



WCB Modernization

2024-2028



**Once upon a
time...**

today.



Two Major Areas of Approval:

Legislative Approval for Budget:
25-27 Session Approved for
\$650,000 start up costs.

DAS EIS Approval for Purchase
and Implementation: Assigned
Oversight Level 3 .

Required Artifacts Form – Oversight Level 3

Agency Worker's Compensation Board
 Project Name Litigation Case Management System

As a matter of formal project management best practices, it is expected that agencies will develop most or all of the following artifacts for a project under Level 3 oversight. Items denoted with a "X" must be provided for EIS P3 review and approval to demonstrate readiness for obtaining endorsement to proceed to the next stage.

EIS may request additional documents be reviewed or substituted at any time during the project lifecycle. Agile specific or equivalent artifacts are designated as such and listed in blue font. See the Project Oversight Guide for more detail on project artifacts.

Items with an asterisk (*) denote that draft versions should be provided via email for review and approval. Final versions should be uploaded to PPM. Additionally, artifacts listed under prior stages must be provided again if changes are made or required.

Stage 1. Initiation	
Stage 1. Artifacts	Notes
X IT Investment Form	
X Business Case	
X Project Charter	
X Initial Complexity Assessment	
Procurement Documents/Contractor Statements of Work ¹ *	Provide if contracting for PM, BA or planning services
(Agile) Project Agile Readiness Evaluation	

Stage 1. Initiation		Stage 2. Resource/ Solution Analysis
Stage 2. Artifacts		Notes
X	Project Status Reports	Monthly
X	Detailed Project Risk, Issue and Decision Logs	Monthly
X	Procurement Documents/Contractor Statements of Work ¹ *	Provide if contracting for PM, BA, planning services or Independent Quality Management Services (IQMS)
X	IQMS final deliverables *	Provide if engaged with IQMS at this stage
X	Market Research	Provide if not included in business case
X	Solution Analysis	Provide if not included in business case
X	Current, Future, & Gap Analysis (Agile) User Research & Business Process Maps	Provide if not included in business case
X	Project Management Plan	High level approach and framework
X	Organizational Change Management Plan	
X	Stakeholder Registry	
X	RACI (Agile) Roles & Team Agreements	
X	Budget (± 50%)	
X	Schedule (± 50%) (Agile) Roadmap, Release Plan & Milestones	
X	Scope (± 50%) (Agile) Project Backlog	
X	Requirements	
	System Security Plan	Engage with CSS Business Security Advisor
	Cloud Workbook	Engage with CSS Business Security Advisor
	(Agile) Project Agile Readiness Evaluation	Provide if not completed earlier

¹ Agencies should work with their procurement office to submit copies of Feasibility Determination, Cost Analysis and Department Report (see ORS 279B.033 and Oregon State Procurement Rule 125-247-0110)

Stage 1. Initiation		Stage 2. Resource/ Solution Analysis	Stage 3. Implementation Planning
Stage 3. Artifacts		Notes	
X	Project Status Reports	Monthly	
X	Detailed Project Risk, Issue and Decision Logs	Monthly	
X	IQMS final deliverables *	Provide if engaged with IQMS at this stage	
X	Procurement Documents/Contractor Statements of Work ¹ *	Provide if contracting for project management, business analysis, solution vendor, or IQMS	
X	Baseline Project Management Plan		
X	Benefits Management Plan		
X	Baseline Budget (± 10%)		
X	Baseline Schedule (± 10%) (Agile) Roadmap, Release Plan & Milestones		
X	Baseline Scope (± 10%) (Agile) Project Backlog		
X	Requirements Traceability Matrix (Agile) Project Backlog		
	LFO Readiness Assessment	Engage with LFO	
	Cloud Workbook	Engage with CSS Business Security Advisor	

Stage 1. Initiation		Stage 2. Resource/ Solution Analysis	Stage 3. Implementation Planning	Stage 4. Execution
Stage 4. Artifacts		Notes		
X	Project Status Reports	Monthly		
X	Detailed Project Risk, Issue and Decision Logs	Monthly		
	Project Major IT Quarterly Reports	Engage with Statewide Quality Assurance		
X	IQMS final deliverables *	Provide if engaged with IQMS		
X	Executed Contracts & Amendments ¹ *			
X	Updated Project Management Plan			
X	Test Plan	Provide for review and approval prior to executing plan		
X	Baseline Budget (± 10%)			
X	Baseline Schedule (± 10%) (Agile) Roadmap, Release Plan & Milestones			
X	Baseline Scope (± 10%) (Agile) Project Backlog			
	(Agile) Initial Delivery Release Plan	Before initial delivery		
	(Agile) Initial Delivery Completion Report	After initial delivery		
	(Agile) Sprint Completion Report	End of each sprint		
X	Operations and Maintenance Plan	Provide for review and approval prior to initial delivery or go-live		
	System Security Plan	Engage with CSS Business Security Advisor		
	Cloud Workbook	Engage with CSS Business Security Advisor		
X	Data Dictionary	Provide for review and approval prior to initial delivery or go-live		
X	Disaster Recovery Plan	By project completion		
X	Requirements Traceability Matrix	Provide for review and approval prior to initial delivery or go-live		
X	Benefits Realization Report	By project completion		
X	Lessons Learned/Project Close Out Reports	By project completion		

¹ Agencies should work with their procurement office to submit copies of Feasibility Determination, Cost Analysis and Department Report (see ORS 279B.033 and Oregon State Procurement Rule 125-247-0110)

MEMORANDUM

To: Terrence Woods, State Chief Information Officer (State CIO)

From: Katy Combest, Oversight Analyst

Date: April 10, 2025

Subject: Workers' Compensation Board (WCB) Litigation Case Management System (LCMS) Level 3 Stage Gate 1 Conditional Approval

BACKGROUND

The Workers' Compensation Board (WCB) is an independent adjudicatory agency within the Department of Consumer and Business Services (DCBS), whose mission is to resolve disputes resulting from Oregon Workers' Compensation Law and the under the Oregon Safe Employment Act. To meet this intended mission, WCB has relied upon paper-based processes and a system that is unable to meet the agency's basic business needs. WCB has partnered with DCBS, IT and Research (IT&R), to develop and modify the existing WCB system as needed. Unfortunately, the mix of paper and automation and the architecture the legacy system cannot meet the changing needs of the business, nor the needs of Oregonians.

WCB is seeking to purchase a litigation case management system (LCMS) that is specifically designed to streamline and optimize the complexities of legal disputes. Purchasing a software as a service (SaaS) litigation case management system will enable WCB to more effectively provide services to the Oregonians who require our forum.

DISCUSSION

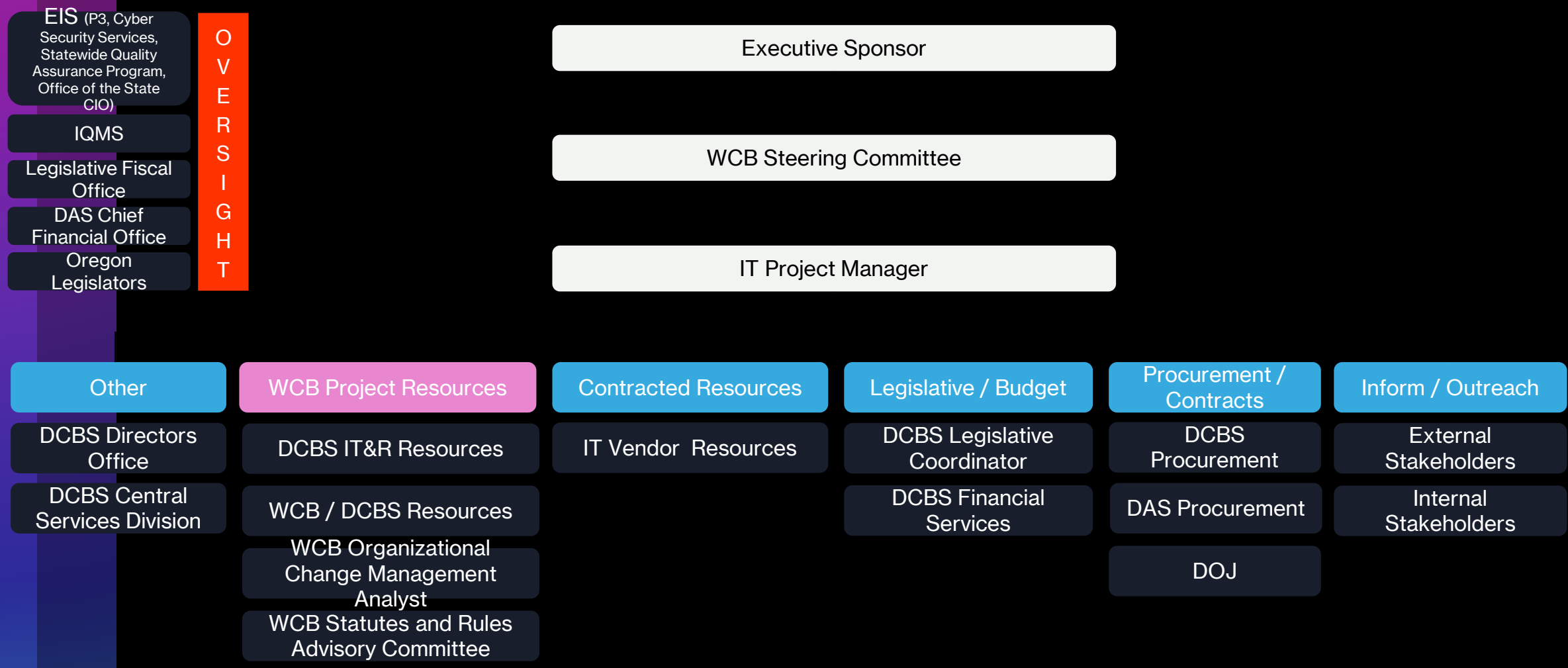
**Passed Stage
Gate 1:**

April 10, 2025

Current Tasks

		Detailed Project Risk, Issue and Decision Logs
		Procurement Documents/Contractor Statements of Work ¹ *
		IQMS final deliverables *
		Market Research
		Solution Analysis
		Current, Future, & Gap Analysis (Agile) User Research & Business Process Maps
		Project Management Plan
X		Organizational Change Management Plan
X		Stakeholder Registry
X		RACI (Agile) Roles & Team Agreements
X		Budget (± 50%)
		Schedule (± 50%) (Agile) Roadmap, Release Plan & Milestones
		Scope (± 50%) (Agile) Project Backlog
		Requirements
		System Security Plan
		Cloud Workbook
		(Agile) Project Agile Readiness Evaluation

Workers' Compensation Board: Litigation Case Management System (LCMS) Project Structure



Stage 1. Initiation

Stage 2. Resource/
Solution Analysis

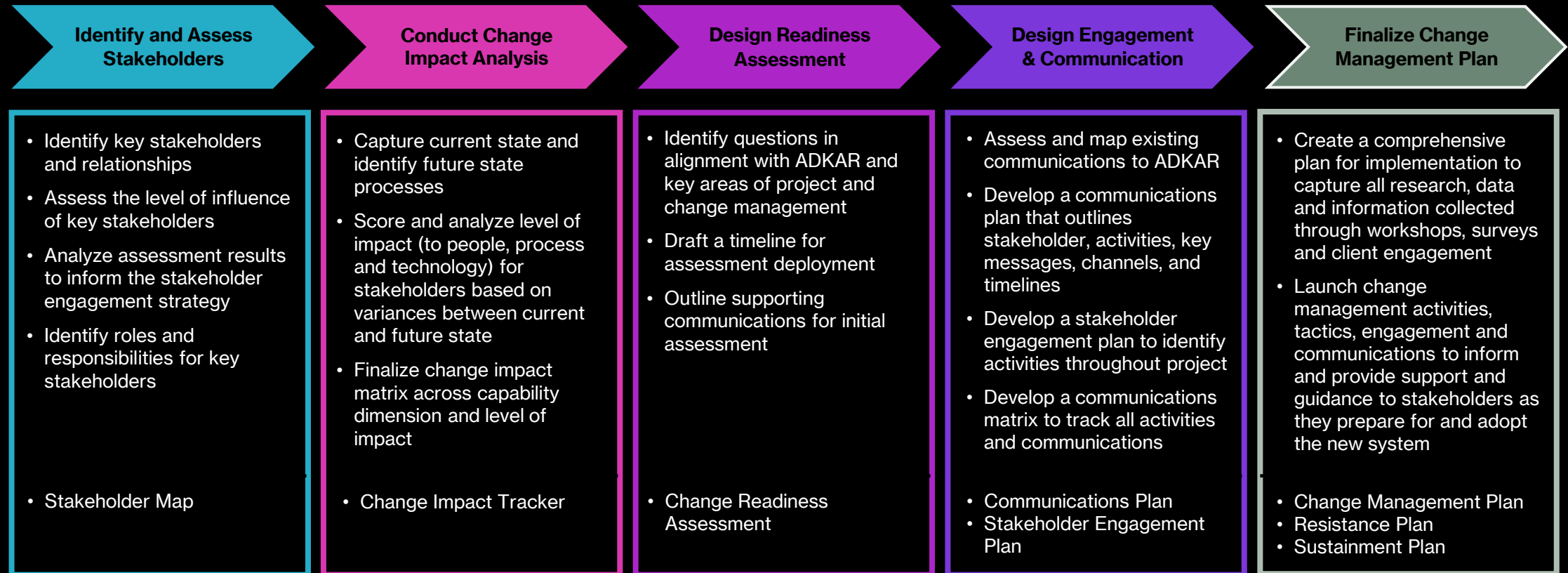
Stage 2. Artifacts

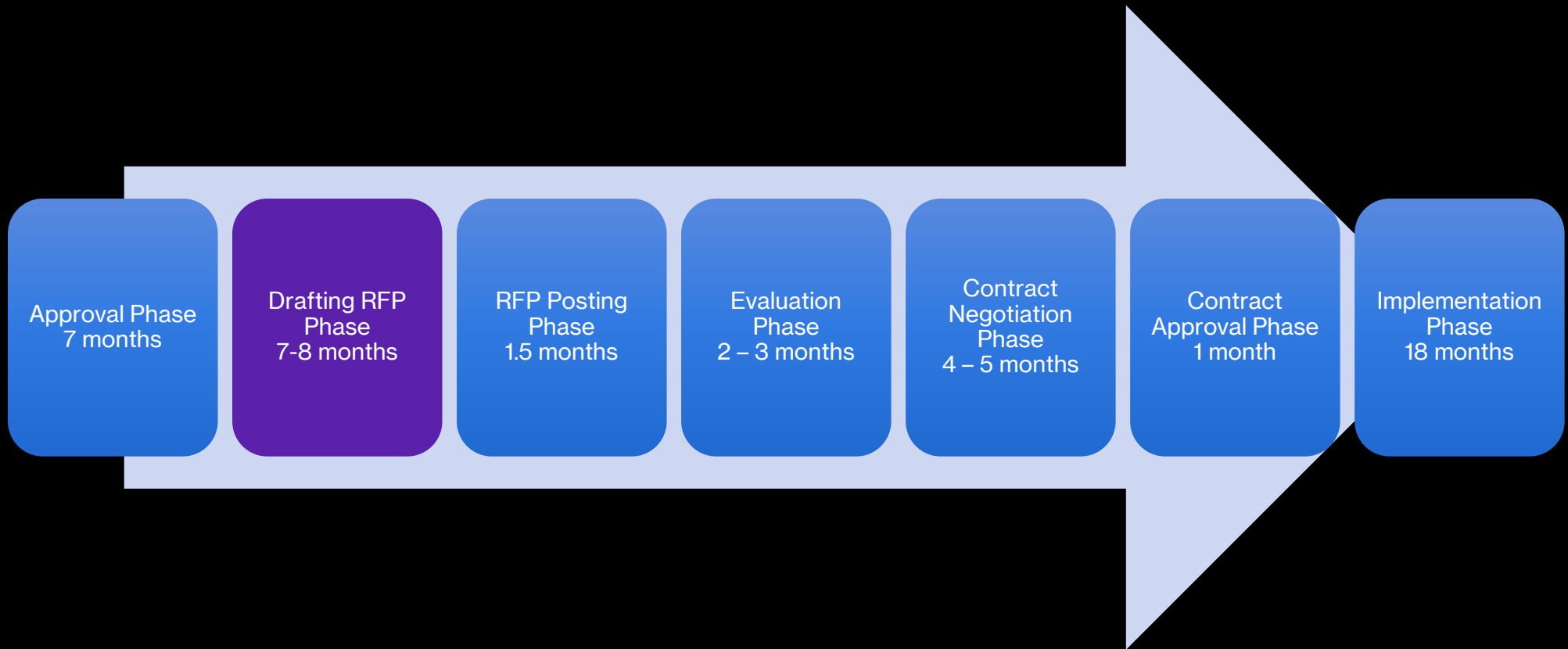
- X Project Status Reports
- X Detailed Project Risk, Issue and Decision Logs
- X Procurement Documents/Contractor Statements of Work
- X IQMS final deliverables *
- X Market Research
- X Solution Analysis
- X Current, Future, & Gap Analysis | (Agile) User Requirements |
Business Process Maps
- X Project Management Plan
- X Organizational Change Management Plan
- X Stakeholder Registry
- X RACI | (Agile) Roles & Team Agreements
- X Budget ($\pm 50\%$)
- X Schedule ($\pm 50\%$) | (Agile) Roadmap, Release Plan & Milestones
- X Scope ($\pm 50\%$) | (Agile) Project Backlog
- X Requirements
- System Security Plan
- Cloud Workbook
- (Agile) Project Agile Readiness Evaluation

* Agencies should work with their procurement office to submit copies of Feasibility

Change Management Plan Components

The following activities inform and support the implementation of the change management plan for external stakeholders.







The End