CalACES Process – CalACES Design Input Process

CalACES Design Input (CDI) allows the counties to submit design suggestions for SCRs created for draft or published State policy letters prior to the start of the SCR design. This process is also used to submit design suggestions for any SCRs approved for design.

The county completes a CDI Request Form (CDI 001). The PPOC reviews the CDI for completeness. Then, the PPOC e-mails the CDI form and supporting documentation to Design.Input@calaces.org .

# CDI Tracking

When a CDI is received by the Project, the consortium representative completes the following:

1. Logs the CDI on the CDI Tracking spreadsheet:

(CDI Tracking spreadsheet SharePoint location: add location)

* Received Date
* County
* State Letter Type and Number
* State Letter Subject
* Analyst Assigned
* Date Sent to Analyst
* Date Response Sent to PPOC/RM
1. Forward the CDI e-mail/CDI 001 to the assigned Analyst. Insert CDI <Tracking Number> into the Subject before sending the e-mail.
2. Send the CDI Acknowledgement email to the PPOC/Regional Manager (RM) and assigned analyst. For e-mail communication, see below.

# Analyst Responsibilities Prior to SPG Approval

The Analyst completes the following steps for each CDI:

1. Create a folder for the SCR in the Project SharePoint CDI Tracking Folder, if one does not exist, and complete the following:

(Folder Naming Format: SCR CA-<Number>)

* Save the CDI form to this folder

Form Naming Format: CDI <Tracking Number> SCR CA-<Number>

* Create the SCR CDI Tracking spreadsheet if one does not exist. Save this spreadsheet to the SCR CA-<Number> folder.

Spreadsheet Naming Format: CDI Tracking SCR CA-<Number>

* Add the CDI information to the spreadsheet

1. Attach the CDI Tracking SCR CA-<Number> spreadsheet to the CA SCR. If a CDI tracking spreadsheet is already attached to the SCR replace it with the updated version which includes all suggestions received to date.
2. Send the ‘CDI Associated to SCR’ e-mail to the PPOC/Regional Manager (RM). For e-mail communication, see below.

# Analyst Responsibilities After SPG Approval

After the SCR is approved by SPG, the Analyst sends the ‘After SPG Approval’ e-mail to the committee/workgroup to request design input. This e-mail will include the CDI Tracking SCR spreadsheet, if one exists. For e-mail communication content, see below. The Analyst follows the above steps when a CDI is received.

When the Analyst receives notification from the Design Team that the SCR design will begin, the Analyst sends the ‘When the SCR Begins Design’ e-mail to the committee/workgroup to request design input. Allow two weeks for the committee/workgroup to provide design input. This e-mail will include the CDI Tracking SCR spreadsheet, if one exists. For e-mail communication content, see below. The Analyst follows the above steps when a CDI is received and shares the updated CDI Tracking SCR spreadsheet with the appropriate Design Team members.

# Analyst Responsibilities When SCR Design is Complete

Prior to sending the SCR design to the committee/workgroup for final review, the Analyst completes the following columns on CDI Tracking SCR spreadsheet:

* Incorporated into SCR Design – Select Yes, No, or Partial
* Justification – If No, or Partial, is selected in the Incorporated into SCR Design column, enter an explanation for why the suggestion(s) was not incorporated into the SCR design.

The Analyst shares the updated CDI Tracking SCR spreadsheet with the appropriate Design Team members to confirm Incorporated into SCR Design and Justification entries are correct. Then, the Analyst includes the CDI Tracking SCR spreadsheet when sending the SCR, design document, and other supporting documentation to the committee/workgroup for review.

After the committee/workgroup approves the SCR, no additional design suggestions will be accepted.

# E-mail Communication

Use the following guidelines to send e-mail communication.

**CDI Acknowledgement** - Include the following in the e-mail to the PPOC/RM to acknowledge the receipt of a CDI:

* **E-mail Subject Line**

CalACES/<Insert State Letter Type and Number or Subject>/CDI Tracking <Number>

* **E-mail Body**

Your design input suggestion has been received. The tracking number assigned to this CDI is <Insert CDI Tracking Number>. You will receive additional information when this CDI is associated to the SCR.

**CDI Associated to SCR** - Include the following in the e-mail to the PPOC/RM to inform them of the SCR for the CDI:

* **E-mail Subject Line**

CalACES/CDI Tracking <Number>/ SCR CA-<Number>

* **E-mail Body**

Your design input suggestion CDI Tracking <Number> has been associated to SCR CA-<Number>. Further design input for this SCR will be communicated through the <Insert committee/workgroup name>.

**After SPG Approval** - Include the following in the e-mail to the committee/workgroup to inform them of SPG approval and request design input:

* **E-mail Subject Line**

CalACES/ Committee/Workgroup/SCR(s) <Number(s)> and <Summary>/Request for Design Input

* **E-mail Body**

The SCR Planning Group (SPG) has approved this SCR, which means design may begin. Prior to the start of design, the counties may submit design suggestions by following the CalACES Design Input Process. Counties may use the attached CDI form to submit design suggestions, according to the process specified in CIT xx-xxx.

The attached CDI Tracking SCR CA-<Number> spreadsheet includes design suggestions received to date.

**When the SCR Design Begins** - Include the following in the e-mail to the committee/workgroup after receiving notification from the Design Team that the SCR design will begin:

* **E-mail Subject Line**

CalACES/ <Committee/Workgroup>/SCR(s)-<Number(s)> and <Summary>/Request for Design Input/Input Due <Insert Date>

* **E-mail Body**

Design on SCR CA-<Number> will begin shortly. The counties may submit design suggestions by following the CalACES Design Input Process. Counties may use the attached CDI form to submit design suggestions, according to the process specified in CIT xx-xxx.

Design Input is due on or before **<Insert Date>.**

The attached CDI Tracking SCR CA-<Number> spreadsheet includes design suggestions received to date.