fiscal Agents *and* Sub-Areas for all 4 Friday's in April (5th, 12th, 19th & 26th)
 - Expenditure details for Fiscal Agents and Sub-Areas for SFY13 Jan-Mar Quarter
- Templates for capturing necessary data will be provided along with more details in upcoming communication

BCFTA WIA Module Training

- Jointly hosted and presented by BCFTA and SSG
- Sessions from August 21st through September 4th
- Across multiple Regional Training Centers
 - Columbus – AirCenter
 - Akron – Ocasek Building
 - Bowling Green – ODJFS Training Center
- Makeup Session – September 6th
 - *Columbus – AirCenter Only*
- Details will be provided at a later date by BCFTA

Question & Answer Session

Questions or Comments:

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