Information Technology Expansion
Report 1

(FY2019 Appropriation Act - Public Act 207 of 2018)

March 1, 2019

Sec. 1901. (1) The department shall provide a report on a semiannual basis to the senate and house appropriations subcommittees on the department budget, the senate and house fiscal agencies, the senate and house policy offices, and the state budget office all of the following information:

(a) The process used to define requests for proposals for each expansion of information technology projects, including timelines, project milestones, and intended outcomes.

(b) If the department decides not to contract the services out to design and implement each element of the information technology expansion, the department shall submit its own project plan that includes, at a minimum, the requirements in subdivision (a).

(c) A recommended project management plan with milestones and time frames.

(d) The proposed benefits from implementing the information technology expansion, including customer service improvement, form reductions, potential time savings, caseload reduction, and return on investment.

(e) Details on the implementation of the integrated service delivery project, and the progress toward meeting the outcomes and performance measures listed in section 1507(2) of this part.

(2) Once an award for an expansion of information technology is made, the department shall report to the senate and house appropriations subcommittees on the department budget, the senate and house fiscal agencies, the senate and house policy offices, and the state budget office a projected cost of the expansion broken down by use and type of expense.

MDHHS

Michigan Department of Health & Human Services

1901-1-Rpt boilerplate language: Sec. 1901. (1) The department shall provide a report on a semiannual basis to the senate and house appropriations subcommittees on the department budget, the senate and house fiscal agencies, the senate and house policy offices, and the state budget office all of the following information:

(a) The process used to define requests for proposals for each expansion of information technology projects, including timelines, project milestones, and intended outcomes.

Update FY19:

The Integrated Service Delivery Portal has been updated to include functionality from other MDHHS Programs including Child Protective Services Mandated Reporters as well as the Women, Infants & Children (WIC) program. This functionality was included within the program and project charter documents. The scope, schedule and cost for the additional functionality was approved by project governance which included business and technology representatives.

The ongoing implementation of Universal Case Load is a modernization of the existing Bridges functionality used to assign work to Bridges Field Operations staff.

The Integrated Contact Center utilizes common functionality available through the Michigan Enterprise Contact Center (MIECC). The MIECC provides call center functionality across multiple State of Michigan agencies as part of a DTMB shared service.

(b) If the department decides not to contract the services out to design and implement each element of the information technology expansion, the department shall submit its own project plan that includes, at a minimum, the requirements in subdivision (a).

Update FY19:

The MDHHS Strategic Integration Administration (SIA), formerly the Business Integration Center, developed a program charter for the Integrated Service Delivery (ISD) Program. The scope, schedule and cost for the projects within the ISD Program are detailed in the project level charters for each area. These documents are attached as:

- Integrated Service Delivery ISD Portal - Year 3 Charter.docx (Unapproved - Awaiting Approval)
- ISD Contact Center Year Two Project Charter – On Hold – The Scheduling Dates in Section 2 are being revisited after the delivery of the functional assessment on 5/31/19.

- ISD UCL Year Two Project Charter – On Hold - The Scheduling Dates in Section F are being revisited after the delivery of the functional assessment on 5/31/19.

(c) A recommended project management plan with milestones and time frames.

Update FY19:
The Integrated Service Delivery Portal has been moved to the Enterprise Integrated Service Area (ISA), Program Management Office as a MDHHS Strategic Service according to the approved MDHHS IT Roadmap strategy. The Program Management Plan for the Enterprise ISA is attached as SIA Enterprise ISA Program Management Plan.

Universal Case Load and Contact Center have been moved to the Eligibility Integrated Service Area (ISA). The Program Management Plan for the Eligibility ISA is attached as Eligibility ISA Program Management Plan.

(d) The proposed benefits from implementing the information technology expansion, including customer service improvement, form reductions, potential time savings, caseload reduction, and return on investment.

Update FY19:
The original proposed benefits are still waiting to be realized at the conclusion of this fiscal year's activities.

(e) Details on the implementation of the integrated service delivery project, and the progress toward meeting the outcomes and performance measures listed in section 1507(2) of this part.

Update FY19:
ISD Portal

R3.0 (9/22/18) –
View missed appointments
View scheduled appointments
WIC referrals based on customer qualifications
Dynamic application for benefits based on VLP steps 1a and 1b
Upload cell phone contact to Bridges
Integrated Great Start to Quality resources
Expanded 211 data (confidential address disclaimers, expanded search features)
Expanded MILogin user account recovery features
Additional reporting tools for MDHHS Admin users
SQL server for data archiving, report generation and OIG data reporting
Enhanced report changes and renew my benefits

Expanded Trouble Ticket support through CRM/Remedy integration
Improved MILogin Account Recovery Options (change password and secret questions)

R4.0 (1/26/19) –

MORS (Michigan Online Reporting System [Formerly CI-MR]) Statewide rollout
Self Sufficiency Planning (SSP) tools [was success planning]
Dynamic application based on SSN and FTI real time FDSH validation data
Expanded WIC integration to include restricting referrals for active WIC clients and authorized persons
Targeted improvements in Bridges integration to expand user self-service options (primarily users who can't currently renew benefits)
Expanded business and integration status reporting
Continuing application enhancements based on user inputs and policy changes
Enhanced eligibility renewals
Enhanced login for state workers using MILogin for workers
Revised navigation (top menu)
CP enhancements (managing orgs, client directory)

Universal Caseload (UCL)

FY18 Releases/Accomplishments:

UCL Release 1.0 – 2/17/18

Initial pilot launch of the UCL application to the pilot counties: Shiawassee and Gratiot

UCL Wave Rollout 1 – 5/19/18

Rollout of the UCL application to the following counties/districts: Alpena, Montmorency, Iosco, Alcona, Ogemaw, Roscommon, Wexford, Missaukee, Mecosta, Osceola
Minor release to address defects, performance improvements, and minor system enhancements:

General task management enhancements (e.g., allow unlimited date to defer tasks, complete all tasks, task progress bar, task prioritization)
Prioritization of SER documents
Search enhancements (e.g., search by case number, application, SSN, First and Last Name)
Case Conversion Enhancements

Contact Center (CC)

FY18 Releases/Accomplishments:

Contact Center Pilot on 2/20/18

Shiawassee and Gratiot Counties

Pilot and subsequent rollouts consist of a single point of contact toll free number that prompts beneficiaries for specific information and then routes the call to individuals depending on the expertise needed
Automated self-service to answer common beneficiary questions to assist with worker productivity by freeing up the worker for other task-based work

Contact Center Wave Rollout on 5/19/2018
Alpena, Montmorency, Iosco, Alcona, Ogemaw, Roscommon, Wexford, Missaukee, Mecosta, Osceola
New Prompts added

Contact Center Wave Rollout on 8/20/2018
Keweenaw, Houghton, Baraga, Marquette, Alger, Schoolcraft, Dickinson, Delta, Menominee, Luce, Chippewa, Mackinac, Gogebic, Ontonagon, Iron, Benzie, Manistee, Emmet, Charlevoix, Antrim, Leelanau, Grand Traverse, Kalkaska, Cheboygan, Presque Isle, Crawford, Otsego, Oscoda, Jackson
New Prompts added
Zip codes were added to assist with county code authentication and routing to the appropriate county office

Contact Center Wave Rollout on 10/29/2018
Arenac, Bay, Clinton, Eaton, Genesee, Gladwin, Midland, Isabella, Clare, Sanilac/St. Clair, Lake/Newaygo, Montcalm, Ionia, Mason, Oceana
GEO Group Specific Manager Security Profiles
New Prompts added

The Contact Center has monthly **minor** releases that are less than 40 hours of work and contain minor enhancements to the IVR flow based on business feedback (usually changing verbiage and prompts) and to address telecom/phone configuration related issues.

MDHHS
Michigan Department of Health and Human Services
STRATEGIC INTEGRATION ADMINISTRATION

Enterprise
Integrated Services Area

Program Management Plan

Prepared by the Enterprise ISA Leadership Team
Updated on 11/28/2018

Table of Contents

Revision History

Version	Date	Author	Change Description
1.0.0	5/27/2016	Enterprise ISA Leadership	Document Creation
1.1.0	06/01/2016	Enterprise ISA Leadership	Updated Work approval process, Issue/Risk/Change Management
1.2.0	06/15/2016	Enterprise ISA Leadership	Revise ISA name and other issues related to the Tactical review
1.5.0	07/18/2016	Enterprise ISA Leadership	Updates required by the combination of Enterprise and Data Warehouse ISAs
1.5.1	08/09/2016	Enterprise ISA Leadership	Final updates after Leadership review
1.5.2	08/15/2016	Enterprise ISA Leadership	Final updates after Tactical review
2.0.0	11/14//2016	Enterprise ISA Leadership	Optimize – Modify processes to reflect current business practice
3.0.0	12/08/2017	Kellie Kochenderfer	Added RTC Tags to SIA work intake
4.0.0	12/13/2017	Kellie Kochenderfer	Updated Section 1.8
5.0.0	03/20/2018	Cody Reeve	Updated Section 2.8 Performance Measurement Plan with updated Project Performance Criteria from SOM EISA.
6.0.0	11/28/2018	Cody Reeve	Update BIC naming to SIA. Updated PMO naming to ISA

1 Program Management Plan

1.1 Introduction

To improve project delivery, the Michigan Department of Health and Human Services (MDHHS) implemented the Business Integration Center (SIA) to serve the entire MDHHS agency. The purpose of the SIA is to improve MDHHS project delivery using common project management processes and disciplines. The SIA will strive to standardize and introduce economies of repetition in the delivery of projects and serve as the source of documentation, guidance, reporting, and metrics on the practice of project management and project delivery. The SIA will plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver projects on time, on budget and within scope.

Project Planning occurs in advance of a project, and subsequently at the beginning of a project, to understand exactly how the project will function. This is the "Project Plan" document for the Enterprise Program Management Office (ISA), and serves as the process disciplines that will be adhered to by the all Enterprise ISA teams and projects. This is not process for process sake – this is the tailoring of processes to support the successful implementation of ISA Projects within budget and schedule.

1.2 SIA Program Management Office Purpose

The purpose of a SIA ISA Program is to improve integrated business and technology project delivery using common project management processes and disciplines, concentrating in the areas of Program / Project Monitoring, Business Integration, Quality Assurance, and Strategic Alignment. The ISA will strive to standardize and introduce economies of repetition in the execution of projects and will serve as the source of documentation, guidance, and metrics on the practice of project management and project execution.

The goal of the SIA is to effectively plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver both business and technology projects on time, on budget and within scope.

1.3 Program Charter

Review the SIA Enterprise ISA Program Charter to understand Program Purpose, Objectives, High-Level Scope, etc.

1.4 Program Governance Framework

The purpose of Program Governance is to serve as a mechanism for ensuring that all audiences and stakeholders are aware of their responsibilities for managing SIA Enterprise ISA Project information in order to provide:

- Program & Project Management (Including all Business and Technical projects)
- IT Vendor management and monitoring
- Project Control and monitoring
- Project status and risk reporting to executive management
- System integration for all participating vendors
- Technical requirements and system level design development that advance MDHHS towards future systems goals and objectives
- Technical testing of Michigan systems and interactions with outside systems

1.4.1 Program Governance Organizational Chart

The Enterprise ISA Governance Organization has been designed around Strategic, Tactical, and Operational responsibilities.

Strategic:

- Strategic Plan Development
- Remove roadblocks to program success
- Render strategic decisions
- Serve as the focal point for resolving escalated issues and risks with other State Agencies and external organizations.

- Provide support for the overall program, including necessary human and other resources
- Review and approve use of budget dollars
- Communicate program issues and concerns to the ISA Leadership Team for resolution

Tactical:

- Understand, monitor, and control the program budget
- Remove roadblocks to program and project success
- Provide support for the program and projects, including necessary human and other resources and tools
- Communicate program and project issues and concerns to the Ownership Team for resolution
- Review and approve all program change request items not requiring escalation to the Executive Steering Committee
- Render decisions and provide requested project input/feedback within the required timeframes
- Serve as the focal point for resolving issues and risks with other State Agencies and organizations external to the State of Michigan.

Operational:

- Implement proven processes and controls
- Establish clear goals and deliverables
- Understand, monitor, and control the projects
- Create focus and accountability
- Drive better decisions faster
- Resolve issues and mitigate risks at the project level
- Communicate project issues and concerns to the ISA Leadership Team when necessary
- Develop partnerships and collaboration

1.4.2 Program Governance Committees

MDHHS SIA Governance Committees are forums with standing agendas and decision-making authority. They bring together the authoritative leaders within the appropriate State Agencies to make decisions and recommendations. Additional committees may be organized later if the need arises.

See section 1.6 for Communication Management details for the frequency of when each group meets.

SIA Executive Steering Committee

Executive Steering Committee is the highest decision-making body for the SIA. This group operates at the strategic level and will make decisions on items surrounding portfolio, business vision, and program budgets. The Executive Steering Committee consists of MDHHS deputy directors including the SIA director, and DTMB General Manager. This committee is also an escalation point for critical issues or risks.

SIA Enterprise Steering Committee

Enterprise Steering Committee is an enterprise decision-making body for the SIA that crosses all Program Offices. This group operates at the strategic level and will make decisions on items surrounding portfolio of project requests, strategic business alignment, and funding sources. The Enterprise Steering Committee consists of the SIA Enterprise Integration Director, the SIA Enterprise Program Manager, the DTMB Technology Office Director, and the SIA Financial Manager. This committee is also an escalation point for critical issues or risks.

Enterprise ISA Leadership Team

The Enterprise Leadership team consists of Business Program Owners, Business Delivery Liaison (SIA business delivery leader), ISA Manager, Technical Delivery Owner (DTMB business relationship manager), Technical Vendor Partner, and Financial Management Specialist. The ISA Leadership team is responsible for decision-making at the tactical level of the organization, including approval of all projects, schedules and major milestone changes, budgets and costs changes, and approval of all scope removal requests.

Program Ownership Teams

The Program Ownership Teams are responsible for owning overall integration and implementation of the project portfolio, eliminating day-to-day operational issues and risk. The Program Ownership Teams consist of MDHHS, DTMB and Vendor Leadership resources and Project Managers.

Project Teams

Project and operational leadership teams are responsible to deliver goals and objectives related to specific projects. These teams normally consist of a Project Manager leading various resources in the State Agencies and/or the vendor community. These teams consist of State Agency and/or vendor staff responsible for implementation of the scope of their given project.

1.5 Program Roles and Responsibilities

Each Enterprise ISA Program and Project role is defined along with the responsibilities for that role in order for the MDHHS, SIA, and other State Agencies teams, to have clear expectations. This document is aligned with the MDHHS SIA Governance Structure.

Refer to the Enterprise ISA Roles and Responsibilities document for details.

1.6 Program Communication Management

Communication Management sets the communications framework for the Enterprise ISA. It will serve as a guide for communications throughout the life of the Enterprise ISA and will be updated as communication needs change. This plan identifies and defines the roles of persons involved with communications within this program and projects. It also includes a communications matrix, which provides a summarized view of the multiple communication items such as the type of communication, the frequency of the communication, who is responsible for making sure the communication takes place, the audience for a particular communication item and whether or not approval is required.

Please refer to the Enterprise ISA Communication Plan.

1.7 Program Contact List

Please refer to the Enterprise ISA Contact List.

1.8 Program Work Intake, Assessment and Approval

Work coming into the Enterprise Program must be managed in a consistent manner. Work is defined as:

- All additions, changes or deletions of functionality to the Enterprise portfolio of systems, including additions, changes or deletions required to support a project managed by another ISA;
- Any changes needed to support the infrastructure for these systems;
- Initiatives to support the ISA itself (like upgrades to the tools that support the ISA or new tools to be used by the ISA); and
- Any business initiatives that support the systems or the ISA (e.g. policy changes);

The Enterprise ISA Work Approval Process depicts how work enters into the ISA, is prioritized, is potentially assigned to be executed (becomes a project), and if assigned, finally executed and implemented.

Work Intake

There are two paths in which work can flow into the Enterprise ISA. The first path is via Maintenance and Operations (M&O), where defects and minor enhancements are identified and collected. The second path is via the SIA Work Intake process.

M&O – Defects and Minor Enhancements are identified, collected and documented. The documented defects and minor enhancements are assessed to determine area of impact, some sizing, possible grouping of like items, and impact on users.

SIA Work Intake – All system changes required to support federal and state legislation, policy initiatives and updates required due to audit citations are required to be submitted via a SIA Request through the SIA Work Intake process. All other system changes which require resource tracking and Department visibility (including infrastructure changes) should be routed through this process as well. This process allows the SIA Work Intake Team the opportunity to review each new request for strategic business alignment, funding need and potential fulfillment; and high-level scope, duration, and estimation of cost. The SIA Work Intake team will also review each new request and determine the proper ISA to manage the work, as well as other impacted ISAs.

New Work Request Intake

SIA Work Request Assessment

- Enterprise ISA Business Delivery Liaison (BDL) will work with the SIA Work Intake Team to determine if the work request should be assigned to Enterprise ISA.
- SIA Work Intake process will create the RTC Request and will file/assign to the Enterprise ISA.
- Enterprise ISA Manager will receive notification of all work requests assigned to the Enterprise ISA and will forward the "Request Received" email to the appropriate Program Manager.

Enterprise ISA/RTC Update

- If the work request does not belong to the Enterprise ISA; the work request will be routed to the SIA Work Intake Team.
- If work request belongs to the Enterprise ISA
    - Status of RTC request will be updated from New to Proposed.
    - Request is now eligible for Leadership Acceptance
- Upon approval into the Enterprise ISA the work request will be assigned a tag in RTC, to following tags are available for each program area.
    - Data Hub
        - datahub
        - MPI/PI
        - Messaging
    - Web Apps
        - web-app
        - sharepoint
        - cc360
    - Data Warehouse
        - datawarehouse
        - dw-human
        - dw-elig
        - dw-health
        - dw-cs
        - dw-cw
    - Independent
        - independent
        - filenet
    - MiLogin
        - milogin

Leadership Review of Work Request

Leadership Acceptance

- This process happens in parallel to Program Area Triage.
- Leadership will determine if request is Accepted or Rejected
    - Requests will be eligible for Program Scoring Session once the identified program triage team completes their assessment.
    - Any request that is declined will be routed back to the SIA Work Intake Team.
    - The SIA Communication Plan will be used to send appropriate email to the requestors notifying them that the work request has been accepted by leadership.
    - Enterprise Program Coordinator will update RTC

Enterprise Program Triage

Program Area Evaluation

- Program Area Assessment
    - Program area will determine if work request is assigned to the correct program area.
        - If yes, the work request will proceed with program area triage.
        - If no, the work request will be reviewed by Program Managers to identify correct program area.
- New Development
    - Assign scoping lead if needed
    - Responsible for scheduling scoping meeting with all necessary attendees.
- Routine (DW specific)
    - If work is identified as Routine, the work will be assigned to the appropriate resource.
    - If work is not identified as routine, the work request will be returned to the SIA work intake team
    - If routine, Program Manager will add the work request to the Prioritization Matrix and assign the work to appropriate resource manager
        1. Email sent to MDHHS-Service-Request Mailbox
            a. Resource completes routine work and Program Manager updates RTC and closes request.
- Scope Identification Process
    - If Scope is needed the assigned scoping lead will identify initial stakeholders; organize and schedule scoping meeting to complete Enterprise ISA Scope Document.
        - Scope Detail
        - Type of Work
        - Development Teams Impacted
        - Identify Potential Funding Resources
    - Completed scope document will be uploaded to RTC
        - An email will be sent to the appropriate stakeholders and ISA Program Manager according to the SIA communication plan.
    - If Scope Document <u>includes</u> a Rough Order of Magnitude (ROM) Estimate, the Enterprise ISA Program Manager will update the Prioritization Matrix and RTC request to reflect that scope and ROM are completed.
    - If the Scope Document does not include a ROM, one will be requested.
- Rough Order of Magnitude
    - If a ROM is needed, the Program Manager will assign a Lead to coordinate the ROM estimates based on identified development areas
    - Once the ROM is completed the Program Prioritization Matrix and RTC will be updated with ROM estimate.

<u>Scoring Session</u>

- Once Scope and ROM are completed and Leadership has accepted the request, the Enterprise ISA Program Manager will schedule a scoring session (determined by program area), where the team will review the criteria in the Program Prioritization Matrix and score the request.
- Score will determine status on the priority listing that is reviewed by Program Ownership.

Enterprise Program Ownership Prioritization/Work Authorization

<u>Program Ownership Initial Work Request Prioritization</u>

- Stakeholders for each request will be made up of Program Business Owners, Program Technical Owners and Integration Support. Based on guidance for overall agency strategy and priority (legislative mandates, etc.) from the Enterprise ISA Leadership team, the Ownership Team will set priority for all work requests. Each Program will have separate priority lists.

<u>Program Ownership Work Authorization/Prioritization Review</u>

- At each meeting, the Program Ownership team will review the current list of prioritized Work Requests.
    - All Work Requests will be verified to ensure that they are still valid Business Needs.
- If resources, funding or other necessary predecessors to a Work Request (e.g. work on other projects/systems) <u>are</u> forecast to be available, Enterprise ISA will assign appropriate resource for work to begin.
    - The SIA Communication Plan will be used to send appropriate email to the requestors notifying them that work has been approved to start.
    - RTC will be updated to reflect status of work request.
- If resources, funding or other necessary predecessors to a Work Request (e.g. work on other projects/systems) <u>are not</u> forecasted to be available, the work request will be backlogged.

- The SIA Request Communication Plan will be used to send appropriate email to the requestors notifying them that the work request is backlogged.
- Backlogged work requests will be reviewed during each Program Ownership Prioritization Review meeting.

1.9. Program Document Collaboration

Microsoft SharePoint will be used for Program and Project collaboration. Program documents will be stored here (plans, processes, and templates). Administrative information for the Enterprise ISA team will be stored on the site. SharePoint provides a secured location for all State and Vendor Partner resources to access program and project deliverables. Documents will be under version control, and SharePoint will track who stored the document and the storage date.

1.9 Program Budget and Financial Tracking Processes

The SIA ISA has a dedicated Financial Specialist who will work at the leadership level to assist in planning and forecasting annual budgets, as well as assist in the approval of project work. The Financial Specialist will also work at the operational level to organize and track budgets and financials associated with all SIA ISA projects. The budget office sends out monthly consolidated cost sheets, detailing resource hardware, software and vender service costs. The ISA Financial Specialist maintains origin of these costs. The associated processes are described in this section.

1.9.1 Financial Tracking Process

In conjunction with the SIA ISA Program Coordinator, the Financial Specialist will track effort hours reported and invoices submitted against the projected SIA ISA budget for the fiscal year. The goal is to determine whether the budget is being spent at the rate expected or over/under the projected amount by percentage and dollar amount. On a monthly basis, the cost versus budget information will be reported to the Project Managers, Program Managers, and ISA Leadership Team. If/when areas of concern arise (spend rate is too high, funding sources depleted, etc.), appropriate action and escalation will be initiated to help alleviate the concern.

1.9.2 Resource Cost Management Process (DCDS)

The Financial Specialist receives copies of all invoices related to staff costs. The SIA ISA Program Coordinator and SIA ISA Financial Director will receive copies from the ISA Financial Specialist and update actual costs against projected costs to ensure staffing stays on track as projected. Similarly, DTMB will send updates of actual costs for each budget/project line item that will also be incorporated into financial management reports.

2 Project Management

Project Management will focus on project-level activities that have a defined start and finish. Project Management applies the skills, tools, and techniques to meet project needs or expectations. By design, the processes used at the project level are aligned with the processes used at the program level to build conduits of information flow. Projects follow project management processes together with life-cycle methodologies to manage and execute the work necessary to meet project requirements.

The ISA will utilize the project portfolio management tool, Changepoint, to maintain schedules with at least all major milestones for each project. The ISA will also utilize Microsoft Project to maintain detailed project schedules and for quality assurance analysis. All ISA project management processes are based upon the Project Management Institute's (PMI®) best practices.

2.1 Project Governance Framework

As part of establishing consistent project governance for all projects, a common leadership framework is required. For each project, the ISA Program Manager will work with the project stakeholders to establish the project governance, normally consisting of an assigned Project Manager, Project Business Owner, Project Systems Owner, and potentially a Project Vendor Owner. The following depicts the common leadership roles necessary to govern the projects.

Project Manager

The Project Manager has overarching responsibility for the project. The project manager works with the appropriate Program Manager for the majority of work. The Project Manager defines schedule, control, and adjust all tasks and

workloads of the project. They are responsible for guiding their teams and ensuring adherence to Enterprise ISA processes. The Project Manager must also manage and track project issues and risks, ensuring that all project commitments are met. They communicate project status to clients and leadership.

Project Business Owner

The Project Business Owner works directly with Agency Business Owners and Business Delivery Liaison to provide the business knowledge to support the project team in planning and execution. The Project Business Owner collaborates with the Project Manager to create the project schedule, and assists the Project Manager ensuring project timelines and deliverables are met.

Project Technical Owner

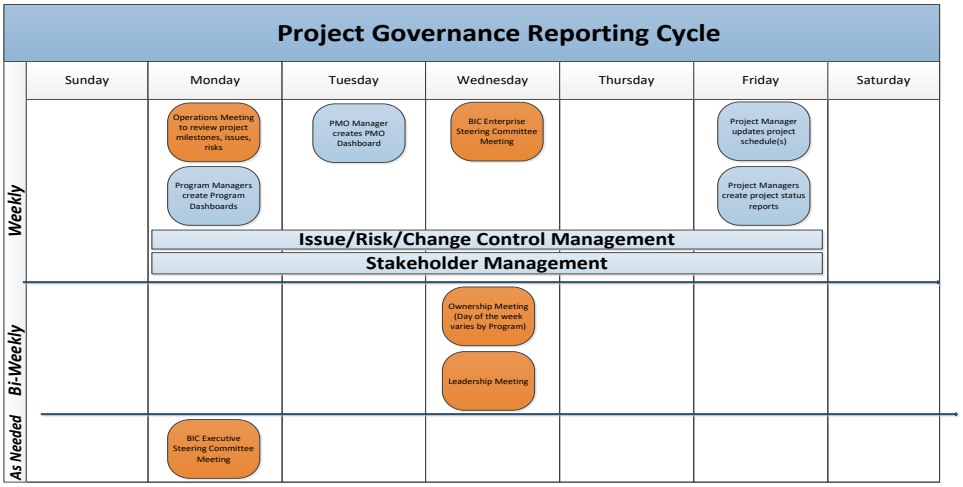
The Project Technical Owner works directly with the vendors to provide the technical knowledge to support the project team in planning and execution. The Project Technical Owner plans and works according to the project schedule taking direction from the Project Manager and the Program Management Team.

Project Vendor Owner

The Project Vendor Owner works directly with the project team to provide the institutional knowledge of the vendor-maintained products to support the project team in planning and execution. The Project Vendor Owner plans and works according to the project schedule, taking direction from the Project Manager.

2.2 Governance Reporting Cycle

The following diagram identifies the information flow and defined meetings that will be used to enable governance at the Program and Project level. The ISA will not be saturated with meetings, keeping key overall status progress to a limited amount of standard meetings.



2.2.1 Status Reporting

Program Status Reporting

The ISA Manager and Program Managers will use a standard 4-Up Status reporting template, combined with a Program dashboard and individual Project dashboards, to communicate progress to Program Ownership, ISA Leadership, etc. This report will be created weekly, and stored on the ISA's SharePoint site. Per the Communication Plan, the Program status report will be reviewed with ISA Leadership on a pre-defined basis.

Project Status Reporting

Each Project Manager will use a standard 4-Up Status reporting template for reporting project status. Each Project Manager will report status to the Program Manager on a weekly basis.

2.3 Total Cost of Ownership Process

The Total Cost of Ownership (TCO) Process is the mechanism for a Project Manager to understand, document, and manage the entire cost of a project. The TCO serves as the main document for understanding funding information, including resources, resource effort, software, hardware, and other costs.

Please refer to the Total Cost of Ownership template located in the Enterprise ISA project repository on SharePoint.

2.4 Project Funding Tracking Process

In alignment with SIA Funding Sources, the ISA manages and tracks projects to their funding sources.

2.5 Issue, Risk, and Change Management

The Issue, Risk and Change Management and Escalation Procedure provides a means to spotlight, track, and resolve issues, risks or changes before they affect deliverables and/or client commitments. This procedure promotes visibility of long-standing, unresolved project level items, while maintaining a historical record of what occurred, the associated escalation levels and the associated resolution. For issues, risks or changes that must be escalated to the Tactical level or higher the Issue Tracking tool is the SIA Item Tracker on the SIA Sharepoint site.

2.5.1 Issue and Risk Management

Definition of “Issue Management” – An issue is any point of controversy, debate, or concern that will adversely affect the success of the project. Issues can be identified at any level of the project and should be resolved at the lowest possible project level. An issue that cannot be resolved at a particular level of the project must be escalated to ensure the issue is brought to the attention of appropriate parties and resolved.

Definition of “Risk Management” – Risk management is the systematic and explicit approach used for identifying, analyzing, and controlling project risk. Risks will remain open as long as they exhibit probability of occurrence and potential impact to the project. A risk may be closed when the project stakeholders jointly agree that (1) the risk will never be realized, (2) the risk will not actually deter the project in any way or (3) the risk was reduced and is no longer a risk.

The ISA Leadership and Ownership Teams will review escalated items (Issues and Risks) bi-weekly to determine status of existing items and a resolution approach for newly escalated items. An issue tracking tool will be used to manage an item from initiation to closure.

PMO Issue and Risk Management and Escalation

Tool Used For:	Issue/Risk Creation	Issue/Risk Management	Issue/Risk Escalation	Issue/Risk Reporting
Issue/Risk Tracking Tool	 Anyone can create an Issue or a Risk. All Issues and Risks are created in the Issue/Risk Tracking Tool The assigned owner will be notified via email.	 The assigned owner reviews the Issue/risk and takes appropriate action. The issue/risk owner will manage the issue/ risk until closure or escalation. Status, Status Type, Target Date, etc. will be maintained on (at least) a weekly basis.	 Owners, Project Managers and/or the Program Manager will manage escalation to The appropriate escalation level.	 Issue and Risk reports can be generated in the Issue/Risk Tracking Tool and used for review meetings and status reporting

2.5.1.1 Creating Issues and Risks

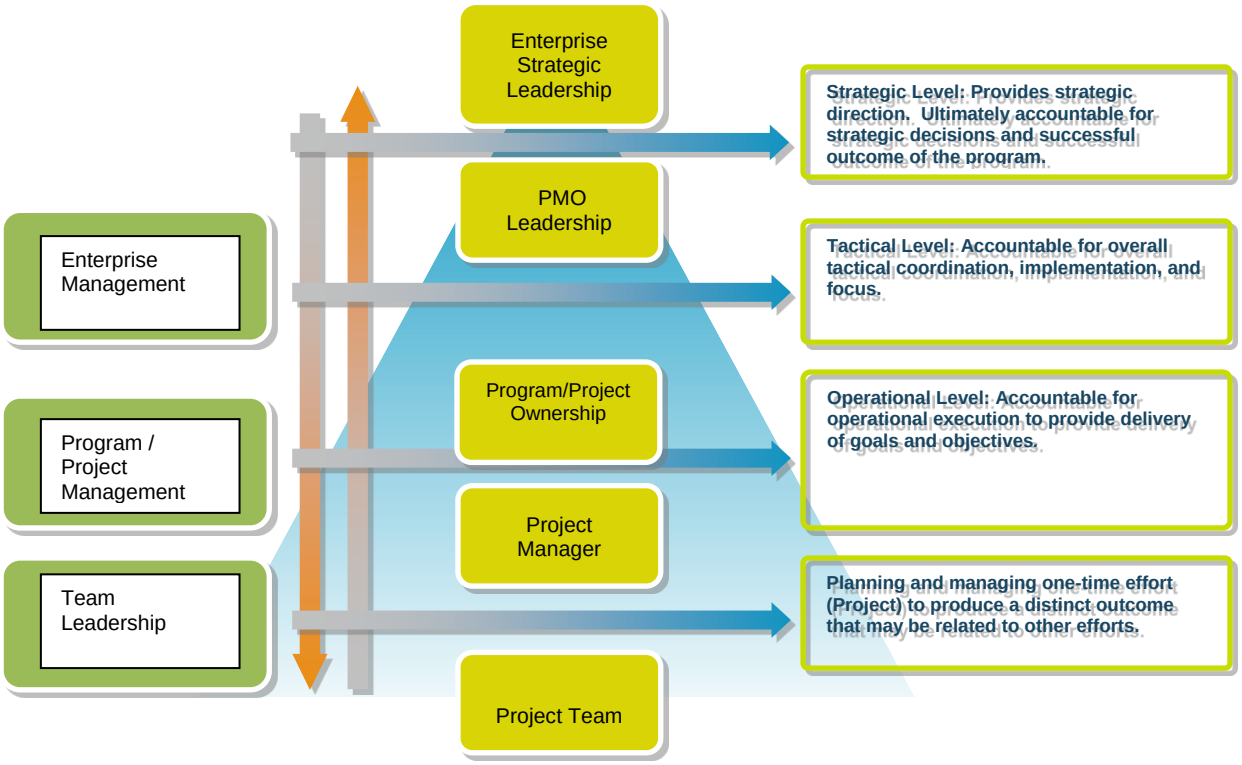
Any person working on a project can initiate an issue or risk. If the project overall status is Yellow or Red, there must be a corresponding Issue or Risk.

2.5.1.2 Managing Issues and Risks

Issues and risks created in the Issue/Risk Tracking tool will be evaluated by the person to whom the issue or risk is assigned.

2.5.1.3 Escalating Issues and Risks

The diagram below depicts the progressive nature of risk and issue management starting with "work", up to a "Project", all the way through and up to "Enterprise Strategic Leadership". The ISA and all projects will follow strict escalation procedures for issue and risk management.



Escalation Path

Escalation Level	Description	Escalation Threshold
Project Manager / Governance	Project Managers must seek to resolve the initial issue or risk. • In Issue/Risk Tracking tool, the PM will set the owner of the issue or risk to him or herself. The Project Governance team (usually Project Business Owner, Project Technical Owners, Project Vendor Owner, etc.) must seek to resolve the issue or risk in coordination with the Project Manager. • In Issue/Risk Tracking tool, the PM will set the owner of the issue or risk to the appropriate Project Governance resource. • In Issue/Risk Tracking tool, the PM will set the escalation path of the issue or risk to the Project Governance. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** Escalate immediately **Medium** 3 business days **Low** 5 business days
Program Ownership	The Program Ownership team must seek to resolve the issue or risk in coordination with the Project Manager. • In Issue/Risk Tracking tool, the PM will set the owner of the issue or risk to the appropriate Program Ownership resource. • In Issue/Risk Tracking tool, the PM will set the escalation path of the issue or risk to the Program Ownership. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** Escalate immediately **Medium** 3 business days **Low** 5 business days
ISA Leadership Team	If the Program Ownership team cannot resolve the issue or risk, the issue or risk will be escalated to the ISA Leadership Team. • In Issue/Risk Tracking tool, the Program Manager will set the Owner of the issue or risk to the appropriate ISA Leadership Team member. • In Issue/Risk Tracking tool, the Program Manager will set the escalation path of the issue or risk to the ISA Leadership. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** Escalate immediately **Medium** 3 business days **Low** 5 business days
Executive Steering / Oversight Steering	If ISA Leadership cannot resolve the issue or risk, the issue or risk will be escalated to the Steering Committee and/or Executive Steering Committee via the SIA Item Tracker. The Oversight/Executive team will seek to resolve escalated issues and risks with ISA Leadership, as well as seek input from other State Agencies and external organizations, as needed. • In SIA Item Tracker, the ISA Manager will set the owner of the issue or risk to the appropriate Oversight/Executive member. • In SIA Item Tracker, the ISA Manager or Program Manager will set the escalation path of the issue or risk to Oversight/Executive. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** 1 business day **Medium** 2 business days

2.5.1.4 Reporting Issues and Risks

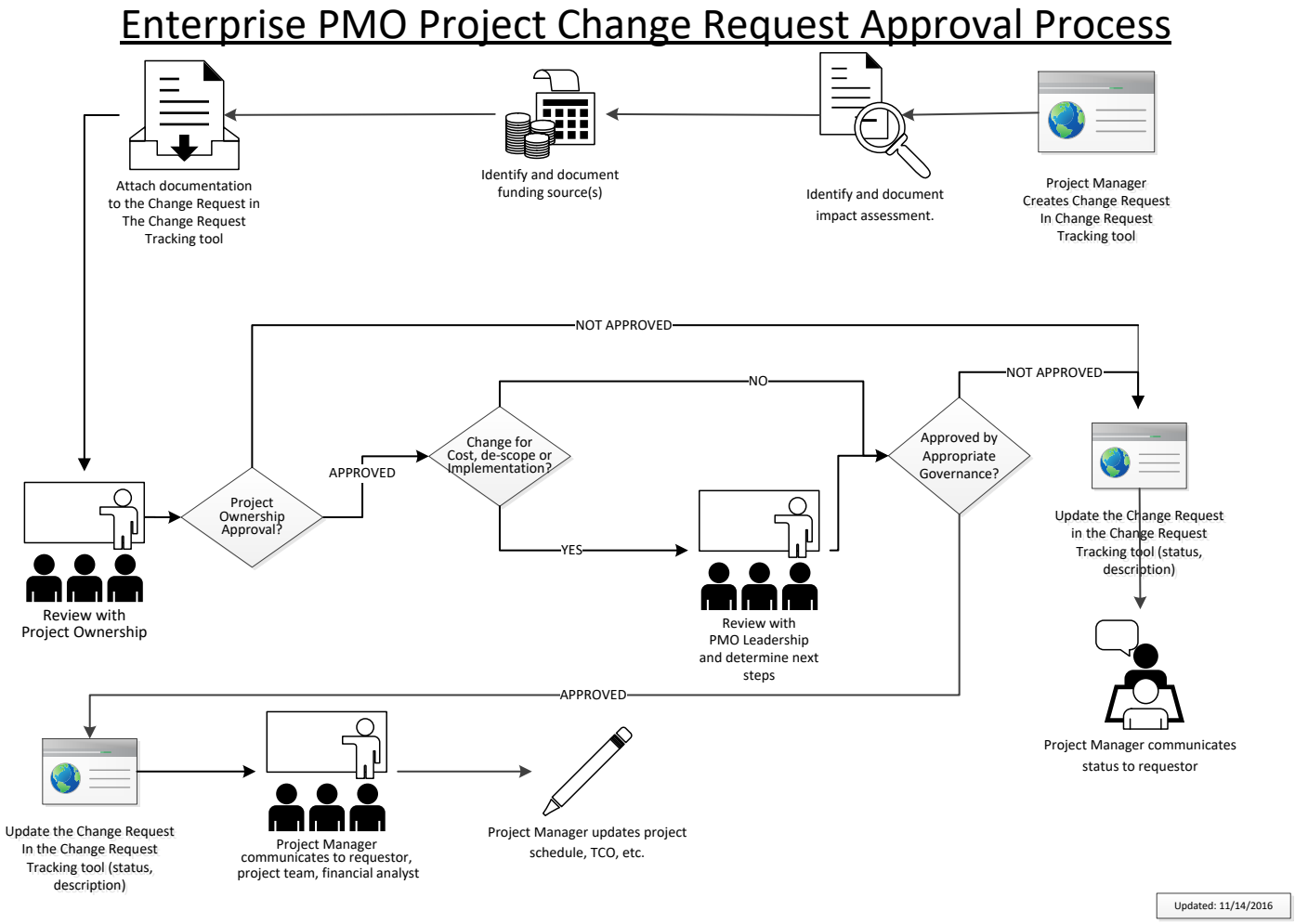
Standard and custom views in the Issue/Risk Tracking tool will be used to display issues and/or risk lists (project or program level).

2.5.2 Change Management

Change management is the systematic and explicit approach used to manage approved scope and requirements. Change Requests are documented and acted upon similar to Issues and Risks. Once the change request is approved by the appropriate project stakeholders, the change will be implemented as a change to a project's scope, schedule and/or cost. Change requests are managed in the Enterprise ISA Change Request Tracking tool.

- Project Ownership is responsible to review all Change Requests. All Change Requests that are related to cost, project de-scoping, and/or a change of implementation date will be referred to the ISA Leadership team for approval. All other Change Requests will be approved by the Project Ownership team.
- ISA Leadership will approve all cost, project de-scoping and/or a a change of implementation date.

Below is the diagram showing the Enterprise ISA approval process for project Change Requests that affect scope/requirements, schedule, cost, or contract.



2.5.2.1 ISA Project Change Request Approval Process

- When a change to project Scope, Schedule, or Cost (including vendor Contract modification) is identified, the Project Manager creates a Change Request in the Change Request Tracking tool.
- The Change Request is analyzed to determine the impact of the change.
    - Identify potential funding sources and document funding, or lack thereof
    - General information about the Change Request is updated in the Change Request Tracking tool.
- The Project Manager seeks review and approval from the Project Ownership team.
    - If analysis identifies impact to project cost, project de-scoping and/or the Implementation Date, the Change Request is escalated to ISA Leadership for review and approval.
- The Project Manager updates the Change Request in the Change Request Tracking tool with results of the governance review.
    - For Rejected/Deferred/Escalated Change Requests, the Project Manager:
        - Documents reason for rejection/deferral/escalation in the Change Request in the Change Request Tracking tool
        - Moves item to appropriate new status (e.g. Closed or Deferred)
        - Communicates status to requestor
    - For Approved Change Requests, the Project Manager:
        - Documents approval in the Change Request in Change Request Tracking tool
        - Communicates status to requestor and project team
        - Updates project plan and related documents and re-baselines project schedule.
        - Moves item to Closed status

2.6 Time Management

All Project team members on projects for which cost should be tracked versus budget (to support APDs, Grants, etc.) must officially report effort on the standard Monday through Friday work week.

2.6.1 Collecting Project Time

Time for project effort should be collected in one of two places.

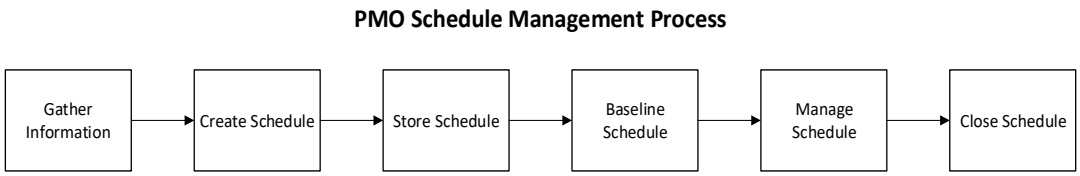
- If assigned as a resource to a project in Changepoint, the resource should enter time in Changepoint against that project. Various reports can be used to summarize effort by resource.
- If not assigned as a resource to a project in Changepoint (some State of Michigan resources), time should be collected via the State's Data Collection and Distribution System (DCDS). The ISA's assigned Financial Specialist will assist with setting up the proper codes in DCDS to track effort to.

2.7 Schedule Management

OVERVIEW

Schedule management provides the guiding principles for creating, managing, and executing the project schedules. Schedule management ensures the project team achieves the projects objectives. This enables the Project Managers to make the best-informed decision regarding the project's state of progress.

PROCESS ILLUSTRATION



2.7.1 Objectives and Directives

The Program Manager uses the information in the schedule to make informed decisions surrounding each project in the ISA. The following applies to all projects under the ISA.

- Gather key information needed to start the project schedule.
  - Scope
  - Tasks and milestones
  - Mandatory dates
  - Task durations and milestone dates
  - Available resources
  - Estimated effort
  - State Holiday schedule
  - Resource time off
  - Constraints

- Create the project schedule in Changepoint and/or MS Project
  - Use a project schedule template as a base
  - Tailor the template to fit the specific needs of the project
  - SOM holidays are flagged as non-working on the calendar
  - Resource vacation days are indicated on the calendar

- Store the project schedule in the appropriate repository

- Baseline the project schedule when all milestone dates are approved

- Manage the project schedule during project execution
  - At least weekly
    - Update task % Complete for tasks in progress
    - Update task Status for key tasks and milestones
  - Weekly, provide status of milestone tasks and overall schedule to the ISA Program Manager
  - Approved Change requests could modify task dates (baseline and actual)

- Close the project schedule once all tasks are completed

2.7.2 Project Schedule Template

Multiple project schedule templates will be available for projects to use as a starting baseline for the different types of ISA business projects as well as technical projects in both Microsoft Project and Changepoint.

2.7.3 Weekly Schedule Management Activities

The following is a representation of weekly activities related to Schedule Management within the ISA. It is important these procedures be followed in order to control the Projects within the ISA so that leaders can easily determine status and be proactive about items/areas that need attention. For Cross-ISA projects that are being managed by other organizations, the Enterprise ISA Project Manager will follow the cadence of activities required by the managing ISA.

Schedule Management Critical Weekly Activities				
Monday	Tuesday	Wednesday	Thursday	Friday
• Each Program Manager Updates Program Dashboard based on Project 4-UP reports • Each Program Dashboard is finalized and stored on SharePoint.	• Create ISA Dashboard based on each Program Dashboards	• ISA and Program Dashboards are Available for Review in Ownership and Leadership meetings.		• PMs Update Issues, Risks, Change requests • PMs Update Project Schedules • PMs Create Project 4-UP reports

Each Program Manager Updates Program Dashboard based on Project 4-UP reports – Every Monday (COB) each Program Manager is responsible for using the milestone information from Project 4Up reports to update the Program 4-UP Reports and Dashboards. These Program 4-Up Reports and Dashboards are stored on the ISA SharePoint site.

New ISA Dashboard Created – Every Tuesday, the ISA Manager is responsible for creating the current week's ISA 4-UP Report and Dashboard. This is stored on the ISA SharePoint site.

Program Milestone Dashboard Reviewed with Program Ownership and/or Leadership – Every Wednesday/Thursday the Program Milestone Dashboard will be reviewed with Program Ownership and/or Leadership. The content of the Dashboard will be from the previous week's Dashboard (completed on Monday).

PMs Updates Issues, Risks, Change requests – Every Friday (COB), PMs will be responsible for updating Issues, Risks, and Change Requests in SharePoint for their projects.

PMs Updates Project Schedules – Every Friday (COB), PMs will be responsible for updating their project schedules for their projects, paying special attention to ensure milestone information is accurate. Any milestones that are yellow or red will require further explanation in their 4Up project status report – either via logged issue, risk, or comment on one of the other sections in the report.

PMs Creates Project 4-Up Report – Every Friday (COB), PMs will be responsible for creating 4-Up Reports for each of their projects. The 4-Up reports will be stored in their respective project folder. Based on milestone statuses and the impact of issues, risks and changes to the project, the overall status (Green, Yellow, and Red) will be assigned. See Performance Measurement Plan section below on criteria for determining overall project status.

2.8 Performance Measurement Plan

The Enterprise ISA will institute performance measurements for each project. Measures are collected, analyzed, or statistically controlled. Within this plan, metrics/data elements are identified that will be collected or both collected and analyzed. Items "collected" include metrics data gathered for an organization, placed in a repository for historical purposes and used later. An example of an item to be "collected and analyzed" is estimated vs. actual start and end dates used to track, analyze and report conformance to schedule. All items that should be "statistically controlled" are listed here.

The project will use the following SOM required measurements as Analysis Triggers.

Project Performance Criteria

Criteria	Green	*Yellow	*Red	**Notes
Schedule Variance	All **key** milestones are on schedule.	One or more of the key milestones are projected to be missed, **or** one or more of the key milestones have been missed however the project delivery date will not be impacted.	One or more of the key milestones have been missed, **and** it is projected that the project delivery date will be missed.	Milestones are used to mark specific points along a project timeline. ****Key milestones** are used to designate progress points that **must be** met by the scheduled timeline to **achieve project success**. Missing a Key milestone date will impact project duration and the project delivery/ implementation date.
Cost Variance	The variance between the approved project budget and the forecasted actual cost is <= 10%.	The variance between the approved project budget and the forecasted actual cost is > 10% and <= 20%.	The variance between the approved project budget and the forecasted actual cost is > 20%.	The project budget includes the allocated contingency for the project.
Issues	Issues are effectively being addressed, with limited risk to the project.	One or more ***executive issues remain unresolved for more than one week after the target resolution date and the issue does not result in a high level of impact to the project delivery date or success of the project.	One or more ***executive issues remain unresolved for more than two weeks after the target date or the issue results in a high level of impact to the project delivery date or success of the project.	A project may need to be coded as yellow/red based on a significant project issue, even when the schedule and/or cost are not impacted. Examples include resource availability, scope issues, and concerns with realizing the anticipated benefits.

2.9 Maintenance & Operations Management Process

Please refer to the Enterprise ISA Maintenance & Operations Management Process in the team Sharepoint folders.

2.10 Portfolio Management Process

The Enterprise ISA Leadership team will review the Enterprise ISA System List and Enterprise ISA Project List on a monthly basis and revise as needed to represent the existing ISA Portfolio..

Michigan Department of Health and Human Services
STRATEGIC INTEGRATION ADMINISTRATION

Eligibility ISA
Program Management Plan

Table of Contents

Revision History

Version	Date	Author	Change Description
1.6	09/13/2017	Brian Anderson	Updated to correct sections out of date and update links that were no longer accurate. Listed and added links for Processes.
1.7	10/3/2017	Brian Anderson	Updates based on 10/3/17 review
1.8	10/30/17	Brian Anderson	Added reference to CMS' MEELC and MEET in Section 1.5 (Program Governance Framework.
1.9	10/10/2018	Gail Jacqmain	Updated to reflect the new Delivery Model
2.0	11/29/18	Janice Redpath	Changed BIC references to SIA and PMO references to ISA

1 SIA Eligibility ISA Program Management Plan

1.1 Introduction

The Michigan Department of Health and Human Services (MDHHS) has implemented a Strategic Integration Administration (SIA) to serve the entire MDHHS agency. The purpose of SIA is to improve MDHHS project delivery using common project management processes and disciplines. SIA will strive to standardize and introduce economies of repetition in the delivery of projects and serve as the source of documentation, guidance, reporting and metrics on the practice of project management and project delivery. Effectively, SIA will plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver projects on time, on budget, and within scope.

Project Planning occurs in advance of a project and subsequently at the beginning of a project to understand exactly how the project will function. This is the "Project Plan" document for the Eligibility Program Office, and serves as the process disciplines that will be adhered to by the all Eligibility ISA teams and projects. This is not process for process sake – this is tailoring processes to support the successful implementation of ISA Projects within budget and schedule.

1.2 Program Office Purpose

The purpose of the ISA Program Office is to improve integrated business and technology project delivery using common project management processes and disciplines, concentrating in the areas of Program / Project Monitoring, Business Integration, Quality Assurance, and Strategic Alignment. The ISA Program Office will strive to standardize and introduce economies of repetition in the execution of projects and will serve as the source of documentation, guidance and metrics on the practice of project management and project execution.

The goal of the ISA is to effectively plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver both business and technology projects on time, on budget and within scope.

The following are the MDHHS business areas the Eligibility ISA supports:

1. Field Policy
2. Medicaid Policy
3. Child Development and Care (CDC) Policy
4. Refugee Cash Policy
5. State Disability Assistance (SDA) Policy
6. Family Independence Program (FIP) Cash Policy
7. Food Assistance Program (FAP) and Employment and Training (E&T)
8. State Emergency Relief (SER)
9. Children Services
10. Office of Inspector General (OIG)
11. Child Support
12. Medicaid Services
13. OQA
14. Accounting
15. Health Customer Service
16. Managed Care/MI Health Account Interface
17. Provider Management
18. Medicaid Payments

1.3 SIA Program Charter

For a complete review of the MDHHS SIA Program Charter, including details of the SIA Purpose, Objectives, High Level Scope statement, etc., please refer to the SIA Program Charter.

1.4 Eligibility Program Charter

For a complete review of the Eligibility Program Charter, including details of the Eligibility Program Purpose, Objectives, High Level Scope statement, etc., please refer to the Eligibility Development Program Charter (Eligibility Development Program Charter).

1.5 Program Governance Framework

The purpose of Program Governance is to serve as a mechanism for ensuring that all audiences and stakeholders are aware of their responsibilities for managing SIA Eligibility ISA Project information in order to:

- Program & Project Management (Including all Business and Technical projects)
- Vendor management and monitoring
- Project Control and monitoring
- Project status and issue and risk reporting to executive management
- System integration for all participating vendors
- Technical requirements and system level design development that advance MDHHS towards future systems goals and objectives
- Technical testing of Michigan systems and interactions with outside systems

ISA Program will follow the PMBOK standards of the nine disciplines of program and project management. These nine areas are incorporated in all the process definitions contained in this Project Plan document.

1. Project Integration management
2. Project Scope Management
3. Project Time Management
4. Project Cost Management
5. Project Communication Management
6. Project Human Resource Management
7. Project Quality Management
8. Project Risk Management
9. Project Procurement Management

The ISA Program will also follow DTMB State Unified Information Technology Environment (SUITE) and utilize industry Best Practices.

The ISA Program will also follow CMS' Medicaid Eligibility and Enrollment Life Cycle (MEELC) found in CMS' Medicaid Eligibility and Enrollment Toolkit (MEET).

1.5.1 Program Governance Organizational Chart

The ISA Program Governance Organization has been designed around Strategic, Tactical, and Operational responsibilities.

Strategic:

- Define vision and strategy
- Approve priorities and policy
- Provide escalated issue resolution
- Facilitate partner coordination
- Provide budget to perform work

Tactical:

- Implement vision and strategy
- Monitor cross system/agency projects
- Facilitate cross team coordination
- Manage schedule(s) based on budget, resources, and priorities
- Provide Program Leadership support

Operational:

- Manage and implement projects
- Resolve project level issues

The following governance has been approved at the executive level.

Eligibility ISA Program Governance Structure

1.5.2 Program Governance Committees

MDHHS SIA Governance Committees are forums with standing agendas and decision-making authority. They bring together the authoritative leaders within the appropriate State Agencies to make decisions and recommendations. Additional committees may be organized at a later date if the need arises.

See section 1.6 for Communication Management details for the frequency of when each group meets.

SIA Executive Committee

SIA Executive Committee is the highest decision-making body for the SIA. This group operates at the strategic level and will make decisions on items surrounding portfolio, business vision, and program budgets. The SIA Executive Committee consists of MDHHS deputy directors including the SIA director, and DTMB General Manager. This committee is also an escalation point for critical issues or risks.

Program Leadership Team

The ISA Program Leadership team consists of Business Program Owners (bureau directors), Business Delivery Liaisons (SIA Business Delivery Leaders), Business Program Office Manager, Technical Delivery Owner (DTMB Business Relationship Manager), Technical Vendor Partner, and Financial Management Specialist. The Program Leadership team is responsible for decision-making at the tactical level of the organization, including approval of all projects, schedules and major milestone changes, budget and costs changes, and approval of all scope change requests.

Program / Project Teams

Project and Operational Leadership teams are responsible to deliver goals and objectives related to specific projects. These teams normally consist of a Project Manager leading various resources in the State Agencies and/or the vendor community. These teams consist of State Agency and/or vendor staff responsible for implementation of the scope of their given project. The Project Teams meet at defined frequencies as described in the “Communication Management” section.

1.6 Roles and Responsibilities

Each ISA Program and Project role is defined along with the responsibilities for that role in order for the MDHHS, SIA, and other State Agencies teams to have clear expectations. This document is aligned with the MDHHS SIA Governance Structure.

Eligibility ISA Roles and Responsibilities

1.7 Communication Management

Communication Management sets the communications framework for the SIA Eligibility ISA. It will serve as a guide for communications throughout the life of the SIA Eligibility ISA and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this program and projects. It also includes a communications matrix, which provides a summarized view of the multiple communication items such as the type of communication, the frequency of the communication, who is responsible for making sure the communication takes place, the audience for a particular communication item, and whether or not approval is required.

Eligibility ISA Communication Management Plan

1.8 SIA Request Intake Process

The purpose of the Project Request process is to describe the procedure required to translate an idea, regulation, or policy into an approved project.

The volume of regulations, policies, and changes that impact SIA continue to grow. The resulting impact to SIA is a large amount of work that must be spread across a limited number of human, capital, and operational resources.

To address this growing demand for limited resources, SIA has developed this process for each new SIA project request. This process will allow the SIA Project Portfolio Planning group the opportunity to review each request as it occurs for strategic business alignment, funding source, and high level scope, duration, and rough estimated costs. The outcome of the process is a prioritized list of MDHHS strategic aligned business and technology projects and the recommendation for which ISA(s) will own for the delivery of work. All maintenance work will follow the ISA maintenance work request process. Otherwise, all non-maintenance type project requests will follow the standard project request process. If urgent, there is also an urgency indicator on the Project Request Form that will be used to expedite the assessment / ISA assignment process.

SIA Intake Process
SIA Work Request Template

1.9 Eligibility Release Planning Process

The purpose of the Eligibility Release Planning Process is to show the life-cycle of a new work request up until the work is approved for a Release and how it flows through the process. It shows how work is assigned to the Eligibility ISA, estimated, and approved for the appropriate Program Area by the Business.

1.10 Program Document Collaboration

Microsoft SharePoint will be used for Program and Project collaboration. Program documents will be stored in Sharepoint (plans, processes, and templates). Administrative information for the SIA Eligibility ISA team will be stored on the site. Each of the areas (i.e. Administrative, Program Status, Program Processes, Projects, etc.) will have their own libraries/folders to store collaborative information. Each project will also have a standard work break down sub folder structure so information can be consistently stored and found across each project. SharePoint provides a secured location for all State and Vendor Partner resources to access program and project deliverables, version control, tracks who stored the document and the storage date.

1.11 Program Budget and Financial Tracking Processes

The SIA ISA has a dedicated Financial Analyst that will work at the Leadership level to assist in planning and forecasting annual budgets, as well as assist in the approval of project work. The Financial Analyst will also work at the operational level to organize and track budgets and financials associated with all SIA ISA projects. The budget office sends out monthly consolidated cost sheets, detailing resource hardware, software and vender service costs. The ISA Financial Analyst maintains origin of these costs. The associated processes are described in this section.

2 Project Management

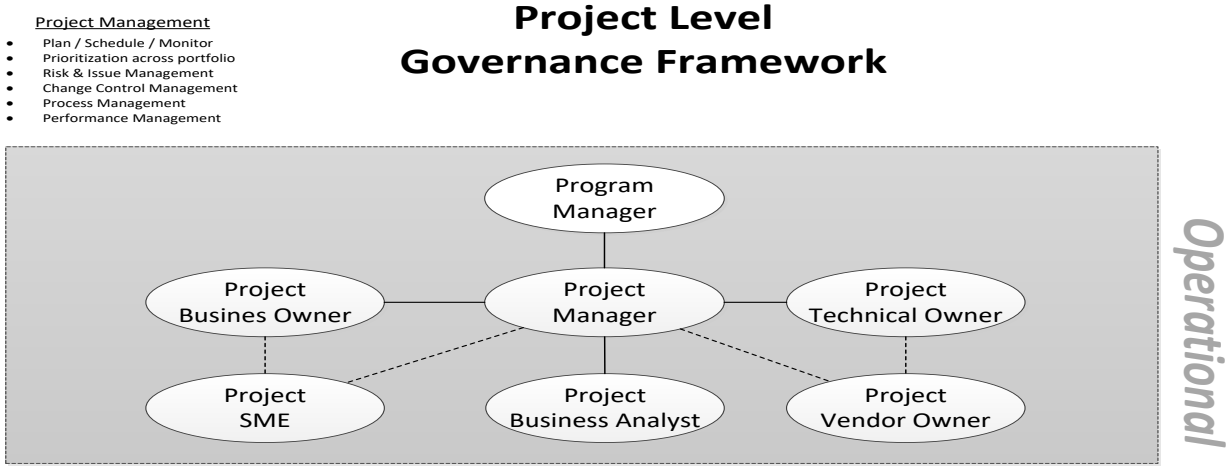
Project Management will focus on project-level activities that have a defined start and finish. Project Management applies the skills, tools, and techniques to meet project needs or expectations. By design, the processes used at the project level are aligned with the processes used at the program level to build conduits of information flow. Projects follow project management processes together with life-cycle methodologies to manage and execute the work necessary to meet project requirements.

The ISA will utilize the project portfolio management tool, Changepoint, to maintain schedules with at least all major milestones for each project. The ISA will also utilize Microsoft Project to maintain detailed project schedules and for quality assurance analysis when deemed necessary. The latest status information is maintained on the ISA

SharePoint site. This SharePoint site provides key schedule management, financial management, program and project status reporting, risk and issue management, and change management functions.

2.1 Project Governance Framework

As part of establishing consistent project governance for all projects, a common leadership framework is required. For each project, the ISA Program Manager will work with the project stakeholders to establish the project governance, normally consisting of an assigned Project Manager (PM), Project Business Owner (BO), Project Systems Technical Owner (TO), and potentially a Project Vendor Owner. The following diagram depicts the common leadership roles necessary to govern the projects.



Program Manager
The Program Manager has overarching responsibility and accountability for the activities of the Program Area. All resources in the functional area of Program/Project Monitoring report up through the Program Manager for the project work. The Program Manager works directly with the Project Managers, Release Planning Manager, Business Operations Integrator, Testing Project Manager, Program Project Manager, ISA Manager, and other Management Teams to adjust workloads of the projects. The Program Manager also communicates project status to clients and management, working closely in alignment with the Program Project Manager and ISA Manager. There are multiple Program Managers for the Eligibility ISA since there are multiple Program Areas.

Project Manager
The Project Managers have overarching responsibility for their assigned projects. All Project Managers work with the Program Manager for the majority of work. The Project Managers define schedule, control, and adjust all tasks and workloads of projects. They are responsible for guiding their teams and ensuring adherence to of SIA ISA processes. The Project Managers must also manage and track project issues and risks, ensuring that all project commitments are met. They communicate project status to clients and leadership.

Project Business Owner (BO)
The Project Business Owner works directly with Agency Business Owners to provide the business knowledge to support the project teams in planning and execution. The Project Business Owner plans and works according to the project schedule, taking direction from the Project Manager and the Program Management Teams. The Project Business Owner works directly with the customer.

Project Technical Owner (TO)
The Project Technical Owner works directly with the vendors to provide the technical knowledge to support the project teams in planning and execution. The Project Technical Owner plans and works according to the project schedule, taking direction from the Project Manager and the Program Management Team.

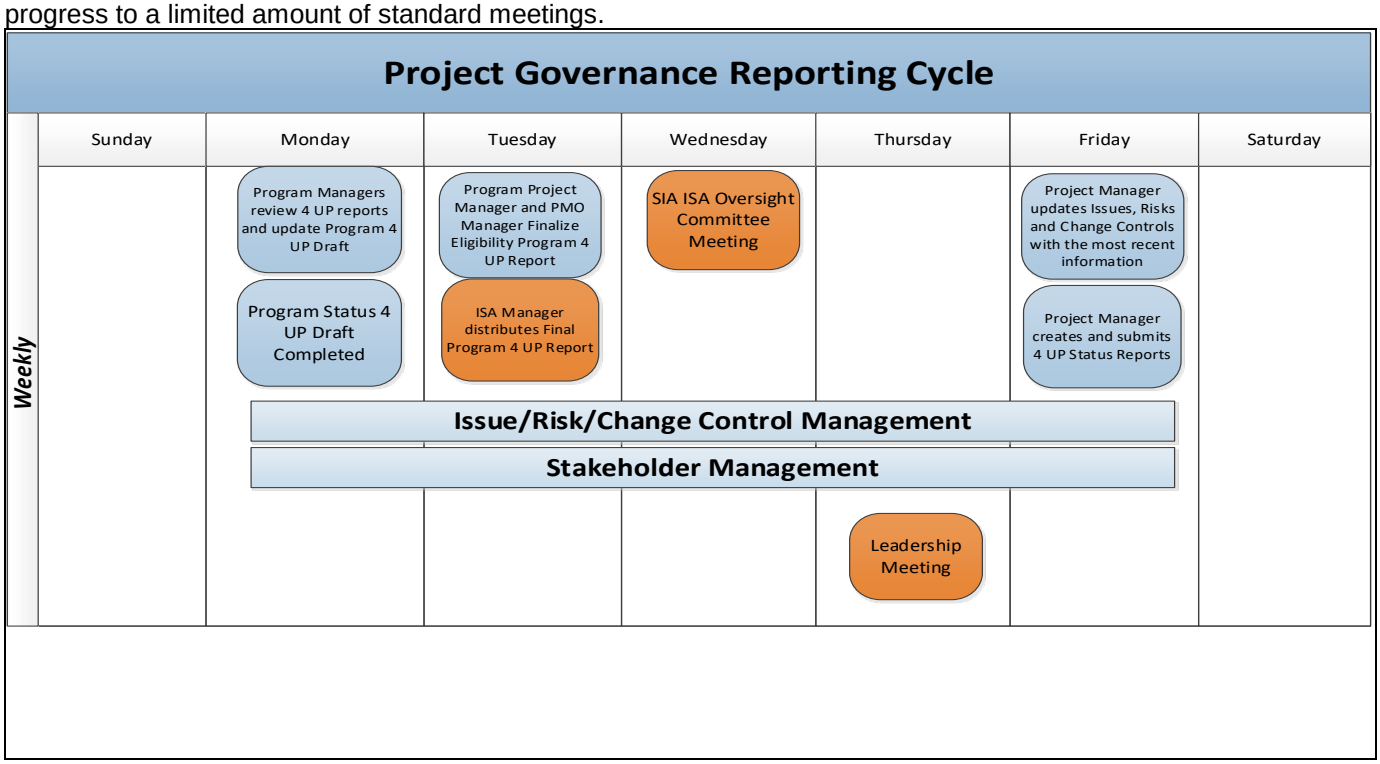
Project Vendor Owner
The Project Vendor Owner works directly with the project teams to provide the institutional knowledge of the vendor-maintained systems and products to support the project teams in planning and execution. The Project

Vendor Owner plans and works according to the project schedule, taking direction from the Project Manager and the Program Release Management Team.

Please refer to the Eligibility ISA Roles and Responsibilities document for detailed roles and responsibilities of the common project leadership framework.

2.2 Governance Reporting Cycle

The following diagram identifies the information flow and defined meetings that will be used to enable governance at the Program and Project level. SIA ISA Projects will not be saturated with meetings, keeping key overall status progress to a limited amount of standard meetings.



2.2.1 Status Reporting

Program Status Reporting

The Eligibility Program uses a web based tool titled “HealthBeat” for Program 4-Up Status reporting to communicate progress to Executive Level Management. The tool allows to extract the information and format into a PDF file so that the information is printable and presentable. This report is created weekly, and stored on the ISA SharePoint site.

Project Status Reporting

Each Project Manager will report status to the respective Program Manager on a weekly basis. The format of the status report will use a standard 4up status report from Changepoint or use the SIA provided 4-Up status report MS Excel template.

2.3 Total Cost of Ownership Process

The Total Cost of Ownership (TCO) is the mechanism for a Project Manager to understand, document, and manage the entire cost of a project. The TCO serves as the main document for funding information, including resources, software, hardware and other costs.

The TCO Process and TCO Template reside on the SharePoint site. The template has certain terms and costs built in. All items on the staffing sheet and the change control sheet should copy to the summary page and are part of the budget calculation.

The TCO should be sent to the Program Project Manager and the Financial Specialist, then loaded to the SharePoint site under Budget Library, under the appropriate project folder.

2.4 Issue, Risk, and Change Control Management

The Issue, Risk and Change Control Management and Escalation Procedure provides a means to spotlight, track, and resolve issues, risks or changes before they affect deliverables and/or client commitments. This procedure promotes visibility of long-standing, unresolved project level items, while maintaining a historical record of what occurred, the associated escalation levels and the associated resolution.

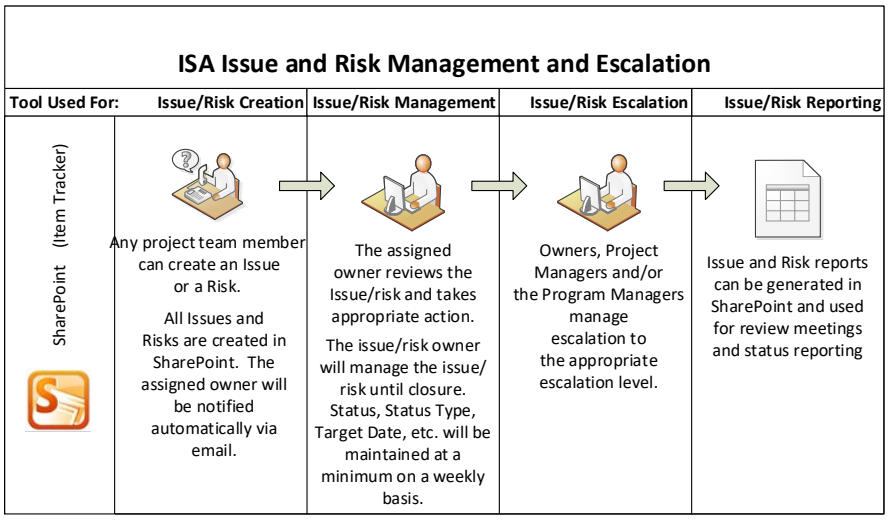
Eligibility Issues, Risks, and Change Controls will be tracked in the ISA's Item Tracker tool on the Eligibility ISA Sharepoint website.

2.4.1 Risk and Issue Management

Definition of "Risk Management" – Risk management is the systematic and explicit approach used for identifying, analyzing, and controlling project risk. Risks will remain open as long as they exhibit probability of occurrence and potential impact to the project. A risk may be closed when the project stakeholders jointly agree that (1) the risk will never be realized, (2) the risk will not actually deter the project in any way or (3) the risk was reduced and is no longer a risk.

Definition of "Issue Management" – An issue is any point of controversy, debate, or concern that will adversely affect the success of the project. Issues can be identified at any level of the project and should be resolved at the lowest possible project level. An issue that cannot be resolved at a particular level of the project must be escalated to ensure the issue is brought to the attention of appropriate parties and resolved.

The ISA Leadership and Management Teams review escalated items (Issues and Risks) weekly to determine status of existing items and a resolution approach for newly escalated items. The ISA SharePoint site is the mechanism used to manage an item from initiation to closure.



2.4.1.1 Creating Issues and Risks

Any person working on a ISA Project can create an issue or risk. However, the appropriate Project Manager (or Program Manager if it is a Program issue or risk) should be contacted to validate the issue or risk **prior** to the item being entered. The issue or risk should be created on the SharePoint site using ISA Item Tracker tool using the following link:

Item Tracker

- Navigate to the ISA Item Tracker list via the left side menu pane
- Click the “New Item” top menu option or “Add a New Item” bottom icon
- Complete all mandatory fields
- Choose the **Item Type** (Issue or Risk)
- Set **Escalation** (default to Project Manager)
- Set **Assigned To**
- Click [Save] to save the issue or risk

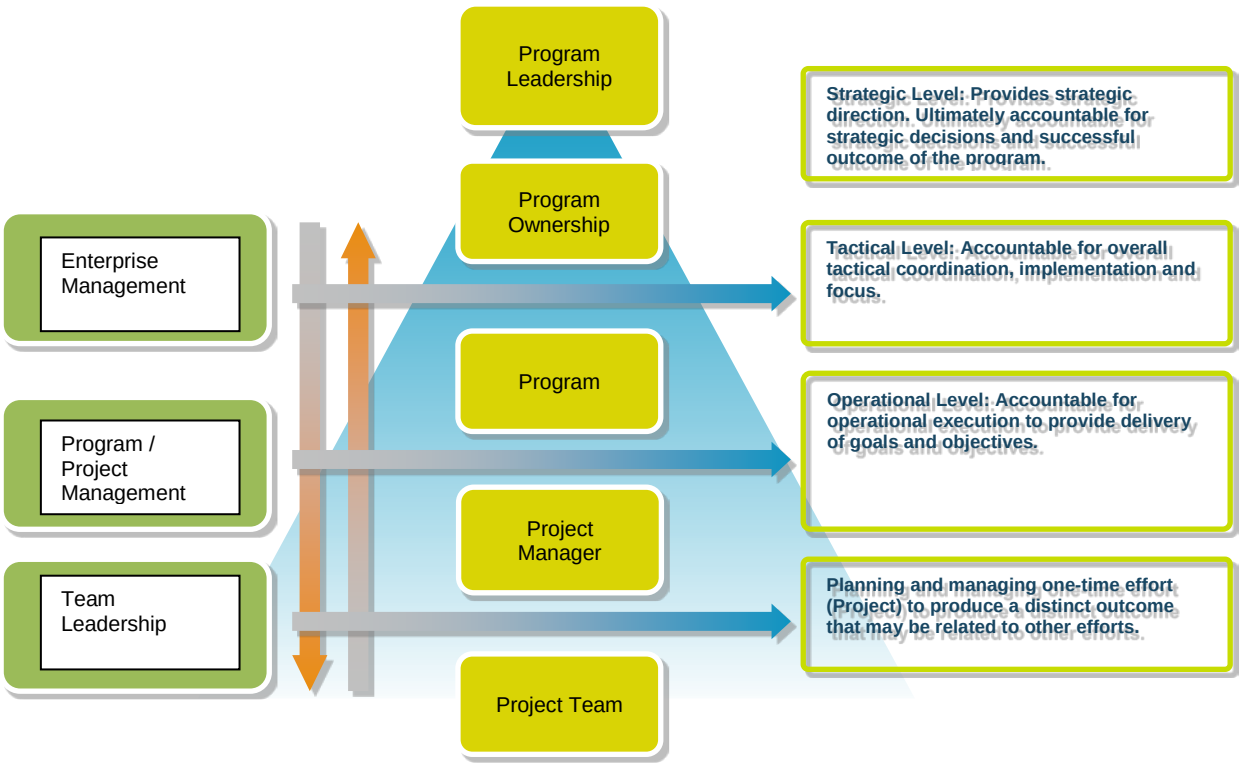
Note: If the Project overall status is Yellow or Red, there must be a corresponding Issue or Risk. In addition, a Corrective Action Plan (CAP) needs to be created in Changepoint.

2.4.1.2 Managing Issues and Risks

Issues and risks created in the Item Tracker tool will be evaluated by the person to whom the issue or risk is assigned. The person will also be responsible for maintaining the Target Date. Even though issues and risks can be assigned to any team member, the Project Manager (or Program Manager if issue or risk is at the Program level) for the issue or risk are equally responsible for the issue or risk and should monitor the issues and risks at a minimum on a weekly basis and more often if they have been escalated past the Project/Program manager.

2.4.1.3 Escalating Eligibility Issues and Risks

The diagram below depicts the progressive nature of risk and issue management starting with “work”, up to a “Project”, all the way through and up to “Executive Leadership”. The ISA and all projects will follow strict escalation procedures for issue and risk management.



Escalation Path

Escalation Level	Description	Escalation Threshold
Project Manager	Project Managers must seek to resolve the initial issue or risk. • In Item Tracker, the PM will assign the owner of the issue or risk to him or herself or somebody on their project team. • The Project Governance team (usually Project Business Owner, Project Technical Owner, Project Vendor Owner, etc.) must seek to resolve the issue or risk in coordination with the Project Manager. • In Item Tracker, the PM will set the owner of the issue or risk to the appropriate ISA Project Governance resource. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** - Escalate immediately **Medium** - 3 business days **Low** - 5 business days
Program	The associated Program Manager must seek to resolve the issue or risk in coordination with the Project Manager. • In Item Tracker, the PM will assign the owner of the issue or risk to the appropriate Program Manager for the area. • In Item Tracker, the PM will set the escalation path of the issue or risk to “Program”. Place a comment in the detailed description field stating that the issue has been escalated.	**High** - Escalate immediately **Medium** - 3 business days **Low** - 5 business days
Program Ownership Team	The Program Ownership team must seek to resolve the issue or risk in coordination with the Program Manager and Project Manager. • In Item Tracker, the PM will assign the owner of the issue or risk to the appropriate Program Manager for the area. • In Item Tracker, the PM will set the escalation path of the issue or risk to “Ownership”. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** - Escalate immediately **Medium** - 3 business days **Low** - 5 business days
Program Leadership Team	If the Program Ownership team cannot resolve the issue or risk, the issue or risk will be escalated to the Program Leadership Team. The Leadership team must seek to resolve the issue or risk in coordination with the Program Project Manager, Program Manager, and Project Manager. • In Item Tracker, the Program Manager will assign the Owner of the issue or risk to the Program Project Manager. In Item Tracker, the Program Manager will set the escalation path of the issue or risk to “Leadership”. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** - Escalate immediately **Medium** - 3 business days **Low** - 5 business days
SIA ISA Oversight	If the Program Leadership team cannot resolve the issue or risk, the issue or risk will be escalated to the SIA ISA Oversight Team. The SIA ISA Oversight team will resolve the issue or risk in coordination with the ISA Manager, Program Project Manager, and Program Manager. • In Item Tracker, the Program Manager will be responsible for creating the issue or risk in the SIA ISA Item Tracker. The Program Manager will set the escalation path of the issue or risk to “Executive”. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** - Escalate immediately **Medium** - 3 business days **Low** - 5 business days

2.4.1.4 Reporting for Issues and Risks

Standard views have been created for issue and risk reporting in Item Tracker. Once a view is displayed, the list can be printed to a printer or as a .pdf.

2.4.2 Change Control Management

Definition of "Change Control Management" – Change control management is the systematic and explicit approach used to manage approved scope and requirements. Change controls are documented and acted upon similar to Issues and Risks. Once the Change Control is approved by the appropriate project stakeholders, the change will be implemented. If the Change Control has a change to cost, the TCO will be updated accordingly. Change Controls are managed in the Eligibility ISA Item Tracker.

- Program Ownership is responsible to approve all scope and schedule changes
- Program Leadership will approve all major milestone, cost, and scope changes

2.4.2.1 ISA Change Control Process

- The Eligibility Change Control Process is used for managing Change Controls for the Eligibility ISA.

2.5 Corrective Action Plan (CAP)

If the status of a project is yellow or red, the Project Manager is responsible for creating and maintaining a Corrective Action Plan (CAP) in Changepoint to document what steps the Project Manager is taking to resolve the issue or risk and get the project back on track. This CAP must be maintained as part of the weekly project status reporting cycle until the project is back to a green status.

2.6 Time Management

All Project team members on projects for which cost should be tracked versus budget (to support APDs, Grants, etc.) must officially report effort on the standard Monday through Friday work week.

2.6.1 Collecting Project Time

Weekly Time Tracking Process – State DTMB and Non-State of Michigan resource

State DTMB and Non-State of Michigan resources will track their project time weekly in Changepoint.

Weekly Time Tracking Process – State of Michigan (Non-DTMB) resource

Non-DTMB State of Michigan Resources will track their project time weekly in the DCDS Time Tracking tool.

2.7 Quality Management Plan

2.7.1 Purpose

The purpose of the Quality Management Plan is to describe how quality of the project will be managed throughout the lifecycle of the project. It also includes the processes and procedures for ensuring quality

planning, assurance and control processes are all conducted. All stakeholders should be familiar with how project quality will be planned, assured, and controlled.

The Quality Management Plan will establish the activities, processes and procedures for ensuring a quality product is delivered upon the conclusion of the project.

The purpose of this plan is to:

- Ensure quality is planned
- Define how quality will be managed
- Define quality assurance activities
- Define quality control activities
- Define acceptable quality standards

2.7.2 Acceptance Criteria

The SUITE Systems Engineering Methodology (SEM) provides “stage exits” or points in time during the project when the customer and stakeholders will review the deliverables in detail and accept or reject the work (or accept with noted revisions). Every effort will be made to identify all stakeholders and plan for their participation in the acceptance process. Each stage of the SEM is planned, documented and reviewed by all applicable stakeholders. Each deliverable will be reviewed and approved, if required, before proceeding to the next stage.

2.7.3 Quality Assurance Activities

SEM processes will be used to monitor and control quality on this project. The SEM provides for seven stages, each with required documentation, reviews and approvals. The stages will be executed and monitored during the project.

The quality of the project outcome depends upon the quality of these plans, documents and knowledge transfer phases. Their quality is ensured by walkthrough reviews done by knowledgeable and invested stakeholders. A formal change control process will be followed for modifications required to documents that have been reviewed and approved. PMM and applicable SEM documents will be stored in the Enterprise Solution Tool (i.e., SharePoint) on the Eligibility ISA site.

The project will use verification, validation and structured walkthrough techniques to promote quality in deliverables.

Verification

The objective of verification is to make sure that a deliverable is correctly derived from the inputs to the stage that creates it, is internally consistent, and conforms to standards. The verification of a specification deliverable identifies errors in that deliverable before they are passed on to the next stage of development. The resulting benefit is that errors are caught early in the development process where they can be addressed with a minimum of effort, rather than during testing where correcting errors becomes more costly. Verification is the process of checking that a deliverable is correctly derived from the inputs and is in the correct format, while testing makes sure that the specification was properly implemented.

The purpose of these activities is to:

- Evaluate a deliverable against appropriate project standards
- Identify and correct defects as early in the process as possible
- Reduce the number of Remedy Tickets and Change Controls (CCs) as the work effort progresses
- Reduce time and costs that result from rework

Validation

Validation uses techniques similar to verification (e.g., testing, analysis, simulation) and covers hardware and software. Validation can be done by analyzing a model of the implementation, by creating and testing a prototype (performing a usability test to validate if user interface requirements are met) or by conducting a peer or expert review (as in validating the design for maintainability).

Structured Walkthroughs

Deliverables are also monitored and controlled for quality through a process known as a Structured Walkthrough. The Structured Walkthrough process is used to identify and correct errors early in the development process by evaluating a deliverable according to SUITE guidelines and project standards. A Structured Walkthrough can be formal (meeting with a facilitator to guide the process) or informal (document reviewers email their comments to a scribe who will compile the results). This process is intended to reduce the number of problems and warranty issues, as well as reduce the time and costs resulting from rework. The purpose of the Structured Walkthrough feedback form is to document peer review findings which include the following:

- Action Items
- Errors
- Issues/Risks
- Suggestions/Omissions

Deliverables are reviewed for quality in terms of the following criteria (as applicable):

- Clarity
- Contractual concerns
- Functional content and accuracy
- Performance impact
- Project standards/format
- Scope
- Technical content
- Value/benefit to the client

The following table illustrates the criteria used in determining the type of Structured Walkthrough and the intended audience:

Structured Walkthrough Guidelines

Work Product	Review Type	Suggested Reviewers	Relevant Documents
Business Requirements	Formal/Informal as determined by project	Assigned Developer Business Lead Lead Developer Project Manager	Business Requirement Document Relevant Supporting Documentation
Technical Requirements	Formal/Informal as determined by project	Assigned Developer Business Lead Lead Developer Project Manager	Business Requirement Document Relevant Supporting Documentation
Functional Design (FDSN)	Formal/Informal as determined by project	Assigned Developer Business Lead Lead Developer Project Manager	FDSN Relevant Supporting Documentation
Technical Design (TDSN)	Formal/Informal as determined by project	Architect Assigned Developer DBA Lead Developer Project Manager	TDSN Relevant Supporting Documentation
Source Code, Unit Test Plan, Unit Test Scenarios and Test Results	Formal/Informal as determined by project	Architect Assigned Developer DBA Lead Developer Project Manager	Source Code and Unit Test Plan, Unit Test Scenarios and Unit Test Results
System Test Plan and Test Results	Formal/Informal as determined by project	Architect Assigned Developer DBA Lead Developer Project Manager	System Test Plan, System Test Scenarios and System Test Results

If a document or deliverable is not listed here, then the project manager will make a determination on how to conduct the review. All listed work products must be reviewed.

2.7.4 Project Monitoring and Control

Monitoring and controlling project quality will be done via:

- The structured walkthrough review and approval process performed for every deliverable of the project as documented in the project schedule
- Weekly review of tasks, risks, schedule and issues with the project team
- Escalation process will be followed when project milestones will be missed
- Escalation of risks where needed using the project governance model

2.7.5 Project Team Quality Responsibilities

Quality is a shared responsibility of all project stakeholders. Quality is not just a review at the completion of a deliverable. Quality is built into the project from the beginning by support from stakeholders as each phase of the project is executed. Appropriate stakeholders will participate in the creation and/or review of all deliverables.

2.7.6 SUITE Processes and Product Quality Assurance (PPQA) Reviews

The DTMB PPQA team provides objective project quality reviews to ensure compliance with SUITE processes, methodologies, and CMMI best practices. The PPQA teams attempts to review at least one project per customer agency per year.

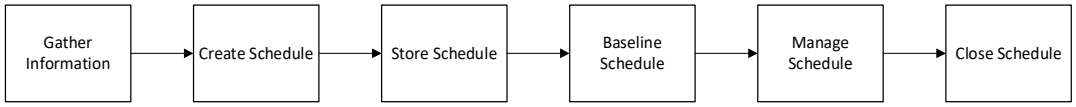
2.8 Schedule Management

OVERVIEW

Schedule management provides the guiding principles for creating, managing, and executing the project schedules. Schedule management ensures the project team achieves the project's objectives within the time and cost constraints allocated. This enables the Project Managers to make the best informed decision regarding the project's state of progress.

PROCESS ILLUSTRATION

PMO Schedule Management Process



2.8.1 Scheduling Objectives and Directives

The following describes how the ISA will manage project schedules. The Program Manager uses the information in the schedule to make informed decisions surrounding each project in the ISA. The following applies to all projects under the ISA.

- Gather key information needed to start the project schedule.
    - Scope
    - Tasks and milestones
    - Mandatory dates
    - Task durations and milestone dates
    - Available resources
    - Estimated effort
    - State Holiday schedule
    - Resource time off

    - Constraints
- Create the project schedule in Changepoint and/or MS Project
    - Use a project schedule template as a base
    - Tailor the template to fit the specific needs of the project
    - SOM holidays are flagged as non-working on the calendar
    - Resource vacation days are indicated on the calendar
- Store the project schedule in the appropriate project folder on the ISA SharePoint site
    - Under the project folder, use WBS folders 00 Execution and Control
- Baseline the project schedule when all milestone dates are approved
- Manage the project schedule during project execution
    - At least weekly
        - Update task % Complete for tasks in progress
        - Update task Status for key tasks and milestones
    - Weekly, provide status of milestone tasks and overall schedule to the ISA Program Manager
    - Approved Change Controls could modify task dates (baseline and actual)
- Close the project schedule once all tasks are completed

2.8.2 Project Schedule Template

Multiple project schedule templates will be available for projects to use as a starting baseline for the different types of ISA business projects as well as technical projects in Changepoint. Please see the ISA Schedule Management Specialist for addition details on project schedule templates.

2.8.3 Weekly Schedule Management Activities

The following is a representation of weekly activities related to Schedule Management within the ISA. It is important these procedures be followed in order to control the Projects within the ISA so that leaders can easily determine status and be proactive about items/areas that need attention.

Schedule Management Critical Weekly Activities				
Monday	Tuesday	Wednesday	Thursday	Friday
• Program Manager Updates Program Milestone Dashboard based on Project Milestones • The Program Dashboard is finalized and stored on SharePoint.	• Program Manager creates new Program Dashboard representing activities completed this week (new tab within Dashboard spreadsheet)	• N/A	• N/A	• PMs Update Issues, Risks, Change Controls • PMs Update Project Schedules • PMs Create Project 4up reports

Program Manager Updates Program Milestone Dashboard – Every Monday (COB) the Program Manager is responsible for using the milestone information from Project 4 UP reports to update the Program Milestone Dashboard. The Program Manager will update the milestone dashboard items that have changed from the previous week based on the information available. *Note: There are multiple Programs for Eligibility, therefore there are multiple Program Managers and Program Milestone Dashboards.*

Program Milestone Dashboard Finalized – When all reviews are complete, the Program Milestone Dashboard is finalized and stored on the ISA SharePoint site under the Program Status library.

New Program Milestone Dashboard Started – Every Tuesday, the Program Manager is responsible to begin creation of the current week's Program Milestone Dashboard. This is stored on the ISA SharePoint site. Each tab of the dashboard represents a week, therefore each tab name is the Friday date a week ends. For example, for the week ending 09/08/17, the tab name is "09-08-2017". However, when the tab is first created, the tab name contains the word "DRAFT" preceding the date. Once the changes are finalized for a given week, the word "DRAFT" is removed to indicate the tab is finalized for the week. A tab (sheet) is also password protected once it is finalized so that no changes can be made to it and preserve the integrity of the information. The most recent reporting period tab is listed as the first tab, followed in descending week order, the subsequent weeks.

PMs Updates Issues, Risks, Change Controls – Every Friday (COB), PMs will be responsible for updating Issues, Risks, and Change Requests in SharePoint Item Tracker for their projects.

PMs Updates Project Schedules – Every Friday (COB), PMs will be responsible for updating their project schedules for their projects, paying special attention to ensuring milestone information is accurate. Any milestones that are yellow or red will require further explanation in their 4 Up project status report – either via logged issue or risk, and comment on one of the other sections in the report. Completion percentage must be updated as accurately as possible as well for the milestones.

PMs Create Project 4-Up Report – Every Friday (COB), PMs will be responsible for creating 4 UP Reports for each of their projects. The 4 UP reports will be stored in their project folder in SharePoint (10 Status Reports). Based on milestones statuses and the impact of issues, risks and changes to the project, the overall status (Green, Yellow, and Red) will be assigned. See *Performance Measurement Plan* section below on criteria for determining overall project status.

2.9 Performance Measurement Plan

The ISA will institute performance measurements for each project. Measures are collected, analyzed or statistically controlled. Within this plan, metrics/data elements are identified that will be collected or both collected and analyzed. Items "collected" include metrics data gathered for an organization, placed in a repository for historical purposes and used at a later date. An example of an item to be "collected and analyzed" is estimated vs. actual start and end dates used to track, analyze and report conformance to schedule. All items that should be "statistically controlled" are listed here.

The project will use the following SOM required measurements as Analysis Triggers.

Criteria	Green	Yellow	Red	Notes
Schedule Variance	All key milestones are on schedule.	One or more of the key milestones are projected to be missed, or one or more of the key milestones have been missed however the project implementation date will not be impacted.	One or more of the key milestones have been missed, and it is projected that the project implementation date will be missed.	Key milestones include the PMM phases and SEM stages. For agile projects, key milestones include release milestones. Other metrics may be used as appropriate for predicting milestone completion, such as earned value, percent hours/user stories complete, percent test cases complete, and open defects.
Cost Variance	The variance between the project budget and the forecasted actual cost is <= 10%.	The variance between the project budget and the forecasted actual cost is > 10% and <= 20%.	The variance between the project budget and the forecasted actual cost is > 20%.	The project budget includes the allocated contingency for the project.
Issues	Issues are effectively being addressed, with limited risk to the project.	One or more escalated issues designated as critical or high priority remain unresolved for more than one week after the target date, resulting in a high level of risk to the project.	One or more escalated issues designated as critical or high priority remain unresolved for more than two weeks after the target date, resulting in a high level of risk to the project.	A project may need to be coded as yellow/red based on a significant project issue, even when the schedule and/or cost are not impacted. Examples include resource availability, scope issues, and concerns with realizing the anticipated benefits.

Note: A Corrective Action Plan (CAP) must be completed for items causing the project to be yellow or red.
Note: If a major milestone is yellow/red then the overall project status must be coded as yellow/red.

3 ISA Processes

The following is a directory of processes and associated flows currently documented and being followed for the Eligibility ISA that may not have been mentioned/referenced previously in this document.

Directory of Eligibility Processes

Operational Readiness Management Process

Operational Readiness is an integrated subset of all business and technology projects, and is designed to ensure that stakeholders are ready, willing and able to participate in each release of functionality. The purpose of the Operational Readiness meetings is to gather the project, technical and business stakeholders to assess organizational communication, outreach, business processes, training, and systems. The Operational Readiness meeting /reviews will determine if various initiatives and tasks are at appropriate stages of development and implementation to ensure a successful execution for end users and stakeholders.

Operational Readiness includes:

- Aligning key business processes to program or project requirements and technology
- Communicating with and engaging stakeholders so they are informed and knowledgeable
- Assessing the impact of the technology, policy and process changes on those who work with consumers, beneficiaries, providers and vendors across the agencies
- Preparing and training staff members to successfully carry out their jobs with updated systems and processes

- Workforce transition planning and potential transition workshops that includes identifying changes to roles and responsibilities as needed
- Aligning on Business Owner responsibilities and assigning tasks to drive to our deadlines

Integrated Service Delivery (ISD)

ISD Portal Project Charter

State of Michigan
Integrated Service Delivery (ISD) Portal
Project Charter

A. General Information

Project ID/Acronym:	ISD Portal	**Date:**	12/8/2016
Controlling Agency:	MDHHS	**Modification Date:**	1/06/2017
Prepared by:	Thomas Manzagol	**Authorized by:**	Amy Hundley Jamy Hengesbach Phillip Bergquist

Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved with this system/project or who will become involved during its lifecycle.

Program Charter

This project operates under the authority and governance of the Business Integration Center – PMO Program Charter and follows the processes set forth in the BIC Project Plan.

Updated ISD FY17 Program Charter

Change Control

Revision Date	Author	Section(s)	Summary
12/6/2016	Thomas Manzagol	All	Initial Draft

Revision Date	Author	Section(s)	Summary
12/12/2016	Thomas Manzagol	Purpose, Objectives, Scope, Assumptions, Constraints, Risks, Estimated Scheduling Dates, Summary Milestone Timeline	Added changes from 11/30/2016 Business Owner Discussion on ISD portal, as well as notes from meetings with Deloitte Consulting PM and Phillip Bergquist on 12/9/2016.
12/13/2016	Thomas Manzagol	Scope, Risk, Assumptions, Summary Milestone Timeline	Based on integration and requirements meeting input on 12/13/2016.
12/16/2016	Thomas Manzagol, Manoj Zutshi	All	Changes based on comprehensive internal review with Kevin Adler, Manoj Zutshi and Larry Wildt.
12/20/2016	Thomas Manzagol,	All	Meeting with Strategic Integration Team, and inputs from first management review.
12/22/2016	Thomas Manzagol	Scope, Scheduling Dates, Summary Milestone Timeline	Inputs from Deloitte on Sprint Schedule, and further refinements from Strategic Integration Team
12/27/2016	Thomas Manzagol	Project Objectives, Assumptions	Added further definition to the term pilot.
12/27/2016	Kevin Adler	Roles and Responsibilities and Governance	Standardized the formatting of these sections and added references to the PMO documentation.
12/28/2016	Thomas Manzagol	All	Changes from John Dullock, Karen Parker, and Linda Pung
12/29/2016	Thomas Manzagol	All	Final review edit
1/5/2017	Thomas Manzagol	Estimated Scheduling Dates, Summary Milestone Timeline, Project Objectives, Project Scope	Based on inputs from Manoj Zutshi
1/6/2017	Thomas Manzagol	Project Scope, Summary Milestone Timeline	Based on inputs from Thomas Rony, and Cynthia Edwards
1/23/2017	Thomas Manzagol	Final formatting	Final Version

B. Project Purpose

The Integrated Service Delivery (ISD) Portal provides an intuitive experience that allows community partners, program applicants and program participants the ability to electronically participate in self-service change reporting, personal needs assessment, single point of application for public Health and Human Service benefits, and ability to view existing benefits with renewal dates. The ability to maintain a secure, common profile of individual information used throughout a holistic application process with needs assessment supporting community partner and State of Michigan (SOM) program recommendations to be a source of beneficiary empowerment.

The business objective of the ISD portal is to improve user experience based on person-centric design and services by providing links to existing MDHHS programs and community resources, and by developing an ISD Portal that provides a needs assessment, success planning, and a holistic application.

C. Project Objectives

The objectives of this project include the following:

1. The ISD Portal project will gather detailed requirements, design, construct and test the ISD Portal, Needs Assessment, and Holistic Application; such that it is implemented and ready for pilot of release (1) in August 2017, in Muskegon County. The pilot will be released as the first release of a functional product with features described in the scope section of this charter to the county region above with the intent of learning how a large-scale rollout might work in practice. Release 1 focuses on addressing the ISD Portal and Needs Assessment functionality, with Release 2 in December 2017 focused on the Holistic Application functionality. Specific objectives of both releases include the following:
    a. Improve person-centric business processes.
    b. Improve beneficiary/customer empowerment based on a person-centric needs assessment focused on identifying goals, barriers and other impediments in a person's life to improve outcomes.
    c. Develop holistic application, with integration to Bridges.
    d. Build a needs assessment and success planning toolset leveraging an intuitive user interface.
    e. Implement a service support structure that helps achieve person-centric outcomes, enabling customers to:
        - Access self-service resources.
        - Change customer profile information.
        - Build success plan.
        - Manage success goals and supporting resources.
        - Provide consent for community partner referrals.
        - Find community partner resources with or without holistic application.
        - Upload documents.

f. Implement a structure that engages community partners as essential collaborators in service delivery, including providing higher degrees of customer assistance functionality to partner organizations.

2. Deliver a technological experience which achieves modernity in terms of design, user interface and intuitiveness. This will result a social media inspired feel.

D. Project Scope

This project inherits the high-level program scope of the ISD FY '17 [RT1]Program [MT(2]Charter, Section F. Project scope specific to ISD Portal, Needs Assessment and Holistic Application have been listed here for completeness:

In-Scope:

ISD Portal (Release 1)[RT3][MT(4]

a. Implement an ISD Portal that will provide basic information on MDHHS programs to general public and do not require a login to access.
b. Integrate the Portal with MiLogin.
c. Implement an ISD Portal that supports customer access through multiple devices and browsers, with a special emphasis on mobile devices.
d. Implement an ISD Portal that incorporates the "Needs Assessment" functionality (allows the customer to identify their needs and connect them with community partner resources).

Needs Assessment (Release 1)

a. Implement a Success Plan tailored to the beneficiaries needs, linked to applicable community resources.
b. Integrate Links to existing Program Applications and Community Partners.
c. Integrate shared business rules to understand needs assessment input, and responsively recommend supportive resources.
d. Integrate with the 2-1-1 for community resources database (for access to available geographic resources).
e. Provide recommendation on programs and services based on input from needs assessment. Needs assessment will recommend those SOM and Community Partner programs that the customer may benefit from.

Holistic Application (Release 2)

a. Implement a holistic application for all of the programs administered in Bridges including, but not limited to the following items. Other SOM Programs will be prioritized in future ISD releases.
    i. Food Assistance Program (FAP).
    ii. Health Care Coverage.
    iii. Cash assistance.
    iv. State Emergency Relief (SER).
    v. Child Development and Care (CDC).

b. Implement functionality that requests information from applicants only when necessary, supplementing and verifying attested information dynamically from trusted data sources.
c. Implement functionality where applicants have a dynamic interactive experience wherever possible (person-centric interaction based on customer profile information and needs assessment input).
d. Implement functionality where applicant supplied documents utilize the existing document management system (FileNet).
e. Integrate with Michigan Trusted Data Sources:
    i. Bridges demographic and current benefits information.
    ii. CHAMPS[MT(5)] Health Plan enrollment data.[RT6]

f. Implement an ISD Portal that includes the Holistic Application functionality (adds error checking and data pre-population for existing beneficiaries).

g. Integrate shared business rules between Needs Assessment, Holistic Application and Supporting Services.[MT(7]

h. Self-Service Features:
    i. Customer profile management.
    ii. Change reporting.[MT(8]

i. Self-Service Features:
    i. Redetermination.
    ii. View current benefits and past referrals[RT9][MT(10][MT(11].
    iii. Document uploads.
    iv. Consent management for sharing data with partner organizations.

<u>General</u>

a. Includes maintenance and help desk support provided for the ISD Portal pilot.
b. Provide ADA compliant user interface.
c. Provide language support for Spanish and Arabic.
d. Provide compliance with Federal Limited English Proficiency (LEP) requirements.
e. Integrate Short Message Service (SMS) messaging and e-mail.
f. Integrate with Master Person Index (MPI).
g. Leverage the Maximus call center to support customer calls on the operational use of the ISD Portal, Needs Assessment, or Holistic Application.

<u>Supporting Services (ISD Portal, Holistic Application and Needs Assessment)</u>

<u>Eligibility PMO</u>

1) Support recreation of MiBridges self-service functions in the ISD Portal including:
    a. Change reporting.
    b. Redetermination.
    c. Check my benefits.
    d. Customer profile management.
    e. Document uploads.
2) Make customer eligibility and enrollment data available [MZ12]to the ISD Portal.

3) Make customer eligibility and enrollment data available through the Master Person Index (MPI).
4) Establish and support the new infrastructure environments.
5) Enhance the Enterprise Services Bus to interface supporting systems, such as Bridges, with ISD Portal, Holistic Application and Needs Assessment.
6) Integrate existing MAGI Eligibility Determination Service to function interactively [MT(13)][RT14][MT(15)]with the Holistic Application.
7) Integrate Bridges to intake Holistic Applications as it functions today for other applications from MiBridges.

Enterprise

1) Integrate ISD Portal with MiLogin and MPI.
2) Load the following two data sources into the MPI
    i. Bridges
    ii. CHAMPS
3) Integrate Helping Hand 2-1-1 information to be used within the ISD Portal for Needs Assessment and success plan.
4) Integrate Eligibility and Enrollment data to be used by the ISD Portal, Needs Assessment and Holistic Application.
5) Implement the FileNet Document Upload functionality
6) Integration with MiPage.
7) Support connections with existing MDHHS functionality, as required.

MMIS

1) Making customer program enrollment data available to the ISD Portal.
2) Making customer program enrollment data available to the Master Person Index (MPI).

Out-of-Scope:

1. Enrollment into a managed care plan.
2. Selection of Primary Care Physician.
3. Integration with MS Outlook calendar.
4. Integration with News feeds.
5. Information specific to a customer from 2-1-1 trusted data source.
6. Non-MAGI eligibility determination.
7. Integration with Live Chat functionality.
8. myHealthPortal Portal is not being replaced.
9. Childcare Database (of Childcare providers) will not be integrated.

Assumptions:

1. Business owner(s) will be accountable for the scope and delivery of functions to the end-users.

2. The State of Michigan SUITE process will be used and Agile and vendor software development methods will be integrated in accordance with SUITE Agile Process Guide, dated January 2015.[RT16][MT(17]
3. Work required to implement the ISD Portal, Needs Assessment, and Holistic Application, but done by groups outside the ISD Portal team, will be completed on a mutually agreeable schedule.
4. Supporting PMO schedules will be aligned to support this effort.
5. The MDHSS Civilla application pilot will provide the business requirements for the basis of the Holistic application.
6. Community partner access to customer success plan information will be based on consent management rules defined by the business.
7. Community partners will continue to register their resource data through existing 2-1-1 registry process.
8. The Business Owner is accountable for prioritizing user stories across sprints based on the Delivery team's capacity.
9. There are regular reporting updates for grants and Federal requirements.
10. Additional user requirements and future enhancements identified during the pilot will be documented for potential future development.
11. Project is dependent on completion and lockdown of Civilla application by February 15, 2017 (or appropriate sprint cycle date).
12. Any necessary waivers from FNS or other Federal Agencies will be made available to support the development of the portal components.

Constraints:

1. Solution Design Team (SDT) final design approval does not take place until start of second Sprint Cycle.

Risks:

1. If the SOM requires the use of the state supported project management software, as opposed to the vendor proposed Agile software development toolset, there is a system security risk for vendor offshore development team access.
2. Pilot timeline requires concurrent solution development, hardware installation, EASA, and Sprint Development.
3. SDT process and final EASA packet approval occurs concurrently with Sprint 1 development – may create further design modifications to Sprint 1 code during Sprint 2.
4. Concurrent SDT, EASA, Hardware Implementation and Sprint development may extend to last sprint cycle to address architecture changes.
5. Potential impact if one, or more policy changes are required to implement the project.
6. The overall process time to identify and implement agreements with Trusted Data Sources, and other impacted systems and get corresponding services stood up.
7. Business agreements, contracts and access to technical resources required to interface with Trusted Data Sources and other third party applications, databases, ESBs, portals and registries.
8. Provisioning Bridges timeline for development, quality and user test environments could delay Sprint development cycles.

E. Project Critical Success Factors

Project critical success factors include:

1. All in scope items delivered on-time and within budget.

F. Initial High Level Project Planning

Estimated Project Budget

Please refer to the ISD Budget Worksheet at the link below for all ISD estimates:

ISD Budget Worksheet

Estimated Scheduling Dates

Anticipated Start Date: January 3, 2017

Target Completion Date: December 31, 2017

The ISD Portal project will be constructed in two releases. The release dates are as follows:

- Release 1: 8/31/2017
- Release 2: 12/31/2017

Release 1 of the ISD Portal project consists of nine (9) Agile development sprint cycles culminating in nine (9) iterative UAT cycles and a single one-county pilot. Throughout the release 1 construction period, development work will also continue on Holistic Application, in addition to ISD Portal and Needs Assessment.

Key milestones include the following:

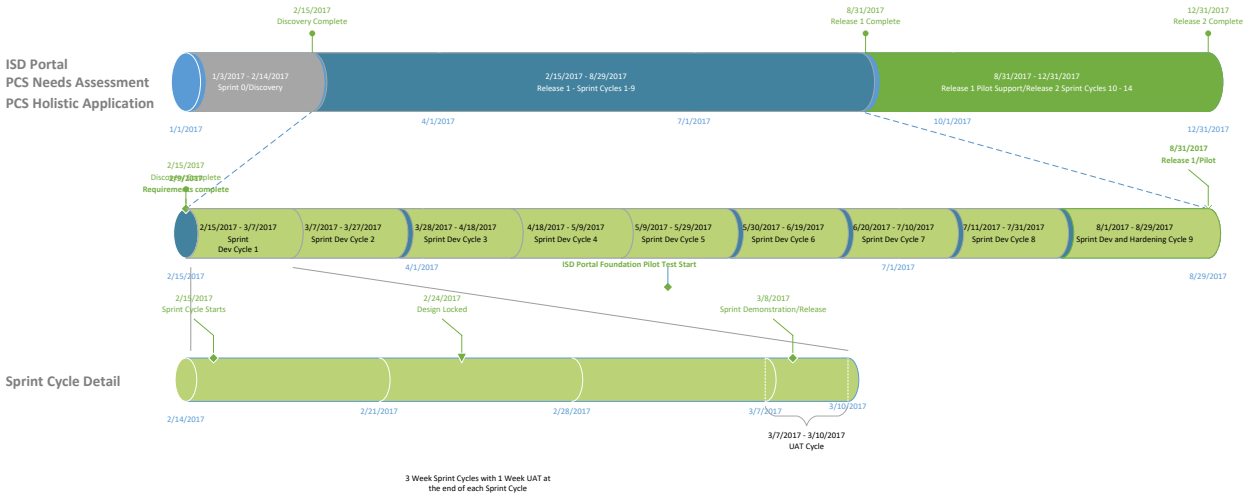
Submission of initial EASA Packet	12/19/2016
Sprint 0 Discovery complete	2/14/2017
Civilla application template locked down	2/15/2017
Sprint 1: Complete/UAT 1 Starts	3/8/2017
Sprint 2: Complete/UAT 2 Starts	3/29/2017
Sprint 3: Complete/UAT 3 Starts	4/19/2017
Sprint 4: Complete/UAT 4 Starts	5/10/2017
Sprint 5: Complete/UAT 5 Starts	5/31/2017
Sprint 6: Complete/UAT 6 Starts	6/21/2017
Sprint 7: Complete/UAT 7 Starts	7/12/2017
Sprint 8: Complete/UAT 8 Starts	8/2/2017
Sprint 9: Complete/UAT 9 Starts	8/30/2017
Release 1 Completion - Single county pilot roll-out	8/31/2017
Pilot Completion	12/31/2017

Release 2 of the ISD Portal project consists of five (5) Agile development sprint cycles culminating in five (5) iterative UAT cycles. Throughout this construction period, the focus is on extending the Holistic Application development to production release.

Key milestones include the following:

Sprint 10: Complete/UAT 10 Starts	9/26/2017
Sprint 11: Complete/UAT 11 Starts	10/17/2017
Sprint 12: Complete/UAT 12 Starts	11/7/2017
Sprint 13: Complete/UAT 13 Starts	11/28/2017
Sprint 14: Complete/UAT 14 Starts	12/27/2017
Release 2 Completion	12/31/2017

Summary Milestone Timeline[RT18][MT(19]



G. Project Authority

Authorization:

Phillip Bergquist – Business Owner
Amy Hundley – Business Owner
Jamy Hengesbach – Business Owner
Brant Cole – Business Delivery Liaison
Thomas Manzagol – ISD Portal Project Manager
Judy Odett – Technical Delivery Owner
Manoj Zutshi – Deloitte Project Manager

H. Roles and Responsibilities

Program Roles and Responsibilities

Refer to the ISD PMO Roles and Responsibilities document at the following link:
ISD Roles & Responsibilities Document

Project Governance

Refer to the ISD PMO Governance diagram at the following link:
ISD Program Governance Document

I. Project Management Processes

This project will follow the standard BIC Project Management guidelines and procedures for management checkpoints, including a weekly review of project status, issues, and risks.

Please refer to BIC ISD Program Management Plan for a list of all these processes.

J. Approval Information

The signatures relay an understanding of the purpose and content of the document by those endorsing it. By signing this document, you agree to this as the formal Charter statement to begin work on the project described within, and commitment of the necessary resources.

Approval Signatures

Role	Name	Signature	Date
Business Owner	Phillip Bergquist Business Owner-Policy & Legislative		
Business Owner	Amy Hundley Business Owner-Field Operations		
Business Owner	Jamy Hengesbach Business Owner-Medicaid		
BIC Project Manager	Thomas Manzagol		
BIC Business Delivery Liaison	Brant Cole		
DTMB Technical Delivery Owner	Judy Odett		
Vendor Project Manager	Manoj Zutshi		

Integrated Service Delivery Program Management Office

Program Management Plan

Table of Contents

Revision History

Date	Version	Author	Change Description
9/1/2016	0.0.1	Kevin Adler	Initial Draft
10/18/2016	0.0.2	Kevin Adler	Minor document enhancements
11/4/2016	0.0.3	Kevin Adler	Adding the PMO Funding Management information
12/6/2016	0.0.4	Kevin Adler	Program Governance Update (Section 1.4.1)
12/14/2016	0.0.5	Kevin Adler	Added bookmarks for the Integration/Business Requirements touchpoints (Section 1.4)
12/29/2016	0.0.6	Kevin Adler	Minor enhancements and links to other PMO process documentation.
1/12/2017	0.0.7	Kevin Adler	Provide links to the updated ISD PMO Governance diagram, and update the meeting cadence.
1/23/2017	1.0	Kevin Adler	Overall updates to the document to account for Leadership and Ownership responsibilities.

1 Program Management Plan

1.1 Introduction

To improve project delivery, the Michigan Department of Health and Human Services (MDHHS) implemented the Business Integration Center (BIC) to serve the entire MDHHS agency. The purpose of the BIC is to improve MDHHS project delivery using common project management processes and disciplines. The BIC will strive to standardize and introduce economies of repetition in the delivery of projects and serve as the source of documentation, guidance, reporting, and metrics on the practice of project management and project delivery. The BIC will plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver projects on time, on budget and within scope.

Project Planning occurs in advance of a project, and subsequently at the beginning of a project, to understand exactly how the project will function. This is the "Project Plan" document for the Integrated Service Delivery (ISD) Program Management Office (PMO), and serves as the process disciplines that will be adhered to by the all ISD PMO teams and projects. This is not process for process sake – this is the tailoring of processes to support the successful implementation of PMO Projects within budget and schedule.

1.2 BIC Program Management Office Purpose

The purpose of a BIC PMO Program is to improve integrated business and technology project delivery using common project management processes and disciplines, concentrating in the areas of Program / Project Monitoring, Business Integration, Quality Assurance, Change Management/Business Readiness, and Strategic Alignment. The PMO will strive to standardize and introduce economies of repetition in the execution of projects and will serve as the source of documentation, guidance, and metrics on the practice of project management and project execution.

The goal of the BIC is to effectively plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver both business and technology projects on time, on budget, and within scope.

1.3 Program Charter

Review the BIC-ISD Program Charter to understand the program purpose, objectives, and high-level scope.

The Integrated Service Delivery Program charter can be found here on the program's SharePoint site.

1.4 Program Governance Framework

The purpose of program governance is to serve as a mechanism for ensuring all audiences and stakeholders are aware of their responsibilities for managing ISD PMO project information in order to provide the following:

- Program and Project Management for both business and technical projects
- IT vendor management and monitoring
- Project control and monitoring
- Project status and risk reporting
- System integration for all participating vendors
- Technical requirements and system level design development that advances MDHHS toward future goals and objectives
- Technical testing of Michigan systems and interactions with outside systems

1.4.1 Program Governance Organizational Chart

The Integrated Service Delivery PMO Governance diagram can be found here on the program's SharePoint site.

The ISD PMO Governance Organization has been designed around Strategic, Tactical (Leadership), and Operational responsibilities. These responsibilities have been summarized below.

Strategic:

- Strategic Plan Development
- Remove roadblocks to program success
- Render strategic decisions
- Serve as the focal point for resolving escalated issues and risks with other State Agencies and external organizations
- Provide support for the overall program
- Review and approve use of budget dollars
- Communicate program issues and concerns to the Program Leadership team for resolution

Tactical (Leadership):

- Understand, monitor, and control the program budget
- Establish clear goals and deliverables
- Remove roadblocks to program and project success
- Provide support for the program and projects
- Communicate program and project issues/risks to the Ownership team for resolution
- Review and approve all program change request items not requiring escalation to the Executive Steering Committee
- Render decisions and provide requested project input/feedback within required timeframes
- Serve as the focal point for resolving issues and risks with other State Agencies and organizations external to the State of Michigan

Operational (Ownership):

- Implement proven processes and controls
- Understand, monitor, and control the projects
- Create focus and accountability
- Drive better decisions faster
- Resolve issues and mitigate risks at the project level
- Communicate project issues and concerns to the Program Leadership team when necessary
- Develop partnerships and collaboration

1.4.2 Program Governance Committees

MDHHS BIC governance committees are forums with standing agendas and decision-making authority. They bring together the authoritative leaders within the appropriate State Agencies to make decisions and recommendations. Additional committees may be organized later if the need arises.

See section 1.6 Communications Management for more details related to the frequency that ISD committees meet.

Executive Steering Committee

The Executive Steering Committee is the highest decision-making body for the BIC. This group operates at the strategic level and will make decisions on items surrounding portfolio, business vision, and program budgets. This committee consists of MDHHS Deputy Directors, including the BIC Director and DTMB General Manager. It is considered an escalation point for critical issues and risks.

Enterprise Steering Committee

The Enterprise Steering Committee is an enterprise decision-making body for the BIC that crosses all Program Offices. This committee operates at the strategic level and will make decisions on items surrounding portfolio of project requests, strategic business alignment, and funding sources. The Enterprise Steering Committee consists of the BIC Enterprise Integration Director, BIC Enterprise Program Manager, the DTMB Technology Office Director, and the BIC Financial Manager. This committee is an escalation point for critical issues and risks.

ISD Executive Steering Committee

The ISD Executive Steering Committee is the highest decision-making body for the ISD Program. This group operates at the strategic level and will make decisions on items regarding Program Vision and Budgets. This committee consists of MDHHS Deputy Directors, including the BIC Director and DTMB General Manager. It is considered an escalation point for critical issues and risks.

ISD Leadership Team

The Leadership Team consists of Business Program Owners, Business Delivery Liaisons (BIC business delivery leaders), PMO Manager, Technical Delivery Owner (DTMB business relationship manager), Technical Vendor Partner, Financial Management Specialist, and the System Integration Team Functional Manager. The Program Leadership team is responsible for decision-making at the tactical level of the organization, including approval of all projects, schedules and major milestone changes, budgets and costs changes, and approval of all scope removal requests.

ISD Ownership Team

The Ownership Team is responsible for owning overall integration and implementation of the project portfolio, eliminating day-to-day operational issues and risk. The ISD Program Ownership Team consists of MDHHS and DTMB Leadership resources, Scrum Masters, and Project Managers.

Project Teams

Project and operational leadership teams are responsible to deliver goals and objectives related to specific projects. These teams normally consist of a Project Manager leading various resources in the State Agencies and/or the vendor community. These teams consist of State Agency and/or vendor staff responsible for implementation of the scope of their given project.

1.5 Program Roles and Responsibilities

Each ISD PMO Program and Project role is defined along with the responsibilities for that role in order to set clear expectations. These roles and responsibilities are inherited from the MDHHS BIC roles and responsibilities document.

The Integrated Service Delivery Roles and Responsibility document can be found here on the program's SharePoint site.

1.6 Program Communications Management

Communication Management sets the communications framework for the BIC PMO. It will serve as a guide for communications throughout the life of the BIC PMO and will be updated as communication needs change.

This plan identifies and defines the roles of persons involved with communications within this program and projects. It also includes a communications matrix, which provides a summarized view of the multiple communication items such as the type of communication, the frequency of the communication, who is responsible for making sure the communication takes place, the audience for a particular communication item, and whether or not approval is required.

The Integrated Service Delivery Communication Management Plan can be found here on the program's SharePoint site.

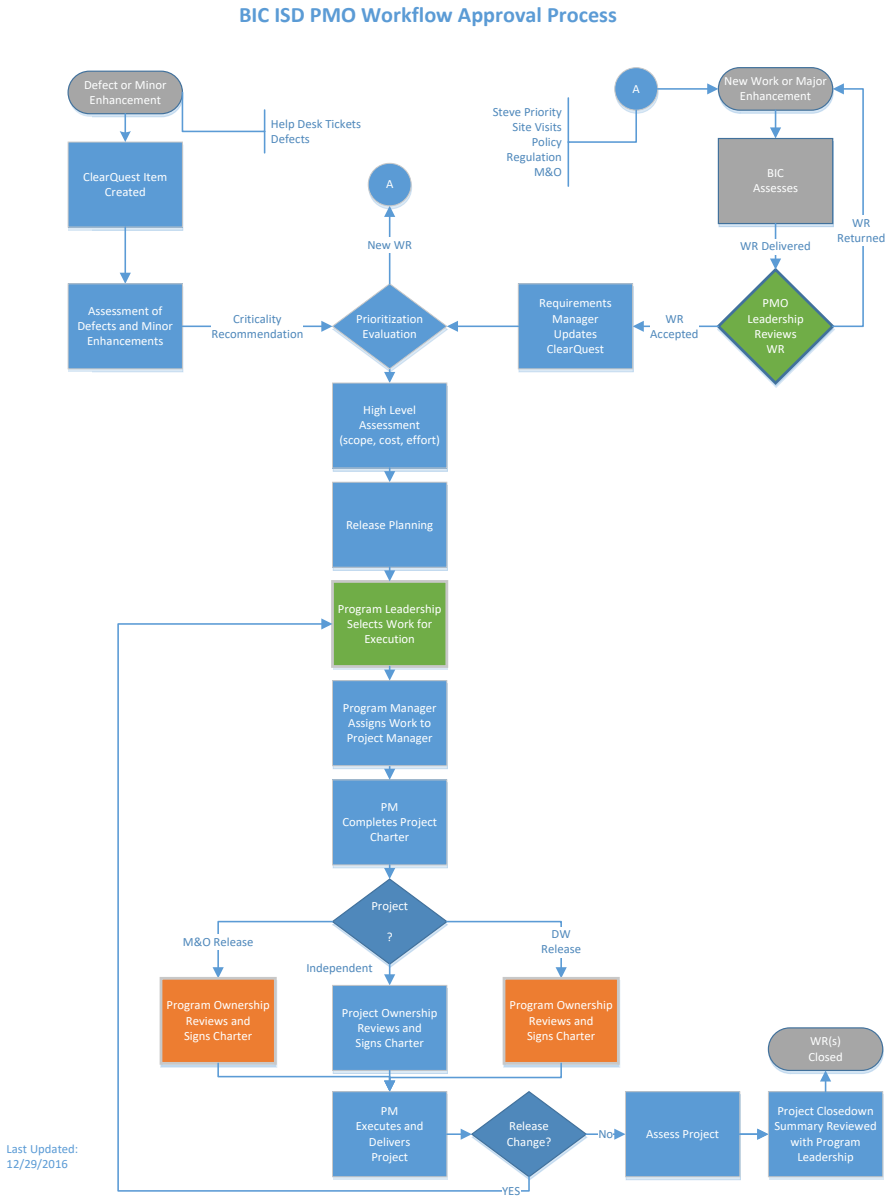
1.7 Program Contact List

The Integrated Service Delivery Contact List can be found here on the program's SharePoint site.

1.8 Program Work Intake, Assessment, and Approval

Work coming into the ISD Program must be managed in a consistent manner. Work is considered as all additions, changes, or deletions of functionality to the ISD portfolio of systems, as well as any changes needed to support the infrastructure for these systems. Work also includes initiatives to support the PMO itself (i.e., upgrades to tools that directly support the PMO).

Additionally, work could be any business initiative that support the systems or the PMO (e.g., policy changes). The process diagram below depicts how work enters into the PMO, is prioritized, is potentially assigned to be executed (becomes a project), and if assigned, finally executed and implemented.



Work Intake

There are two paths in which work can flow into the ISD PMO. The first path is via Maintenance and Operations (M&O), where defects and minor enhancements are identified (through the Helpdesk or Project Testing) and collected. The second path is via the BIC Work Intake process.

Maintenance and Operations (M&O)

Defects and Minor Enhancements are identified, collected and documented. These items are documented in ClearQuest. The documented defects and minor enhancements are assessed to determine area of impact, some sizing, possible grouping of like items, and impact on users. After assessment, items identified as having the greatest impact are then prioritized internally and assigned a project or release.

BIC Work Intake

All major enhancements to systems, new systems, infrastructure changes, changes or additions to PMO support tools, and any new business Initiatives must be requested through the BIC Work Intake process. This process allows the BIC Work Intake Team to review each new request for strategic business alignment; funding need and potential fulfillment; and high-level scope, duration, and estimation of cost.

The BIC Work Intake Request form can be found here on the BIC SharePoint site.

For work deemed applicable to the ISD PMO, the analysis is passed on to the PMO for review. The ISD PMO Leadership team reviews each request to determine if the work truly belongs in the PMO, while also ensuring that enough information to process the request is documented.

If the request does not have enough information or if it does not belong to the ISD PMO, the request is returned to the BIC Work Intake team. If the request is valid and has the appropriate information, the request is accepted into the PMO.

Work Prioritization

The ISD Leadership team will set, or reset, priority for M&O project(s)/release(s), internal work items, and BIC work requests.

High-level Assessment

Some work items may need further analysis to be able to determine size (effort and duration) before work assignment can take place. For such items, resources will be assigned to identify additional scope to determine effort needed, and duration to implement. This information will be documented with the work item.

Work Assignment

The ISD Leadership team will assess all prioritized work, determine the most appropriate release (if applicable), and assign the work to the appropriate ISD program area for implementation.

Work Execution

The ISD Ownership Team will review all recommendations for work assignment and either approve the recommendation or request additional review by either the Work Prioritization or the Release Planning team (or both).

The Program Manager for a given Program will assign the recommended work from the Ownership Team to a Project Manager to create a project charter. Once the project charter is approved, the Project Manager can begin executing the project.

1.9 Program Document Collaboration

Microsoft SharePoint will be used for Program and Project collaboration. Program documents will be stored here (i.e., plans, processes, and templates). Administrative information for the ISD PMO team will be stored on the site as well.

SharePoint provides a secured location for all State and Vendor-Partner resources to access program and project deliverables. Documents will be under version control, and SharePoint will track who stored the document and the storage date.

1.10 Program Budget and Financial Tracking Processes

The BIC PMO has a dedicated Financial Specialist who will work at the leadership level to assist in planning and forecasting annual budgets, as well as assist in the approval of project work. The Financial Specialist will also work at the operational level to organize and track budgets and financials associated with all BIC PMO projects. The budget office sends out monthly consolidated cost sheets, detailing resource hardware, software and vender service costs. The PMO Financial Specialist maintains origin of these costs. The associated processes are described in this section.

1.10.1 Financial Tracking Process

In conjunction with the BIC PMO Program Coordinator, the Financial Specialist will track effort hours reported and invoices submitted against the projected BIC PMO budget for the fiscal year. The goal is to determine whether the budget is being spent at the rate expected or over/under the projected amount by percentage and dollar amount. On a monthly basis, the cost versus budget information will be reported to the Project Mangers, Program Managers, and Program Leadership Team. If/when areas of concern arise (spend rate is too high, funding sources depleted, etc.), appropriate action and escalation will be initiated to help alleviate the concern. =

1.10.2 Resource Cost Management Process (DCDS)

The Financial Specialist receives copies of all invoices related to staff costs. The BIC PMO Program Coordinator and BIC PMO Financial Specialist will receive copies from the Financial Specialist and update actual costs against projected costs to ensure staffing stays on track as projected. Similarly, DTMB will send an updates of actual costs for each budget/project line item that will also be incorporated into financial management reports.

2 Project Management

Project Management will focus on project-level activities that have a defined start and finish. Project Management applies the skills, tools, and techniques to meet project needs or expectations. By design, the processes used at the project level are aligned with the processes used at the program level to build conduits of information flow. Projects follow project management processes together with life-cycle methodologies to manage and execute the work necessary to meet project requirements.

The PMO will also utilize Microsoft Project to maintain detailed project schedules and for quality assurance analysis. All PMO project management processes are based upon the Project Management Institute's (PMI®) best practices.

2.1 Project Governance Framework

As part of establishing consistent project governance for all projects, a common leadership framework is required. For each project, the PMO Program Manager will work with the project stakeholders to establish the project governance, normally consisting of an assigned Project Manager, Business Delivery Liaison, Project Systems Owner, and potentially a Project Vendor Owner. The following depicts the common leadership roles necessary to govern the projects.

Project Manager

The Project Manager has overarching responsibility for the project. The project manager works with the appropriate Program Manager for the majority of work. The Project Manager defines schedule, control, and adjust all tasks and workloads of the project. They are responsible for guiding their teams and ensuring adherence to Child Welfare PMO processes. The Project Manager must also manage and track project issues and risks, ensuring that all project commitments are met. They communicate project status to clients and leadership.

Business Delivery Liaison

The Business Delivery Liaison has overarching responsibility and accountability for the people and BIC activities within the ISD PMO. The Business Delivery Liaison is responsible for ensuring the success of the PMO Implementation and Operations from the business standpoint. The Business Delivery Liaison reports directly to the Business Integration Administrator. All BIC business resources within the ISD PMO report up through the Business Delivery Liaison for all project work related to the PMO.

Technical Delivery Owner

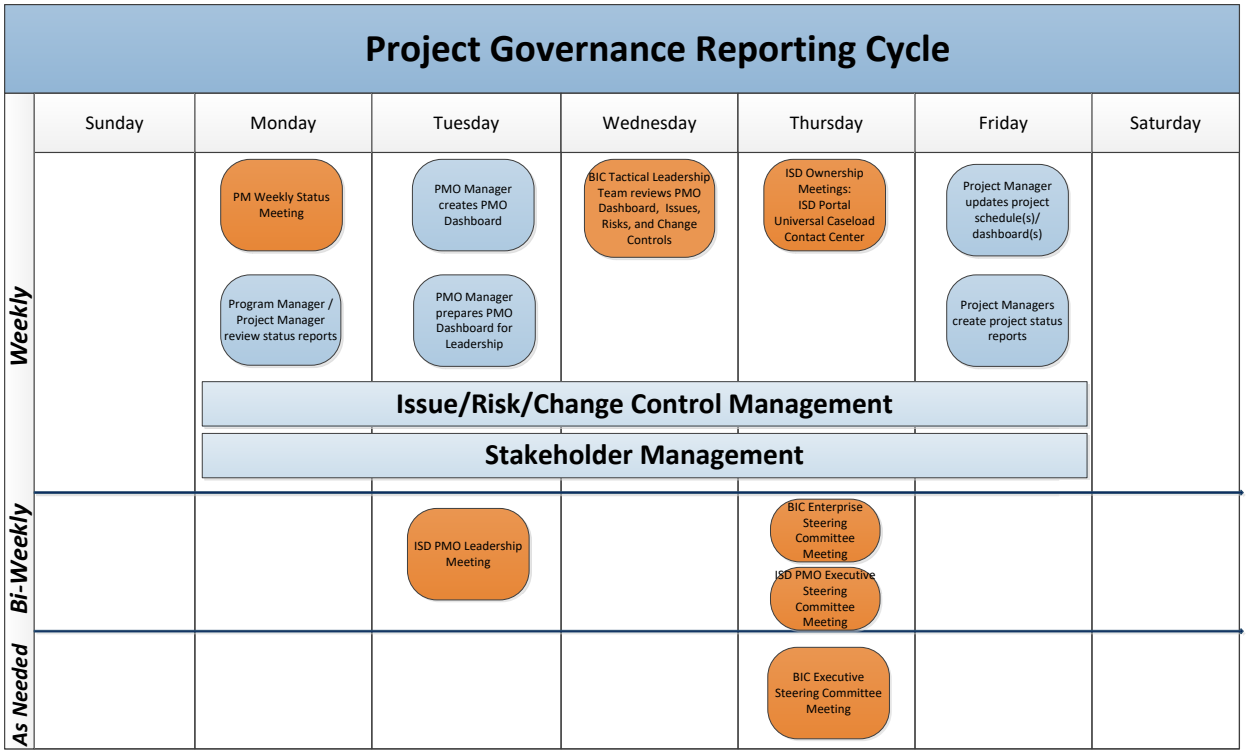
The Technical Delivery Owner is responsible for ensuring the success of the PMO delivery mechanisms from the technology standpoint. Responsibility for the success includes the alignment of other department projects, as appropriate, to ensure that work efforts are coordinated and synchronized.

Project Vendor Owner

The Project Vendor Owner works directly with the project team to provide the institutional knowledge of the vendor-maintained products to support the project team in planning and execution. The Project Vendor Owner plans and works according to the project schedule, taking direction from the Project Manager and the Program Release Management Team.

2.2 Governance Reporting Cycle

The following diagram identifies the information flow and defined meetings that will be used to enable governance at the Program and Project level. The PMO will not be saturated with meetings, keeping key overall status progress to a limited amount of standard meetings.



2.2.1 Status Reporting

Program Status Reporting

The PMO Manager and Program Managers will use a standard 4-Up Status reporting template, combined with a Program dashboard and individual Project dashboards, to communicate progress to Program Ownership, Program Leadership, etc. This report will be created weekly, and stored on the PMO's SharePoint site. Per the Communication Plan, the Program status report will be reviewed with PMO Leadership on a pre-defined basis.

PMO Project Status Reporting

Each Project Manager will use a standard 4-Up Status reporting template for reporting project status. Each Project Manager will report status to the Program Manager and PMO Specialist on a weekly basis.

2.3 Total Cost of Ownership Process

The Total Cost of Ownership (TCO) Process is the mechanism for a Project Manager to understand, document, and manage the entire cost of a project. The TCO serves as the main document for

understanding funding information, including resources, resource effort, software, hardware, and other costs.

The Total Cost of Ownership template can be found here on the ISD SharePoint site.

2.4 Project Funding Tracking Process

In alignment with BIC Funding Sources, the PMO manages and tracks projects to their funding sources.

2.5 Issue, Risk, and Change Management

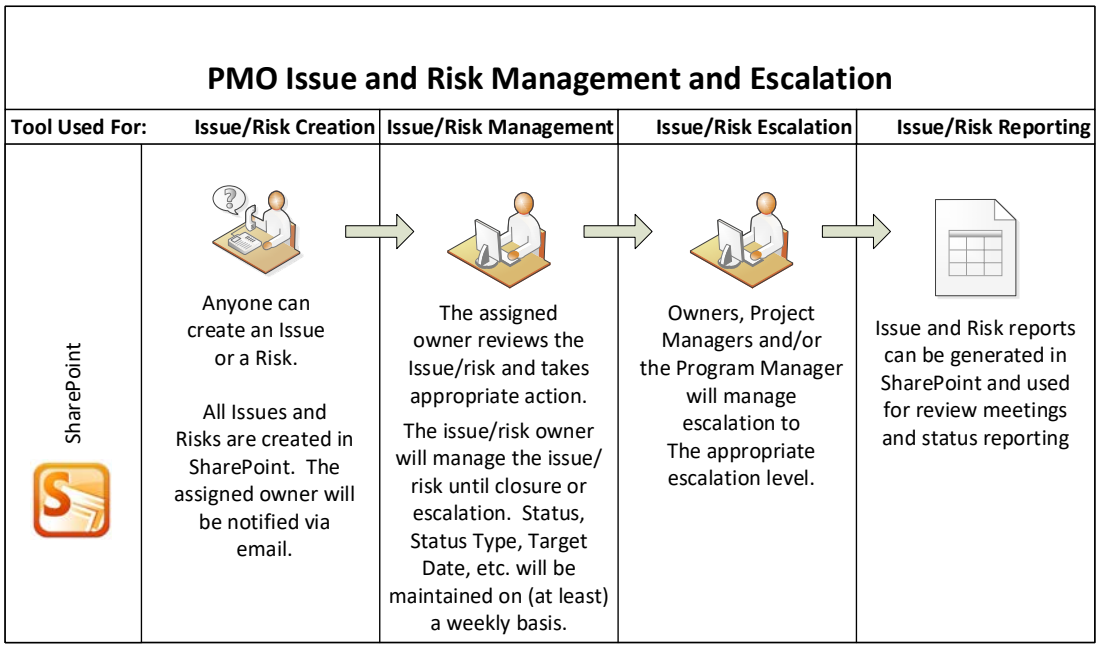
The Issue, Risk and Change Management and Escalation Procedure provides a means to spotlight, track, and resolve issues, risks or changes before they affect deliverables and/or client commitments. This procedure promotes visibility of long-standing, unresolved project level items, while maintaining a historical record of what occurred, the associated escalation levels and the associated resolution.

2.5.1 Issue and Risk Management

Definition of "Issue Management" – An issue is any point of controversy, debate, or concern that will adversely affect the success of the project. Issues can be identified at any level of the project and should be resolved at the lowest possible project level. An issue that cannot be resolved at a particular level of the project must be escalated to ensure the issue is brought to the attention of appropriate parties and resolved.

Definition of "Risk Management" – Risk management is the systematic and explicit approach used for identifying, analyzing, and controlling project risk. Risks will remain open as long as they exhibit probability of occurrence and potential impact to the project. A risk may be closed when the project stakeholders jointly agree that (1) the risk will never be realized, (2) the risk will not actually deter the project in any way or (3) the risk was reduced and is no longer a risk.

The PMO Leadership and Management Teams will review escalated items (Issues and Risks) weekly to determine status of existing items and a resolution approach for newly escalated items. The PMO SharePoint site will be the mechanism used to manage an item from initiation to closure.



Creating Issues and Risks

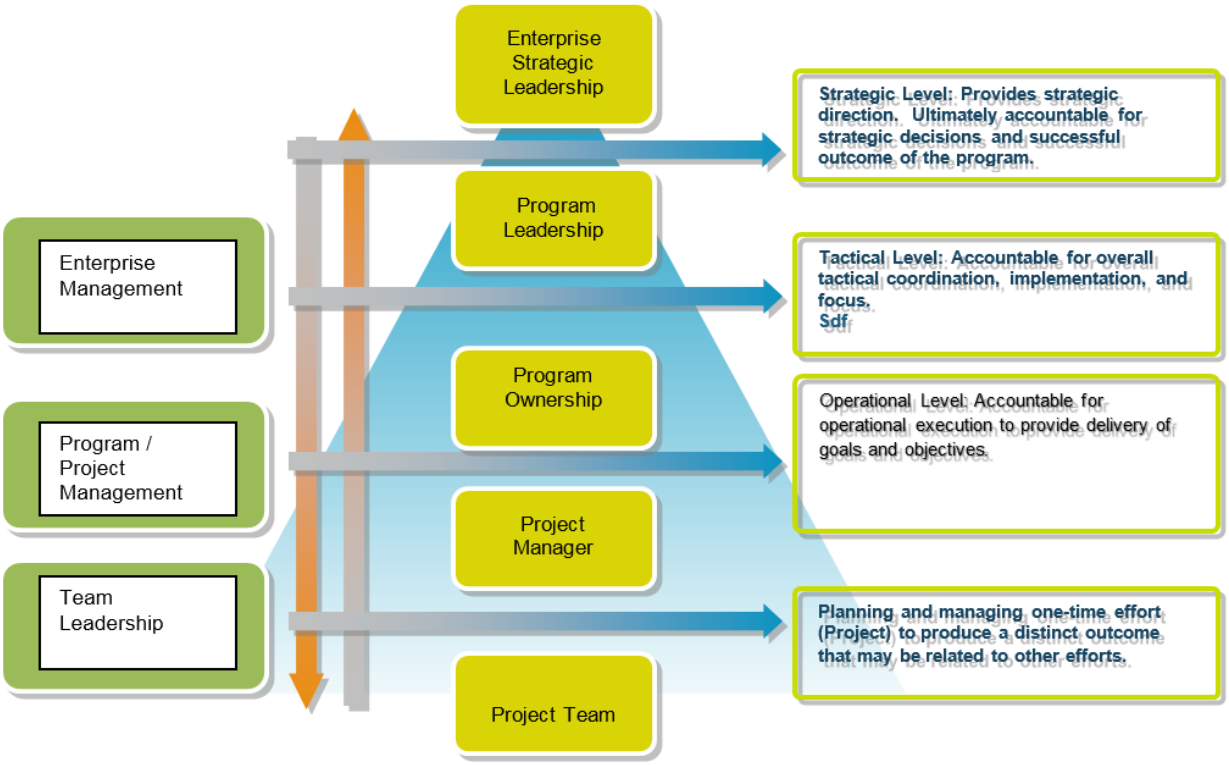
Any person working on a project can initiate an issue or risk. If the project overall status is Yellow or Red, there must be a corresponding Issue or Risk.

2.5.1.1 Managing Issues and Risks

Issues and risks created in the Item Tracker tool, located on the PMO SharePoint site, will be evaluated by the person to whom the issue or risk is assigned. If the issue or risk can be resolved easily, or if it is a duplicate, manage the issue or risk in SharePoint.

2.5.1.2 Escalating Issues and Risks

The diagram below depicts the progressive nature of risk and issue management starting with "work", up to a "Project", all the way through and up to "Enterprise Strategic Leadership". The PMO and all projects will follow strict escalation procedures for issue and risk management.



Escalation Path

Escalation Level	Description	Escalation Threshold
Project Manager / Governance	Project Managers must seek to resolve the initial issue or risk. • In Item Tracker, the PM will set the owner of the issue or risk to him or herself. The Project Governance team (usually Business Delivery Liaison, Technical Delivery Owner, Project Vendor Owner, etc.) must seek to resolve the issue or risk in coordination with the Project Manager. • In Item Tracker, the PM will set the owner of the issue or risk to the appropriate PMO Project Governance resource. • In Item Tracker, the PM will set the escalation path of the issue or risk to the Project Governance. Place a comment in the detailed description field stating that the issue has been escalated.	**High** Escalate immediately **Medium** 3 business days **Low** 5 business days

Escalation Level	Description	Escalation Threshold
Project Ownership	The Project Governance team must seek to resolve the issue or risk in coordination with the Project Manager. • In Item Tracker, the PM will set the owner of the issue or risk to the appropriate Program Ownership resource. • In Item Tracker, the PM will set the escalation path of the issue or risk to the Program Ownership. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** Escalate immediately **Medium** 3 business days **Low** 5 business days
Program Leadership Team	If the PMO Program Ownership team cannot resolve the issue or risk, the issue or risk will be escalated to the Program Leadership Team. • In Item Tracker, the Program Manager will set the Owner of the issue or risk to the appropriate Program Leadership Team member. In Item Tracker, the Program Manager will set the escalation path of the issue or risk to the Program Leadership. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** Escalate immediately **Medium** 3 business days **Low** 5 business days
Executive Steering / Enterprise Strategic	If Program Leadership cannot resolve the issue or risk, the issue or risk will be escalated to the BIC Enterprise Strategic Team and/or Executive Steering Committee. The Enterprise/Executive team will seek to resolve escalated issues and risks with Program Leadership, as well as seek input from other State Agencies and external organizations, as needed. • In Item Tracker, the PMO Manager will set the owner of the issue or risk to the appropriate Enterprise/Executive member. • In Item Tracker, the PMO Manager or Program Manager will set the escalation path of the issue or risk to Enterprise/Executive. • Place a comment in the detailed description field stating that the issue has been escalated.	**High** 1 business day **Medium** 2 business days

2.5.1.3 Reporting Issues and Risks

Item Tracker standard and custom views will be used to display issues and/or risk lists (project or program level). Once a list is displayed, print the list (to a printer or as a .pdf).

2.5.2 Change Management

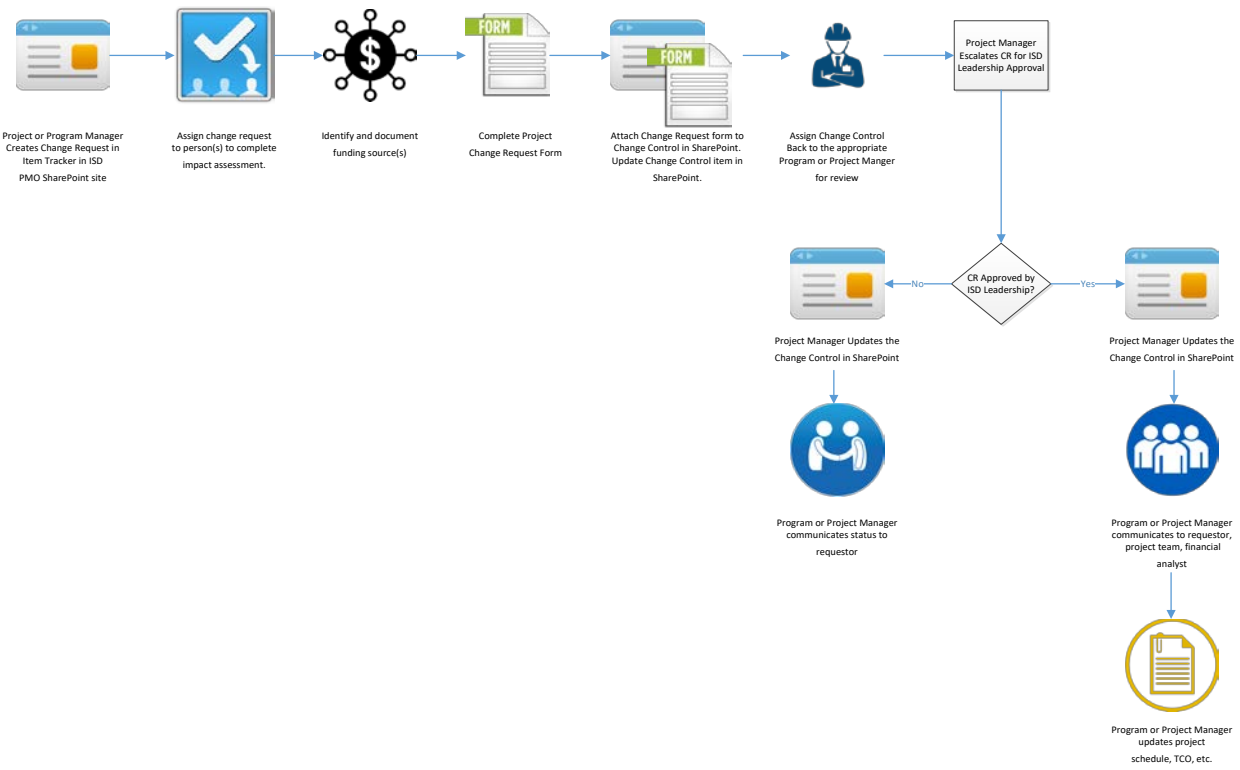
Change management is the systematic and explicit approach used to manage approved scope and requirements. Change Requests are documented and acted upon similar to Issues and Risks. Once the change request is approved by the appropriate project stakeholders, the change will be implemented as a change to a project's scope, schedule and/or cost.

Issues, risks, and change requests are managed in the ISD PMO SharePoint Item Tracker.

- Program Leadership will approve all release related cost and de-scoping changes, and any schedule changes.

Below is the diagram showing the ISD PMO approval process for project Change Requests that affect scope/requirements, schedule, cost, or contract.

ISD Project Change Request Approval Process



2.5.2.1 PMO Project Change Request Approval Process

- When a change to project Scope, Schedule, or Cost (including vendor Contract modification) is identified, the Program or Project Manager creates a Change Request in Item Tracker on the ISD PMO SharePoint site.

- The Change Request is assigned to an individual or team to analyze the impact of the change. Results of the analysis are documented using the ISD PMO Change Request Form (PM 0014)
    - Identify potential funding sources and document funding, or lack thereof, in the Change Request Form
    - The completed Change Request Form is attached to the Change Request in Item Tracker
    - General information about the Change Request is updated in Item Tracker
    - The Change Request is assigned back to the Program or Project Manager for review.
- The Program or Project Manager evaluates the analysis to determine next steps.
    - If analysis identifies impact to Scope, Schedule, or Cost, a Change Request is created and escalated for ISD Leadership review and approval.
    - The Change Request includes updated scope statements, schedule milestones or tasks, and cost information where appropriate.
- The Program or Project Manager updates the Change Request in Item Tracker with results of the governance review.
    - For Rejected/Deferred/Escalated Change Requests, the Program or Project Manager:
        - Documents reason for rejection/deferral/escalation in the Change Request in Item Tracker
        - Moves item to appropriate new status (e.g. Closed or Deferred)
        - Communicates status to requestor
    - For Approved Change Requests, the Program or Project Manager:
        - Documents approval in the Change Request in Item Tracker
        - Communicates status to requestor and project team
        - Updates project plan and related documents and re-baselines project schedule.
        - Moves item to Closed status

2.6 Time Management

All Project team members on projects for which cost should be tracked versus budget (to support APDs, Grants, etc.) must officially report effort on the standard Monday through Friday work week.

2.6.1 Collecting Project Time

Time for project effort should be collected in one of two places.

- If assigned as a resource to a project in Changepoint, the resource should enter time in Changepoint against that project. Various reports can be used to summarize effort by resource.
- If not assigned as a resource to a project in Changepoint (e.g., some State of Michigan resources), time should be collected via the State's Data Collection and Distribution System (DCDS). The PMO's assigned Financial Specialist will assist with setting up the proper codes in DCDS to track effort.

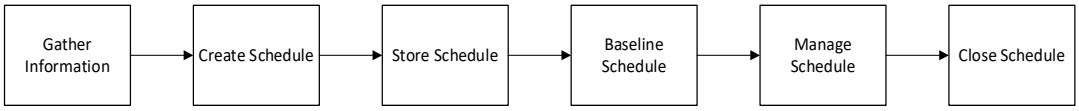
2.7 Schedule Management

Overview

Schedule management provides the guiding principles for creating, managing, and executing the project schedules. Schedule management ensures the project team achieves the projects objectives. This enables the Project Managers to make the best informed decision regarding the project's state of progress.

Process Illustration

PMO Schedule Management Process



2.7.1 Objectives and Directives

The Program Manager uses the information in the schedule to make informed decisions surrounding each project in the PMO. The following applies to all projects under the PMO.

- Gather key information needed to start the project schedule.
  - Scope
  - Tasks and milestones
  - Mandatory dates
  - Task durations and milestone dates
  - Available resources
  - Estimated effort
  - State Holiday schedule
  - Resource time off
  - Constraints

- Create the project schedule in Changepoint and/or MS Project
  - Use a project schedule template as a base
  - Tailor the template to fit the specific needs of the project
  - SOM holidays are flagged as non-working on the calendar

  - Resource vacation days are indicated on the calendar

- Store the project schedule in the appropriate repository

- Baseline the project schedule when all milestone dates are approved

- Manage the project schedule during project execution
  - At least weekly
    - Update task % Complete for tasks in progress
    - Update task Status for key tasks and milestones
  - Weekly, provide status of milestone tasks and overall schedule to the PMO Program Manager
  - Approved Change requests could modify task dates (baseline and actual)

- Close the project schedule once all tasks are completed

2.7.2 Project Schedule Template

Multiple project schedule templates will be available for projects to use as a starting baseline for the different types of PMO business projects as well as technical projects in both Microsoft Project and Changepoint. Please see the PMO Schedule Management Specialist for addition details on project schedule templates.

2.7.3 Weekly Schedule Management Activities

The following is a representation of weekly activities related to Schedule Management within the PMO. It is important these procedures be followed in order to control the Projects within the PMO so that leaders can easily determine status and be proactive about items/areas that need attention.

Schedule Management Critical Weekly Activities				
Monday	Tuesday	Wednesday	Thursday	Friday

• Each Program Manager Updates Program Dashboard based on Project 4-UP reports • Each Program Dashboard is finalized and stored on SharePoint.	• Create PMO Dashboard based on each Program Dashboards • PMO and Program Dashboards are Available for Review in Ownership and Leadership meetings.			• PMs Update Issues, Risks, Change requests • PMs Update Project Schedules • PMs Create Project 4-UP reports

Each Program Manager Updates Program Dashboard based on Project 4-UP reports – Every Monday (COB) each Program Manager is responsible for using the milestone information from Project 4Up reports to update the Program 4-UP Reports and Dashboards. These Program 4-Up Reports and Dashboards are stored on the PMO SharePoint site.

New PMO Dashboard Created – Every Tuesday, the PMO Manger is responsible for creating the current week's PMO 4-UP Report and Dashboard. This is stored on the PMO SharePoint site.

Program Milestone Dashboard Reviewed with Program Ownership and/or Leadership – Every Tuesday/Thursday the Program Milestone Dashboard will be reviewed with Program Ownership and/or Leadership. The content of the Dashboard will be from the previous week's Dashboard (completed on Monday).

PMs Updates Issues, Risks, Change requests – Every Friday (COB), PMs will be responsible for updating Issues, Risks, and Change Requests in SharePoint for their projects.

PMs Updates Project Schedules – Every Friday (COB), PMs will be responsible for updating their project schedules for their projects, paying special attention to ensure milestone information is accurate. Any milestones that are yellow or red will require further explanation in their 4Up project status report – either via logged issue, risk, or comment on one of the other sections in the report.

PMs Creates Project 4-Up Report – Every Friday (COB), PMs will be responsible for creating 4-Up Reports for each of their projects. The 4-Up reports will be stored in their respective project folder. Based on milestone statuses and the impact of issues, risks and changes to the project, the overall status (Green, Yellow, and Red) will be assigned. See Performance Measurement Plan section below on criteria for determining overall project status.

2.8 Performance Measurement Plan

The ISD PMO will institute performance measurements for each project. Measures are collected, analyzed, or statistically controlled. Within this plan, metrics/data elements are identified that will be collected or both collected and analyzed. Items "collected" include metrics data gathered for an organization, placed in a repository for historical purposes and used later.

An example of an item to be "collected and analyzed" is estimated vs. actual start and end dates used to track, analyze and report conformance to schedule. All items that should be "statistically controlled" are listed here.

The program will use the following SOM required measurements as Analysis Triggers.

Criteria	Green	Yellow	Red
Schedule Variance	The schedule indicates the major milestones are on schedule	The schedule indicates that one or more of the major milestones will be missed by <= 20% of phase duration	The schedule indicates that one or more of the major milestones have been missed or will be missed by > 20% of phase duration
Cost Variance	The variance between the budget and actual costs is <= 10%	The variance between the budget and actual costs is > 10% and <= 20%	The variance between the budget and actual costs is > 20%
Test Progress	The percent completion of planned test execution minus percent completion of actual Test Execution < 20%	The percent completion of planned test execution minus percent completion of actual Test Execution >= 20% and < 30%	The percent completion of planned test execution minus percent completion of actual Test Execution >= 30% or after surpassing 75% of the planned test duration, the percent completion of planned test execution minus percent completion of actual Test Execution >= 20%
Earned Value Schedule Variance (SPI) (If using Earned Value)	.9 <= SPI <= 1.2	.8 <= SPI < .9 or 1.2 < SPI	SPI < .8
Escalated Issues / Risks	Issues and Risks have a documented Mitigation Plan and are on target.	Escalated Issues or Risks, designated as critical or high priority, remain unresolved for more than one week after the target date, resulting in a high level of risk to the project. Issues and Risks do not have a documented Mitigation Plan.	Escalated Issues or Risks designated as critical or high priority, remain unresolved for more than two weeks after the target date, resulting in a high level of risk to the project. Critical or high Issues and Risks do not have a documented Mitigation Plan.
Testing Defect Rate	The planned test cases / scenarios have a defect rate of 15% or less	The planned test cases / scenarios have a defect rate > 15% and <=20%	The planned test cases / scenarios have a defect rate > 20%

State of Michigan

Michigan Department of Health and Human Services - Business Integration Center

Integrated Service Delivery Phase 1 (FY17)

Updated Program Charter

State of Michigan
Integrated Service Delivery (ISD)
Program Charter

A. General Information

Project ID/Acronym:	Integrated Service Delivery (ISD)	**Date:**	11/15/2016
Controlling Agency:	MDHHS	**Modification Date:**	12/29/2016
Prepared by:	Lesa Schreier	**Authorized by:**	Amy Hundley Jamy Hengesbach Phillip Bergquist

1. Privacy Information

This document may contain information of a sensitive nature. This information should not be shared with persons other than those who are involved with this system/project or who will become involved during its lifecycle.

2. Revision History

Revision Date	Author	Section(s)	Summary
11/15/2016	Kevin Adler	All	Initial Draft of Updated Program Charter (all sections carried over from prior Program Charter)
12/5/2016	Kevin Adler	D	Added a section for Business Readiness
12/9/2016	Kevin Adler	C, D, E, F, G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.
12/16/2016	Kevin Adler	C, D, E, F, G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.
12/22/2016	Kevin Adler	C, D, E, F, G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.

Revision Date	Author	Section(s)	Summary
12/29/2016	Kevin Adler	G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.

Table of Contents

B. Purpose

The program charter is the first step in the State's project management methodology and formally initiates project activities through authorization by the project sponsor. The program charter provides a high-level description of the program and initial program planning estimates.

This Program Charter has been updated to include the precise scope, schedule, and cost estimates for Integrated Service Delivery (ISD) Phase 1 (FY17).

C. Agency Goals and Business Needs

The lists below identify the *agency goals* and *business needs* of the Integrated Service Delivery (ISD) program.

1. Agency Goals

Integrated Service Delivery (ISD)

- Create a portal that focuses on holistic, proactive, and preventative services and outcomes.
- Create a service support structure that helps achieve person-centric outcomes, which enable customers to access self-service resources, community partners, and specialized case workers.
- Create a platform for relationship management and success plan support that utilizes success coaching strategies as the basis of customer interactions.
- Develop a system that orients solutions toward solving root causes rather than symptoms.

Universal Caseload (UCL)

- Increase in case management efficiency through task repetition, specialization, and through virtual management of resources.
- Create a system that supports task-oriented case management, virtual workforce management, and advanced performance metrics, which are configurable by the local office users (i.e., County or Virtual Office), Business Service Center (BSC) Managers, the Central Office, or by other roles yet to be determined.
- Develop a targeted training program whereby newly hired staff benefit from skills-based training modules and progress to a new task once a new skill has been mastered.

Contact Center (CC)

- Develop a statewide contact center that functions as a first contact support center, providing self-service functionality and striving to be the primary support interface between a customer, their benefits, and their case management resources.

Supporting Systems (Technology Modernization)

- Consolidate agency portals, registries, and call center services to provide a more uniform and consistent customer experience that is strategically aligned.

- Modernize existing enterprise systems to afford the ability to interact with data in a streamlined portal and to provide access to information held outside the department. Efforts include the following:
    - Incorporation of trusted data sources from inside and outside the department through the Master Person Index (MPI)
    - Utilize existing Enterprise Service Busses (ESB)
    - Consolidate the current communication technologies to streamline information sharing

2. Business Needs

Integrated Service Delivery (ISD)

- The creation of a modular system whereby person-centric modules can be constructed and added on as defined by strategic priorities
- Develop a portal that is the integration point for MDHHS programs and services, including integration with the Universal Caseload system and Contact Center.
- Development of a holistic application and needs assessment that connects customers with supports that address their needs and help develop a plan aimed at improving a customer's overall stability.

Universal Caseload (UCL)

- The elimination of the single casework owner barrier to effectively distribute work across local offices and other geographic regions.
- Eliminate case worker tasks that can be provided by other self-service mechanisms.

Contact Center (CC)

- Create a statewide contact center that integrates with the Universal Caseload system, which enables information sharing to resolve cases in real-time (i.e., one-call resolution).
- Develop a system whereby case workers are freed up from responding to inquiries for things that could be handled by an automated self-service system.

Supporting Systems (Technology Modernization)

- Develop an infrastructure that supports the Integrated Service Delivery platform Universal Caseload system, and Contact Center where the following can be achieved:
    - A common profile that can be accessed by each system
    - Data Sharing
    - Communications Management

D. High Level Project Description

Integrated Service Delivery (ISD) is a new concept to the State of Michigan which fundamentally changes the way people access public benefits and community resources to support their personal goals.

Integrated Service Delivery incorporates three components for FY17; an Integrated Service Delivery Portal (available through MiPage), Universal Caseload with the associated Contact Center, as well as a general third category for all of the underlying components which will need to be improved in order to support Integrated Service Delivery, commonly referred to as supporting services.

1. Integrated Service Delivery (ISD) Portal

The ISD Portal will provide an intuitive experience that allows community resources, success coaches, MDHHS staff and program applicants and participants the ability to electronically participate in self-service change reporting, personal needs assessment, single point of application for public Health and Human Service benefits, and viewing of existing benefits. The ability to maintain a common profile of individual information used across programs which supplements information through the use of trusted data sources is intended to be a source of beneficiary empowerment.

2. Universal Caseload

Universal Caseload (UCL) creates a task based casework process focused on work routing. Since there is no single case owner, the work force can be maximized to re-direct people to particular tasks increasing efficiencies and is customizable at the local level. Universal Caseload is anticipated to provide workload tracking and reporting, which will result in improved customer service.

3. Contact Center for One Call Resolution

The Contact Center (CC) will be organized to support Universal Caseload for some programs and functions administrated in the Bridges system using predictive analytics to route calls to the appropriate group of experts for one call resolution.

4. Supporting Tasks

In order to support Integrated Service Delivery, existing systems will be added to the MPI (Master Person Index) to serve as Trusted Data Sources (TDS). Data will be made available over an improved enterprise bus for integration through common services provided by exiting systems of record. MiLogin will be used to identity-proof end users.

5. Strategic Alignment

As part of this charter, it is beneficial to identify the MDHHS strategic direction with regard to Portals, Universal Caseload (UCL), and Contact Center (CC):

Overall:

- Integration of program delivery around a person's holistic needs.

Portals:

- MDHHS currently supports several public facing and internal portals where program specific information can be entered and/or viewed. In the future, requests for "portal" functionality from business areas will be evaluated for inclusion in the Integrated Service Delivery Portal.
- Requests for portal functionality determined to align with the ISD Portal will be added to the ISD work queue.
- Requests for portal functionality determined not to align with the ISD Portal, and for which portal functionality already exists and will continue to be used, will be directed to the appropriate Program Management Office (PMO).
- Requests for portal functionality determined not to align with the ISD Portal, and for which portal functionality does not exist, will be designed using the MDHHS Integration Guide so that the new portal is accessible through the ISD Portal as a module of functionality.
- In the future, existing portals will be incorporated into the ISD Portal during large maintenance tasks or functional upgrades.

Universal Caseload (UCL):

- MDHHS currently utilizes case workers who own their caseloads from beginning to end. The caseworker is the beneficiary's single point of contact.
- In the future, task-oriented case management will be utilized and case workers will not own specific cases. Instead, the case work will be performed by a multitude of individuals with the common skills to address whatever questions/issues arise. Work will be distributed among offices/geographic areas on a task-based need.
- Strategic reporting will be created to measure workload tracking and improve the beneficiary experience.

Contact Center (CC):

- MDHHS currently has multiple contact numbers for beneficiaries to call for specific issues.
- In the future, a single point of contact toll-free number will be created and will prompt beneficiaries for specific information and route the call to individuals depending on the expertise needed.
- Strategic reporting will be created to measure the key performance indicators of the contact center to identify areas for improvement regarding one-call resolution, average speed to answer, abandon rate, etc.
- Automated self-service will be available to answer common beneficiary questions which will assist in worker productivity by freeing up the worker for other task based things.

6. Business Readiness

Business Readiness will provide tools and establish activities to help individuals understand and change the way they think about or perform their work in order to support the new or updated systems and processes.

Key Business Readiness activities include the following:

- Aligning key business processes to requirements and technology.
- Communicating with and engaging stakeholders so they are informed and knowledgeable.
- Assessing the impact of the technology, policy and process changes on those who work with consumers, beneficiaries, providers and vendors across the agencies.
- Preparing and training staff members and identified stakeholders to successfully carry out their work with updated systems and processes.
- Workforce transition planning that includes identifying changes to roles and responsibilities as needed.

E. Project Objectives

ISD Portal:

The objectives of the ISD Portal include the following:

1) The ISD Portal project will gather detailed requirements, design, construct and test the ISD Portal, Needs Assessment, and Holistic Application; such that it is implemented and ready for pilot of release (1) in August 2017, in Muskegon County. The pilot will be released as the first release of a functional product with features described in the scope section of this charter to the county region above with the intent of learning how a large-scale rollout might work in practice.

   Release 1 in August 2017 focuses on addressing the ISD Portal and Needs Assessment functionality. Release 2 in December 2017 focuses on addressing the Holistic Application and self-service functionality. Specific objectives of both releases include the following:

   a. Improve person-centric business processes.
   b. Improve beneficiary/customer empowerment based on a person-centric needs ssessment focused on identifying goals, barriers and other impediments in a person's life to improve outcomes.
   c. Develop holistic application, with integration to Bridges.
   d. Build a needs assessment and success planning toolset leveraging an intuitive user interface.
   e. Implement a service support structure that helps achieve person-centric outcomes, enabling customers to:
      i. Access self-service resources.
      ii. Change customer profile information.
      iii. Build success plan.
      iv. Manage success goals and supporting resources.
      v. Provide consent for community partner referrals.

vi. Find community partner resources with or without holistic application.
vii. Upload documents.

f. Implement a structure that engages community partners as essential collaborators in service delivery, including providing higher degrees of customer assistance functionality to partner organizations.

2) Deliver a technological experience which achieves modernity in terms of design, user interface and intuitiveness. This will result a social media inspired feel.

Universal Caseload (UCL):

The objectives of Universal Caseload include the following:

1) Complete a pilot for UCL.
2) Complete new infrastructure development pre-implementation to support the UCL system.
3) The UCL system design will be modular and will be aligned to meet the standards established in the MDHHS Integration Guide.
4) Create standardized business processes throughout the organization to ensure successful integration of UCL into the organization and into other supporting components.
5) Create and execute an Operational Readiness program.
6) Perform data conversions on applicable cases within the pilot counties.

Contact Center:

The objectives of the Contact Center include the following:

1) Complete a Contact Center (CC) Pilot.
2) Complete new infrastructure development pre-implementation to support the CC system.
3) Create standardized business processes throughout the organization to ensure successful integration of CC systems into the organization and into other supporting components.
4) Create and execute an Operational Readiness program.

F. Program Scope

This section identifies those work items that are deemed in- and out-of-scope for the program. Program constraints and assumptions are also listed here.

1. In-Scope

The following activities and functions are considered in-scope for Phase 1 (FY17) of the ISD Program.

1) The Integrated Service Delivery (ISD) Portal with support for modular extensibility, centralized messaging capabilities, eligibility enrollment and program integration (for some programs and functions in Bridges), success plan management/needs assessment, and community resource integration/referrals.

2) The Universal Caseload (UCL) system with support for task-oriented case management, virtual workforce management, and advanced performance metrics.
3) The Contact Center (CC) system with support for self-service capabilities, service optimization (e.g., call list consolidation), and specialized queue management capabilities.
4) The development of two Person-Centric Services—the Needs Assessment and Holistic Application—aimed at ensuring accurate identification and management of needs in a success plan, coordination with community partners and resources, and enrollment in department programs.
5) Enhancements to supporting systems to ensure the proper integration of the Integrated Service Delivery (ISD) Portal, Universal Caseload (UCL), and Contact Center (CC) systems and to establish a data sharing model through addition or modification of Trusted Data Sources (TDS).
6) The development and execution of an Business Readiness/Communication Plan and associated staff training program.

2. Out-of-Scope

The following activities and functions are excluded from the scope of this project:

ISD Portal:

1) Enrollment into a Managed Care Plan.
2) Selection of a Primary Care Physician.
3) Integration with MS Outlook calendar.
4) Integration with News feeds.
5) Information specific to a *customer* from 2-1-1 trusted data source.
6) Non-MAGI eligibility determination.
7) Intetgration with Live Chat functionality.
8) myHealth Portal is not being replaced.
9) Childcare Database (of Childcare providers) will not be integrated.

Universal Caseload:

1) Any new enhancements identified during the UCL Pilot will be planned as part of future phases of the ISD Program.
2) Support for customer self-service capabilities via integration with the ISD Contact Center (CC), such as the ability to update case information through the IVR tool. This would continue to be done by a caseworker.

Contact Center:

1) Inclusion of new or existing MDHHS contact centers into the ISD CC
2) Support for customer self-service capabilities, such as the ability to update case information through the IVR tool. This functionality would continue to be done by a caseworker.
3) 3rd party translation service integration (i.e., Language Link)
4) Interactive chat functionality between customers and staff
5) The ability to solicit customer satisfaction feedback via phone survey.
6) Workforce Management which provides the ability to project seasonal call volumes and to manage workforce respectively.
7) Text and Short Messaging Service (SMS) messaging both inbound and outbound.

3. Assumptions

The list below identifies the assumptions made regarding this program:

a. Business owner(s) will be accountable for the scope and delivery of functions to the end-users.
b. The State of Michigan SUITE Agile and Waterfall processes will be used as appropriate.
c. Work required to implement the ISD Portal (including the Needs Assessment and Holistic Application), Universal Caseload, and Contact Center, but done by groups outside the ISD Program teams, will be completed on a mutually agreeable schedule.
d. All additional development and implementation beyond the ISD Portal, UCL, and Contact Center pilots will require additional funding.
e. Delivery of the UCL pilot will coincide with the delivery of the Contact Center pilot.
f. There are regular reporting updates for grants and Federal requirements.
g. Any necessary waivers from FNS and other Federal agencies will be made available to support the development of the portal components.

4. Constraints/Risks

The list below identifies the constraints identified regarding this program:

a. Completing the purchasing activities on time is vitally important to keeping the project on schedule.
b. This program requires dedicated Subject Matter Experts (SMEs), Community Partners, and other staff to complete analysis, requirements, development, testing, and training tasks.
c. It is anticipated that this project will impact existing prioritized projects within Program Management Offices (PMOs), vendors, and other business units (i.e., DTMB).
d. It is anticipated, yet unknown, how Federal and State program policy mandates and/or waivers may be affected. It is unknown what new mandates or waiver requests are needed.
e. The overall process time to identify and implement agreements with Trusted Data Sources (TDS) and get the corresponding service stood up.

G. Initial High-Level Project Planning

1. Estimated Project Budget

Please refer to the ISD Budget Worksheet at the link below for all ISD estimates:

ISD Budget Worksheet

2. Estimated Scheduling Dates

Anticipated Start Date:	**January 3, 2017**
Target Completion Dates:	
ISD Portal Pilot (Release 1) *Includes the ISD Portal, Needs Assessment, and Success Plans*	**August 31, 2017**
ISD Portal Pilot (Release 2) *Includes the Holistic Application and Self-Service Features*	**December 31, 2017**
Universal Caseload Pilot	**December 29, 2017**
Contact Center Pilot	**December 29, 2017**

A weekly dashboard will track the status of key tasks and activities of this program throughout phase one with corrective action plans implemented to keep the program on track to meet the target completion date.

H. Project Authority

Authorization:

Jamie Hengesbach – Business Owner
Amy Hundley – Business Owner
Phillip Bergquist – Business Owner
Brant Cole – Business Delivery Liaison
Judy Odett – Technical Delivery Owner
Kevin Adler – ISD PMO Manager

I. Roles and Responsibilities

Program Roles and Responsibilities

Refer to the ISD PMO Roles and Responsibilities document at the following link:
ISD Roles & Responsibilities Document

Project Governance

Refer to the ISD PMO Governance diagram at the following link:
ISD Program Governance Document

J. Project Management Processes

This project will follow the standard BIC Project Management guidelines and procedures for management checkpoints, including a weekly review of project status, issues, and risks.
Please refer to BIC ISD Program Management Plan for a list of all these processes.

K. Approval Information

By signing this document you agree to this as the formal charter statement to begin work on the program described within and the commitment of the necessary resources (budget, personnel, etc.) to complete it.

Approval Signatures

Name/Role	Signature	Date
Amy Hundley Business Owner – Field Operations		
Phillip Bergquist Business Owner – Policy & Legislative		
Jamy Hengesbach Business Owner - Medicaid		
Kevin Adler Program Manager		

Integrated Service Delivery (ISD)

Contact Center (CC) Pilot

Project Charter

State of Michigan
ISD-Contact Center (CC) Pilot
Project Charter

A. General Information

Project ID/Acronym:	Contact Center (CC)	**Date:**	12/8/2016
Controlling Agency:	MDHHS	**Modification Date:**	1/20/2017
Prepared by:	Todd Miller	**Authorized by:**	Amy Hundley Jamy Hengesbach Phillip Bergquist

Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved with this system/project or who will become involved during its lifecycle.

Program Charter

This project operates under the authority and governance of the Updated ISD FY17 Program Charter and follows the processes set forth in the BIC ISD PMO.

- Updated ISD FY17 Program Charter

Change Control

Revision Date	Author	Section(s)	Summary
12/8/2016	Todd Miller	All	Initial Draft
12/27/2016	Todd Miller	All	
12/27/2016	Kevin Adler	Roles and Responsibilities and Governance	Standardized the formatting of these sections and added references to the PMO documentation.
12/29/2016	Todd Miller	All	Updates to incorporate feedback from stakeholders and executive sponsors.

Revision Date	Author	Section(s)	Summary
1/04/2017	Todd Miller	Project Scope	Add new scope statements and enhanced statements to clarify, integration with CC and Bridges.

B. Project Purpose

The purpose of this project is to develop an Integrated Service Delivery (ISD) Contact Center (CC) that functions as the first point of contact between a customer, their benefits, and their case management resources. The CC will provide self-service functionality which will free up caseworkers from responding to inquiries that could be handled by an automated system, such as checking eligibility status.

The CC system will be integrated with the Universal Caseload (UCL) system for access to case functions (e.g., registration, intake, redetermination, change, etc.). These case functions, combined with predictive analytics, will be used to help direct calls to the appropriate group of experts for one call resolution.

The CC project will gather detailed requirements, design, construct and test the CC system; such that it is implemented and ready for pilot in January 2018 in Shiawassee and Gratiot counties. The pilot will be released as a functional product with features described in the scope section of this charter to the county regions above with the intent of learning how a large-scale rollout might work in practice.

C. Project Objectives

The CC Pilot project objectives are described within the Updated ISD FY17 Program Charter, section E. Project objectives specific to CC have been listed here for completeness:

1. Complete a Contact Center (CC) Pilot.
2. Complete new infrastructure development pre-implementation to support the CC system.
3. Create standardized business processes throughout the organization to ensure successful integration of CC systems into the organization and into other supporting components.
4. Create and execute an Operational Readiness program.

D. Project Scope

This project inherits the high-level program scope of the Updated ISD FY17 Program Charter, Section F. Project scope specific to CC has been listed here for completeness:

In-Scope

1. Implement a single toll-free number to access assistance state wide.
2. Implement Interactive Voice Response (IVR) functionality that will:

    a. Guide callers to self-service functionality or the most appropriate customer service destination (e.g., caseworker).
    b. Include language support in both English and Spanish.
    c. Utilize Bridges eligibility data (e.g., information about the customer or customer's case) to personalize the menu of options.
3. Provide call reporting and service optimization metrics (e.g., call abandonment rate)
4. Eliminate case worker voicemail functionality.
5. Implement skills-based call routing via integration with Universal Caseload (UCL) that helps direct calls to the appropriate group of experts.
6. Integrate the CC system with UCL to allow caseworker screens to be prepopulated with callers' information.
7. Implement a customer automated call back feature so when wait times exceed a predefined length of time, customers can choose to be called back when it is their turn. This will reduce customer wait times and reserve the customer's place in line.
8. Implement the following phone coaching/management capabilities for caseworker training purposes:
    a. Ability to record calls.
    b. Ability to monitor and participate in live calls.
9. Integrate the CC with the existing State of Michigan call quality recording platform.
10. Implement call queuing functionality to present custom voice messages while customers are on hold (e.g., the caller's expected wait times).
11. Implement agent and manager real-time and historical reporting, (e.g., number of calls in queue, average abandonment time, longest wait time, etc.), for use in making informed decisions for IVR optimizations.
12. Implement dynamic messaging functionality to provide the customers with holiday hours, closure notices and emergency messages.
13. Create an Operational Readiness program which standardizes caseworkers' business processes around the use of CC and supporting components, to enhance the adoption of the CC system and associated roles based casework model.
14. Leverage the Bridges Resource Center (BRC) to support MDHHS staff calls on the operational use of the Contact Center.

Supporting Services

1. Eligibility
    a. Exposing eligibility information about a customer or customer's case to the Contact Center IVR (i.e., leveraging the Master Person Index, MPI).
    b. Enhance the Enterprise Service Bus (ESB)/HUB to support communication between the CC and interfacing systems.

Out-of-Scope

1. Inclusion of new or existing MDHHS contact centers into the ISD CC
2. Support for customer self-service capabilities, such as the ability to update case information through the IVR tool. This functionality would continue to be done by a caseworker.
3. 3rd party translation service integration (i.e., Language Link)
4. Interactive chat functionality between customers and staff
5. The ability to solicit customer satisfaction feedback via phone survey.
6. Workforce Management which provides the ability to project seasonal call volumes and to manage workforce respectively.
7. Text and Short Messaging Service (SMS) messaging both inbound and outbound.

Assumptions

1. The project will adhere to the State of Michigan SUITE waterfall project processes
2. Work required to implement the CC, but done by groups outside the CC team, will be completed on a mutually agreeable schedule.
3. All additional development and implementation beyond the CC pilot will require additional funding.
4. Delivery of the CC Pilot will coincide with the delivery of the Universal Caseload (UCL) Pilot.
5. Source systems will make data secure and available for consumption by the CC system.

Constraints

1. Project delivery milestones must align with the ISD UCL Pilot project delivery milestones (Training, UAT, and Release).
2. MiECC, Telecom and Enterprise Security have commitments to the daily operational needs of many agencies. Some members of these operational teams have expertise that will be necessary for the success of the project. Operational emergencies may impact their availability.
3. There will be a yet to be determined minimum network and hardware standard that qualifies a county office to leverage the Contact Center technology.
4. The Eligibility PMO has a quarterly release cycles which will dictate when Bridges specific technology can be released.
5. Vendor Statement of Work and Purchase Order approvals will be required to start Requirements Definition phase of the project.

Risks:

1. It is anticipated, yet unknown, how Federal and State program policy mandates and/or waivers may be affected. It is unknown what new mandates or waiver requests are needed.

E. Project Critical Success Factors

The list below identifies the project's critical success factors:

1. All in scope items delivered on-time and within budget.

F. Initial High Level Project Planning

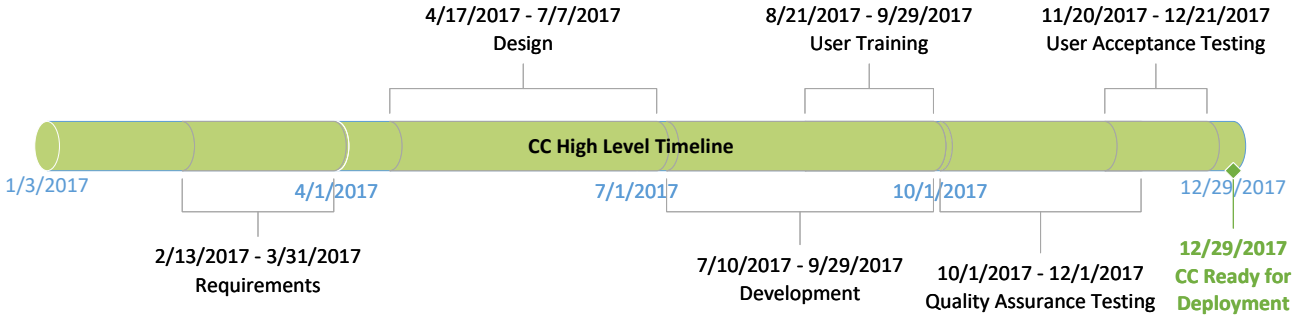
Estimated Project Budget

Please refer to the ISD Budget Worksheet at the link below for all ISD estimates:
ISD Budget Worksheet

Estimated Scheduling Dates

Anticipated Start Date: 01/03/2017
Target Completion Date: 12/29/2017

Milestone Timeline:



G. Project Authority

Authorization:

Jamie Hengesbach – Business Owner
Amy Hundley – Business Owner
Phillip Bergquist – Business Owner
Brant Cole – Business Delivery Liaison
Judy Odett – Technical Delivery Owner
Pawl Walczuk – MIECC Project Manager
Todd Miller – BIC ISD CC Project Manager

H. Roles and Responsibilities

Program Roles and Responsibilities

Refer to the ISD PMO Roles and Responsibilities document at the following link:
ISD Roles & Responsibilities Document

Project Governance

Refer to the ISD PMO Governance diagram at the following link:

ISD Program Governance Document

I. Project Management Processes

This project will follow the standard BIC Project Management guidelines and procedures for management checkpoints, including a weekly review of project status, issues, and risks. Please refer to BIC ISD Program Management Plan for a list of all these processes.

J. Approval Information

The signatures relay an understanding of the purpose and content of the document by those endorsing it. By signing this document, you agree to this as the formal Charter statement to begin work on the project described within, and commitment of the necessary resources.

Approval Signatures

Role	Name	Signature	Date
Business Owner	Phillip Bergquist Business Owner-Policy & Legislative		
Business Owner	Amy Hundley Business Owner-Field Operations		
Business Owner	Jamy Hengesbach Business Owner-Medicaid		
BIC Project Manager	Todd Miller		
BIC Business Delivery Liaison	Brant Cole		
DTMB Technical Delivery Owner	Judy Odett		
MiECC Project Manager	Pawel Walczuk		

Integrated Service Delivery (ISD)

Universal Caseload (UCL) Pilot

Project Charter

State of Michigan
ISD-Universal Case Load (UCL) – Phase 1
Project Charter

A. General Information

Project ID/Acronym:	Universal Case Load (UCL)	**Date:**	12/8/2016
Controlling Agency:	MDHHS	**Modification Date:**	1/20/2017
Prepared by:	Todd Miller	**Authorized by:**	Amy Hundley Jamy Hengesbach Phillip Bergquist

Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved with this system/project or who will become involved during its lifecycle.

Program Charter

This project operates under the authority and governance of the Updated ISD FY17 Program Charter and follows the processes set forth in the BIC ISD PMO.

- Updated ISD FY17 Program Charter

Change Control

Revision Date	Author	Section(s)	Summary
12/8/2016	Todd Miller	All	Initial Draft
12/27/2016	Todd Miller	All	Added additional scope statements.
12/27/2016	Kevin Adler	Roles and Responsibilities and Governance	Standardized the formatting of these sections and added references to the PMO documentation.
12/29/2016	Todd Miller	All	Updates to incorporate feedback from stakeholders and executive sponsors.
1/04/2017	Todd Miller	Project Scope	Added detail to Bridges integration and new statement about CC integration.

B. Project Purpose

The Universal Caseload (UCL) project will create a system and associated intelligent workflows that facilitates breaking casework in to logical case functions (e.g., registration, intake, redetermination, change, etc.), which enables tasks to be distributed across local offices and other geographic regions.

The UCL system will allow County offices, Business Service Centers (BSCs), the Central Office, and other designated entities to manage tasks and overall workload (i.e., resources) in real-time. Tasks reports and dashboards will be developed to help drive how the work is managed. As part of an integrated, yet autonomous module of Bridges, the UCL system will integrate with the new ISD Contact Center (CC) and other key State of Michigan (SOM) systems.

The UCL project will gather detailed requirements, design, construct and test the UCL system; such that it is implemented and ready for pilot in January 2018 in Shiawassee and Gratiot counties. The pilot will be released as a functional product with features described in the scope section of this charter to the county regions above with the intent of learning how a large-scale rollout might work in practice.

C. Project Objectives

The UCL Pilot project objectives are described within the Updated ISD FY17 Program Charter, section E. Project objectives specific to UCL have been listed here for completeness:

1. Complete a pilot for UCL.
2. Complete new infrastructure development pre-implementation to support the UCL system.
3. The UCL system design will be modular and will be aligned to meet the standards established in the MDHHS Integration Guide.
4. Create standardized business processes throughout the organization to ensure successful integration of UCL into the organization and into other supporting components.
5. Create and execute an Operational Readiness program.
6. Perform data conversions on applicable cases within the pilot counties.

D. Project Scope

This project inherits the high-level program scope of the ISD FY17 Program Charter, Section F. Project scope specific to UCL has been listed here for completeness:

In-Scope

1. Implement the changes in Bridges necessary to support UCL (e.g., access to case information to create functional tasks).
2. Implement the UCL module in a way that remains autonomous to Bridges.
3. Integrate the UCL solution with Bridges to allow action initiated in UCL to prepopulate Bridges screens (e.g., case status information).
4. Create the UCL system to support task-oriented case management, virtual workforce management, and advanced performance metrics, which are configurable by the local office

users (county or virtual office), Business Service Center (BSC) Managers, the Central Office, or by other roles yet to be defined.

5. Create a UCL system that will support the assignment and redirection of caseworkers to queues to complete tasks within the queue, as well as tasks outside their assigned queue based on the caseworkers' authorization.
6. Create an Operational Readiness program which standardizes caseworkers' business processes around the use of UCL and supporting components, to enhance the adoption of the UCL system, and associated roles-based casework model.
7. Implement integration with the Integrated Service Delivery (ISD) Contact Center (CC) to support skills-based call routing (e.g., supply UCL case function assignments to the Contact Center to enhance the customer's experience with the Interactive Voice Response menu).
8. Implement Integration with the CC system to allow screens to be prepopulated with calling customers' information, when possible.
9. Leverage the Bridges Resource Center (BRC) to support MDHHS staff calls on the operational use of the UCL system.

Supporting Services

1. Eligibility
    a. Establish and support the new infrastructure environments and batch schedules.

Out-of-Scope

1. Any new enhancements identified during the UCL Pilot will be planned as part of future phases of the ISD Program.
2. Support for customer self-service capabilities via integration with the ISD Contact Center (CC), such as the ability to update case information through the IVR tool. This would continue to be done by a caseworker.

Assumptions

1. The project will adhere to the State of Michigan SUITE waterfall project processes.
2. Work required to implement the UCL system, but done by groups outside the UCL team, will be completed on a mutually agreeable schedule.
3. All additional development and implementation beyond the UCL Pilot will require additional funding.
4. Delivery of the UCL Pilot will coincide with the delivery of the Contact Center Pilot.
5. Caseworkers will continue to use Bridges as their system of record for case management.
6. Bridges data collection and workflow will operate as they do today.

Constraints

1. It is anticipated that this project will impact existing prioritized projects in other PMO's, vendors, and other business units (i.e., DTMB).

Risks

1. It is anticipated, yet unknown, how Federal and State program policy mandates and/or waivers may be affected. It is unknown what new mandates or waiver requests are needed.

E. Project Critical Success Factors

The list below identifies the project's critical success factors:

1. All in scope items delivered on-time and within budget.

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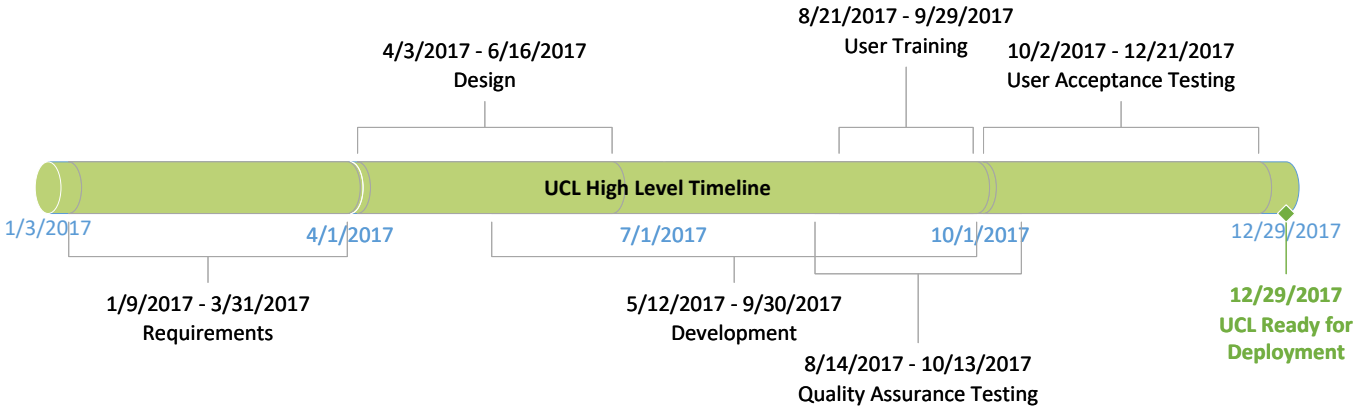

G. Project Authority

Authorization:

Amy Hundley – Business Owner
Phillip Bergquist – Business Owner
Jamie Hengesbach – Business Owner
Brant Cole – Business Delivery Liaison
Kemal Tekinel – Technical Delivery Owner
Gajendra Prasads (GP) Sankaranarayana – Vendor Project Manager
Todd Miller – BIC ISD UCL Project Manager

H. Roles and Responsibilities

Program Roles and Responsibilities

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