

# CORE Bridging Systems, Reducing Waste

Over years of meeting the demands of operations that supported California Department of Community Services and Development (CSD) programs, as well as other programs, Local Service Providers (LSPs) developed internal processes, procedures, and supporting IT systems for their local business operations. As a result, detailed information which could be used to support business operations at the state level was located in over 40 disparate sets of systems (one at each LSP location) statewide. The lack of a central source of information upon which to base research significantly hindered and delayed daily operations at CSD. To facilitate equal access to information, enable timely communication, and ensure smoother-running operations throughout the State, the CORE solution offered CSD an across-State consolidated and intuitive system.

## Overview

The California Department of Community Services and Development (CSD) manages energy programs that were created to assist low-income families to create homes that are more energy efficient. CSD pays out \$160m in funds to 40+ Local Service Providers (LSPs) throughout the state. There were 9+ legacy systems to support these programs. The CORE Project interfaced with 5+ external systems used by Local Service Providers (LSPs) to provide CSD with a single system containing all energy program data in order to streamline state and federal reporting processes.

### Program Areas:

Utility Assistance, WPO – Wood, Propane & Oil, and Weatherization.

### Users:

100+ Internal, 300+ External

## Key Benefits to the Client

- **Elimination of manual processes** – Employee's time is utilized more efficiently as program interfacing and auto-population replace manual processes and reviews.
- **System processes are free from error and are cost effective** – The solution ensures that client information and services, such as post-inspection and billing, are free from defects.
- **Ease of Use** – The CRM platform has the familiar Microsoft look and feel that allows most users to make a simple transition to the new system.
- **Centralized Data** – CORE is able to act as a centralized data repository allowing historical and current data to be accessed and used for analytical purposes.
- **Tracking of Funds** – Both CSD and LSP will be able to track year to date spending. This information is crucial for determining how many more applicants will be able to receive assistance.
- **Simple Maintenance** – Because of CRM's built in "out of the box" features, any future changes to the system require less work than a completely customized system.

## CORE worked closely with CSD to design a system that could facilitate the following operations:

### Eliminate manual, time-consuming processes:

- CORE obviates the need for manual processes that were previously required due to gaps in system operations.
- Where daily processes were drawn out and fragmented due to reliance on multiple systems, CORE orchestrates multiple and diverse processes in one place.
- Automating various processes and centralizing data highly reduces the potential for error (a pre-CORE analysis focused upon potential billing errors found a 6.18% discrepancy rate).
- The user can issue payments on eligible accounts, automating an important step in completed applications.
- Quaterly Activity reports can be generated and automated through CORE, saving a lot of staff time.
- By automating review items (routine calculations, reference checks, and other administrative reviews) the CORE solution cuts back on staff hours (an estimated 1,500 staff hours are saved by automated review generation).

### The system enables and simplifies data sharing with Partner agencies:

- Data sharing makes it more difficult for separate entities to independently service the same address with energy saving measures. This saves the State time, duplicities, and the related expenditures.
- Central data store allows various State departments to access, assess, and validate client needs based upon current and past actions.

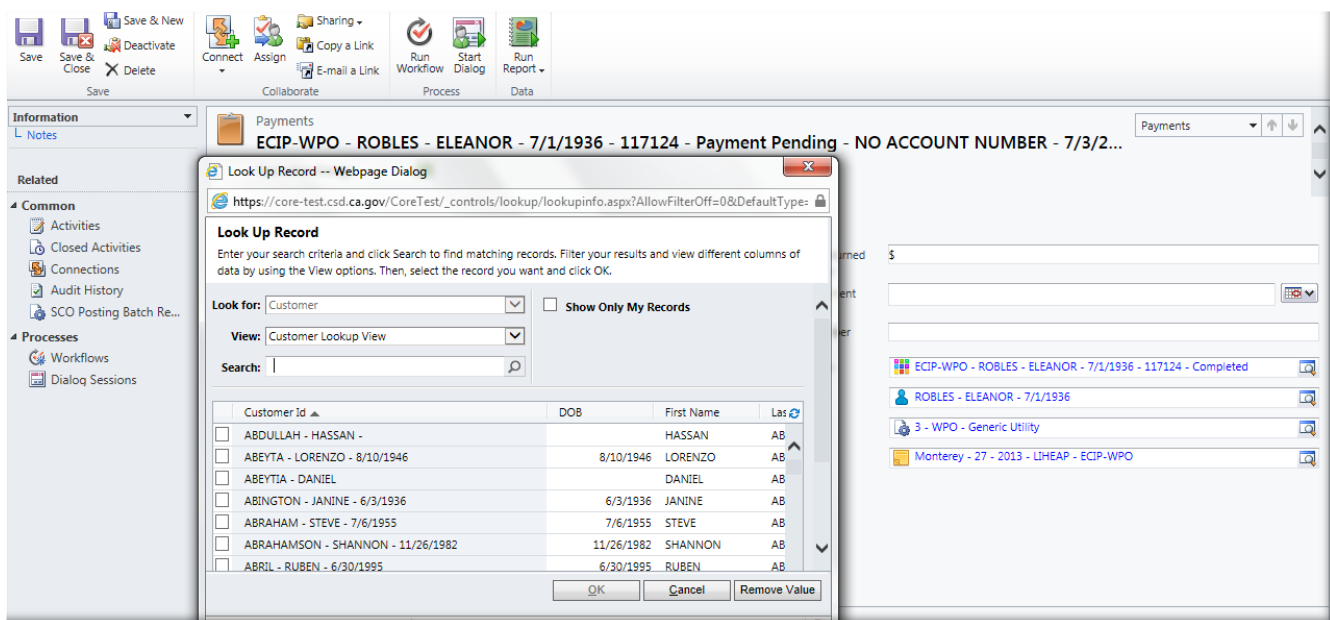


Figure 1. Simplifies data sharing.

### Documents and Pages can be easily generated and shared:

- Tables, views, and forms can be created and customized.
- Overall quicker to-build time with fewer bugs.
- The user can import customer applications and create contracts for an Agency or LSP.
- System creates reports: Year to Date Report, Deficiency Report, Variance Report and Customer Application Details.
- Any data in the system (with the right security privileges) can be exported to/imported from MS Excel.

## The system is intuitive and easy to use:

- Basic Web Application Functions (like Search, Navigation, etc.) are provided.
- Security Roles can be configured using an inbuilt security model, and user management integrates with Active Directory to assign user access levels.
- Dashboards & Charts allow easy display of data.
- Workflows & Plug-Ins are part of the underlying architecture & can be customized.
- Offers an integrated Audit History.

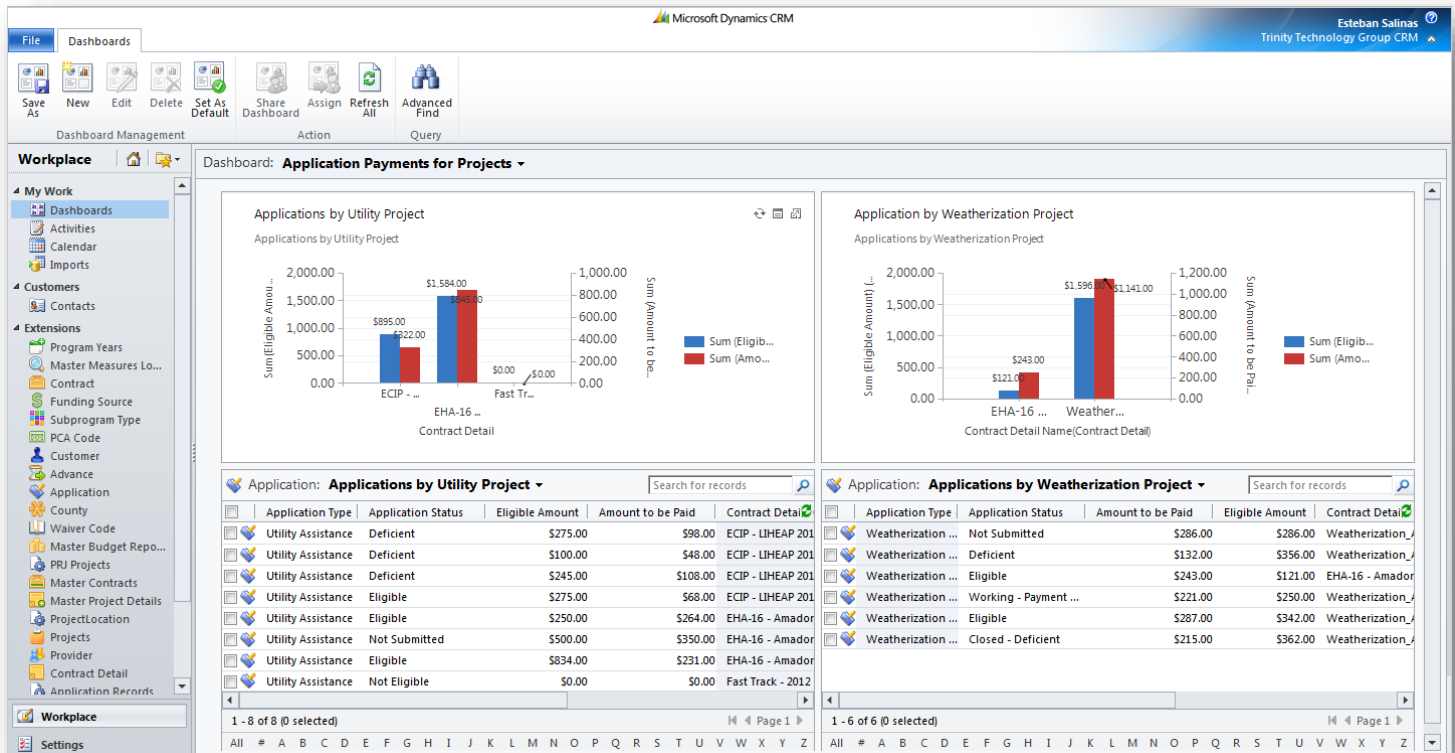


Figure 2. The CORE system's similar look and feel to other Microsoft products contributes to its usability.

## CORE provides current and accurate data that is available Statewide:

- By enabling the fluid movement of data throughout the State, the solution stamps out errors and delays that commonly result from tedious manual processes.
- System changes, especially in terms of capacity and accuracy of data collection, can easily meet new federal reporting requirements and deadlines.
- Automated processing will better verify the accuracy of incoming contracts, even when fiscal years overlap and contract funding fluctuates.
- Errors are rectified by applying business rules proactively to all incoming claims, saving time and company capital.

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