“Children will live in safe, healthy and supportive families and communities.”

Adam Norman, IV-D Director
Joe Jean, Director of Organizational Change Management
Angie Davis, Training & On-site Support Lead
AGENDA

• Project Status Updates
• Technical Readiness
• Training
• On-site Support
• County Profile
• Q & A

INVEST VISION

Be flexible to meet the needs of County Partners who have varying organizational structures.

Be well architected, scalable, and easily maintained.

Improve data quality and security.

Be readily adaptable to implement legislative and policy changes.

Minimize the cost and schedules of programming changes.
County Engagement

• 5 Design Open Houses
• 15 Business Scrums
• 278 Change Champions
• 299 Super Users
• 25 County UAT Testers
• 40 Data Clean-up Reports
• ECM Proof of Concepts & County Meetings

Project Engagement

• 06/01/20 - 01/31/23
• 150+ Team members
• 19 Development Sprints (6 added)
  • 4 Sprint Teams
  • 2132 User Stories
• 10 Data Conversion Sprints
  • 102 Salesforce Objects
• Plus, numerous updates
Technical Statistics

- 168 Screens
- Converting ISETS to INvest:
  - 3 Years Open/Closed cases
  - IV-D/NIVD
  - 515,463 Cases
  - 1,444,110 Participants
- 3 Mock Runs for Data Conversion

Current Status

- User Acceptance Testing (UAT)
  - 12 Week Timeline
    - 7 weeks CSB-IT
    - 5 weeks CSB/County
- Defect Counts (as of 6/1)
  - 192 - DDI must fix prior to pilot
Next Steps

- Training & Implementation Prep
  - Later slides
- Pilot Go/No Go
- Rollout Go/No Go's

<table>
<thead>
<tr>
<th>Group</th>
<th>Day One/Go-Live</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pilot</td>
<td>August 1, 2022</td>
</tr>
<tr>
<td>Regional Rollout #1</td>
<td>October 3, 2022</td>
</tr>
<tr>
<td>Regional Rollout #2</td>
<td>November 1, 2022</td>
</tr>
<tr>
<td>Regional Rollout #3</td>
<td>January 3, 2023</td>
</tr>
</tbody>
</table>

Future Steps

- OCSE Federal Certification
- M & O / Warranty
- Changes/Enhancements
Technical Readiness

Joe Jean

Bandwidth to Support INvest

- **Octane Score**: how quickly a page loads.
- **Network Latency**: the amount of time it takes for data to be captured, transmitted, and processed.
- **Download Speed**: the amount of time it takes for data to download from the server.
**CSB ID USAGE**

**Office 365 Accounts**

- Office 365/CSB ID Account will be used to access INvest
- Activate your account now
- Develop a routine to regularly check emails and Teams messages
- Must use CSB ID to access Teams meeting recordings, chat, etc.

**CLERK-POSTED PAYMENTS**

**Clerk-Posted Payments**

- Receipt printers
- Disbursement
  - ACH will be initiated by clerks
Questions

Training

Adam Norman, Joe Jean, Angie Davis
**LEVEL SET**

**INvest Training Is:**
A basic training course designed to help you conduct your most important business from Day One.

**INvest Training Is Not:**
A comprehensive training course designed to cover all system functionality.
- More in-depth training will be provided during and after statewide implementation.

---

**LEVEL SET**

**Training Questions**

Four types of questions will come up during INvest training.
**Technical Questions/Concerns**

Examples:

1. I’m having trouble logging into INvest.
2. I want the screen in Teams to be larger.
3. I can’t hear the trainer.

These questions are welcome!

---

**System Training Questions**

Examples:

1. Will addresses entered on the enrollment screens transfer over to the intake screens?
2. Can I customize my home page?
3. Is this field mandatory?
4. What happens if I hit refresh in INvest?

These questions are welcome!
### Design Questions/Suggestions

**Examples:**

1. I think that there are too many accordions on Financials.
2. The layout would be better if the home screen displayed the last case you were working on the previous day.
3. The information on the enforcement dashboard and the enforcement actions need to be on the same screen.

These questions/suggestions are welcome but will not be addressed during training.

### Policy-Related Questions

**Examples:**

1. If the NCP requests to close a case, what closure would I use for that situation?
2. Should I send a transmittal 2 or 3 to another state because I need a status update on my initiating case?
3. Is it okay to put a STOP on a new case to allow the NCP time to pay on their case before being submitted to all enforcement actions available?

Policy-Related questions will not be addressed.
PILOT AND SUPER USER TRAINING

Training Details
- Pilot Counties (including CSB)
  - 1 session offered
  - July 13-15
- Super User Training
  - 2 sessions offered
    - July 25-27
    - August 1-3
- Virtual via Teams
- Monday thru Friday
- 9:00 a.m. to 4:00 p.m. ET

PRIMARY USER TRAINING

Training Details
- 12 sessions offered
- Attend just-in-time whenever possible
- May attend earlier or later, space permitting
- Registration for Rollout #1 opens June 27

<table>
<thead>
<tr>
<th>Group</th>
<th>Training</th>
<th>Go-Live</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Rollout #1</td>
<td>September 2022</td>
<td>October 2022</td>
</tr>
<tr>
<td>Regional Rollout #2</td>
<td>October 2022</td>
<td>November 2022</td>
</tr>
<tr>
<td>Regional Rollout #3</td>
<td>November/December 2022</td>
<td>January 2023</td>
</tr>
</tbody>
</table>
Pre-training Meeting

- Wednesday prior to each training session.
- Attendance is required
- Agenda:
  ✓ What to Expect During Training
  ✓ MS Teams Basics & Polls
  ✓ INvest Training Environment
  ✓ Training Materials
  ✓ Final Reminders

*CSB ID use is required during training and for INvest access

Preparing for Training

Find a quiet place where you can avoid interruptions

- What does this look like for your office?
  - Reserving jury room or other office space
  - Splitting staff attendance
  - Office closure
  - Limited services
  - Update voicemail, phone system
  - Notify public
Questions

On-Site Support (OSS)

Angie Davis
**On-Site Support Goals & Objectives**

- Assist in a smooth transition
- Identify, analyze, and resolve troubleshooting issues
- Escalate issues to the Help Desk and Command Center
- Keep workers up-to-date on system changes or issues

---

**T-3 Visit**

- Three months prior to go-live
- In person
- Confirm basic office demographics
- Gather user information
- Assist with technical set-up
- Answer questions

<table>
<thead>
<tr>
<th>Pilot</th>
<th>May/June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Rollout #1</td>
<td>July</td>
</tr>
<tr>
<td>Regional Rollout #2</td>
<td>August</td>
</tr>
<tr>
<td>Regional Rollout #3</td>
<td>October</td>
</tr>
</tbody>
</table>
### T-2 Visit
- Two months prior to go-live
- Virtual via Teams
- Provide Teams training
- Confirm basic office demographics
- Gather user information
- Assist with technical set-up
- Answer questions

<table>
<thead>
<tr>
<th>Pilot</th>
<th>June/July</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Rollout #1</td>
<td>August</td>
</tr>
<tr>
<td>Regional Rollout #2</td>
<td>September</td>
</tr>
<tr>
<td>Regional Rollout #3</td>
<td>November</td>
</tr>
</tbody>
</table>

### Day Zero Visit
- Week prior to go-live
- In-person or virtual via Teams
- Ensure technical readiness
- Explain transitional business processes
- Answer questions

<table>
<thead>
<tr>
<th>Pilot</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Rollout #1</td>
<td>September</td>
</tr>
<tr>
<td>Regional Rollout #2</td>
<td>October</td>
</tr>
<tr>
<td>Regional Rollout #3</td>
<td>December</td>
</tr>
</tbody>
</table>
PRE-GO-LIVE VISITS

Day One Visit
- Day of go-live
- In-person
- Ensure system access
- Troubleshoot technical issues
- Provide hands-on assistance using INvest
- Answer questions

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pilot</td>
<td>August 1</td>
</tr>
<tr>
<td>Regional Rollout #1</td>
<td>October 3</td>
</tr>
<tr>
<td>Regional Rollout #2</td>
<td>November 1</td>
</tr>
<tr>
<td>Regional Rollout #3</td>
<td>January 3</td>
</tr>
</tbody>
</table>

Questions
Where to Find Information

CSR → INvest → INvest Training, INvest Documents, INvest Videos

INvest Training
- Training calendar
- FAQs
- Resources

INvest Documents
- Communications
- ECM Pre-Work
- Change Champion
- Super User
- UAT

INvest Videos
- ECM
- Clerk Work Group
- Change Champion

“Children will live in safe, healthy and supportive families and communities.”

Next Clerk Workgroup Meeting:
June 23 @ 10:00 a.m. ET

INvest Project Team
DcsCbsINvestCommunications@dcs.in.gov