Author: Bonnie Lau

WSIB

CLaims journey to the Cloud onboarding

# Introduction

***Welcome to the Claims Journey to the Cloud!***

*We are genuinely delighted to have you join us on this exciting venture. This program is a cornerstone of our ongoing transformation efforts in the claims sector. Your expertise, creativity, and dedication are essential to realizing our vision and delivering impactful results.*

*During your onboarding process, you'll be introduced to the key objectives, milestones, and team members you'll be working closely with. We'll ensure you have the necessary tools, resources, and support to smoothly integrate into your role and start contributing to the project immediately.*

*Our mission is to foster a collaborative and inclusive environment where every idea and effort is valued. We believe that your unique skills and perspective will greatly enhance our team. We look forward to achieving great things together.*

*In the following onboarding program, we'll delve into the foundational concepts of technology transformation to the cloud. You'll gain a clear understanding of what moving to the cloud entails, key development concepts, a fundamental understanding on the importance of testing, what is testing and its role in ensuring a quality product is delivered to the marketplace and much more. We'll explore key benefits for going to the cloud including scalability, which allows systems to grow and manage increasing demands seamlessly. You'll learn about cost efficiency, as cloud technology enables pay-as-you-go models that optimize spending. We hope you are excited as we are to have you!*

***Welcome aboard!***

*-Siobhan de Graaf, VP of Claims Transformation*

Contents

[Introduction 1](#_Toc189207558)

[Understanding key concepts 4](#_Toc189207559)

[What is a program? 4](#_Toc189207560)

[What is the cloud? 4](#_Toc189207561)

[What is Guidewire? 5](#_Toc189207562)

[Program history and current projects 5](#_Toc189207563)

[Why was the program started? 5](#_Toc189207564)

[Key milestones so far: 5](#_Toc189207565)

[Current projects underway 5](#_Toc189207566)

[How projects fit together 5](#_Toc189207567)

[Introduction to project processes 5](#_Toc189207568)

[Roles in the program 6](#_Toc189207569)

[Collaboration and communication tools 7](#_Toc189207570)

[Key program and activities 7](#_Toc189207571)

[Process and service design 7](#_Toc189207572)

[Data conversion 7](#_Toc189207573)

[Testing processes 8](#_Toc189207574)

[Change management 8](#_Toc189207575)

[Program governance 8](#_Toc189207576)

[What does program governance mean 8](#_Toc189207577)

[How decisions are made 8](#_Toc189207578)

[Where to get help 8](#_Toc189207579)

[FAQ 8](#_Toc189207580)

[What is Claims Journey to the Cloud and why is it unique? 8](#_Toc189207581)

[Guiding Principles for the Program 15](#_Toc189207582)

[Governance 16](#_Toc189207583)

[Target Operating Model 17](#_Toc189207584)

[Overall Themes of the TOM: 18](#_Toc189207585)

[Proposed Onboarding Reading Schedule 18](#_Toc189207586)

[Glossary 20](#_Toc189207587)

# Understanding key concepts

This section provides foundational knowledge to understanding what a program is for those new to project work and a brief introduction the main technology .

## What is a program?

A program is like a big umbrella that covers several related projects. These projects all work together toward a larger, long-term goal. Think of it as a big roadmap for transformation. For example, the Claims Journey to the Cloud program involves multiple projects (like migrating data, training employees, and improving processes) to improve how claims are managed.

### How is a program different from a project?

* **Program:**  Focuses on the big picture and long-term outcomes (e.g., transforming claims processes using the cloud).
* **Project:** Focuses on a specific deliverable within a set timeline (e.g., migrating claims data to the cloud).

### Why does this matter?

Programs help ensure that all the moving parts (projects) align to achieve broader business goals, such as better customer experiences and more efficient operations.

## What is the cloud?

The "[cloud](#Cloud)" refers to servers and services that are accessed over the internet instead of being stored on your local computer or company’s on-site servers. It’s like renting a giant online storage space where you can store, process, and manage data and applications without worrying about hardware.

When people talk about "going to the cloud," it means they are using online services instead of keeping everything on their own computers/phones/devices.

### Some ways the cloud is used:

* **Storage:** Save files, databases, and backups in a secure and scalable location. Many of us already use the cloud in personal lives, whether it be Dropbox, Google Drive or iCloud. All of these examples, enable us to securely save files online (i.e. documents, photos).
* **Processing power:** Run applications and perform tasks without needing powerful hardware on-site. Instead of installing programs on your computer, you can use these programs/applications virtually. Think Google Sheets or Microsoft Word, where as the user, you can use these programs without downloading them. You just simply click on the icon and can start working virtually.
* **Collaboration:** Teams can access files and tools from anywhere, making remote work seamless.

### Why does this matter?

Using the cloud allows organizations to:

* **Be flexible:** Scale up or down based on needs.
* **Save costs:** Reduce expense for on-site servers and maintenance.
* **Increase security:** Protect data with advanced encryption and access controls.
* **Improve accessibility:** Enable employees to work and access data from anywhere

## What is Guidewire?

Guidewire is a comprehensive software platform designed specifically for property and casualty (P&C) insurers to manage their core operations, including claims, policy administration, and billing. At WSIB, we refer to Guidewire’s suite of products (ClaimCenter, BillingCenter, PolicyCenter) as **ACES**.

Throughout this document:

* **Guidewire** refers to the vendor partner at WSIB that provides the software.
* [**Guidewire ClaimCenter**](#Guidewire_ClaimCenter) refers to the software that powers the claims management system in ACES. It helps us manage the entire claims lifecycle, from initial claim intake and registration to [closure](#Closure).

At WSIB, Guidewire ClaimCenter has been highly customized to address the unique needs of worker’s compensation claims.

# How did we get here? *(Bonnie)*

This section aims to contextualize how we got to where we are today.

## Previous programs prior to Claims Journey to the Cloud

WSIB has been on journey to understand how they can better serve employers and injured workers within Ontario, through leveraging different technologies. Through the past decade, WSIB has come a long way.

**From 2014 – 2017**, WSIB embarked on a program known as ACES *()* successfully migrated onto the Guidewire Suite of products – simply put, WSIB committed to using Guidewire as the foundational technology to how business is run; using guidewire to manage claims, employer accounts, and different billing functions.

**From 2018-2021** – WSIB embarked on a program known as Core Modernization Services (CSM for short). The goal of this program was to move Claimcenter to the Cloud. However, due to “xx”, the program was not successful in moving Claimcenter to the Cloud.

**Now** – WSIB is now committing to making it easier for to receive Guidewire updates by moving to the cloud along with co-creating a product that is based on Worker’s insurance. Hence, the raison-d’etre for **Claims journey to the Cloud.**

## Why was the program started?

Claims Journey to the Cloud started because:

1. WSIB wants to modernize our legacy (old) systems
2. WSIB wants to be on a product that is geared towards Worker’s insurance; we realize that we weren’t able to take advantage of the new innovations guidewire was introducing because we weren’t on the cloud. Simply put, because ACES is so customized, moving to the cloud was complex
3. WSIB wants to move to the cloud.
4. WSIB wants to look internally at our own processes and reimagine what is possible within the confines of certain boundaries

For more information on what exactly Claims Journey to the Cloud is and particularly what the program entails, please go to this section

## Current projects underway in the program

There are quite a few initiatives that are underway as part of this program. Below are a few pieces of work that we will deliver as part of this program that are currently underway.

**Return to Work Scheduler and Email Automation**

There are two projects that will be delivered in 2025 as quick wins for the program. These two initiatives include:

1. Improving the experience of a scheduling tool for employers, employees and internal WSIB staff (See Return to Work Scheduler)
2. Creating a more efficient way for Employers to receive documents from WSIB (See email Automation

**Process and Service Redesign**

Our program is working to make things better for our customers and improve how we do things inside WSIB.

*Digital and Customer Experience*

This stream is about understanding the customer to create a better experience for them. Some of the activities in this stream of work include; research and interviews to be able to design a better experience for our employers and injured workers. ((see more in xx for more details)

*Process Design*

**Process Design** about figuring out how we can make our own processes better and match them with the Guidewire product. We use the research from Stream 1 to help us find the best way to create new processes. ((see more in xx for more details)

**Strategic Partnership with Guidewire**

A strategic partnership with guidewire to understand how they can tailor their product to be more geared towards worker’s compensation. This is the precursor and prerequisite for Co-innovation with Guidewire. (see more in xx for more details)

Co-Innovation with Guidewire

This is a joint-partnership with guidewire where guidewire will develop their product to cater to worker’s compensation organizations and companies (see more in xx for more details)

## How projects fit together

Each project is a piece of the puzzle, and when they all come together, they create a wholistic picture of the program.

Digital and Customer experience is the research that feeds into service design and process design. Process design will help inform the co-innovation work that will be completed with guidewire.

# Introduction to project processes

This section provides an overview of how projects work within the Claims Journey to the Cloud program. It explains the key stages of a project lifecycle, the roles involved, and the tools you’ll use to collaborate effectively. Even if you’re new to project work, this guide will help you understand how your contributions fit into the bigger picture.  
How projects work

Projects are structured efforts designed to achieve specific outcomes within a defined timeframe. In the Claims Journey to the Cloud program, projects are the building blocks of the overall transformation. Here are the typical stages of a project lifecycle:

**Initiation**

* + Define the project’s objectives and scope.
* Identify stakeholders and gather initial requirements.
* Example: Setting goals for migrating claims data to the cloud.

**Planning**

* Create a detailed plan outlining timelines, deliverables, and resources.
* Identify risks and dependencies.
* Example: Developing a step-by-step roadmap for training employees on Guidewire ClaimCenter.

**Execution**

* Carry out project tasks according to the plan.
* Collaborate across teams to deliver key milestones.
* Example: Configuring Guidewire to align with WSIB’s worker’s compensation requirements.

**Monitoring and Controlling:**

* Track progress, resolve issues, and ensure the project stays on schedule and within scope.
* Adjust plans as needed based on feedback and performance metrics.
* Example: Addressing challenges during system testing phases.

**Closure**

* Complete final deliverables and hand over results.
* Conduct a project review to capture lessons learned.
* Example: Finalizing the migration of claims data and documenting insights for future projects.

## Roles in the program

Projects in the Claims Journey to the Cloud program involve collaboration across many roles. Here are some (a non-exhaustive list) of the key participants and their contributions:

* + **Project Managers**: Oversees project timelines, resources, and deliverables to ensure objectives are met.
  + **Business Analyst:** Gathers and translates business needs into project requirements.
  + **Subject Matter Experts (SMEs)**: Provide expertise to ensure that deliverables align with business and technical needs.
  + **Developers**: Build, configure, and test technical solutions.
  + **Testers**: Ensure the functionality and performance of the solution meet expectations.
  + **Stakeholders**: Provide input, review deliverables, and approve project outcomes.
  + **Directors:** Provide strategic oversight, ensure alignment with organizational goals, and resolve escalated issues
  + **Business Readiness:** Prepare the organization for the adoption of new processes and technologies, ensuring that employees are trained and equipped for the changes.
  + **Change Management:** Manage the human side of change by communicating updates, addressing resistance, and fostering adoption of new systems and workflows.
  + **Process Leads:** Oversee specific business processes to ensure that project outcomes align with operational needs and best practices
  + **Facilitation Leads:** Coordinate and drive discussions to ensure project teams align on objectives, make informed decisions, and resolve blockers. They ensure meetings are productive and that outcomes are actionable.

## Collaboration and communication tools

Here are some of the tools we use for collaboration in this program:

**1. Microsoft Teams Channels:**

* Use Teams Channels to manage project tasks, share updates, and communicate with team members.
* Example: Tracking project progress and discussing blockers within a dedicated project channel.

**2. Smartsheet:**

* A tool for managing project timelines, resources, and deliverables.
* Example: Creating a Gantt chart to visualize project schedules.

**3. Excel:**

* Used for tracking smaller project details, such as task lists, budgets, or progress metrics.
* Example: Maintaining a simple spreadsheet for issue tracking.

**4. SharePoint:**

* Centralized platform for storing and sharing project documents.
* Example: Accessing the project charter or testing plans.

**5. Email:**

* Used for formal communication and updates with broader audiences.
* Example: Sharing project status reports with stakeholders.

# Training and continuous learning

As part of the Claims Journey to the Cloud program, you will be using various software tools to collaborate, track progress, and complete project-related activities. Additionally, learning and development are key aspects of this program. Training is available to ensure you have the necessary skills and knowledge to contribute effectively.

## Learning as part of your day-to-day activities

Continuous learning is an integral part of working in this program. Whether you are learning how to use a new tool, understanding how to create process design documents, or enhancing your facilitation skills, professional development will be incorporated into your daily work.

We highly encourage you to:

* Be proactive in identifying areas where you need additional knowledge or training.
* Engage with your team members and leadership to learn best practices.
* Take advantage of learning opportunities, and training opportunities as they arise.

## Role-based training

Training is available for specific roles in the program. If required, you will receive training tailored to your responsibilities to ensure you have the skills necessary to perform effectively.

* **Speak with your director** to determine the appropriate training schedule for your role.
* Training sessions will be scheduled based on project needs and availability.

# Key program and activities

As part of most program, there are some key program activities that happen despite the scale of the program. Below are some of the key program activities as part of Claims Journey to the Cloud that you may know or hear about throughout your time on the program.

## Data conversion

**Data conversion during a digital transformation** is like updating old information to fit new technology. When a company switches from old systems to new ones, they need to make sure all their existing data (like customer records, financial information, etc.) works properly with the new setup.

Imagine you have a bunch of old video games that only work on an old game console, but you just got a new, advanced console. To play your old games on the new console, you would need to update or convert the games so they are compatible with the new system.

That is exactly what happens during data conversion on large scale tranformation programs.

## Testing processes

**Testing** in the context of digital transformation is like making sure new technology or software works properly before using it for real. Think of it as quality control for digital systems.

Here are the main types of testing:

1. **Unit Testing:** This is like checking each part of a machine separately to make sure it works. In software, it's about testing individual pieces of code to ensure they do their job correctly.
2. **Integration Testing:** Imagine putting together the parts of a bike and making sure they all fit and work together. Similarly, integration testing checks if different parts of the software work well together.
3. **System Testing:** This is like taking a fully assembled bike for a test ride to ensure everything functions as expected. In software, it's about testing the entire system to make sure it meets all the requirements.
4. **User Acceptance Testing (UAT)/Business Acceptance Testing (BAT):** Think of it as letting people try out the bike to see if they like it and find it easy to ride. In software, it's getting real users to test the system to make sure it meets their needs and is user-friendly.
5. **Performance Testing:** This is like seeing how the bike performs under different conditions, such as riding uphill or with heavy loads. In software, it's about checking how well the system works under various conditions, like heavy usage.
6. **Security Testing:** This is like making sure the bike has a good lock to protect it from being stolen. In software, it's about ensuring the system is secure and protected against potential threats or hackers.

## Change management

**Change management** during a cloud transformation is all about helping people and the company smoothly move from using old technology to new cloud-based systems. It's like guiding everyone through a big change to make sure everything goes well.

Here's how it works:

1. **Communication:** Imagine you’re moving to a new school. Your parents explain why the move is happening, what the new school will be like, and how it will affect you. Similarly, in change management, it's important to tell everyone why the change to cloud technology is happening, what benefits it brings, and how it will impact them.
2. **Training and Education:** Think of learning to ride a bike. At first, you need someone to show you how to balance, pedal, and steer. In the same way, employees need training to learn how to use the new cloud systems. This ensures everyone knows how to work with the new technology.
3. **Involving Key People:** When planning a big event, like a school dance, you involve teachers and student leaders to help organize it. In change management, getting important people, like team leaders and department heads, involved in the planning and implementation helps drive the change throughout the organization.
4. **Support and Help:** If you’re learning a new video game, it’s helpful to have a guide or a friend who knows the game well to assist you. Similarly, offering help desks, guides, and other resources can assist employees as they get used to the new cloud environment, making the transition easier.
5. **Checking Progress:** Imagine you’re studying for a big exam. You regularly check your progress with quizzes and practice tests to see how well you're doing and what you need to improve. In change management, regularly checking in with employees to see how things are going and gathering feedback helps identify and fix any problems early on.
6. **Celebrating Successes:** Think about winning a sports game. Celebrating the win with your team keeps everyone motivated and happy. In the same way, celebrating milestones and successes during the transition to cloud technology helps keep everyone positive about the change.

Claims Journey to the Cloud will have an entire stream and team dedicated to this change management to ensure that when WSIB moves to the cloud, that people know how to use the new system and can service the employers, injured workers and 3rd party groups that WSIB interacts witha

# Governance (Bonnie)

**Governance** is like the rulebook for how organizations, governments, and institutions run. It's about making decisions, managing resources, and ensuring that everything is done fairly and responsibly. Think of it as a mix of setting the rules, playing by the rules, and making sure everyone is playing fair. It's a way to make sure things run smoothly and everyone's interests are considered.

## What is program governance and why is it important?

**Program governance** is the rulebook for specifically managing big projects.

Program governance is important for a variety of reasons:

* **It sets strategy:** Program governance ensures all projects are working towards the same goal, just like a coach creates a game plan for the team to follow.
* **It establishes consistency:** Program governance sets standard rules and processes, similar to how every player follows the same playbook during a game.
* **It communicates clear roles:** Everyone knows their position and what they need to do, like a quarterback knowing they need to lead the team or a goalie knowing they need to defend the net.
* **It prevents mistakes:** It helps spot potential problems early, like a coach noticing a player's bad form during practice and correcting it before game day.
* **Monitoring Performance:** Regularly checking progress helps keep the program on track, similar to a coach reviewing game footage to see how the team is performing and making adjustments as needed.

## In summary, program governance is like having a solid coaching staff and game plan to ensure the team (projects) works together efficiently and effectively to win the championship (achieve the goals)

## How decisions are made

Governance models usually have different layers – each layer is generally responsible for different types of decisions throughout the duration of a program. For example, what happens if there is an unexpected problem. In the sports analogy that we were using above, what happens if a football player unexpectedly gets hurt during a regular season game? Who notifies who? Who makes the decision whether the player can play despite their injury? Who makes the decision who will replace the player if they are badly injured, and specifically, which player will replace the injured player? Each level of governance would be responsible for making a decision or to bring visibility to the issue at hand. For example, if the football player gets injured on the field, the offensive coach may be able to replace the injured player with a player off the bench for 5 games. However, if the injury is severe enough, the offensive coach may escalate the issue to the head coach to discuss a longer term solution.

For information on the program specific governance, please go to this section

## FAQ

# What is Claims Journey to the Cloud?

Claims Journey to the Cloud is a multi-year program anchored on **the GW CC Upgrade to the cloud**, but strategically steered by the GW-WSIB Co-Innovation Partnership.

The pillars of the program include:

1. **Strategic Partnership with Guidewire**
2. **Co-Innovation**
3. **Quick Wins – stand alone projects**
4. **Process and Service Design**
5. **The Re-implementation to the Cloud**

**Goal of Program:** The goal of this program is to ultimately make the experience for employers, employees, and injured workers better. What makes this program unique is our **Strategic Partnership** and **Co-Innovation work** with Guidewire. Further in the document, we will describe what each pillar of the Claims Journey to the Cloud program is. Click here

Here are the details of the different pillars that make up this program.

### Strategic Partnership with Guidewire

The strategic partnership with Guidewire is based on co-innovation and collaboration. Together with our business [subject matter experts (SMEs)](#SMEs_Subject_Matter_Experts), WSIB, is working with Guidewire to design and develop a [Worker's Compensation product layer](#Workers_compensation_layer) (Claims) to meet our needs.

Guidewire is originally built for the property and casualty insurance industry, not worker’s compensation, so worker compensation companies needed to make a lot of custom changes to ensure Guidewire ClaimCenter fit the industry needs. This is similar to how ACES, the system our Claims staff currently uses, is a highly customized version of Guidewire ClaimCenter.

This partnership is all about creating the right platform to help us work more effectively and support the injured workers we serve.

* + - ***Scenario:*** As consumers, most of us can shop for shoes off the shelf from any retailer. Most shoe stores/department stores will carry our size and we don’t need to have our shoes tailored or customized. But if you are basketball player with size 16 feet, chances are it would be difficult for you to find a pair of shoes anywhere. This is because most shoes aren’t made for basketball players with size 16 feet. You would most likely have to get a pair of custom shoes from a shoemaker, which is time consuming and expensive. Similarly, the current Guidewire product is not made for worker’s insurance. There needs to be many customizations to make the product work for worker’s insurance. But what if we could work with Guidewire directly so the product that we purchase off the shelf, fits our needs? What if as a size 16, you’re able to buy shoes off the shelf and not have to go to a shoemaker to make any changes?

In the scenario above, we highlight why the strategic co-innovation and collaboration is unique. We can influence the product as it is being developed so it fits our needs, avoiding the significant costs needed to customize and maintain the customizations afterward.

The overall purpose of the Strategic Partnership with Guidewire is for Guidewire to:

1. Leverage WSIB’s industry knowledge and leading practices to enhance Guidewire’s core platform and services
2. To ensure workers’ compensation carriers, like WSIB, can configure their required functionalities without disrupting their cloud version updates

Output:

1. Output of Strategic Partnership: To have a list of features and understand if Guidewire will be including it in their [product roadmap](https://wsib.sharepoint.com/:b:/r/sites/projects/CJ/Shared%20Documents/GW%20Deliverables/WSIB-GW%20Co-Innovation_Executive%20Summary%20v3.pptx.pdf?csf=1&web=1&e=NeJSS8)
2. For the features that Guidewire will not include as part of their product roadmap, WSIB has to decide how to proceed:
   1. Redesign
   2. Continue as-is
   3. Cease functionality

For more details on the deliverables and other details related to the engagement, see the [Guidewire SOW](https://wsib-my.sharepoint.com/personal/bonnie_lau_wsib_on_ca/Documents/Guidewire%20SOW.pdf) for reference.

*As reference: SOW stands for Statement of Work. It is a document that outlines the scope, outcomes, milestones and timeframes of a project. A Statement of Work is an important project management document created at the very beginning of a project.*

##### Further Details - Strategic Partnership With Guidewire Engagement:

1. Timeline: July 2024 - December 2024.
2. The engagement was divided into 4 separate workstreams with their own independent deliverables:

|  |  |  |  |
| --- | --- | --- | --- |
| Workstream | Description | What does it actually mean? | Deliverables |
| Workstream 1: [Domain Epic Map](#Domain_epic_map) | Analysis and evaluation into how different functions within the claims lifecycle currently functions, and how WSIB’s current state aligns to Guidewire’s out-of-the-box product.  WSIB utilized business resources and SMEs to conduct overview sessions for Guidewire. This ensured Guidewire’s understanding of how things are working (current state) to be able to assess if the functionality can be added to their product backlog |  | Business sessions: [here](https://wsib.sharepoint.com/sites/projects/CJ/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2Fprojects%2FCJ%2FShared%20Documents%2FGW%20Zoom%20Recording%2FBusiness%20Sessions&viewid=db3c8015%2Ddd41%2D47e7%2Db040%2Db89d258fa75a)  Final Deliverables: [here](https://wsib.sharepoint.com/:f:/r/sites/projects/CJ/Shared%20Documents/GW%20Deliverables/Workstream%201%20-%20Transformation%20Assessment%20and%20Strategy?csf=1&web=1&e=6rHlcM) |
| Workstream 2: Co-innovation Feature Candidate List | This deliverable consists of   * 1. A list of candidate features in a priority sequence based on GW Product development decisions. This deliverable outlines the necessary functional modules required to deliver expected business functionality, supporting key processes to ensure smooth, efficient system operation   2. GW Delivery options for list of features. The details capture the rationale and corresponding implications for customer's adoption for the proposed GW delivery option. | . | [**Functional Modularization Document:**](https://wsib.sharepoint.com/:p:/r/sites/projects/CJ/Shared%20Documents/GW%20Deliverables/Workstream%203%20-%20Benefit%20Calculation%20Deep-Dive/Functional%20Modularization%20Document/WS3%20Deliverable_Functional%20Modularization%20Document_v0.1.pptx?d=w11020b428f354bf490764fb6eef3c5c7&csf=1&web=1&e=GyLNY9)  **GW Delivery Options & WSIB Adoption Document:** |
| Workstream 3: Benefit Management – Current State detailed document | a detailed analysis of the functional gaps between Guidewire's out-of-the-box solution and WSIB’s specific benefit calculation and management requirements.  This document provides a detailed overview of the business requirements and workflows related to benefit payments, including survivors' benefits, in their current state. It is designed to offer clear insights into how benefit payments are calculated and managed. | This document provides an analysis on the gaps between how the Guidewire product currently operates and WSIB’s specific needs” | [**Functional Gap Analysis Document:**](file:///C:\Users\bonni\Downloads\WS3%20Deliverable_Functional%20Gap%20Analysis_vFinal.docx)  [**Benefit Management - Current State Detailed Document:**](https://wsib.sharepoint.com/:w:/r/sites/projects/CJ/Shared%20Documents/GW%20Deliverables/Workstream%203%20-%20Benefit%20Calculation%20Deep-Dive/Benefit%20Management%20-%20Current%20State%20Detailed%20Document/WS3%20Deliverable_Benefit%20Management%20-%20Current%20State%20Detailed%20Document_vFinal.docx?d=w5fe92df680d34406bbbaee1b791a1f13&csf=1&web=1&e=lJvKKi) |
| Workstream 4: Architecture | This workstream refers to the integration technical evaluation and consists of what the future architecture could look like as well as what future state integrations could be associated to each epic/feature (in workstream 1). |  | [Solution Architecture Document](https://urldefense.com/v3/__https:/wsib.sharepoint.com/:w:/r/sites/projects/CJ/Shared*20Documents/GW*20Deliverables/Workstream*204*20-*20Integrations*20Technical*20Evaluation/ClaimCenter*20Reimplementation*20Solution*20Architecture*20Document.docx?d=wc3c09715420f452fa92ef8d57871d443&csf=1&web=1&e=mn6ank__;JSUlJSUlJSUlJSU!!Nyu6ZXf5!vp0hJ_aKxdx4kfj0ndz-cSin7mo4sGHMV7vuP7ava6ZcRnwc_Efxhg3fF0y_zMdleS004PNVKESfuSiSXwpvs1DaJezz3Q$) 2. [Integration Inventory (Future State)](https://urldefense.com/v3/__https:/wsib.sharepoint.com/:x:/r/sites/projects/CJ/Shared*20Documents/GW*20Deliverables/Workstream*204*20-*20Integrations*20Technical*20Evaluation/WSIB*20-*20Future*20state*20integration*20inventory.xlsx?d=w98721c0d42f54ba09cfd5f4427215a94&csf=1&web=1&e=qj6RxL__;JSUlJSUlJSUlJSUl!!Nyu6ZXf5!t4XdQjW_Z22tX3XyGl3jsswmhqYr1X0vryxAKg9SsHSeqvtEjFxzAAlUUS4ehuknx3laYsdt6D5r_et3yUBe12pcxqzXZg$) |

### Co-Innovation

The purpose of the Co-Innovation Pillar is for Guidewire to build out the components of a worker’s compensation layer to their product that can be leveraged across the worker’s compensations landscape. During this development phase, Guidewire will engage with WSIB not limited to, but in the following capacity:

1. [Proof Of Concepts (POCS)](#POC_Proof_Of_Concept) of functionality
2. Demonstrations of newly built functionality
3. [SME](#SMEs_Subject_Matter_Experts) Consultations
4. Validation
5. Testing
6. Future State Documentation

The activities listed above present WSIB an opportunity to influence the components of Guidewire’s worker’s compensation layer.

1. **Quick Wins**

**Functionality to be delivered in Q1, 2025**

1. Return To Work Scheduler: The current experience of scheduling meetings with employers and employees to discuss return to work options is not ideal and cumbersome. Leveraging a technology solution to reduce time to meeting with customer self-booking capability and intelligent allocation to RTWS. Implementation
2. Email Automation: When employers want to receive claims correspondence by email in the present state, they have to request each letter, **every single time**. Now imagine an employer has to do o this for multiple letters for multiple injured workers. Going forward, we will be automating the process to send outbound claims letters **via secure mail**.

### Process and Service Design

The Redesign Workstream will start at approximately the same time as the Co-Innovation Phase (early 2025). This workstream has a strong dependency on the Strategic Guidewire Partnership Product Backlog Deliverable. For functionality Guidewire will not build, WSIB will then need to decide:

1. What **functionalities to redesign** to better adhere to the Guidewire Product (if possible) and or;
2. How to create processes/ include functionality that are best in class in the current market

\*We know that even with the Co-innovation agreement with Guidewire, the worker’s compensation layer will likely not meet 100% of our claims functionality needs. As such, we can expect some level of customization even after Guidewire builds the worker’s compensation layer.

Service Design/Customer Journey Mapping

* 1. Refers to the stream led by Michael Martino (Kyle Collins). Work related to service design and/or digital delivery for Claims Transformation, including research on Guidewire Calendar, ethnographic research, mapping claims journeys for online services and service design opportunities

### 4. Reimplementation to the Cloud

This stream of work includes:

1. Request For Proposal (RFP) for a Systems Integration (SI)
   1. RRP and Request for Response to RFP
   2. Vendor Demos
   3. Re-implementation Vendor Selection
   4. SI Onboarding

What is an RFP?

An RFP is a document that businesses use to ask other companies for details about a product or service. RFPs are used when a business needs to evaluate a product or service's overall value, in addition to its price. *A more personable comparison that you could draw, is for example, when an individuals put an ad on Kijiji, asking if there are any babysitters.* Similarly, this is how an RFP functions.

What is the process of an RFP?

* Create RFP: Once an RFP is created – it is listed in the open market.
* Receive Responses: Once a request for proposals is on the open market, potential vendors generally must respond within a certain timeframe.
* Vendor Demos and Evaluate Responses: The organization scores and ranks the proposals based on the vendors' responses and fit with the organization's requirements.
* Once responses are evaluated, then a preferred vendor is chosen and generally a Statement or Work (SOW) or a MSA (master services agreement) is signed with the vendor; depending on if we have engaged with the vendor in the past.
* Once legal documents are signed, then the organization would generally onboard the SI, which can include hardware (laptops and computers), software (access to key programs), and any knowledge transfer as appropriate.

1. Requirements
   1. Data Conversion/integration/reporting requirements will be IT led with business input and validation
      1. Data Conversion Requirements: Data Conversion refers to the ‘translation’ that needs to occur when changing data from one format to another. A simplified way to think of this is: ie*, your dining table is currently located in your living room. However, you decide to downsize and buy another home. When you move houses, you notice that in your new house,* ***your new dining room may be too small,*** *and therefore, you may need to re-size your dining table to fit into your new dining room.*

In this example, the dining table is the data. When referring to data conversion requirements, this refers to the rules in terms of how the data should be stored and operate in the new world. In the example of the dining table. *The resizing of your dining table is the requirement. If you reduced the length and width by 10 centimeters, then the requirement is: reduce length and width by 10 centimeters.*

* + 1. Integration Requirement: This refers to how an integration is supposed to work. The core concept of an integration is a connection between two (or more) systems. Therefore, integration requirements will dictate how two systems connect and talk to each other. An example of an integration requirements includes: *Data will flow from System A, to System B. Data will not flow from System B back to system A.*
    2. Reporting Requirement: This refers to what data to collect, analyze, and present in a report. Can also include the purpose, audience, and frequency of the report, as well as instructions for data formatting and submission
  1. Business Functional Requirements will be business led
     1. Functional Requirements refer to how a system is supposed to work. For example, *If I click button A, then a pop up is supposed to appear where I can click on the “Create” button.* This is an example of a functional requirement.

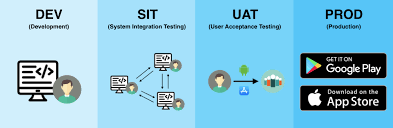
1. Development (of Guidewire’s WCP Layer to WSIB Layer: This layer will include 100% of the functionality WSIB would require)
   1. As referred above, Guidewire is creating a worker’s compensation (WC) layer that should include a lot of the functionality that WSIB requires. However, because the WC layer isn’t created just for WSIB, there will still be development work required to capture the functionality that remains unaddressed by the WC layer.
2. Testing: (DIT/SIT and BAT)

After code has been developed, it needs to be thoroughly tested before releasing the code to production. In most large-scale digital transformations, there are 3 testing phases.

1. DIT: A software testing phase that helps ensure code meets specifications and is ready for the next step in the SDLC. DIT is typically performed by the developer in their own environment
2. SIT: SIT tests the interactions between different modules, systems, or networks to ensure they function properly and are compatible. SIT occurs after DIT
3. BAT (also known as User acceptance testing (UAT)): is a process that evaluates software to ensure it meets business goals. It is when end business users evaluate the software to determine if it meets their requirements and expectations. BAT generally happens after SIT.

Once the business accepts that the software is functioning as expected, then the code is pushed into production. Production refers to the final stage of development where the latest version of a software product is made available to the end user.

\*It is important to note that there are other types of testing, including performance, time-based, regression, penetration and smoke testing to name a few. For the purpose of the document, we will focus on the major buckets of testing as listed above.



## Guiding Principles for the Program

As mentioned previously, Claims Journey to the Cloud isn’t a typical program we have seen at the WSIB. At the beginning of this journey, WSIB IT, WSIB Business, and Guidewire created the guiding principles for the Guidewire Strategic Partnership, which has informed the Guiding Principles for the Program.

1. Trust
   1. Between different business organizations and between different vendors, trust is an essential ingredient in how successful the program will be. This program will require us to work cross functionally with teams that may have different goals and objectives.
2. One Team
   1. Regardless of where an individual organizationally resides (whether internally or externally, in IT or as part of the Business), the success of the program will depend on how successful we can operate as one team.
3. Collaboration
   1. We must be able to work together with other teams to achieve a common goal. It involves the sharing of ideas, resources, and responsibilities, with each participant contributing their expertise and efforts.
4. Zero Tolerance for Bullying
   1. We have a zero tolerance for bullying on this program. This includes but is not limited to zero tolerance for intimidation, physical or verbal harassment, deliberately undermining another individual, and any threats.
5. Ownership & Accountability
   1. Each individual should take responsibility for their own action’s, and decisions, and be able to answer to others for the outcomes. Being accountable involves being transparent, responsible, answerable, and acting with integrity.
6. Well-Defined Roles & Responsibilities
   1. This guiding principle goes hand in hand with defining scope. Although ambiguity exists and will exist, it is important for every individual to pro-activity seek clarity when there is ambiguity in terms of roles & responsibilities.
7. Transparency & Honesty
   1. Transparency as a guiding principle means being open, honest, and straightforward in all actions and communications.
8. Ask Questions
   1. This program will be a safe environment for everyone to ask questions.
9. Have Fun
   1. Some people believe that keeping things weird and having fun can be infectious and help others enjoy the design process. Others believe that fun is a rewarding behaviour that can help a team can help achieve lasting performance. On this program, having fun and create an environment to build those social networks not only increases commitment to the program, but these very social networks can also help increase efficiencies in decision making.
10. Respect
    1. This principle involves treating others with dignity, valuing the opinions of others and acknowledging their feelings. Each individual on this program has a unique experience and skillset – on this program, we will listen and treat each other with dignity.
11. Engaged Leadership
    1. On This program, leadership is visible across all parts of the program, from the C-Suite all the way down to the manager/director level.
12. Innovative Flexibility
    1. Innovative flexibility, or innovation-based strategic flexibility (ISF), is the ability of a company to translate market opportunities into innovation. It's made up of three capabilities: market sensing, resource reconfiguration, and proactiveness. When it comes to this program, this will mean not only thinking outside of the box, but challenging the Guidewire product and our ways of working.
13. Call-In vs Call-Out
    1. This principle relates to the way we approach people when we want to raise an issue. When we call someone out, we single them out, usually in front of an audience on a particular issue. When we call someone in, our approach is usually softer, more collaborative and we usually focus on the problem, not the person.
14. Inclusive by Design
    1. Inclusivity isn’t an after thought. Rather, it should be part of the way we design our future state (product, service, environment and experiences). This approach involves universal design, accessibility, equity and diversity.
15. Radical Candor
    1. Radical candor is a communication approach that emphasizes being both direct and caring when giving feedback.
16. Focus Fridays
    1. On this program, we will try not to schedule meetings on Fridays within the division to enable teams to do other types of work.

## Governance

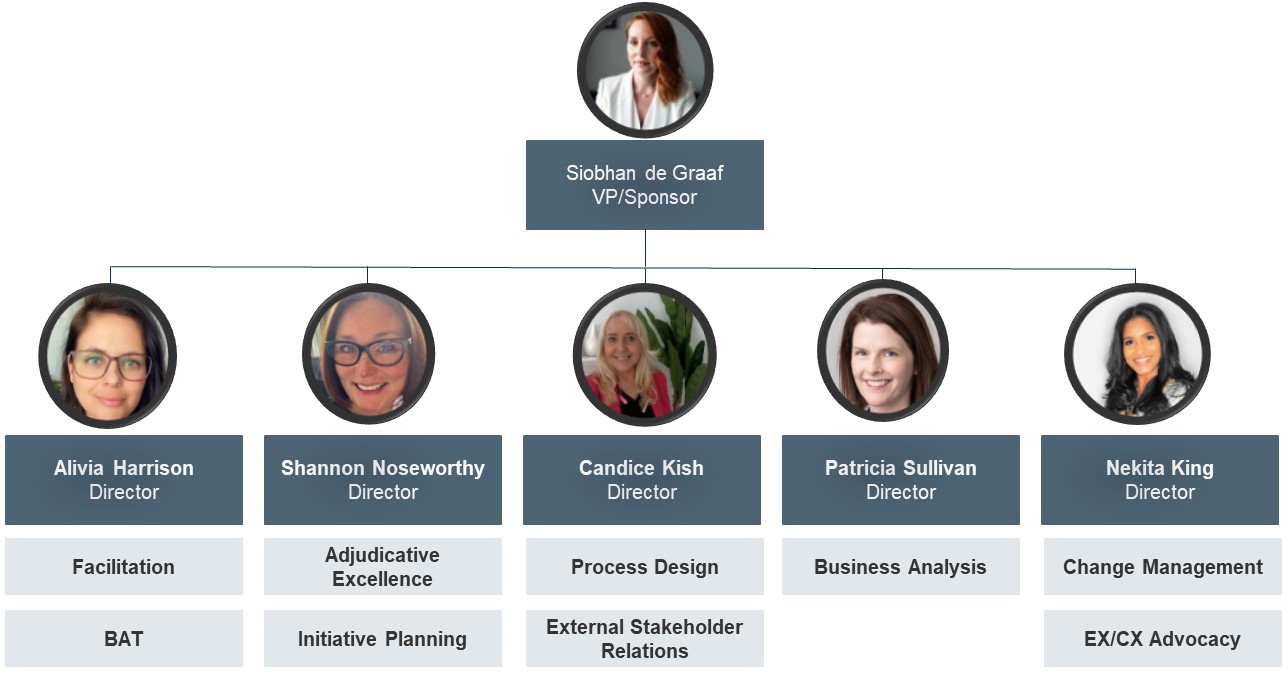
There are 3 levels of governance on this program:

1. Steering Committee
2. Operating Committee
3. Working Group (Directors, Leads)

The governance put in place will enable the program to make key decisions to hit important milestones along the way. It is also a methodology to keep the program accountable.

For more information on the draft governance structure, please click [OLC Governance - Jan 16th.pptx](https://wsib-my.sharepoint.com/:p:/g/personal/bonnie_lau_wsib_on_ca/ERhHCLPpQLFMsgvcUlXRwgkB7xj4NBI7BVmdrULPPv6Eaw?email=Maria_Kwok%40wsib.on.ca&e=1iNLmL)

*Organization Structure (Business)*



## Target Operating Model

A Target Operating Model (TOM) is a blueprint for how an organization will operate in the future to achieve its goals and vision.

It details the desired state of various elements within the organization, including processes, technology, people, and governance. Here's a breakdown of what a TOM typically includes:

* **Processes:** Defines the key activities and workflows that need to be followed to deliver value.
* **Technology:** Outlines the IT systems, software, and infrastructure required to support the processes
* **People:** Specifies the roles, responsibilities, and skills needed within the organization.
* **Governance:** Establishes the policies, controls, and metrics to ensure alignment with the organization's strategic objectives.

A well-defined TOM helps organizations navigate changes, optimize performance, and ensure that all the components are aligned towards strategic goals. It serves as a roadmap for transformation and improvement initiatives.

Our target operating model groups and categorizes activities into 3 sub-groups:

1. Automated
2. AI Augmented
3. Human intelligence and oversight

The belief is that most activities can be either fully automated, can be assisted through AI, or are activities that will require the intelligence of a human brain.

The concepts in the TOM are not new to the organization. Many of these concepts have been embedded operationally. The target operating model will be leveraged to strategically communicate how the operations cluster will operate in the future.

## Overall Themes of the TOM:

1. Automated - Activities that are automated should be utilized for claims of lower complexity, and should cover the largest volume of activities
2. AI Augmented – Leverage AI in quick-starting activities
3. Human Intelligence and Oversight – These are activities in more complex claims, where human intelligence is required

The visualization of the TOM will be outsourced to a consulting firm. In the document below, the concepts and ideas of the TOM are included. However, because the visualization will be outsourced to a consulting company, please only refer to the below for **high level draft ideas** of the target operating model.

[Claims Journey Program WIP - Target Operating Model - Draft.pptx](https://wsib-my.sharepoint.com/:p:/g/personal/bonnie_lau_wsib_on_ca/EZQmuEvJErdBsRL9dnQpwrQBCVosFA3Gm__xGdyjQAW5Dg?e=EYbANT)

# Proposed Onboarding Reading Schedule

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Link** | **Description** | **Onboarding Schedule** |
| GW Strategic Partnership SOW | [Guidewire SOW](https://wsib-my.sharepoint.com/personal/bonnie_lau_wsib_on_ca/Documents/Guidewire%20SOW.pdf) | The SOW for the Partnership including key deliverables, dates and financial deadlines | Week 1- Day 2 |
| Functionality and Domains | [Domains](https://wsib.sharepoint.com/sites/projects/CJ/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2Fprojects%2FCJ%2FShared%20Documents%2FGW%20Zoom%20Recording%2FBusiness%20Sessions&viewid=db3c8015%2Ddd41%2D47e7%2Db040%2Db89d258fa75a) | This includes all sessions the Business SMEs conducted with Guidewire to help them understand 1) current state and 2) known future state. Please note: these are **NOT** requirements | Week 1- Day 2 |
| GW Strategic Partnership Deliverables | [Sharepoint](https://wsib.sharepoint.com/sites/projects/CJ/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2Fprojects%2FCJ%2FShared%20Documents%2FGW%20Deliverables&viewid=db3c8015%2Ddd41%2D47e7%2Db040%2Db89d258fa75a) | This includes the deliverables Guidewire is delivering for the strategic partnership. This will directly inform co-innovation partnership. | Week 1- Day 3 |
| Claims Journey to the Cloud – Governance | [Governance](https://wsib.sharepoint.com/:p:/s/projects/CJ/ESHso4ZpeY1KqHb9KcQGTQQBrhSXTS9WOtTQeYD4HU4scw?e=MtpogU) | This is the proposed governance model that still needs final approval. | Week 1- Day 4-5 |
| TOM Draft Model | [Claims Journey Program WIP - Target Operating Model - Draft.pptx](https://wsib-my.sharepoint.com/:p:/g/personal/bonnie_lau_wsib_on_ca/EZQmuEvJErdBsRL9dnQpwrQBCVosFA3Gm__xGdyjQAW5Dg?e=EYbANT) | This is a Draft Target Operating Model that is attached to demonstrate the concepts involved. | Week 1- Day 4-5 |

# Glossary

This glossary serves as a quick reference to key terms and concepts related to the “Claims Journey to the Cloud” program. It provides clear, concise definitions to help you navigate technical and project-related terminology.

**BAT (Business Acceptance Testing)**

When business users test software to ensure it meets their needs before it is launched.

Typical activities include:

* Verifying that the software aligns with business requirements.
* Performing end-to-end testing of workflows and processes.
* Simulating real-world scenarios to assess usability.
* Identifying and documenting any issues or discrepancies.
* Providing final sign-off for the software to proceed to production. A phase of software testing where business users evaluate whether the software meets their needs and expectations before it goes live.

**Cloud**

A collection of internet-based services (often referred to as “cloud computing”) that businesses use to store data, run applications, manage operations without needing physical servers or on-premises infrastructure.

These resources are accessed online and provided by cloud service providers like Amazon Web Services (AWS), Microsoft Azure, or Google Cloud.

**Cloud migration**

The process of moving data, applications, or systems from on-premises servers to cloud-based environments.

**Closure**

In claims management, closure refers to the final stage of a claim where the insurer determines that no further action is needed on the claim.

**Customization**

The process of modifying a standard software product (e.g. Guidewire) to better fit specific business needs.

**Co-Innovation**

A collaborative approach where WSIB and Guidewire work together to develop new features and solutions tailored to our landscape.

**Data conversion**

The process of transforming data from one format to another during migration.

Imagine you’re moving into a new house, but your old dining table is too large to fit in the new dining room. To make it work, you need to cut down the table’s size or buy a new one that matches the new space.

Similarly, data conversion is like resizing or reformatting your “data” table so it fits perfectly into a new system or software environment. This ensures everything works properly in its new “home”.

**Digital transformation**

The process of adopting digital technology to improve business processes, services, or customer experiences.

**DIT (Developer Integration Testing)**

A phase where developers test the software’s individual components to ensure they meet specifications and work as intended.

**Domain**

A specific area of focus or expertise within an organization. For example, “Claims Management” is a domain focusing on handling and processing claims. Another domain would be “Return-to-Work (RTW)”, a domain focused on helping injured workers recover and return their jobs safely and efficiently, often including vocational rehabilitation and accommodations.

**Domain epic map**

A visual or structured representation that organizes and categorizes major features, functionalities, or work items (epics) within a specific domain. It provides an overview of how large-scale business objectives or deliverables (epics) align with the specific areas of focus (domains) within an organization or project.

**Epic**

A large, high-level work item or feature that represents a significant business objective or deliverable. Epics are often broken down into smaller tasks or user stories for execution. IN the context of domains, an epic typically aligns with a specific area of focus (e.g., Claims Management) and represents a major initiative or functionality required to support that domain.

An example of an epic that would fall under Claims Management would be automated claim assignment.

**Functional gap analysis**

An evaluation comparing the existing capabilities of a system (Guidewire’s out-of-the-box solution) with the specific needs of WSIB, identifying what’s missing.

**Governance**

The framework of rules, practices, and processes used to manage and oversee a project or program to ensure it achieves its goals.

**Guidewire ClaimCenter**

A software platform designed to manage the lifecycle of insurance claims. It was originally designed for property and casualty (P&C) insurers. It is also used by different worker’s compensations boards/organizations across the globe.

It helps manage the entire claims lifecycle from initial claim intake and registration to closure.

At WSIB, Guidewire Claimcenter is the software that powers ACES.

**Infrastructure**

The hardware, software, networks, and systems that provide the foundation for an organization’s IT environment.

Some examples include:

* Hardware, like servers, desktop computers,
* Networking equipment like routers, switches
* Storage devices like hard drives and cloud storage systems
* Operating systems like Windows, Linux, or macOS
* Physical infrastructure like data centers that house servers and networking hardware

**Integration**

The connection between two or more systems that allows them to share and exchange data seamlessly.

Imagine you have different musical instruments, like a piano, a guitar, and a drum set, each designed to produce its unique sound. On their own, they can play music, but if you want them to perform a harmonious song together, you need a conductor to coordinate them.

In integration, the systems (like the instruments) are connected and coordinated (like the conductor), ensuring they work together seamlessly to product the desired outcome.

**Milestone**

A significant event or achievement in a project, used to track progress toward completion.

**OOTB (Out-of-the-Box)**

Standard software functionality provided without any customizations or modifications.

**RFP (Request for Proposal)**

A document issued to invite vendors to submit proposals for products or services, typically including details about deliverables, timelines, and costs.

**POC (Proof Of Concept)**

A proof of concept is a preliminary test/ demonstration or pilot, that validates the feasibility of a new idea, product or method. It essential proves that a concept can work in practice and is worth pursuing further development and thereby, resources.

**SaaS (Software as a Service)**

Software applications hosted on the cloud and access over the internet without needing installation on local machines (e.g., Microsoft Office 365).

**Scalability**

The ability of a system to handle increased demand by adjusting resources or capacity, like expanding storage or processing power.

**SIT (System Integration Testing)**

A testing phase that ensures different modules, systems, or networks interact and function together correctly.

**SMEs (Subject Matter Experts)**

Individuals with deep knowledge and expertise in a specific domain, process, or topic. SMEs provide critical insights and guidance to ensure that business requirements, technical solutions, and project outcomes align with organizational needs.

Typical roles include:

* Providing detailed input during requirements gathering
* Validating process designs for accuracy
* Supporting testing by reviewing processes or outcomes

**Stakeholder**

Anyone who has an interest in or is impacted by the success of a project, such as team members, managers, or end users.

**SOW (Statement of Work)**

A project management document that defines the scope, deliverables, milestones, and timelines for a project.

**System Integration**

The process of combining different systems or components into one cohesive whole to ensure they function together.

**TOM (Target Operating Model)**

A blueprint outlining how WSIB will operate in the future, including processes, technology, people, and governance to achieve strategic goals.

**Testing**

The process of evaluating software to ensure it performs as expected and meets user needs. Major types include DIT, SIT, and BAT.

**Worker’s compensation layer**

Custom-built features added to Guidewire’s standard platform to meet the specific needs of worker’s compensation claims management.

**Return to Work**

Return to work is one of the major objectives that WSIB has for the injured employees it takes care of. The goal is to try to get the injured worker, back to work /modified work.