OREGON EMPLOYMENT DEPARTMENT MODERNIZATION PROGRAM

INDEPENDENT QUALITY MANAGEMENT SERVICES

3.3.38 MONTHLY QUALITY STATUS REPORT – FEBRUARY 2024

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1. PURPOSE

The purpose of this Monthly Quality Status Report is to assess the performance of the Unemployment Insurance (UI) Modernization Project (which includes paid family medical leave insurance functionality) for the reporting period of February 1, 2024, through February 29, 2024. The report provides the Oregon Employment Department (OED) executives and sponsors, Enterprise Information Services (EIS), Department of Administrative Services (DAS), Legislative Fiscal Office (LFO), and OED Modernization team an overview of the current project health and status as it relates to quality and risk assessments. The UI Modernization Project is one of two planned projects for the OED Modernization Program. The other project is the Workforce Modernization Project. The focus for the independent quality management services (iQMS) activities and this report is the UI Modernization Project. The OED Modernization Program supports the UI Modernization Project and may be referenced only to the extent of the support activities that impact the project.

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2. PROJECT QUALITY STATUS

2.1 Overall Project Health

The Project Health Rating for the UI Modernization Project is currently at a medium risk rank for the reasons listed in Table 2. The following tables provide a high-level dashboard summary and the current health status of the UI Modernization Project for the period February 1, 2024, through February 29, 2024. Further details are included in the balance of this report. Changes in the current risks or the identification of new risks could require an adjustment of the Project Health Rating.

Table 1: Project General Information

PROJECT GENERAL INFORMATION	
Project Status "As Of" Date:	February 29, 2024
Original Project Budget:	$106,121,029
Current Project Budget:	$106,410,963
Project Start Date:	December 28, 2018
Project End Date:	March 31, 2025
Project Status Indicators		**Trend Indicators**	
Low	On-track, only minor issues	**+ = Improving**	
Medium	One or more areas of concern	**- = Declining**	
High	Significant issues that limit the success of the Project	N/C = No Change	
N/A	Not applicable	Does Not Apply	

Table 2: Overall Project Health Rating

Overall Project Health Rating		
Previous	**Current**	**Current Trend**
Medium	**Medium**	**+**

As of February 29, 2024, the CSG iQMS team has five open risks. The Modernization team continues to mitigate resource issues covered in CSG Risk #21. Teams have prioritized functionality and prepared for cutover, knowing there will be some clean-up after Go-Live. The project's health status is medium and trends in a positive direction.

The medium risks are:

✓ Risk #4, staff not ready for or accepting the Modernization change. In the month of February, the primary focus for organizational change management (OCM) and training is preparing for UI benefits Go-Live on March 4, 2024. The UI benefit readiness assessments evaluation resulted in mixed responses with no surprises. The initial standard operating procedures (SOP) are ready for rollout with plans for an incremental approach to rollout additional SOPs over the next several weeks. With all the activity focused on Rollout 2b, Contributions and Paid Leave configuration changes are on hold until after completing the Go-Live Rollout 2b activities.

✓ Risk #15, IT skills and resources. The project is in its final preparation for Go-Live. Cutover planning has now moved into cutover execution. The teams check in every day and discuss execution efforts to continue to take programs offline. Good communication exists between the MOD project team, IT resources, and the agency. After Rollout 2b Go-Live support is complete, IT will move toward Frances's system support and implement decommissioning for identified systems or other mainframe support.

✓ Risk #21, regarding staffing shortages and over-allocated resources. The project is in its final cutover process for Go-Live. Some of OED's planned data warehouse activities are behind schedule. The team has experienced some difficulties with the data file mappings aligning with the OED's Warehouse schema. This outstanding work will not impede Frances's progress; other IT activities are on track. Overall, the IT team's outlook is positive, and they continue to assist the project with research, planning, and providing answers. The next month is a critical time and can cause additional stress on staff. Agency leadership should be aware of possible frustration and continue to monitor for burnout.

✓ Risk #22, regarding the schedule missing key elements. The project continues to report no variance for the schedule, though there are variances within the schedule. The project is on track to roll out per the scheduled date as teams prioritize functionality to meet Go-Live dates.

2.2 Project Status Indicators

Table 3 provides the current and previous health status indicators for the UI Modernization Project for the reporting period, February 1, 2024, through February 29, 2024.

Table 3: UI Modernization Project Health Indicators

UI Modernization Project Health Indicators by Area								
Budget			Schedule			Scope		
Previous	Current	Current Trend	Previous	Current	Current Trend	Previous	Current	Current Trend
Low	Low	N/C	Medium	Medium	N/C	Low	Low	N/C
The Budget Health Indicator remains a low risk for this reporting period. The project remains under budget. There are no concerns in this area.			The Schedule Health Indicator remains a medium risk for the reporting period. The project continues to report no variance for the schedule, though there are variances within the schedule. The project is on track to roll out per the scheduled date as teams prioritize functionality to meet Go-Live dates.			The Scope Health Indicator remains a low risk for this reporting period. The project scope remains stable. There is no expectation of any major changes to the scope of the UI Modernization project as it finishes the conversion, testing, training, and rollout phases.		

UI Modernization Project Health Indicators by Area								
Communication			**Quality**			**Organizational Readiness**		
Previous	**Current**	**Current Trend**	**Previous**	**Current**	**Current Trend**	**Previous**	**Current**	**Current Trend**
Low	**Low**	**N/C**	**Low**	**Low**	**N/C**	**Medium**	**Medium**	**N/C**

The Communication Health Indicator remains low for this reporting period. The communication team schedule of events includes action plans and community outreach in preparation to UI benefits Go-Live.	The Quality Health Indicator remains low for this reporting period. The data conversion and purification team meets weekly to address data migration for migrating data into Frances. The goal is for the data to be usable and accurate. The business continues to review contingency plans identified from the purification process, which, if not in agreement with the contingency, may result in poor data quality in Frances if not resolved.	The Organizational Readiness Health Indicator remains medium for this reporting period. In the month of February, the primary focus for organizational change management (OCM) and training is preparing for UI benefits Go-Live on March 4, 2024. The UI benefit readiness assessments evaluation resulted in mixed responses with no surprises. The initial standard operating procedures (SOP) are ready for rollout with plans for an incremental approach to rollout additional SOPs over the next several weeks. With all the activity focused on Rollout 2b, Contributions and Paid Leave configuration changes are on hold until after completing the Go-Live Rollout 2b activities. The CSG iQMS team will continue to monitor activities for resolving pain points and streamlining business workflows to improve end users' overall adoption.

UI Modernization Project Health Indicators by Area								
Leadership and Governance			Project Management			Resources		
Previous	Current	Current Trend	Previous	Current	Current Trend	Previous	Current	Current Trend
Low	Low	N/C	Low	Low	N/C	High	Medium	+

The Leadership and Governance Health Indicator remains low risk this reporting period. The Agency leadership continues to make the Modernization project a priority. They are engaged with resolving resource concerns and help guide the project's direction. There are no concerns in this area.	The Project Management Health Indicator remains low risk. Project management plans and processes have been in place for several years. The team refined and adjusted those plans and processes as needed. The project team continues to follow defined process and procedures defined in the plans.	The Resource Health Indicator was changed from high to medium risk this reporting period, due to the progress made in web, data warehouse and mainframe teams. The project is in its final cutover process for Go-Live. Some of OED's planned data warehouse activities are behind schedule. The team has experienced some difficulties with the data file mappings aligning with the OED's Warehouse schema. This outstanding work will not impede Frances's progress; other IT activities are on track. Overall, the IT team's outlook is positive. They continue to assist the project with research, planning, and providing answers. The next month is a critical time and can cause additional stress on staff. Agency leadership should be aware of possible frustration and continue to monitor for burnout.

2.3   Modernization Issues Monitored by CSG

The are no OED Modernization issues as of February 29, 2024.

2.4   Milestones and Deliverables Status

The table below details the status for the iQMS milestones and deliverables as of February 29, 2024.

Table 4: Milestones and Deliverables Status

#	Milestone or Deliverable	Due Date	Status
1.	D1.1.1 Program and Project Risk Assessment Report – Initial	August 19, 2019	Accepted
2.	D1.1.2 Program and Project Risk Assessment Report – Refresh #1	September 24, 2021	Accepted
3.	D1.1.3 Program and Project Risk Assessment Report – Refresh #2	October 3, 2022	Accepted
4.	D1.1.4 Program and Project Risk Assessment Report – Refresh #3	October 3, 2023	Accepted
5.	D2.1 Quality Standards – Operational Definitions Report	September 20, 2019	Accepted
6.	D2.2 - Preliminary Quality Checklists for Quality Control Reports	May 25, 2019	Accepted
7.	D2.2 - Final Quality Checklists for Quality Control Reports	Various	Completed
8.	D2.3.1 Quality Management Plan	November 18, 2019	Accepted
9.	D2.3.2 Quality Management Plan – Refresh	November 8, 2021	Accepted
10.	D2.4.1 Baseline QMS Work Plan	November 18, 2019	Accepted
11.	D2.4.2 Baseline QMS Work Plan – Refresh	February 24, 2022	Accepted
12.	D2.5 Internal/External Presentations and Special Requests	TBD-as requested by Agency	Not Started
13.	D2.5.1 UI Modernization Procurement Finalist Maturity Assessment Plan and Schedule	March 25, 2020	Accepted
14.	D2.5.2 UI Modernization Procurement Finalist Maturity Assessment Checklists	March 25, 2020	Accepted
15.	D2.5.3 UI Modernization Procurement Finalist Maturity Assessment Report Format	March 25, 2020	Accepted
16.	D2.5.4 UI Modernization Procurement Finalist Maturity Assessment Report Finalist 1	May 8, 2020	Accepted
17.	D2.5.5 UI Modernization Procurement Finalist Maturity Assessment Report Finalist 2	May 8, 2020	Accepted
18.	D2.6.1 Lessons Learned Reports – Periodic Project Evaluations (Contributions Phase)	November 23, 2022	Accepted

#	Milestone or Deliverable	Due Date	Status
19.	D2.6.2 Lessons Learned Reports – Periodic Project Evaluations (PFMLI Benefits Phase)	December 15, 2023	Under Review
20.	D2.6.3 Lessons Learned Reports – Periodic Project Evaluations (UI Benefits Phase)	July 19, 2024	Not Started
21.	D2.6.4 Lessons Learned Reports – Periodic Project Evaluations (Program Closeout)	January 9, 2025	Not Started
22.	D2.6.5 Lessons Learned Reports – Periodic Project Evaluations (Upon Request)	TBD	Not Started
23.	D3.1.1 Request for Proposal - QC Review: Solution requirements related information and data components of the sample final solution contracts	July 22, 2019	Accepted
24.	D3.1.2 Solution Requirements related information and data components of the proposed final solution contract with the successful Proposer QC Review	April 22, 2021	Accepted
25.	D3.1.3 Solution Requirements (Requirements Traceability Matrix) QC Review	June 20, 2019	Accepted
26.	D3.1.4 Solution Contractor's Implementation Plan QC Review	October 26, 2021	Accepted
27.	D3.1.5.a Program Management Plan QC Review, as follows: Stakeholder Engagement Plan, Risk and Issue Management Plan, Change Control Plan, Scope Management Plan, Change Management Plan, and Communication and Outreach Plan	July 1, 2019	Accepted
28.	D3.1.5.a.2 Program Management Plan QC Review refresh: Stakeholder Engagement Plan and Governance Plan	November 17, 2021	Accepted
29.	D3.1.5.b Program Management Plan QC Review, as follows: Staff Management Plan, Procurement Management Plan, Governance Plan, and Contract Management Plan	November 1, 2019	Accepted
30.	D3.1.5.c Program Management Plan QC Review, as follows: Budget, Budget Management Plan, Quality Management Plan, Schedule, Schedule Management Plan, Interface Plan, and System Security Plan	May 24, 2022	Accepted
31.	D3.1.5.c.2 Program Management Pan QC Review, as follows: Interface Plan and System Security Plan	July 26, 2022	Accepted
32.	D3.1.6 Documentation necessary to demonstrate compliance with the OSCIO Cloud Policy (Statewide DAS Policy 107-004-150) QC Review	TBD	Not Started
33.	D3.1.7 Solution Contractor Test Plan QC Review (Rollout 1)	April 26, 2022	Accepted
34.	D3.1.8.a Solution Contractor Conversion Plan QC Review (Rollout 1)	May 18, 2022	Accepted

#	Milestone or Deliverable	Due Date	Status
35.	D3.1.8.b Solution Contractor Training Plan QC Review (Rollout 1)	March 29, 2022	Accepted
36.	D3.1.9 Stakeholder Engagement Plan	October 26, 2020	Accepted
37.	D3.1.10 UI Modernization Business Case	February 17, 2022	Accepted
38.	D3.3.1 – D3.3.32 Monthly Quality Status Report #1-#32	Various	Accepted
39.	D3.3.32 Monthly Quality Status Report #32 – May 2023	June 12, 2023	Accepted
40.	D3.3.33 Monthly Quality Status Report #33 – July 2023	August 10, 2023	Accepted
41.	D3.3.34 Monthly Quality Status Report #34 – August 2023	September 13, 2023	Accepted
42.	D3.3.35 Monthly Quality Status Report #35 – October 2023	November 13, 2023	Accepted
43.	D3.3.36 Monthly Quality Status Report #36 – November 2023	December 12, 2023	Accepted
44.	D3.3.37 Monthly Quality Status Report #37 – January 2024	February 12, 2024	Under Review
45.	D3.3.38 Monthly Quality Status Report #38 – February 2024	March 12, 2024	In Progress
46.	D3.3.39 Monthly Quality Status Report #39 – April 2024	May 10, 2024	Not Started
47.	D4.1.1 – D4.1.14 Quarterly QA Status and Improvement Report #1-#14	Various	Accepted
48.	D4.1.15 Quarterly QA Status and Improvement Report – 2nd Qtr. 2023 (#15)	July 17, 2023	Accepted
49.	D4.1.16 Quarterly QA Status and Improvement Report – 3rd Qtr. 2023 #16	October 16, 2023	Accepted
50.	D4.1.17 Quarterly QA Status and Improvement Report – 4th Qtr. 2023 #17	January 16, 2024	Accepted
51.	D5.3.1 Security Assessment Plan (Contributions)	June 6, 2022	Accepted
52.	D5.3.2 Security Assessment Project Schedule (Contributions)	May 18, 2022	Accepted
53.	D5.3.3.1 Security Risk Assessment Report (Contributions)	June 30, 2022	Accepted
54.	D5.3.3.2 Security Risk Assessment Report – Blackbox Pen Testing	December 16, 2022	Accepted
55.	D5.3.4 Security Assessment Executive Presentation (Contributions)	July 12, 2022	Accepted
56.	D5.3.5 Security Assessment Plan (Paid Leave Benefits)	May 26, 2023	Accepted
57.	D5.3.6 Security Assessment Project Schedule (Paid Leave Benefits)	May 17, 2023	Accepted
58.	D5.3.7.1 Security Risk Assessment Report (Paid Leave Benefits)	June 29, 2023	Accepted
59.	D5.3.7.2 Security Risk Assessment Report – Blackbox Pen Testing	October 31, 2023	Accepted

#	Milestone or Deliverable	Due Date	Status
60.	D5.3.8 Security Assessment Executive Presentation (Paid Leave Benefits)	July 11, 2023	Accepted
61.	D5.3.9 Security Assessment Plan (UI Benefits)	November 27, 2023	Accepted
62.	D5.3.10 Security Assessment Project Schedule (UI Benefits)	November 17, 2023	Accepted
63.	D5.3.11.1 Security Risk Assessment Report (UI Benefits)	December 27, 2023	Accepted
64.	D5.3.11.2 Security Risk Assessment Report – Blackbox Pen Testing	April 15, 2024	Not Started
65.	D5.3.12 Security Assessment Executive Presentation (UI Benefits)	January 17, 2024	Accepted

NOTE: Status designations for deliverables are: Not Started, In Progress (not delivered), Submitted (delivered but no response yet), Under Review (after initial review and before approval), and Accepted

3. PROJECT RISKS AND RECOMMENDATIONS DETAILS

3.1 New CSG iQMS Risks

There are no new risks identified by the CSG iQMS team for this reporting period.

3.2 Previously Reported CSG iQMS Risks

As of February 29, 2024, the CSG iQMS team is monitoring five risks. There are four medium, and one low risk.

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Table 5: Previously Reported Risks

Previously Reported CSG iQMS Risks						
CSG Risk #4: Staff Not Ready for or Accepting Modernization Change		**Medium Risk Rank**			**Medium Risk Rank**	
Risk Model ID: 029 – Openness to Business Processes or Work Changes	**Current**	**Medium Probability**	**Medium Impact**	**Previous**	**Medium Probability**	**Medium Impact**
RFP ID: OR-38 **Category:** Organizational Readiness / OCM						

Risk Trigger: Staff cannot engage with the UI Modernization Project when needed. The staff does not adopt the change.

Risk Description	Recommendation	Current / Previous Analysis
Risk Description: There are concerns about staff adjusting to the change and transition with the new system. Staff will need to adapt to a new way of doing business. There is a high number of new staff and staff in new roles. The need for OCM is high.	**Recommendation:** The CSG iQMS team recommends increasing the change management activities to include "as-is" vs. "to-be" procedures. Involve managers in improving change management plans, which include training where appropriate. The CSG iQMS team also recommends the Agency provide change management training for all UI and Paid Leave managers, hold staff and managers accountable for adopting and implementing the process changes, and ensure Modernization works closely with business and IT subject matter experts during the development of the system. Staff who have been resistant in the past should be included whenever possible. Start early and lock down the UI and Paid Leave benefits letter templates. Develop a comprehensive process to review all letters before cutover.	**Current Analysis – February 2024:** In the month of February, the primary focus for organizational change management (OCM) and training is preparing for UI benefits Go-Live on March 4, 2024. The UI benefit readiness assessments evaluation resulted in mixed responses with no surprises. The initial standard operating procedures (SOP) are ready for rollout with plans for an incremental approach to rollout additional SOPs over the next several weeks. With all the activity focused on Rollout 2b, Contributions and Paid Leave configuration changes are on hold until after completing the Go-Live Rollout 2b activities. **Previous Analysis – January 2024:** In the months of January and February, the primary focus for organizational change management (OCM) and training is preparing for UI benefits Go-Live March 4, 2024. The overall feedback on training is going well. The UI benefit readiness assessments will be evaluated in February. With all the activity focused on Rollout 2b, Contributions and Paid Leave configuration changes are on hold until after completing the Go-Live Rollout 2b activities.

Previously Reported CSG iQMS Risks						

CSG Risk # 15: OED IT Skills and Resources	Current	Medium Risk Rank		Previous	Medium Risk Rank	
Risk Model ID: 241 Resource Availability – Technical Team Support		Medium Probability	Medium Impact		Medium Probability	Medium Impact
RFP ID: N/A **Category:** Project Resources						

Risk Trigger: 1. OED is unable to provide the solution vendor with system information on dependencies and interfaces or clean conversion data from existing legacy systems needed in a timely manner. 2. Unknown dependencies cause UI benefits to be impacted negatively when UI tax is implemented.

Risk Description: The IT support of existing UI systems is "single-threaded", usually with only one resource available to support a given system. Additionally, it is estimated that approximately 40% of the IT staff are eligible for retirement within the next five years. Many of these staff are extremely knowledgeable and considered experts on the legacy system. The Agency may not have the capacity to support the legacy systems and prepare the legacy system and documentation for transition and conversion to the new system, addressing any future pandemic programs or other Agency needs and supporting the Modernization Project at the same time.

The UI Modernization Project is huge and complex and will require significant contributions from technology resources. The recruitment of IT resources has resulted in several failed recruitments, as people with needed skill sets are not readily available or those with the skill sets are not interested in the positions.

Recommendation: The CSG iQMS team recommends:

OED identifies and documents internal and external interfaces and dependencies and prepares for data migration.

Consider other resources to assist with some of the IT support activities, such as the solution vendor or other vendors.

A comprehensive resource plan for IT that includes the skills and resources required as identified by the WBS.

Identify Mainframe test region for research questions and verify existing system business rules for Definition purposes.

Current Analysis – February 2024: The project is in its final preparation for Go-Live. Cutover planning has now moved into cutover execution. The teams check in every day and discuss execution efforts to continue to take programs offline. Good communication exists between the MOD project team, IT resources, and the agency. After Rollout 2b Go-Live support is complete, IT will move toward Frances's system support and implement decommissioning for identified systems or other mainframe support.

The CSG iQMS team will continue to monitor this risk.

Previous Analysis - January 2024: The project is in its final preparation for Go-Live, and working on the last of the remaining deliverables is the primary focus. Cutover planning continues as the project team documents the schedule for the last time the mainframe jobs will run and have files available to migrate to Frances.

The discussion has begun with planning for knowledge transfer, training for IT Staff, and transitioning Frances staff and procedures to OED Operations.

Previously Reported CSG iQMS Risks

CSG Risk #17: IT Support Tasks, Level of Effort, or Dependencies not Identified **Risk Model ID:** 47 Implementation Planning **RFP ID:** OR-43 **Category:** Operational Readiness and Support	Current	Low Risk Rank		Previous	Low Risk Rank	
		Low Probability	**Medium Impact**		**Low Probability**	**Medium Impact**

Risk Trigger: 1. OED is unable to provide the solution vendor with necessary system support for dependencies such as interfaces or clean conversion data from existing legacy systems needed in a timely manner. 2. Unknown dependencies cause UI benefits to be impacted negatively when UI tax is implemented.

Risk Description: There is undefined scope that must be performed by OED IT staff to coordinate with the Frances development effort. No plan or schedule exists for the work required for existing Mainframe, Web, and Data Warehouse IT staff to ensure that the necessary timeframes for integrations with Frances can be met. The lack of defined dependencies and scope of effort for IT staff tasks has the potential of negatively impacting the scope, quality, and schedule of the Frances implementation.

There are very few knowledgeable support resources for most of the key existing mainframe systems such as OATS, OBIS, OAWS and others. Many of the systems are decades old and have seen numerous modifications as additional functionality and interfaces have been incorporated. In addition, there was a concerted effort to provide "integration" of functionality, which given the technology at the time, resulted in "hooks" embedded in program code that potentially impact both UI contributions and benefits, adding complexity to the decoupling effort.

Recommendations: Continue to define the Existing Systems Strategy to analyze, estimate, and develop an integrated plan that identifies resources and dependencies for the OED IT work on systems impacted by Frances and reporting being affected by Frances. The plan should identify the resources needed for data conversion, interface development, and regression testing of the current production environment as changes are made to implement Frances.

Consider carefully prioritizing other legacy work to maximize resource availability for Modernization efforts.

Evaluate alternatives and methods in the work plan that would leverage the institutional knowledge of more experienced OED IT staff. Closely monitor the progress and develop alternatives if resource contention is evident.

Current Analysis – February 2024: The project is in its final preparation for Go-Live. Cutover planning has now moved into cutover execution. The teams check in every day and discuss execution efforts to continue taking programs offline. Good communication exists between the MOD project team, IT resources, and the agency.

The CSG iQMS Team will continue to monitor.

Previous Analysis – January 2024: The project is in its final preparation for Go-Live. Cutover planning continues increasing to a daily cadence. The teams continue to map out the schedule for the last time the mainframe jobs will run and have files available to migrate to Frances, distribute communications, and cease interface file transfers.

Previously Reported CSG iQMS Risks

Risk # 21: Staffing shortage and overallocated resources	**Current**	**Medium Risk Rank**		**Previous**	**High Risk Rank**	
Risk Model ID: 017 – Resource Management – Resource Conflict		**Medium Probability**	**Medium Impact**		**High Probability**	**Medium Impact**
RFP ID: N/A **Category**: Project Resources						

Risk Trigger: 1. Customers complain about incorrect letters and account balances, 2. Deadlines are missed

Risk Description: The C&R Division has multiple vacancies and a backlog of pending work. They do not have enough resources to get caught up before the conversion from mainframe to Frances. Other areas of the Agency such as Paid Leave, also are dealing with vacancies and failed recruitments. Additionally, the ETA Reporting and the trust fund accounting test scenarios were delayed due to over allocated resources on the project. Resource constraints could impact staff's ability to focus on training and testing. Pending work not completed prior to conversion risks the quality of the data and conversion. Data may be missed or incorrectly converted, causing incorrect notices to be sent to customers. A lack of resources to assist Modernization in project activities may cause delays or cause rework. Delayed test scenarios could cause delayed testing.	**Recommendation**: The CSG iQMS team recommends: The Agency continues to collaborate to prioritize work, communicate areas of delays or shortages, and reassign workers where most needed. Develop contingencies for work not completed and plans to review accounts with pending transactions after go-live. Modernization should monitor schedules and activities closely to adjust as needed.	**Current Analysis – February 2024:** The project is in its final cutover process for Go-Live Some of OED's planned data warehouse activities are behind schedule. Some of OED's planned data warehouse activities are behind schedule. The team has experienced some difficulties with the data file mappings aligning with the OED's Warehouse schema. This outstanding work will not impede Frances's progress; other IT activities are on track. Overall, the IT team's outlook is positive, and they continue to assist the project with research, planning, and providing answers. The next month is a critical time and can cause additional stress on staff. Agency leadership should be aware of possible frustration and continue to monitor for burnout. The CSG iQMS team will continue to monitor this risk. **Previous Analysis - January 2024:** The project is in its final preparation for Go-Live and working on the last of the remaining deliverables is the primary focus. Testing interfaces and data warehouse began the 1st week of January 2024, but teams are concerned test schedule is aggressive and worried about completing all end-to-end tests. The next two months is a critical time and can cause additional stress on resources. Agency leadership should be aware of possible frustration and continue to monitor for burnout.

Previously Reported CSG iQMS Risks

	Current	**Medium Risk Rank**		**Previous**	**Medium Risk Rank**	
CSG Risk #22: Schedule Missing Key Elements **Risk Model ID**: 058 Project Schedule – Task Dependencies **RFP ID:** OR-7 Category: Schedule / Business Mission & Goals		**Medium Probability**	**Medium Impact**		**Medium Probability**	**Medium Impact**

Risk Trigger: The Modernization team does not have a clear picture of all required tasks and activities to achieve project objectives.

Risk Description	Recommendation	Analysis
Risk Description: There is no clear view of the entire schedule for the project. The master schedule does not include the details of the implementation phases. Details for the activities reside in the delivery workbench. As a result, it is difficult to develop a well-defined work breakdown structure (WBS) that also includes a critical path. The master schedule is missing details such as dependencies, was not updated to include the letter re-write process for Rollout 1, and does not include the level of effort for tasks and activities. Additionally, including all tasks and activities, resources, and durations in a WBS supports critical path calculation which serves to prevent project managers from overlooking or missing key project tasks and milestones which might impact the overall delivery of project objectives.	**Recommendation**: The CSG iQMS team recommends developing a detailed WBS for Rollouts 2a and 2b. The WBS should be sufficiently detailed to include tasks, dependencies, resources, estimated work, and realistic durations. The WBS should be reviewed regularly by project managers as well as all team leads to ensure project responsibilities are accounted for at all stages. Additionally, the project should create and regularly review the critical path to ensure that missing required tasks and activities do not impact milestones and the overall project implementation dates.	**Current Analysis – February 2024:** The project continues to report no variance for the schedule, though there are variances within the schedule. The project is on track to roll out per the scheduled date as teams prioritize functionality to meet Go-Live dates. **Previous Analysis – January 2024:** The project continues to report no variance for the schedule, though there are variances within the schedule. The project is on track to roll out per the scheduled date as teams prioritize functionality to meet Go-Live dates. The CSG iQMS team will continue monitoring this risk as Rollout 2b moves into production and future planning begins for migration to Cloud services and transition of operational services from project to program.

3.3   Resolved Risks

Risks are closed when the CSG iQMS team determines sufficient mitigation actions have been taken to resolve the risk, or the risk is no longer applicable to the project for other reasons (e.g., a sub-project has ended). If a risk identified by the CSG iQMS team reoccurs after it has been closed, it will be reopened, and recommendations will be provided. There was no resolution during this reporting period.

4. CATALOG OF REVIEWS

During the current reporting period, February 1, 2024, through February 29, 2024, the CSG iQMS team reviewed Modernization documents and materials, attended Modernization meetings, and interviewed Modernization stakeholders. Over the course of the project life cycle, materials may be re-reviewed over time as they support the iQMS activities.

4.1 Documents and Materials Reviewed

During the reporting period, the CSG iQMS team reviewed the materials listed in the table below.

Table 6: Documents and Materials Reviewed

#	Documents or Materials Reviewed	File Name
1.	R2b Benefits Issue Finding – 2/1/2024	email
2.	R2b Benefits Issue Finding – 2/2/2024	email
3.	R2b End to End Pass 3	emails
4.	Implementation Monday's	email
5.	ECLM Information in Frances	ECLM Information in Frances.pdf
6.	Cutover Activities	Cutover Activities.pdf
7.	Shared Customer Addresses	Shared Customer Addresses.pdf
8.	Frances Online Temporary Outage	Frances Online Temporary Outage.pdf
9.	Updates to the 197 & 220	Updates to the 197 & 220.pdf
10.	WSO Navigation Tips in Frances	WSO Navigation Tips in Frances.pdf
11.	Claim and Program Information	Claim and Program Information.pdf
12.	WSO and Frances Data Share	WSO and Frances Data Share.pdf
13.	ID Verification Terminology Changes	ID Verification Terminology Changes.pdf
14.	2.6.23 OED Weekly Digest: Frances migration dates, agency impacts	Email - Website
15.	February 12 RIMT – OED Modernization Program and UI Project Risk and Issue Report	OED Modernization Program and UI Project Risk and Issue Report.docx
16.	Claimant Email – Notification of Upcoming System Changes	email
17.	R2b E2E Pass Two Stats	R2b E2E Pass Two Stats.xlsx
18.	Paid Leave Customer Communications Cutover	Paid Leave Customer Communications Cutover.pdf

#	Documents or Materials Reviewed	File Name
19.	Zendesk for UI	Zendesk for UI.pdf
20.	UI Customer Communications Cutover	UI Customer Communications Cutover.pdf
21.	R&R Cutover	R&R Cutover.pdf
22.	Claims Cutover	Claims Cutover.pdf
23.	Adjudication Cutover	Adjudication Cutover.pdf
24.	OED Air	OED Air.pdf
25.	R2b Findings meeting – 2/21/2024	Email
26.	2/13/2024 OED Weekly Digest: Adjudication explained	Email - Website
27.	Minute for MOD – February 2024	Email
28.	What's changing for UI claimants	Email
29.	Employer and Paid Leave Claimant Email – Notification of Upcoming System Changes	Email
30.	Tier 2 Data	Tier 2 Data.pdf
31.	Frances Online Registration	Frances Online Registration.pdf
32.	Trade Act Converted Data	Trade Act Converted Data.pdf
33.	WSO New User Access	WSO New User Access.pdf
34.	Frances Online Registration	Frances Online Registration.pdf
35.	RESEA	RESEA.pdf
36.	2.20.2024 OED Weekly Digest: What's changing for UI Claimants	Email
37.	R2B Findings – 2/15/2024	Email
38.	OED Modernization Cutover Plan	OED Modernization Cutover Plan.docx
39.	R2b E2E Pass Three Stats	R2b E2E Pass Three Stats.xlsx
40.	Director's Office Message – One week to go live for UI Benefits – talking points	Email - Website
41.	R2b Findings – 2/22/2024	Email
42.	Frances Online Registration	Frances Online Registration.pdf
43.	Federal Reporting	Federal Reporting.pdf
44.	Benefit Services Cutover	Benefit Services Cutover.pdf

#	Documents or Materials Reviewed	File Name
45.	BPC Cutover	BPC Cutover.pdf
46.	Trade Act Day 1	Trade Act Day 1.pdf
47.	Rounding and Calculation Changes	Rounding and Calculation Changes.pdf
48.	Weekly Claim Changes Updates	Weekly Claim Changes Updates.pdf

4.2 Interviews Conducted

The details of the interviews that the CSG iQMS team conducted during February 2024 are in the table below.

Table 7: Interviews Conducted

#	Interviewees	Interview Date	CSG Participants
1.	Renee Royston	February 1, 2024	Terri Grenda
2.	David Ford	February 28, 2024	Terri Grenda
3.	Sara Cromwell	February 27, 2024	Terri Grenda
4.	Tim Valery	February 26, 2024	Terri Grenda
5.	Helen Keever	February 27, 2024	Terri Grenda
6.	Sheri Murphy	February 29, 2024	Terri Grenda
7.	James Wollenweber	February 26, 2024	Terri Grenda
8.	Brad McKinney	February 26, 2024	Terri Grenda
9.	Lisa Schriever	February 26, 2024	Terri Grenda
10.	Lisa Smith-Burham	February 28, 2024	Terri Grenda
11.	Bill Truex	February 27, 2024	Terri Grenda
12.	Jenna Pourciau	February 28, 2024	Terri Grenda
13.	Clyde Berry	February 27, 2024	Terri Grenda
14.	Michelle Nguyen	February 28, 2024	Terri Grenda

4.3 Meetings Attended

The CSG iQMS team attended the meetings listed in the table below during this reporting period.

Table 8: Meetings Attended

#	OED Modernization Meetings	Date	CSG Participants
1.	R2B Cutover Planning	February 1, 2024	Terri Grenda
2.	R2B Benefit Issue Findings	February 1, 2024	Terri Grenda
3.	R2B Cutover Planning	February 2, 2024	Terri Grenda
4.	R2B Cutover Planning	February 5, 2024	Terri Grenda
5.	Data Purification Check-in	February 5, 2024	Terri Grenda
6.	Monthly MOD Staff Meeting	February 6, 2024	Terri Grenda
7.	Conversion and Purification	February 6, 2024	Terri Grenda
8.	R2B Cutover Planning	February 6, 2024	Terri Grenda
9.	iQMS Touchbase	February 6, 2024	Terri Grenda and Drew Sutter
10.	R2B Cutover Planning	February 7, 2024	Terri Grenda
11.	Modernization Schedule Meeting Review	February 7, 2024	Terri Grenda
12.	OAH and OED Mod Interfaces Meeting	February 7, 2024	Terri Grenda
13.	R2B Cutover Planning	February 8, 2024	Terri Grenda
14.	SIDES Certification	February 8, 2024	Terri Grenda
15.	R2B Cutover Planning	February 9, 2024	Terri Grenda
16.	R2B Cutover Planning	February 12, 2024	Terri Grenda
17.	R2b Findings	February 12, 2024	Terri Grenda
18.	Conversion and Purification	February 13, 2024	Terri Grenda
19.	R2B Cutover Planning	February 13, 2024	Terri Grenda
20.	Business Team Weekly Check-in	February 14, 2024	Terri Grenda
21.	R2B Cutover Planning	February 14, 2024	Terri Grenda
22.	Modernization Schedule Management Review	February 14, 2024	Terri Grenda
23.	Frances SQR Prioritization Meeting	February 14, 2024	Jayne Martin
24.	TRA Benefit Payment Reporting and MF Fund	February 14, 2024	Jayne Martin
25.	ETA Reporting Needs for ABS	February 14, 2024	Jayne Martin
26.	MOD Monthly Staff Meeting	February 15, 2024	Terri Grenda
27.	R2B Cutover Planning	February 15, 2024	Jayne Martin
28.	R2B Cutover Planning	February 16, 2024	Terri Grenda

#	OED Modernization Meetings	Date	CSG Participants
29.	Conversion and Purification	February 20, 2024	Jayne Martin
30.	iQMS Touchpoint	February 21, 2024	Terri Grenda
31.	OED Data Warehouse and Frances Data	February 20, 2024	Terri Grenda
32.	R2B Cutover Planning	February 20, 2024	Terri Grenda
33.	Business Weekly Check-in	February 21, 2024	Terri Grenda
34.	R2B Cutover Planning	February 21, 2024	Terri Grenda
35.	Modernization Schedule Management Review	February 21, 2024	Terri Grenda
36.	Modernization Executive Steering Committee	February 21, 2024	Terri Grenda
37.	R2B Cutover Planning	February 22, 2024	Terri Grenda
38.	Modernization Operations and Policy Team	February 22, 2024	Terri Grenda
39.	R2B Cutover Planning	February 23, 2024	Terri Grenda
40.	Managers Modernization Monthly Update	February 23, 2024	Terri Grenda
41.	R2B Cutover Planning	February 26, 2024	Terri Grenda
42.	Data Purification Check-in	February 26, 2024	Terri Grenda
43.	iQMS Touchpoint	February 27, 2024	Terri Grenda
44.	R2B Cutover Planning	February 27, 2024	Terri Grenda
45.	Business Weekly Check-in	February 28, 2024	Terri Grenda
46.	R2B Cutover Planning	February 28, 2024	Terri Grenda
47.	Modernization Schedule Management Review	February 28, 2024	Terri Grenda
48.	Frances SQR Prioritization Meeting	February 28, 2024	Terri Grenda
49.	R2B Cutover Planning	February 29, 2024	Terri Grenda

5. QUALITY CONTROL PLAN FOR NEXT MONTH

The quality management activities planned by the CSG iQMS team for the next reporting period are detailed in the tables in this section. Due dates are based on the latest draft of the iQMS project schedule.

5.1 Milestones and Deliverables Due

Table 9: Milestones and Deliverables Due

Milestone/Deliverable	Date Due	Status
5.3.11.1 Risk Assessment Report (UI Benefits)	January 11, 2024	Accepted
4.1.17 Quarterly Quality Status Assessment and Improvement Report – 4th Quarter 2023	January 16, 2024	Accepted
5.3.12 Security Assessment Executive Presentation (UI Benefits)	January 17, 2024	Accepted
2.6.2 Lessons Learned Reports – Periodic Project Evaluations (PFMLI Benefits Phase) v0.9	January 30, 2024	Under Review
3.3.37 Monthly Quality Status Report – January 2024 v0.9	February 12, 2024	Under Review
3.3.38 Monthly Quality Status Report – February 2024 v0.5	March 12, 2024	In Progress

NOTE: Status designations for deliverables are: Not Started, Submitted, In Progress, Under Review, and Accepted

5.2 Planned iQMS Interviews

Table 10: Planned iQMS Interviews

#	Interviewee Name	Date	CSG Participants
1.	Renee Royston	March 19, 2024	Terri Grenda
2.	Lindsi Leahy	TBD	Terri Grenda
3.	Sara Cromwell	TBD	Terri Grenda
4.	Tim Valery	TBD	Terri Grenda
5.	Nate Stevens	TBD	Terri Grenda
6.	Lori Graham	TBD	Terri Grenda
7.	David Gerstenfeld	TBD	Terri Grenda
8.	Brad McKinney	TBD	Terri Grenda
9.	Lisa Schriever	TBD	Terri Grenda
10.	Lisa Smith-Burham	TBD	Terri Grenda

#	Interviewee Name	Date	CSG Participants
11.	Karen Madden Humelbaugh	TBD	Terri Grenda
12.	Nancy Curtis	TBD	Terri Grenda
13.	Maggie Gleason	TBD	Terri Grenda
14.	Sarah Flores	TBD	Terri Grenda
15.	Jill Coleman	TBD	Terri Grenda
16.	Alex Kasner	TBD	Terri Grenda

5.3   Planned Meeting Attendance

Table 11: Planned Meeting Attendance

#	OED Modernization Meetings	Scheduled Date	CSG Participants
1.	R2B Cutover Check-in	March 4, 2024	Terri Grenda
2.	R2B Cutover Check-in	March 5, 2024	Terri Grenda
3.	iQMS Touchbase	March 5, 2024	Terri Grenda
4.	Business Team Weekly Check-in	March 6, 2024	Terri Grenda
5.	Modernization Schedule Meeting Review	March 6, 2024	Terri Grenda
6.	R2B Cutover Check-in	March 6, 2024	Terri Grenda
7.	R2B Cutover Check-in	March 7, 2024	Terri Grenda
8.	R2B Cutover Check-in	March 8, 2024	Terri Grenda
9.	R2B Cutover Check-in	March 11, 2024	Terri Grenda
10.	R2B Cutover Check-in	March 12, 2024	Terri Grenda
11.	iQMS Touchpoint	March 12, 2024	Terri Grenda
12.	R2B Cutover Check-in	March 13, 2024	Terri Grenda
13.	Business Team Weekly Check-in	March 13, 2024	Terri Grenda
14.	Modernization Schedule Meeting Review	March 13, 2024	Terri Grenda
15.	Frances SQR Prioritization Meeting	March 13, 2024	Terri Grenda
16.	R2B Cutover Check-in	March 14, 2024	Terri Grenda
17.	R2B Cutover Check-in	March 15, 2024	Terri Grenda
18.	Modernization Executive Steering Committee	March 18, 2024	Terri Grenda and Drew Sutter

#	OED Modernization Meetings	Scheduled Date	CSG Participants
19.	iQMS Touchbase	March 19, 2024	Terri Grenda
20.	Business Team Weekly Check-in	March 20, 2024	Terri Grenda
21.	Modernization Schedule Management Review	March 20, 2024	Terri Grenda
22.	Modernization Operations and Policy Team	March 21, 2024	Terri Grenda
23.	Managers Modernization Monthly Updates	March 22, 2024	Terri Grenda
24.	iQMS Touchbase	March 26, 2024	Terri Grenda
25.	Business Team Weekly Check-in	March 27, 2024	Terri Grenda
26.	Modernization Schedule Management Review	March 27, 2024	Terri Grenda
27.	Frances SQR Prioritization Meeting	March 27, 2024	Terri Grenda
28.	Monthly Communication and outreach planning	March 28, 2024	Terri Grenda
29.	MOD Budget Meeting	March 28, 2024	Terri Grenda