



TRAILS MODERNIZATION OVERVIEW

September 9, 2021



COLORADO
Department of Human Services



Trails Modernization Overview

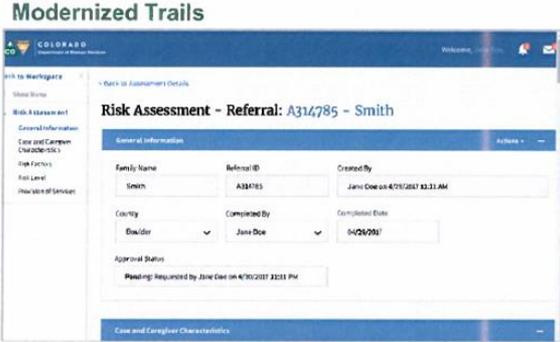
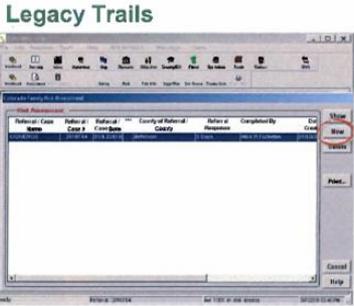
- Trails Modernization is an integrated case management system used by 5,400 users serving children, youth and families across Colorado.
- The existing (legacy) system documents services, payments and activities including referrals, assessments, cases and commitments. Users include workers in 64 county departments, 22 judicial districts, and the Division of Youth Services (DYS).
- Trails Modernization is an upgraded legacy system with improved functionality and new features.
- Modernization of the Trails system will improve user experience, create workflow efficiencies, improve system reliability and allow for mobile access for case workers.





Trails Legacy to Mod

- Trails Modernization was a project undertaken to modernize the existing Legacy application and make the system available via web and mobile browsers, and add new functionality for users.
- The approach included modernizing different features over time through “releases” rather than doing a “big bang approach.”
- Under the original scope of the project, Colorado contracted with a vendor, CGI, that would be responsible for modernization.



Engagement with Colorado Digital Services (CDS)

- In June 2020, OIT and CDHS engaged the Colorado Digital Services (CDS) to explore issues regarding resourcing and contracts. Some of the CDS findings included:
 - An observed lack of strategic procurement to hold vendors accountable
 - An observed lack of key roles, including a strong OIT Technical Lead
 - Insufficient resourcing of OIT to support backend work for both Trails systems
 - Insufficient automated testing

In response, CDHS and OIT undertook the following actions:

- Renegotiated contract with CGI to hold vendor accountable for high-quality deliverables
- Hired and empowered technical staff
- Reduced CGI's burn rate by 50% to align with OIT's capabilities
- Empowered and elevated the CDHS Product Manager
- Enhanced and improved collaboration between OIT, CDHS, and CGI



The Trails Teams

Other Stakeholders
Mollie
OIT leads
CDS Leads



Product Management
J.P.



Change Agents
CDS Leads



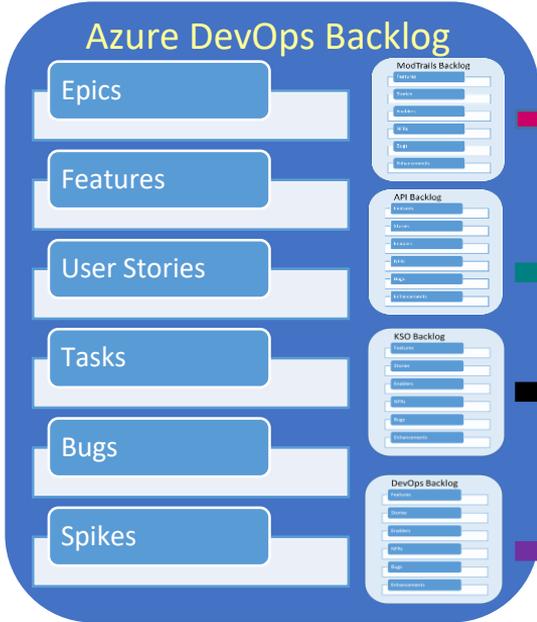
Release Manager
Mike

Agile Coach
Troy

Architect/Engineering
Chad



Quality Owner
Nick



Agile Teams	SM	PO	Dev			QA	UAT
Caminos Team	Troy N.	J.P. Sleeger (with PO Delegates)	Fred B Charles Igor C. Win S.	Dan S. Barbara K Sha James W Lois	ModSquad DYS UAT OIT QA Team		
T.I.M Team	Troy N.	Heather Miller	Matt C. Dan C. Marvin .	Dileep B Annika Andres	Ilya K.	ModSquad DYS UAT	
TikTok Team	Angie P.	Caitlin Smith	Ming X. Nancy J. David D.	Qing Charles P. Ben	Testing as required	ModSquad DYS UAT	
Ecosystems Support	SM Mike W.	Chad Geidel	Arch Sridhar C.	DBA Rick S.	DevOps Ken Nick T. Kalyan	QA Ilya K Rafiq	UAT Rik

Shifts in Framework:

- *Moving from a “project” to a “product” mindset: Moving to a “product” mindset allows Trails to consider all components of the system that support the work of users.*
- *Focusing resources on the highest-value activities: The team pivoted to focus on creating highly effective teams that use resources to maximize values to users, and that are positioned to continue to make improvements long after a vendor has rolled off.*



Trails Release Timeline Release 6 onward

2020

2021

- 5/31/2020 - Release 6: Family First
 - Utilized supplemental funding provided by the JTC to incorporate new Family First functionality into Trails
 - This release ensures Trails is in **alignment with federal law** and prepares Colorado for Family First to take effect on October 1, 2021
- 12/20/2020 - Plans of Safe Care
 - Utilized supplemental funding provided by the JTC to bring Trails **into compliance with The Comprehensive Addiction and Recovery Act (CARA)**.
 - Plans of Safe Care addresses the needs of infants who are identified as affected by substance abuse, experience withdrawal symptoms, or have fetal alcohol spectrum disorders.
- 4/3/2021 - Oracle Upgrade
 - The Oracle upgrade substantially **increased system stability** and allowed users **access to real-time reporting**.
 - Upgrade was out of scope for the Trails Modernization “project” on the product roadmap; delay to subsequent roadmap stages is estimated to be close to one year
- 6/12/2021 - Release 7: Division of Youth Services (DYS)
 - Release 7 brought all DYS users into Modernized Trails and subsequently **represents 50% of all Trails users operating in a singular system**.

STRATEGY CHALLENGES

1. Half of our end-users are still operating in two systems for specific functionality.

- Functionality continues to be slowly migrated from Legacy to Mod but progress was slowed substantially due to Oracle upgrade.

2. CGI, the Trails Modernization vendor, is expected to fully roll off the Trails product by the end of September 2021.

- Vendor was unable to deliver the remainder of Trails Mod functionality prior to the expiration of their contract.
- CDHS and OIT extended the contract to finalize warranty work from Release 7 and facilitate knowledge transfer to state staff.

Trails Strategy: FY21-22

- System Stability and Hygiene
 - The Oracle upgrade emphasized the need to refocus on system hygiene and processes. The current increment of work **ensures system is stable and secure** to diminish future system issues and to better accommodate future development.
- Agile Releases
 - Previous releases have been substantial in scope; preparation and reconciliation for large scope releases is unsustainable. Team will focus on **smaller, more agile releases** in the future.
- Augmenting in-house talent
 - Utilize new agile vendor pool to support new development while internal staff retains technical direction and leadership. **Enhance the in-house bench strength** by cross-training developers who can build institutional knowledge of the code.
- Developing product metrics
 - Metrics will eventually **measure product success** benchmarks and overall system health/performance

Reference Slides

Trails Product Roadmap (Updated!)

Now

Medicaid (Prod Issue)

Value: Children/youth who are eligible for continuous eligibility and former foster care Medicaid receive services timely.

Initial Release: March 21, 2021

Continued improvements: Q2 2021

Update: JAI Involvement/Support

Duplicate Clients (Prod Issue)

Problem: Having duplicate records in Trails means we have bad data.

Value: Quality, reliable data allows Trails end-users to make informed decisions about the lives of children, youth and families.

Initial Release: March 14, 2021

Continued Improvements: Q2 2021

Update: UX Involvement

Scaled Agile Implementation

Value: Defined processes for the entire Trails ecosystem.

Initial Release: January 1, 2021

Continued improvements: Q3 2021

Functional Analysis

Value: Understand work remaining to migrate from legacy to mod and status of existing development activities.

System Monitoring

Value: Monitor real-time information about system (Google Analytics + Splunk + Dynatrace)

SANCA/ICON

Value: Child Welfare D&N information transferred from judicial to Trails

Update: August 29th, 2021

WIG: Children/Youth Thriving in their communities

Outcome: Decrease # of new CA Service Desk Tickets

Value: Information in Trails is accurate

Activities:

- Focus on root-cause analysis of CA Service Desk Tickets
- Improved System Documentation (Erwin, Azure, etc.)
- Cross-training of new and existing staff

Next Steps:

- Hire new developers & fill FTE vacancies
- On-boarding & Cross-training
- Documentation expectations (Erwin, Azure, etc.)
- Knowledge transfer from CGI

WIG: Increase Product Stability & Delivery Velocity

Outcome: Clear SDLC

Value: Fixes & changes are completed efficiently and accurately

- Lower & prod environments match
- Migrate to one Azure backlog
- Clear pipelines & processes for deployment to lower environments and production

Next Steps:

- Define MVP
- Define deadlines

Outcome: Trails System Hygiene

Value: Trails ecosystem is secure and running on up-to-date servers

- Decommission any unsupported servers
- Regular system security scans with timely remediations
- Full documentation of Trails ecosystem (servers, applications, etc.)

Next Steps:

- Define MVP
- Define deadlines

Trails Product Roadmap

Later

New State/Federal Requirements

Value: Ensure compliance as new requirements are passed.

Case

Value: Case-related workflow activities fully completely in Trails Mod. Includes:

- Contacts
- Framework
- Removals/Placements
- Service Provision
- Family Service Plans
- Permanency Roundtables

Assessment

Value: Assessment workflow activities fully completed in Trails Mod.

- New FAR (Family Assessment Response) Assessment Type.
- Able to provide services at time of assessment (supports Family First).

Two-Factor Authentication

Value: 2FA is a security best practice that ensures only authorized users are accessing Trails by requiring a password + a 2nd credential (token or text code).

New Case Types

Value: The following case types have unique workflows that will be available in Trails Mod: ICPC, Adoption/RGAP, Chafee, Prevention

Fiscal

Value: County fiscal staff complete full workflow in Mod. Includes: CFMS interface updates, Payroll, Claims, SSI/SSA, etc.