FX Onboarding
Agenda

Morning Agenda
• Introductions and Expectations
• FX Background
• FX Governance
• FX Portfolio Management
• FX EPMO
• FX Project and Program Management Standards
• IV&V
• OCM Services
• Q&A
Agenda

Afternoon Agenda

• Business Analyst (BA)
• Technical IS/IP Solution Review
• Integration Scope
• Technical Standards
Introductions

• Welcome aboard FX
• Training Expectations
  – 8 hours
  – Presentation, Q&A
• Let’s get to know each other
• Please stand up and state:
  – Your name
  – Your position on your project
  – Something we may not know about you
What is FX?
What is SEAS?
What is FX Governance?
What is the FX Portfolio?
What is the FX EPMO?
What is FX?
FX Organization

• Florida Health Care Connections (FX) encapsulates everything that is affected by the transformation of Medicaid service delivery
• FX projects are:
  • authorized by FX Governance through the FX Portfolio
  • directed by FX EPMO
  • FX Project teams are influenced by Agency stakeholders and external to the Agency stakeholders such as providers, recipients, and third-party service providers
Who is SEAS?
Who is SEAS?

• Strategic Enterprise Advisory Services (SEAS)
  • SEAS will develop the technical standards and propose solutions for the Florida Health Care Connections (FX) in accordance with the CMS Conditions and Standards, including MITA 3.0
  • Provide strategic, programmatic, and technical advisory services for the Agency.
  • The Agency accepted the 17 initial deliverables in FY 2017-18. The SEAS Vendor is now executing those plans and performing the annual refresh.
The SEAS Vendor provides the technical advisory expertise to identify solutions that meet current and future business needs of FX.

We do this by providing ongoing strategic, technical advisory, and programmatic services.

Who is SEAS?
What is SEAS tasked with?

The SEAS Vendor was tasked with areas such as the following...

- Providing the consulting expertise needed to develop the strategic plan for FX in accordance with the MITA Framework 3.0 and the CMS Standards and Conditions
- Developing and managing the FX Governance
- Managing a PMO for FX projects
- Developing data and technical standards
- Developing and maintaining information and technical architecture documentation
What is SEAS tasked with?

The SEAS Vendor was tasked with areas such as the following...

• Establishing an enterprise data security plan
• Providing integrated Organizational Change Management
• Providing strategic project portfolio management including assisting the Agency in developing Advanced Planning Documents (APDs) needed for requesting federal enhanced funding for FX projects
• Managing the Medicaid Enterprise Certification process for FX to support modular system implementation and support the Agency with early feedback from CMS that may impede certification
SEAS Deliverables

- **Enterprise Systems Strategic Plan** – Defines the Vision for the future FX and the areas of focus to achieve that Vision.
- **Enterprise Systems Governance Plan** – Sets a system for addressing the issues arising throughout the project.
- **Enterprise Systems Strategic Planning Training Program** – Trains Agency staff on strategic planning to support the transformation.
- **Strategic Project Portfolio Management Plan** – The framework for identifying, prioritizing, and stage-gating FX projects.
- **SEAS Management Plan** – Outlines how the SEAS Vendor will deliver strategic enterprise advisory services per the contract.
- **Revised MITA State Self-Assessment and Update Process** – The rating of each MITA Business Processes to gauge MITA maturity.
- **FX Project Management Standards** – Establishes the processes and controls to manage project work effort to transform the FX.
- **FX Project Management Toolkit** – The set of tools enabling the FX Project Management Standards.
- **Medicaid Enterprise Certification Management Plan** – Analyzes the Medicaid Enterprise Certification Toolkit and summarizes the Certification Lifecycle process.
- **FX EPMO Charter and Program Management Plan** – Charters the FX EPMO and establishes the guidelines and operational processes for how the FX EPMO shall manage and/or monitor FX projects.
- **Data Management Strategy** – Provides a structure to improve information management and data sharing across FX.
- **Data Standards** – Creates consistent definition of the required format, structure, and rules around data usage.
- **Technical Management Strategy** – Sets AHCA’s technology management based on outcome-driven, initiative-based management principles.
- **Technology Architecture Documentation** – Documents the conceptual overview of the FX and guides development of technical solutions for the FX.
- **Technology Standards** – Produces standards following guidance defined in MITA 3.0 Part 3 Technical Architecture Chapter 6 Technology Standards.
- **Design and Implementation Management Standards** – Defines development standards and processes for procurement implementation of FX components.
- **Enterprise Data Security Plan** – Defines the required protections, processes, and controls to meet compliance requirements, such as the Health Insurance Portability and Accountability Act.

Deliverables will be assessed for needed revisions on at least an annual basis.
Strategy and Execution work hand in hand to provide the Best Value
The agency determined the below Strategic priorities to transform FMMIS into a modular environment by 2024

### Nearer Term Strategic Priorities

<table>
<thead>
<tr>
<th>Integration Platform</th>
<th>Provider</th>
<th>Recipient</th>
<th>Program Integrity</th>
<th>Financials</th>
<th>Value Based Care</th>
<th>Inter-Agency Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integration Services Platform (ISP)</td>
<td>Identity Reconciliation</td>
<td>User Interface / Recipient Portal</td>
<td>Automation and Analytics</td>
<td>Enhanced / Real Time Reporting</td>
<td>Health Plan Encounter Data</td>
<td>Data Sharing¹</td>
</tr>
<tr>
<td>Enterprise Data Warehouse (EDW)</td>
<td>Streamlined Provider Enrollment</td>
<td>Streamlined Recipient Enrollment</td>
<td>Develop Model for Managed Care &amp; FFS</td>
<td>Reduce &amp; Eliminate Manual Processes &amp; Redundant Systems</td>
<td>Performance/Contract Management</td>
<td>Social Determinants of Health</td>
</tr>
<tr>
<td></td>
<td>Performance Management &amp; Population Health</td>
<td>Integrated and Accessible Data for the Recipient</td>
<td></td>
<td>Analytics &amp; Dashboarding</td>
<td></td>
<td>Shared Licensure &amp; Credentialing</td>
</tr>
</tbody>
</table>

¹ While inter-agency data sharing would take place across previous Strategic Priority area (e.g. Provider, Recipient), the Agency will make it a central focus during the Inter-Agency Focus Strategic Priority.
## FX Phased Procurement Strategy
(formally known as the Florida MES Procurement Strategy)

*Released in June 2016*

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase 1</strong></td>
<td>Procurement of a Strategic Enterprise Advisory Services (SEAS) Vendor and an Independent Verification and Validation (IV&amp;V) Vendor</td>
</tr>
<tr>
<td><strong>Phase 2</strong></td>
<td>Establishes the technical foundation of the modular transformation through the Agency’s procurement of an Integration Services and Integration Platform (IS/IP) Solution and an Enterprise Data Warehouse (EDW) Solution</td>
</tr>
<tr>
<td><strong>Phase 3</strong></td>
<td>Existing Medicaid-related systems will be integrated into the infrastructure created by IS/IP and EDW</td>
</tr>
<tr>
<td><strong>Phase 4</strong></td>
<td>Acquisition and implementation of modular processing capabilities, systems and services that upgrade, modernize and replace the functions currently performed by multiple existing systems</td>
</tr>
</tbody>
</table>

- **Complete** : Fall 2017
- **WE ARE HERE** : Fall 2019 – Fall 2021
- **Spring 2020 - 2025**
What is Governance?
FX Governance

FX Executive Governance
FX Program Governance
FX Governance

Given the volume and subject matter diversity of the decision-needs originating from FX, the goal of the FX Governance structure is to develop an organized flow of analysis and recommendations which equip the Secretary or her designee to make holistic and well-informed decisions in a timely manner.

All decision-making authority for FX ultimately rests with the Secretary of the Agency, or with her appointed individual designee.
FX Governance Structure

FX Governance is a two-tiered structure comprised of Executive Governance and Program Governance.

Executive Direction Flows Down (Portfolio Level Decision-Making)  
*i.e. Select and Prioritize the Right Projects*

Project Operational Challenges Flow Up (Project Level Decision Making)  
*i.e. How Should We Keep This Project On Track?*
## FX Governance Committee Membership

### Executive Governance (9)
- AHCA Secretary
- Chief of Staff
- General Counsel
- Deputy Secretaries (3)
- CIO
- Assistant Deputy Secretary of Medicaid Operations
- Chief of Central Services

### Program Governance (15)
- Assistant Deputy Secretary Medicaid Ops (Chair)
- Assistant Deputy Secretaries of Medicaid (2)
- HQA Chiefs (2)
- Operations Chiefs (2)
- IT Chiefs (2)
- HQA and Medicaid SMEs (2)
- Medicaid Chiefs (4)
# FX Executive Governance Membership

<table>
<thead>
<tr>
<th>Membership</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mary Mayhew</td>
<td>Agency Secretary</td>
</tr>
<tr>
<td>Toby Philpot</td>
<td>Chief of Staff</td>
</tr>
<tr>
<td>Stefan Grow</td>
<td>General Counsel</td>
</tr>
<tr>
<td>Beth Kidder (Chair)</td>
<td>Deputy Secretary</td>
</tr>
<tr>
<td>Molly McKinstry (Vice Chair)</td>
<td>Deputy Secretary</td>
</tr>
<tr>
<td>James Miller</td>
<td>Deputy Secretary</td>
</tr>
<tr>
<td>Scott Ward</td>
<td>Chief Information Officer</td>
</tr>
<tr>
<td>Abby Riddle</td>
<td>Asst. Deputy Secretary</td>
</tr>
<tr>
<td>Ryan Fitch</td>
<td>Chief of Central Services</td>
</tr>
</tbody>
</table>
## FX Program Governance Membership

<table>
<thead>
<tr>
<th>Membership</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abby Riddle (Chair)</td>
<td>Asst. Deputy Secretary Medicaid Operations</td>
</tr>
<tr>
<td>Shevaun Harris</td>
<td>Asst. Deputy Secretary Medicaid Policy &amp; Quality</td>
</tr>
<tr>
<td>Tom Wallace</td>
<td>Asst. Deputy Secretary Medicaid Fin &amp; Analytics</td>
</tr>
<tr>
<td>Gay Munyon</td>
<td>Chief of Medicaid Fiscal Agent Operations</td>
</tr>
<tr>
<td>Damon Rich</td>
<td>Chief of Medicaid Recipient and Provider Assistance</td>
</tr>
<tr>
<td>Ryan Fitch</td>
<td>Chief of Central Services</td>
</tr>
<tr>
<td>Nikole Helvey</td>
<td>Chief of Health Information &amp; Policy Analysis</td>
</tr>
<tr>
<td>Erica Thomas</td>
<td>Chief of Medicaid Policy</td>
</tr>
<tr>
<td>Brian Meyer</td>
<td>Chief of Medicaid Data Analytics</td>
</tr>
<tr>
<td><strong>VACANT</strong></td>
<td>Chief Financial Officer</td>
</tr>
<tr>
<td>Jennifer Barrett</td>
<td>Chief of Support Services</td>
</tr>
<tr>
<td>Mike Magnuson (Vice Chair)</td>
<td>Chief of Strategic Information Technologies</td>
</tr>
<tr>
<td>John T. Edwards</td>
<td>Chief of Distributed Infrastructure</td>
</tr>
<tr>
<td>Kristin Sokoloski</td>
<td>Agency for Healthcare Administrator</td>
</tr>
<tr>
<td>Lucy Gibson</td>
<td>Sr. Management Analyst Supervisor</td>
</tr>
</tbody>
</table>
The majority of the Technology Standards Committee members were previous members of the governance committee to improve continuity and reduce time to develop the necessary background.

<table>
<thead>
<tr>
<th>Member</th>
<th>Division</th>
<th>Member</th>
<th>Division</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scott Ward, Chair</td>
<td>IT, MDA</td>
<td>Terry Schmidt</td>
<td>MFAO</td>
</tr>
<tr>
<td>Sheri Creel</td>
<td>TPL, IT</td>
<td>Larry Strickland</td>
<td>MFAO</td>
</tr>
<tr>
<td>Luis Diaz-Santiago</td>
<td>HQA, IT</td>
<td>Michael Tatum</td>
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<tr>
<td>Josh Doerr</td>
<td>MFAO</td>
<td>Cheryl Travis</td>
<td>MFAO</td>
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<tr>
<td>Heidi Fox*</td>
<td></td>
<td>Brian Wilson</td>
<td>IT</td>
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<tr>
<td>Shaun French</td>
<td></td>
<td>Mike Ying</td>
<td>MDA</td>
</tr>
<tr>
<td>Taylor Haddock</td>
<td></td>
<td>Jay Linton</td>
<td>MFAO</td>
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<tr>
<td>Ashleye Jenkins</td>
<td></td>
<td>David Powers</td>
<td>MFAO</td>
</tr>
<tr>
<td>Matt Kline</td>
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</table>

*If membership must be reassigned, a decision will be needed as to a replacement for specific knowledge, skills, and abilities needed on this committee.
## FX Governance Operations

<table>
<thead>
<tr>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
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</thead>
<tbody>
<tr>
<td>FX Program</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>FX Executive</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FX Program</td>
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<td>9</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>TSC</td>
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<tr>
<td>FX Executive</td>
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<tr>
<td>FX Program</td>
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<td>FX Program</td>
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</tr>
<tr>
<td>FX Executive</td>
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</tr>
</tbody>
</table>

**FX Program Governance meets every Monday.**

**FX Executive Governance meets every Thursday.**

The Technology Standards Committee meets once a month and ad hoc.

### Examples of Meeting Materials:
FX Governance Operations

MEETING FACILITATION
The SEAS Vendor is a co-facilitator of FX Governance meetings. Facilitation will include printed materials and utilize PowerPoint presentations only when necessary.

POST MEETING COMMUNICATION
Decisions and recommendations are communicated to Governance membership and FX stakeholders via a bi-weekly "Governance Highlights" email from the SEAS Governance Team.
## Decision Impact Score Methodology

<table>
<thead>
<tr>
<th>Impact</th>
<th>Qualitative Score Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>1</td>
</tr>
<tr>
<td>Medium</td>
<td>3</td>
</tr>
<tr>
<td>High</td>
<td>5</td>
</tr>
</tbody>
</table>

### Dimensions of Consideration

<table>
<thead>
<tr>
<th>Impact</th>
<th>Cost</th>
<th>Schedule</th>
<th>Scope</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>Impact to cost is below 4% of appropriation</td>
<td>No or little impact to project schedule</td>
<td>Minor clarification to existing scope</td>
<td>Project quality is not affected</td>
</tr>
<tr>
<td>Medium</td>
<td>Impact to cost is above 4% but below 10% of appropriation</td>
<td>Schedule impact is possible</td>
<td>Scope change is noticeable, but not deemed significant</td>
<td>Impact to quality possible</td>
</tr>
<tr>
<td>High</td>
<td>Impact to cost is above 10% of appropriation</td>
<td>Schedule and deliverable due dates will be impacted; determination of the schedule</td>
<td>Scope change or scope determination is deemed significant</td>
<td>Impact to quality is very likely</td>
</tr>
</tbody>
</table>

### Total Impact Score Weight

- **Cost**: 40%
- **Schedule**: 20%
- **Scope**: 20%
- **Quality**: 20%

**Final Impact Score**

- **≤ 2**: Part of general project management for FX EPMO or Project Team
- **> 2 to < 4**: Route to Program Governance for Recommendation
- **≥ 4**: Route up to Executive Governance for Recommendation
Decision Impact Score Summary

How will Impact for each decision-need be scored to inform routing to Governance?

FX will assess decision or recommendation needs across four relevant criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td></td>
</tr>
<tr>
<td>Schedule</td>
<td></td>
</tr>
<tr>
<td>Scope</td>
<td></td>
</tr>
<tr>
<td>Quality</td>
<td></td>
</tr>
</tbody>
</table>

Legend for Numerical Scores:

1. LOW IMPACT
2. SOMEWHAT LOW IMPACT
3. MODERATE IMPACT
4. SOMEWHAT HIGH IMPACT
5. HIGH IMPACT
What is Portfolio?
FX Portfolio

A portfolio is a collection of projects and programs that are managed as a group to achieve an organization’s strategic goals.

The FX Portfolio Team monitors the FX Portfolio projects during delivery management through the integrated project management by the SEAS Vendor. The monitoring may identify strategic changes or risks for the portfolio requiring direction or decisions from FX Governance.
FX Portfolio Stages

FX Portfolio Management consists of four stages Portfolio Initiation, Portfolio Planning, Portfolio Execution and Portfolio Optimization.

1. Portfolio Initiation – Starts the portfolio and establishes vision and strategic priorities.
2. Portfolio Planning – Develops the portfolio contents and consists of two core processes, Project Identification and Project Sequencing.
3. Portfolio Execution - Procures and delivers the components in the portfolio.
4. Portfolio Optimization – Applies changes to improve portfolio effectiveness.

Project Changes Requests are reviewed by the Portfolio Team and a Portfolio Impact Analysis is performed, with results presented to FX Governance for review and recommendation.
The below depicts the portfolio structure, including program and project integration. The exhibit also identifies the respective focus of a portfolio and the focus of a program or project.
FX Portfolio Management

FX Portfolio projects are classified as Planning and Analysis, Procurement, or Implementation.

- **Planning and Analysis Project**
- **Procurement Project** - Focuses on developing the procurement vehicle for selecting and awarding the desired solution. Key activities include refining requirements, developing R1 certification artifacts, evaluations, negotiations, and contract award.
- **Implementation Project** - Focuses on the activities necessary to deliver the solution. Technical projects follow traditional execution phases including analysis, design, development, testing, and implementation. Included in these phases is the R2 certification artifacts. Non-technical projects will follow execution phases appropriate for the defined scope in the Project Charter.
The approach to managing the inventory of projects, is through documenting projects in the Portfolio Management Tracker (PMT) tool. The PMT will:

• Document key attributes of projects, metrics to be measured, project prioritization, and dependencies.
• Standardize projects, identify opportunities to combine projects, use ongoing projects, and reinforces alignment to outcomes.

The attributes captured in the PMT, including combining projects, are used to develop recommendations to Governance.
What is EPMO?
Project and Program Management

As part of SEAS Programmatic Services

- MITA Updates
- CMS Certification
- Project Management Standards
- Organizational Change Management

SEAS Provides Project and Program Management Services for all FX Projects/Programs

- Strategy & Architecture
- Standards
- Security Approach
- Enterprise System Strategic Plan
- Strategic Governance Plan
- Strategy Training

SEAS Management
What is the FX Enterprise Program Management Office?
How are Projects or Programs assigned to the EPMO?

Projects are requested and recommended through the Project Portfolio Management (PPM) Processes and approved via FX Governance Committee Processes.
How are Projects or Programs assigned to the EPMO?

- Projects are assigned by the FX Governance Committee for management or oversight by the FX EPMO based on the following criteria:

<table>
<thead>
<tr>
<th>CHARACTERISTIC(s)</th>
<th>MANAGED BY</th>
<th>REQUIRED TO FOLLOW FX PROJECT MANAGEMENT STANDARDS AND REPORT TO GOVERNANCE?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency-wide FX project</td>
<td>FX EPMO</td>
<td>Yes</td>
</tr>
<tr>
<td>Multi-agency FX project led by the Agency</td>
<td>FX EPMO</td>
<td>Yes</td>
</tr>
<tr>
<td>FX projects with Risk and Complexity scores of 3 or 4 (per DMS Risk and Complexity tool; whether an IT project or not)</td>
<td>FX EPMO</td>
<td>Yes</td>
</tr>
</tbody>
</table>
| FX projects with Risk and Complexity scores of 1 or 2 (per DMS Risk and Complexity tool; whether an IT project or not) | • FX EPMO (preferred)  
• AHCA Business Unit  
• AHCA IT | Yes |
| Non-FX project | • AHCA Business Unit  
• AHCA IT | No |
Project Type and Category

The Decision Tree shows how to use project type and project category to complete the Project Process Agreement (PPA) to identify required project artifacts.

1.0 Start Portfolio Management Process
2.0 Project Category is Estimated
3.0 IT Project
4.0 Non IT Project
5.0 Business Process Modeling
6.0 Procurement
7.0 Project is Approved by Portfolio Management
8.0 Project Process Agreement PPA Completed
9.0 Required Artifacts Determined
10.0 PPA Review and Confirmation with FX EPMO

Note DMS R/C Category Crossover
- DMS R/C 1 = CMS FX Cat 1
- DMS R/C 2 = CMS FX Cat 2
- DMS R/C 3 & 4 = CMS FX Cat 3

Project Process Agreement
Give details of what artifacts and reviews are required for each stage in the FXPLC
FX PMO Manages Projects and Programs

FX Stakeholders

Status

FX EPMO

Status

Metrics

CRAIDL

Program A

Project A

Project B

Program B
Let’s take a break
FX Project Management Standards

- FX Project Management Standards
- FX Project Life Cycle
- FX Project Initiation
- FX Project Planning
- FX Project Execution
- FX Project Monitoring and Controlling
- FX Project Close Out
- FX Roles & Responsibilities
FX Project Management Standards

• Are based on
  – Project Management Institute (PMI)
  – Centers for Medicare and Medicaid Services (CMS)
  – Department of Management Services Project Management and Oversight Standards (Rules 60GG-1.001 through 60GG-1.009, F.A.C)
  – SEAS Contract MED191 and subsequent Task Orders
  – SEAS Invitation to Negotiate (ITN) 001-16/157
FX Project Management Standards

- Align with State Standards and Management Plans
  - FX Design and Implementation Management Standards T-7)
  - FX Medicaid Enterprise Certification Management Plan (P-4)
  - FX Strategic Project Portfolio Management Plan (S-4)
  - FX Governance Plan (S-1)
  - FX EPMO Charter and Program Management Plan (O-2)
  - FX Organizational Change Management (OCM) Plan
The state standards, processes, procedures, and templates are designed to follow industry standards and address the requirements of applicable standards.

All FX Projects must comply with applicable FX standards.
FX Project Life Cycle (FXPLC) is a project life cycle based on the CMS eXpedited Life Cycle (XLC) and customized for use by FX Projects.

The DMS risk and complexity levels and CMS XLC sizing were mapped to identify required artifacts and reviews.
FX Project Initiation Stage

- Project Site Setup (FX Projects Repository) – *Done by FX EPMO*
- Project Risk and Complexity (R&C) Categorization
- Project Process Agreement (PPA)
- Identify Key FX Project Stakeholders
- Develop Project Charter
FX Project Planning Stage

• Complete Project Management Plan (PMP)
• Develop Work Breakdown Structure (WBS)
• Develop Schedule
• Identify Risks
• Perform Risk Assessment
• Plan Risk Response
• Estimate Costs and Confirm Budget
FX Project Execution Stage

• Manage Project
  – Quality Management
  – Stakeholder Management
  – Communication Management
  – Team Management
  – Deliverable Management

• Define and Implement Requirements
FX Project Monitoring and Controlling Stage

- Monitoring and Controlling Scope
- Monitoring and Controlling Schedule
- Monitoring and Controlling CRAIDL
  - Change Log
  - Risk Log
  - Action Item Log
  - Issue Log
  - Decision Log
  - Lessons Learned Log
- Monitoring and Controlling Performance
- Monitoring and Controlling Outcomes and Benefits
- Monitoring and Controlling Cost
The purpose of the project close out stage is to formally finalize all project activity.

- **Lessons Learned Summary** – The FX Project Manager will conduct a Lessons Learned review session and complete the Lessons Learned summary of the Project Close Out Report.

- **Disposition of Project Documentation** – At this stage of the FX Project, the FX Project Manager works with the FX EPMO to review project documents for completeness and archiving according to the document management plan.

- **Project Close Out Summary** – Finally, the project manager documents and submits the sponsor-approved Project Close Out Report to the FX EPMO.
FX Roles/Responsibilities: AHCA

- AHCA Responsibilities
  - Review FX Governance Dashboard (Weekly) as part of FX Governance
  - Review and approve FX Monthly Status Report prior to sending to DST
  - Attend project’s weekly Schedule Review Meetings and provide updates on assigned tasks
  - Attend Weekly Project Status Meetings and provide input and updates on project status, CRAIDL items, and general discussion
  - Identify CRAIDL items, provide input on the management of CRAIDL items (Risk Response, Issue Resolutions, etc.), and provide updates when assigned as a Named Owner
  - For AHCA-owned meetings, input meetings on the Meeting Log and provide agendas and minutes
  - Attend the Weekly FX Schedule Review Meetings
  - Attend the FX Program CRAIDL Meetings
FX Roles/Responsibilities: SEAS

- SEAS Responsibilities
  - Develop and submit FX Governance Dashboard (Weekly)
  - Develop and submit FX Monthly Status Report
  - Schedule and facilitate project’s Weekly Project Schedule Review Meeting
  - Schedule and facilitate project’s Weekly Project Status Meeting
  - Input, monitor, and control CRAIDL Logs and program-related CRAIDL Items
  - For SEAS-owned meetings, input meetings on the Meeting Log, provide agendas and minutes
  - Represent the project in the Weekly FX Schedule Review Meetings
  - Represent the project in the FX Program CRAIDL Meetings
  - Manage overall project execution
FX Roles/Responsibilities: FX Vendor

- FX Vendor Responsibilities
  - Provide project status input to populate the FX Governance Dashboard (Weekly) and Monthly Project Status Report (Monthly)
  - Attend project’s Weekly Schedule Review Meetings and provide updates on assigned tasks
  - Attend project’s Weekly Status Meetings and provide input and updates on project status, CRAIDL items, and general discussion
  - Identify CRAIDL items, provide input on the management of CRAIDL items (Risk Response, Issue Resolutions, etc.), and provide updates when assigned as a Named Owner
  - For FX Vendor-owned meetings, input meetings on the Meeting Log and provide agendas and minutes
  - Manage assigned activities and team members
Independent Verification & Validation
Independent Verification & Validation (IV&V)

- IV&V Responsibilities
- Why IV&V?
- Team Organization
- Reporting
- Communications
IV&V Responsibilities

• IV&V Vendor Responsibilities
  – The IV&V vendor will provide independent evaluation and review processes that evaluate the adherence to the standards, correctness, and quality of the FX projects solutions and ensure that FX projects are developed and managed in accordance with Agency and Federal requirements.
  – The IV&V vendor will also participate in the CMS-required reviews and certification for the FX solutions that are associated with the Medicaid Enterprise.
Why IV&V?

• Provides Agency management and CMS with an objective analysis to deal with issues and to make informed decisions
• Provides management with objective visibility into the progress and quality of the development effort
• Reduces errors in delivered products and increases probability of project success
IV&V Team Organization

Jim Joyce
Executive Advisor

Lonna Peterson
Client Engagement Manager

Peter Wall
IV&V Contract/Project Manager

Vacant
Project Oversight/FX Module Development Lead

Julie Allen
IV&V Certification Lead

Hope Chukes
IS/IP DDI Lead IV&V Analyst

Mitch Shepard
IS/IP DDI IV&V Analyst

Kelly Flaminio
EDW DDI Lead IV&V Analyst

Lynn O’Connor
PMMP Lead IV&V Analyst

Robert Lenard
PMMP IV&V Analyst

Terry Sanderson
IV&V Analyst

Liz Dudek
Executive Advisor

Kelly Flaminio
EDW DDI Lead IV&V Analyst

Robert Lenard
PMMP IV&V Analyst

Terry Sanderson
IV&V Analyst
IV&V Reporting

• Weekly IV&V Update
• Monthly IV&V Status Report
• CMS MMIS IV&V Quarterly Report
• FX Project Management Initial Assessment
• FX Vendor Deliverable Assessments
• FX Vendor IV&V Comment Logs
• FX Project Lessons Learned
IV&V Communications with FX Vendors

- IV&V FX Project Findings, Recommendations, Deliverable Assessments and Comment Logs
- Requests for access
Organizational Change Management (OCM) Services
OCM Services

Objective
Aid AHCA Staff through the FX transformation, with the right information, at the right time, at the right detail level, for sustainable change

Team Roles
OCM Services, Communications, Project Specific Actions

Types of Activities
Understanding *current* and formulating a transition plan for the *future* environment, bringing all staff comfortably through the transformation from the enterprise perspective. This includes:

- Assessments for measuring and monitoring change adoption
- Utilizing Team Leads and Division Partners in message development and delivery
- Identifying policy and procedure updates affecting stakeholders per project
- Assisting with training planning
- Supporting Team Leads and where applicable, Vendors, across the entire project in areas such as HR & Training, Stakeholder impacts, Business Readiness, etc.

*Keeping the entire agency in mind for every project from the enterprise perspective*
OCM Services

Vendor Contract Begins

<table>
<thead>
<tr>
<th>Phase</th>
<th>OCM Services - Contributions to a Project</th>
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</thead>
<tbody>
<tr>
<td>Initiation</td>
<td>General Orientation Sessions developed and delivered</td>
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<tr>
<td>Planning</td>
<td>OCM Methods Training – Tools training for Vendor and Team Lead</td>
</tr>
<tr>
<td>Requirements Analysis</td>
<td>Stakeholder Work (Analysis, Engagement Planning, Business Readiness Assessment, Impact Index, Case for Change and Change Strategy)</td>
</tr>
<tr>
<td>Design</td>
<td>Continue working with Division Partners and writing articles and FAQs, continue to assist the Team Lead and Vendor in achieving awareness and desire</td>
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<tr>
<td>Development</td>
<td>Training materials drafted (Vendor and Agency), coordinate testing of the training materials</td>
</tr>
<tr>
<td>Testing</td>
<td>Monitoring and on-going support of training materials and modifications to policies and procedures as needed, Train the Trainer events occur if appropriate</td>
</tr>
<tr>
<td>Implementation</td>
<td>Training of end users and monitoring call log, error log, and reassess change adoption</td>
</tr>
<tr>
<td>Operations &amp; Maintenance</td>
<td>Identifying final project measurements and documenting benefits</td>
</tr>
<tr>
<td>Disposition</td>
<td>Finalize and close the project with the Continuous Improvement Plan and identifying lessons learned have been applied in preparation for all in flight and future projects</td>
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Q & A

Questions?