

**Mapping legacy  
processes to modern  
systems (CSPS, RTS,  
skills-based hiring,  
chatbots)**



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# Housekeeping

Please Silence Cell Phones

Resources Available After the Conference

Water/Refreshments

# Speaker Introductions



**Brandon Rutschmann**  
Project Director, California State Payroll  
System



**Chris Dainard**  
Chief, Selections Division



**Joel Russell**  
Innovation Officer, IT

# Agenda

- The Modernization Landscape
- California State Payroll System
- Request Tracking System
- Skills-Matching and Chatbots
- Open Forum Q&A

# The Modernization Landscape

## Challenges

- Decentralized Processes
- Different maturity levels
  - Manual workflows
- Inconsistent department practices

## Opportunities

- Statewide systems (CSPS)
  - Internal platform alignment (RTS)
- Emerging tools and technology (Skills-matching and chatbots)

# California State Payroll System – CSPS



## Modernization Lessons at Scale

Brandon Rutschmann, CalHR Project Director, CSPS

# More Than a Technology Replacement

Modernizing means mapping more than systems



**PROCESSES**



**POLICIES**



**PEOPLE**



**EXCEPTIONS**

# Question the Foundation

## TODAY

- Monthly
- 21/22-day cycle

## QUESTION IT

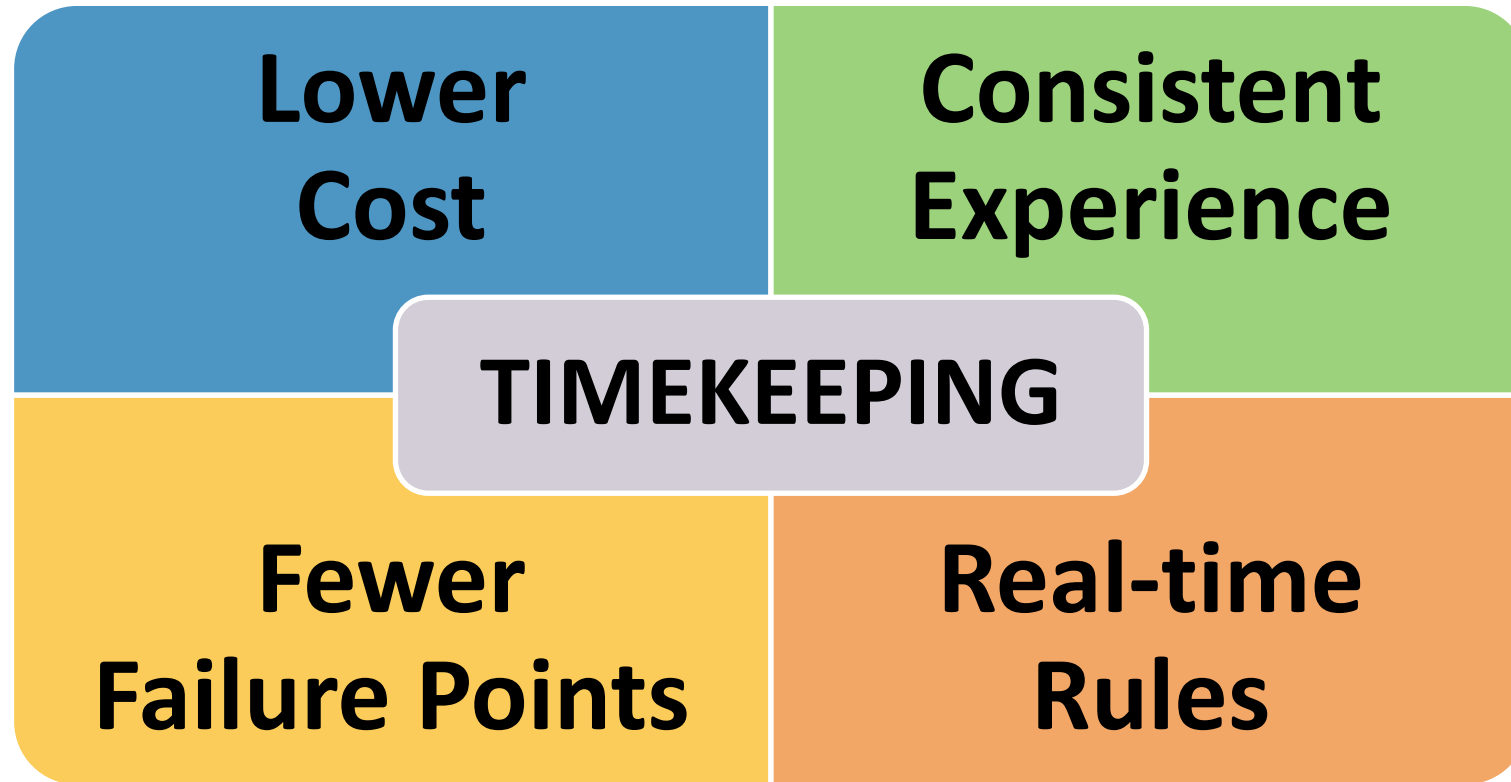
- Required?
- Or familiar?

## FUTURE

- Biweekly
- Consistent

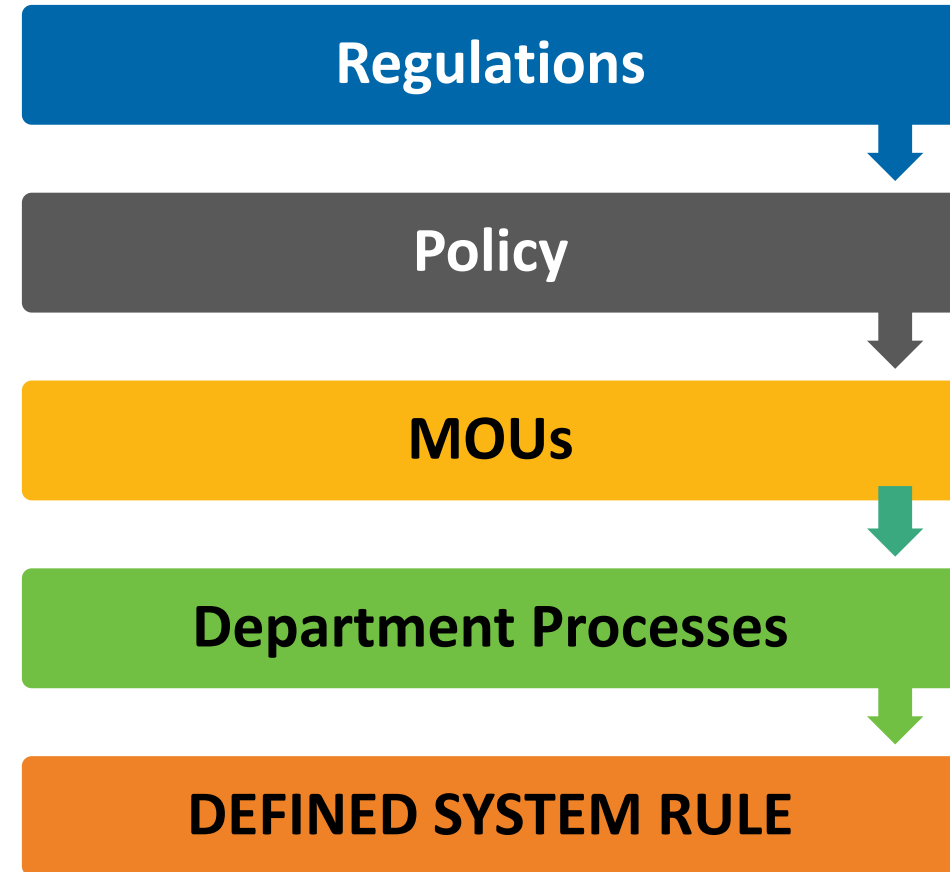
Modernization is an opportunity to reconsider the business model—not just replace the technology

# Standardize Where Possible

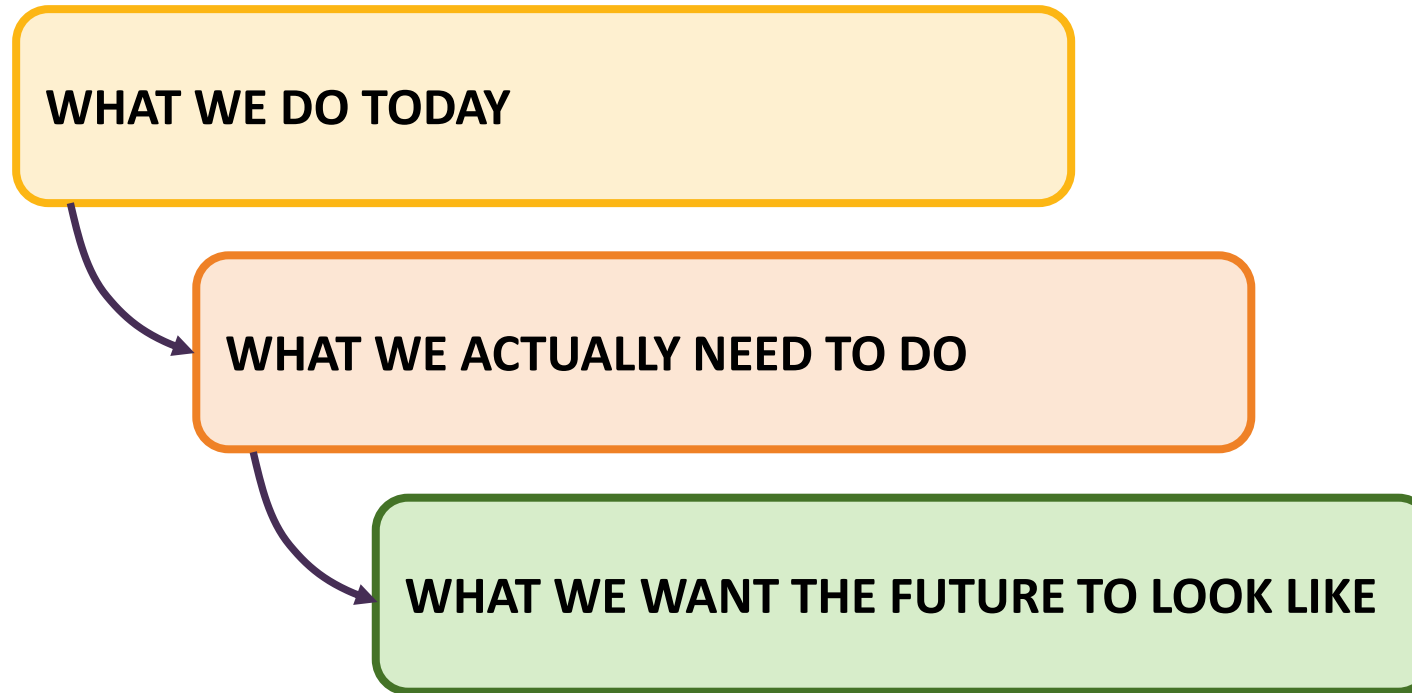


Standardize the common need. Justify the exception.

# Codify What Remains



# Takeaway



Process mapping connects the three.

# RTS: From spreadsheets to organizational visibility



Request Tracking System

50+ custom workflows organization wide

## Divisions handled requests in different ways

Separate forms, inboxes, and handoffs made work difficult to track across teams.

### BEFORE RTS

- Spreadsheets and shared inboxes
- Different forms, terminology, and approval chains
- Unclear ownership across handoffs
- Little visibility into aging, workload, or bottlenecks

### THE DESIGN QUESTION

**How do we create a shared system of record without forcing every division into the exact same process?**

**Standardize the common case.  
Configure meaningful differences.  
Govern the exceptions.**

# Process mapping turns work into an RTS workflow

We map how work happens today, then translate it into forms, tasks, routing, approvals, and reporting.

## 1 UNDERSTAND THE WORK

- Intake channels and forms
- Roles and responsibilities
- Approvals and handoffs
- Exceptions and rework
- Timelines and expectations



## 2 MAKE DESIGN DECISIONS

- What information is required?
- Who owns each step?
- What triggers the next step?
- Where is flexibility needed?
- What should be measured?



## 3 CONFIGURE RTS

- Structured intake form
- Task assignments
- Routing and approval rules
- Controlled overrides
- Due dates, statuses, dashboards

**Process mapping is the bridge between a division's way of working and a workflow RTS can support, measure, and improve.**

# Requesters: easy to ask, easy to follow

Lens 1 of 3 | Requesters

The screenshot displays a web form for requesting information. It is divided into three main sections: Examination Information, Candidate Information, and Screenshots. The Examination Information section includes fields for Exam Title, a Yes/No toggle for 'LEAP Exam?', and an Exam Code field. The Candidate Information section includes fields for Candidate Name, Candidate Email, Candidate Phone, CalCareer User ID, and CalCareer ID #. Below these are two Yes/No toggles for 'Do we have permission to access candidate's account if needed?'. The Screenshots section includes a text area for 'Internet Browser(s) Used', a text area for 'Internet Service Provider', and a section for 'Screenshots #1' with a note: 'NOTE: Candidates should only be providing screenshots of their notice, results page, or errors they encountered, not the actual exam items.' Below the note is a 'Screenshot/Proof of Error' field with a 'Choose' button. An 'Add Row' button is at the bottom right of the Screenshots section.

## THEIR EXPECTATION

*"Make it easy to submit and review the necessary information."*

## THEIR EXPERIENCE IN RTS

- Submit through one structured, guided form
- Provide required information up front
- Check status and progress at any time
- Review past requests and message CalHR in one place

**Fewer status emails and less back-and-forth to collect missing information.**

# Business teams: clear ownership of the work

Lens 2 of 3 | Business teams

The screenshot displays the 'CalHR Assistance for Candidate Inquiries Request - Candidate Inquiry Assistance' interface. At the top, there are tabs for 'Active Task', 'Communications & Notes', and 'History'. The main section shows a 'Request Title' of 'Sample Request - 1024', a 'Tag' of 'Mine', and a 'Status' of 'Not Started'. Below this, there is a 'Forms' section with 'CalHR Assistance for Candidate Inquiries Request - Intake Form' and 'CalCares Form'. The 'Tasks & Actions' section shows a list of tasks for 'Request #1024' assigned to 'analyst@example.gov'. The tasks are: '#1024.1 Intake Form' (Completed), '#1024.2 Candidate Inquiry Assistance' (Not Started), and '#1024.3 Candidate Inquiry Assistance Completion' (Not Started). The '#1024.2' task card is expanded, showing 'Assigned To: Selections - EVM' and 'Status: Not Started'. Below the task card, there are two sub-tasks: 'Candidate Inquiry Assistance - Assign maintenance project to Analyst' and 'Candidate Inquiry Assistance - Perform maintenance'. A 'Save' button is visible at the bottom of the task card.

## THEIR EXPECTATION

*"Make it easy to see what work is assigned to me and fulfill it."*

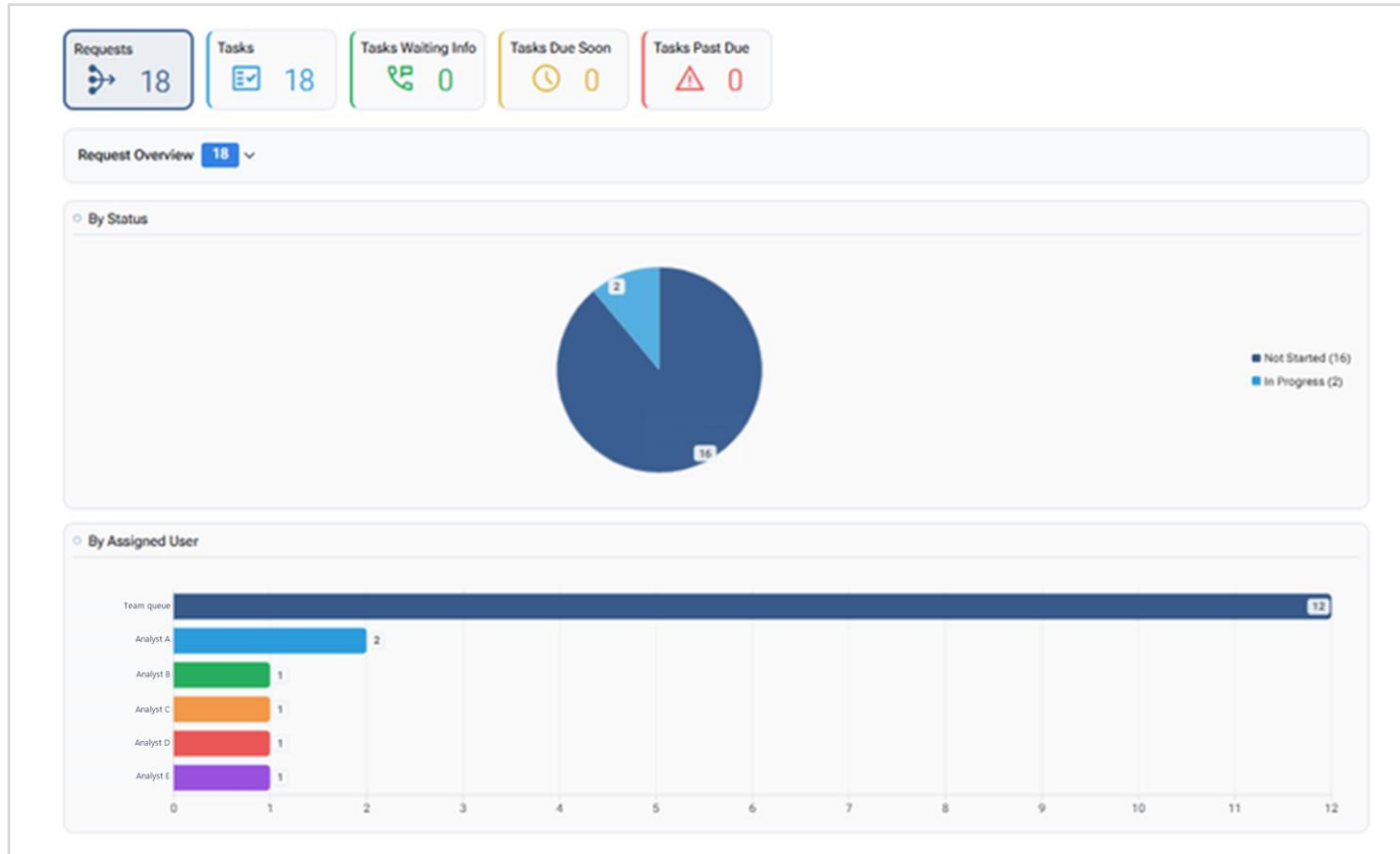
## THEIR EXPERIENCE IN RTS

- See assigned work and its current status
- Follow guided tasks and approvals
- Know who owns each handoff
- Keep forms, notes, and history with the request

**Built-in guidance shortens training and keeps requests from getting lost between teams.**

# Management: visibility without asking for updates

Lens 3 of 3 | Management



## THEIR EXPECTATION

*"Make it easy to see team workloads, work in progress, and trends over time."*

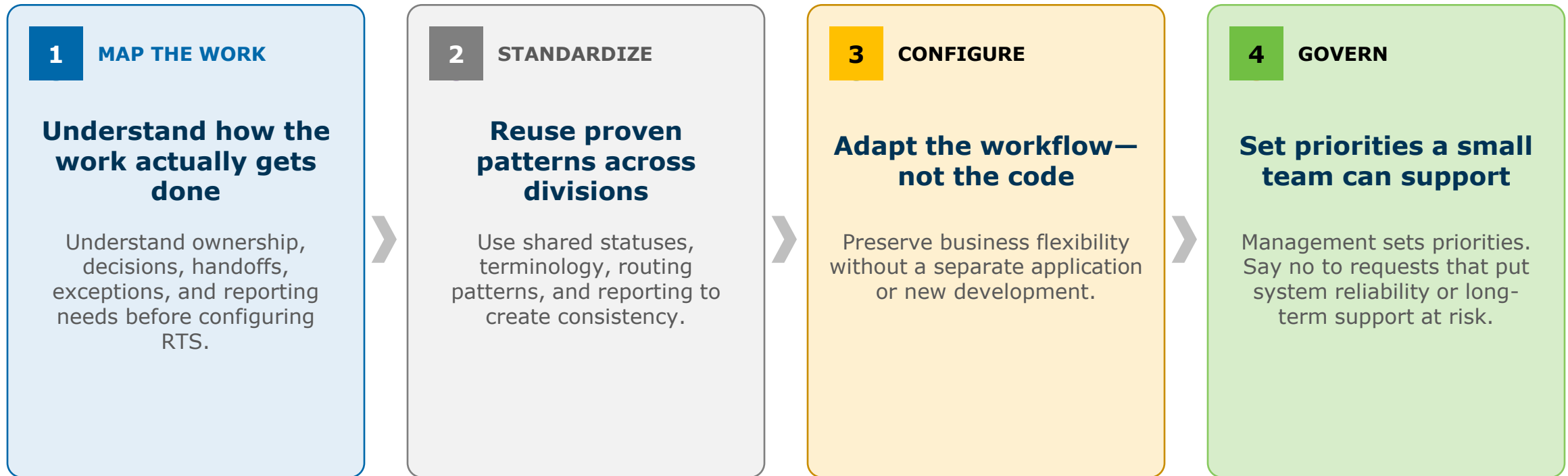
## THEIR EXPERIENCE IN RTS

- See open requests and tasks at a glance
- Spot work waiting, due soon, or past due
- Balance workload across staff
- Track task duration and trends over time

**Decisions are based on current data, not spreadsheets compiled by hand.**

# What made RTS sustainable

A configurable platform helped, but the implementation and governance approach made it scalable.



**Divisions don't need identical processes. They need work that is easier to track, support, and improve.**

## The takeaway

**We didn't make every division work the same way.**

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We gave teams one place to track requests, a consistent user experience, and configured workflows to fit how their work gets done.

**That's how a small team supports more than 50 workflows.**

# Emerging Technologies

How leveraging technology enabled skills-matching and chatbots to serve our customers



# Identifying The Problem



User experience  
research



Applicant  
feedback surveys



Focus groups



Anecdotal  
evidence



Technical jargon



Siloed  
information

# Defining Approach

## Thinking

### Design Thinking

- Iterate and prototype

## Centralizing

### Centralizing information

- BLOB file
- Snowflake integration
- Website crawlers

## Determining

### Determining touchpoints with users

- Critical points of failure/struggle
- Dynatrace and Google Analytics
- UX data

# Implementation and Migration



Communication



Reduce downtime



Don't overcommit

Commitment vs. Target



Maintain scope

Avoid the spiral



Backup plans



## Post-Implementation Considerations



User feedback



System data and metrics



Maintain iterative thinking



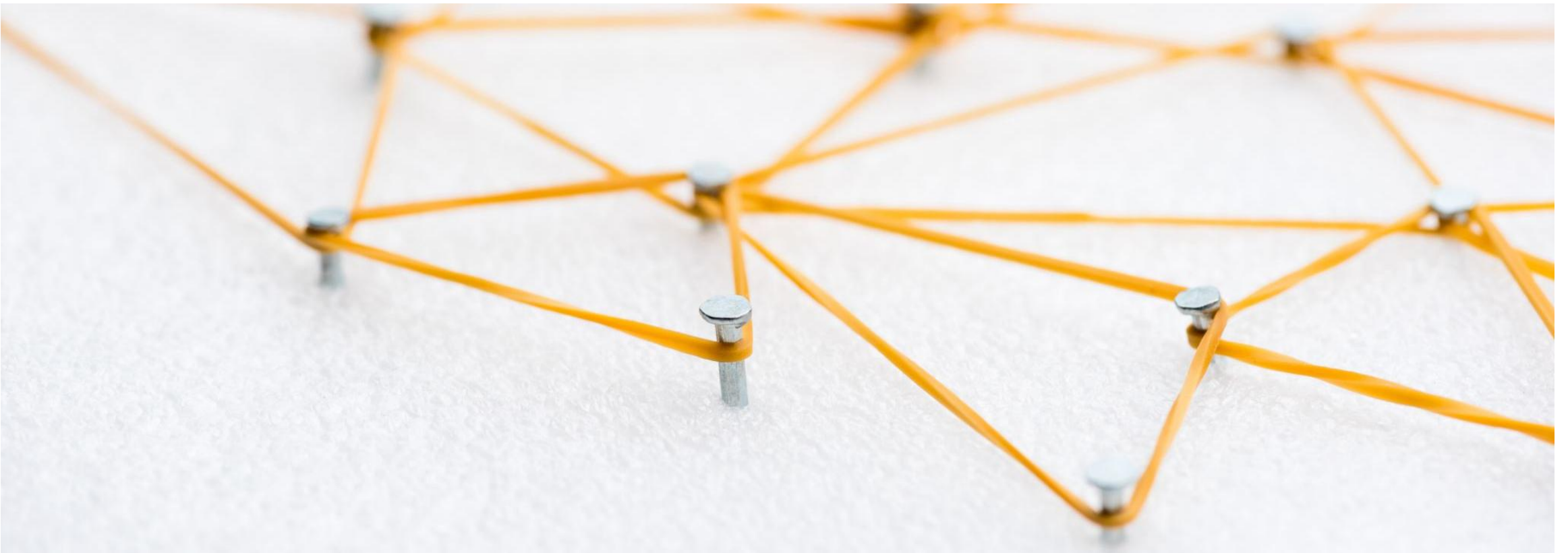
Sustainability considerations



Monitoring and course-correcting when necessary



Communication!



## Connecting the Dots

# Q&A

