

Change Request Review

Department of Health Services - Project # HS23009 - MEDSIS Modernization - CR-1107
Oversight Name: Les

OA Peer Review Date: No Response ▾	OA Recommendation Date: 8/8/24 Approve with Standard Conditions ▾	EM Review Date: 8/8/24 Approve with Standard Co... ▾
Oversight Director Decision Date: Approve ▾	OR Deputy CIO Decision Date: No Response ▾	

<u>Areas Affected:</u>		
<input checked="" type="checkbox"/> Budget	<input checked="" type="checkbox"/> Scope	<input checked="" type="checkbox"/> Timeline

Brief Project Description:

Justification: Due to the complexity of some user stories and associated requirements, the project schedule and budget need to be adjusted.

Risk: The complexity of user stories has driven the number of sprints to grow from 22 to 43 sprints when compared to the original count. If the additional user stories are not added, the system functionality will not meet the user expectations.

What Initiated This Change, Reasons:

1. Budget - Total estimated Budget Increase is \$3,841,855
The development budget will increase from \$4,581,458 to \$8,264,313
Additional estimated IV&V costs will be \$159,000
2. Scope - The number of sprints increased from 26 to 46. The story points increased from 1029 to 2324.
3. Timeline - The estimated go live date will change from October 2, 2024 to July 9, 2025.

<u>CR Submission Date:</u> 6/17/24 <u>Current Project Duration:</u> 1 year and 3 months Start Date: 10/2/2023 End Date: 1/30/2025 <u>CR Project Duration:</u> 2 years and 3 months Start Date: 10/2/2023 End Date: 1/30/2026	<u>Current Project Budget</u> Development Cost \$ 4,745,713.38 Operational Cost \$ 372,729.12 Total Cost \$ 5,110,440.50 <u>CR Project Budget</u> Development Cost \$ 8,423,313.00 Operational Cost \$ 528,985.00 Total Cost \$ 8,952,298.00
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If the project has prior CR list below:

CR-ID	Approved Date	Type
CR-1107	Pending	Development Cost, End Date and Scope

Funding source re-verification* Required if there is a change to the Development costs on the project

The budget will be available through the following sources:	Funding expiration(s)? Yes
% APF Budget	Start Date: End Date:
% Base Budget	Start Date: End Date:
92% Federal	Start Date: 10/2/2023 End Date: 10/1/2026
8% Other Appropriated	Start Date: 10/2/2023 End Date: 10/1/2026
% Other Non-Appropriated	Start Date: End Date:

CR Checklist:

Requirement	Received?	Notes
Is the CR above 10%	Yes ▾	
Security approval (SSP update)	Not Needed ▾	
New SOW or quote from the vendor	Missing ▾	After ITAC approval to get the new redline docs from Slalom and InfoTech
New Project Plan	Received ▾	
5-Year Equipment Refresh Plan for Equipment Purchases	Not Needed ▾	
Maintenance & Support Options Identified for Years 2-5	Not Needed ▾	
Cloud Exception Form for On-Prem Servers	Not Needed ▾	

Vendor activity or documentation (training, functionally change, etc.) to be Shared with Agency (Knowledge Transfer)	Received ▾	
Internal Approvals from the Director, CTO, CIO, CFO/Budget Manager via email	Received ▾	
Have the original ITAC conditions reviewed	Yes ▾	
If APF funding, Has it been discussed with Financial Analyst	Not Needed ▾	
Ask Report needed	Not Needed ▾	

Risks:

1. Assumptions around Agency velocity to support (1/3rd story points) are not vetted.
2. Training / KT requirements are not road-mapped and confirmed.
3. Product Owner changeover could impact velocity.
4. UAT test availability has not been confirmed.
5. UAT stakeholders will require more lead time to be onboarded to test.
6. Unsure of triaging support tools in remote environments.
7. The schedule includes a reduction in velocity during holidays, but the State’s development team is expected to increase velocity over Holiday periods.
8. Key resources are single-threaded.
9. The Agency has some competing / parallel product/project deliveries.
10. Post-implementation change support.

CR Modifications + Follow-Up

OA Post-Approval Checklist

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| <input type="checkbox"/> Copy the information from this document into the Oversight Summary section in Salesforce (Project Background, Business Justification, Implementation Plan, Vendor Selection, and Budget or Funding Considerations). |
| <input type="checkbox"/> Ensure that within the Submission Info section of the PIJ in Salesforce, the IT Goal, Brief Description, Status Report Frequency, and Requested Development Amount fields have been populated. |
| <input type="checkbox"/> Add the appropriate conditions within the Conditional Approval Section. |
| <input type="checkbox"/> Complete any follow-up/edits to the CR that were noted in the executive review. |

After the CR is complete, pdf this document and attach to the Project.

Click Generate CR Document, copy as a pdf, and attach to the approval email.

Log the approval email to the Project in Salesforce using the Gmail Extension.

Guides

Milestones

Common milestones include, but not limited to:

- Project Kickoff
- Delivery of Signed SOW
- Delivery of Project Plan Document
 - Sometimes an Agency can only produce this after an assessment from the vendor. Ensure this is added as a milestone after the assessment takes place, and ensure the assessment is added as a milestone as well.
- Installation
- Configuration
- Sprints (design & build, with descriptions)
- UAT
- Training (support team/admin)
- Training (end users)
- Go Live
- Payment Invoices (by milestone or date(s))
- Final Payment of Invoices
- Lessons Learned
- Project Close

Common things to look out for:

- If milestones span a long interval of time, for example, several months or longer, there are events that take place within this milestone that can be broken into several milestones that can be more easily monitored.

Financials

- All financials during the first fiscal year are considered Development. Every year after is Operational. However this may be different for projects that span over 1 year.
- Professional services cannot be taxed.
- Ensure the quote from the vendor matches the financials' line items.
- Keep note of the funding expiration dates, when payments will be made (identified within milestones), and whether the Agency has the budget for the project. For example, some Agencies receive new funding every October. Ensure their payment dates are aligned with their ability to pay using the funding they anticipate to receive. Some projects will have multiple funding sources expiring at different times.
- Ensure the categorization of the line items makes sense and they are separated by 1 item per line. For example, licenses and professional services should not be combined; they should be separated into each line item with the applicable categorization and tax information.
- If static maintenance and support costs for years 2-5 are not guaranteed by the vendor, include a 2.5% increase year over year in order to account for any future price increases.

Risks

- Common risks include:

- Aggressive timelines
- Two or more agencies involved with the project
- Two or more vendors involved with the project
- Paying the vendor at one time, all upfront, prior to any work being performed
- Any other items included in the conditional approval that are required within future status report submissions