OREGON EMPLOYMENT DEPARTMENT MODERNIZATION PROGRAM

INDEPENDENT QUALITY MANAGEMENT SERVICES

4.1.15 QUARTERLY QUALITY ASSURANCE STATUS AND IMPROVEMENT REPORT – 2ND QTR. 2023

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1. EXECUTIVE SUMMARY

The Quarterly Quality Assurance (QA) Status and Improvement Report provides the Oregon Employment Department (OED) executives and sponsors, Enterprise Information Services (EIS), Department of Administrative Services (DAS), Legislative Fiscal Office, and OED Modernization team an independent review and status of the Unemployment Insurance (UI) Modernization Project. 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, which includes Paid Family Medical Leave Insurance (PFMLI) functionality. The OED Modernization Program supports the UI Modernization Project and as such may be referenced only to the extent of the support activities that impact the project.

1.1 UI Modernization Project Health Dashboard

Table 1 – OED UI Modernization Project General Status Information

GENERAL INFORMATION	
Project Status "As Of" Date:	July 31, 2023
Original Project Budget:	$106,121,029
Current Project Budget:	$106,410,963
Project Start Date:	December 28, 2018
Project End Date:	September 30, 2024
Project Status Indicators		**Trend Indicators**
Green	On-track, only minor issues	+ = Improving
Yellow	One or more areas of concern	- = Declining
Red	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**
Yellow	Yellow	NC

The overall iQMS health status rating for the UI Modernization Project as of June 30, 2023, remains medium.

➢ As of June 30, 2023, the CSG iQMS team has eight open risks. There are two high, five medium, and one low ranked risk.

➢ The high risks include:

✓ Risk #1, regarding missing requirements. Not all of the functionality for Paid Leave will be completed when the system goes live, due to a lack of time and some requirements determined late in the development or not completely understood. The items not completed are put on the pull list. The project team works with business to prioritize those items. Careful consideration is given to what is necessary and what is "nice to have".

✓ Risk #21, regarding staffing shortages and over allocated resources. This is a very busy time for the project, with testing, training, development, production support, conversion, and other activities happening at the same time. It is impacting meetings such as the cutover meetings, where not all the needed individuals are present. Items to address either must be carried over or the meeting owner needs to reach out to the individuals separately for the needed information. Project management is developing strategies to address the resource issues.

➢ The medium risks are:

✓ Risk #4, staff not being ready for or accepting the Modernization change. The OCM team continued to attend project meetings to identify business process changes. They are working with business managers on ensuring staff are informed, to involve staff, and monitoring the acceptance of the changes. The project team is conducting its second readiness assessment for Rollout 2 now and will be working with managers to analyze and address the findings.

The Paid Leave program continues to hire staff. This does create challenges with training. It is preferable to have policy or business process training first and then Frances training, but it is not always possible.

✓ Risk #15, IT skills and resources. OED IT had some delays on their legacy work due to Frances files and data not being received when needed. The resources are stretched thin, and management is monitoring the situation to develop remediation.

✓ Risk #17, IT efforts not identified. The project and OED IT have reassessed the need for a detailed WBS. They have identified and documented the critical dates and activities, such as testing. They are managing to those dates. The scheduled activities will evolve as they dive into the work and identify additional activities or need to adjust schedule dates. This is the critical information needed and helps to mitigate this risk.

✓ Risk #18, Concurrent Paid Leave Implementation. Paid Leave benefits goes live August 14, for filing claims and other activities. Payment of Paid Leave benefits begins September 11. The project team has planned two production support streams. The project team has worked to ensure the new program receives the attention needed for a successful launch. Time was short and there will be things not completed by go-live. There were requirements that were not known until late in development and they will not be ready at go-live. The project team and business are working to prioritize these items.

✓ Risk #22, regarding the schedule missing key elements. The project team has been conducting quality reviews of the master schedule and there are minimal incorrect dates. However, the schedule does not calculate variances for all activities. There are no schedule variances reported on the DAS quarterly reports. The master schedule also is missing some dependencies.

There is no concern regarding the go-live for Paid Leave benefits being met. However, there are items that will not be available at go-live. Though the project will work with business to ensure the items with the highest priorities are completed as soon as possible, there is no guarantee of when that will be, due to the focus of the project shifting to UI benefits after rollout support is over.

1.2 UI Modernization Project Health Status

The table below provides the status of the project health indicators for the UI Modernization Project as of June 30, 2023. Recommendations are documented in Section 3 of this report.

Table 3 – UI Modernization Project Health Status

UI Modernization Project Health Indicators by Area								
Budget			**Schedule**			**Scope**		
Previous	**Current**	**Current Trend**	**Previous**	**Current**	**Current Trend**	**Previous**	**Current**	**Current Trend**
Low	**Low**	**NC**	**Medium**	**Medium**	**NC**	**Low**	**Low**	**NC**
The Budget Health Indicator remains low risk for this reporting period. The project budget continues to be under budget. There are no concerns in this area.			The Schedule Health Indicator remains medium risk for the reporting period. The project team has been conducting quality reviews of the master schedule and there are minimal incorrect dates. However, the schedule does not calculate variances for all activities and there are no schedule variances reported on the DAS quarterly reports. The master schedule also is missing some dependencies. There is no concern regarding the go-live for Paid Leave benefits being met. However, there are items that will not be available at go-live. Though the project will work with business to ensure the items with the highest priorities are completed as soon as possible, there is no guarantee of when that will be, due to the focus of the project shirting to UI benefits after rollout support is over.			The Scope Health Indicator remains low for this reporting period. The project scope is stable. Minor changes as the project reviews the requirements continue. The additional requirements discovered, or minor scope changes are not impacting the budget or schedule of the project, though it does impact the time of when some functionality is available.		

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**	NC	**High**	**High**	NC	**Medium**	**Medium**	NC

Communication	Quality	Organizational Readiness
The Communication Health Indicator remains a low risk. The Modernization project continues to communicate with internal and external interested parties. Focus groups are ongoing and more are being planned to provide further accessibility. The project and Agency are open to opportunities for dialog with customers regarding issues they may be having with the live system. The Agency continues to focus on improving services, processes, and communications with customers whenever possible.	The Quality Health Indicator remains high risk during this reporting period. Not all functionality for Paid Leave will be completed when the system goes live, due to a lack of time and some requirements determined late in the development or not completely understood. The items not completed are put on the pull list. The Modernization team works with business to prioritize those items. Careful consideration is given to what is necessary and what is "nice to have". Customer service is always a guiding factor in these determinations. There are no concerns with the project deliverable quality.	The Organizational Readiness Health Indicator remains medium risk. The project OCM team continued to attend project meetings to identify business process changes. They are working with business managers on was to inform and involve staff and monitoring the acceptance of the changes. The project team is conducting its second readiness assessment for Rollout 2 now and will be working with managers to analyze and address the findings. The Paid Leave program continues to hire staff. This does create challenges with training. It is preferable to have policy or business process training first and then Frances training, it is not always possible.

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	NC	Low	Low	NC	High	High	NC
The Leadership and Governance Health Indicator remains low risk. The Agency leadership continues to make the Modernization project a priority. They are engaged with resolving resource concerns and program direction. There are no concerns in this area.			The Project Management Health Indicator remains low risk. The project team continues to manage the project management plans appropriately, updating them when needed. The projects processes are documented, and leadership communicates with project staff and ensure they have the tools needed.			The Resource Health Indicator remains high risk. This is an extremely busy time for the project team, with testing, training, development, production support, conversion, and other activities happening at the same time. It is impacting meetings such as the cutover meetings, where not all the needed individuals are present. Items to address either must be carried over or the meeting owner must reach out to the individuals separately for the needed information. Project management is developing strategies to ease the resource issue.		

1.3 Modernization Issues Being Monitored

There are currently no OED Modernization issues being monitored by the CSG iQMS team.

1.4 OED Modernization Accomplishments and Achievements

The UI Modernization Project's key accomplishments and achievements during the second quarter of 2023 include (but are not limited to):

➢ Decommissioning the UI Tax legacy system has begun. OED IT will continue this work as time is available.

➢ The project completed the first pass of end to end (E2E) testing for Paid Leave benefits. Of the 4542 scenarios available, 288 were completed.

➢ The project team completed business testing. The project instituted weekly meetings with Paid Leave leadership to discuss findings from business testing. Testers were raising concerns that the system wasn't operating the way they thought the Paid Leave program had decided.

Many of their concerns or questions revolved around policy versus system. The meetings were added to address the unique element of developing the system for a new program, ensuring changes were not made that went against policy and that Paid Leave leadership was informed and able to provide input to changes requested by staff.

➢ The Conversion team completed its fifth mock conversion. They also completed their third verification session. During these sessions the project team reviews the data received during the mock conversions for quality.

➢ During this reporting period Tier 3 training courses were released.

➢ Penetration testing, as part of the Security Assessment, was completed with no major findings.

➢ Numerous process change documents were created for Agency managers to use when working with their staff, preparing them for the new system. Many other change management activities took place to assist managers and prepare staff.

➢ Production Support for UI and Paid Leave Contributions continued, releasing several system changes and to provide additional training and guidance on using the new system efficiently and effectively.

➢ External support also continued, with focus groups for employers being conducted to respond to common employer questions and provide tips on using the new system. The project team also engaged employers to get feedback on pain points and suggested improvements. The tax system includes functionality that are annual, so some processes are running for the first time. This brings about new questions and new bugs are found that need addressing.

➢ The Paid Leave Employee Guidebook was completed by the Paid Leave Program. It was distributed and available in 11 languages.

1.5 Three-Month Rolling Risk Matrix by Assessment Area

This section provides a three-month rolling risk matrix by assessment area based on the iQMS risks tracked each month during the reporting period. Details about open risks are provided in Section 4 of this report. The Quarterly Risk Trend shows the trend in the number and severity of risks in each assessment area risk category. The categories may be updated based on the phase of the project or based on discussions with project leadership. The CSG iQMS Project Manager will work with the OED Modernization Program leadership regarding these assessment categories as needed.

A negative trend exists when the following conditions are met:

1. The number of total risks in the assessment area increases from the previous reporting quarter to the current reporting quarter (e.g., from three to five). There is no change to the risk severity indicator (e.g., the prior quarter is green, and the current reporting quarter is green).

2. The severity of risks in the assessment area increases (e.g., from green to yellow) from the previous reporting quarter to the current reporting quarter, even if the number of risks decreases (e.g., from five to three).

A positive trend exists when the following conditions are met:

3. The number of total risks in the assessment area decreases from the previous reporting quarter to the current reporting quarter (e.g., from 5 to 3). There is no change to the risk severity indicator (e.g., the prior quarter is green, and the current reporting quarter is green).

4. The severity of risks in the assessment area decreases (e.g., from yellow to green) from the previous reporting quarter to the current reporting quarter, even if the number of risks increases (e.g., from three to five).

"No Change" (N/C) is indicated when both the number and severity of risks remain the same from the previous reporting quarter to the current reporting quarter for the assessment area.

Table 4 – Quarterly Risk Trend by Assessment Area

Assessment Area Risk Category	# of Open Risks as of 3/31/2023	# of Open Risks as of 4/30/2023	# of Open Risks as of 5/31/2023	# of Open Risks as of 6/30/2023	Quarter Risk Trend (+ - N/C)
Business Mission and Goals	1	1	1	1	**NC**
Data Management	0	0	0	0	**NC**
Design Specification / Management	1	1	1	1	**NC**

Assessment Area Risk Category	# of Open Risks as of 3/31/2023	# of Open Risks as of 4/30/2023	# of Open Risks as of 5/31/2023	# of Open Risks as of 6/30/2023	Quarter Risk Trend (+ - N/C)
Development Environment	0	0	0	0	NC
Leadership and Governance	0	0	0	0	NC
Operating Environment	0	0	0	0	NC
Operational Readiness and Support	1	1	1	1	NC
Operations	0	0	0	0	NC
Organizational Change Management	1	1	1	1	NC
Planning Oversight	0	0	0	0	NC
Platform Components	0	0	0	0	NC
Project Management Planning	2	1	1	1	+
Project Management Processes	0	0	0	0	NC
Project Parameters	0	0	0	0	NC
Project Resources	2	2	2	2	NC
Quality Management	0	0	0	0	NC
Requirements Management	1	1	1	1	NC
Security	0	0	0	0	NC
Software Development	0	0	0	0	NC
System and Acceptance Testing	0	0	0	0	NC
Training	0	0	0	0	NC

Assessment Area Risk Category	# of Open Risks as of 3/31/2023	# of Open Risks as of 4/30/2023	# of Open Risks as of 5/31/2023	# of Open Risks as of 6/30/2023	Quarter Risk Trend (+ - N/C)
User Involvement	0	0	0	0	**NC**
Totals	**9**	**8**	**8**	**8**	**+**

1.6 Identification and Resolution of New Problems Encountered by the CSG iQMS Team

No problems were encountered by the CSG iQMS team during this reporting period. There were no previously encountered problems to resolve.

1.7 UI Modernization Project's Ability to Deliver Approved Scope and Desired Outcomes

At the end of this reporting period there is nothing that indicates the project would not be able to deliver the approved scope (as stated in the UI Modernization Project Scope Plan v3.0) or the desired outcomes (as stated in the UI Modernization Project Charter v3.0 - Goals and Objectives). Some functionally will not be implemented at the scheduled go-live, but will be at a later date, agreed to by the sponsors and business areas. The commercial-off-the-shelf software has not been used for Paid Leave programs to the extent it has been for UI, therefore there was a great deal of configuration needed to meet the Paid Leave requirements.

2. OED MODERNIZATION PROJECT STATUS

2.1 Milestones and Deliverables Status

The major Modernization milestones and deliverables known to the CSG iQMS team for the current and upcoming reporting period are provided in the tables below.

Table 5 – Milestones & Deliverables for the 2nd Quarter 2023

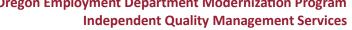| #	Milestone/Deliverable	Owner	Date Due	Status
1.	Work Product – Application Security Plan (R2a)	FAST	April 7, 2023	Accepted
2.	D4.1.14 Quarterly Quality Status and Improvement Report – 1st Quarter 2023	CSG	April 14, 2023	Accepted
3.	Milestone: Web Team - Legacy Application Portfolio Validation	OED	April 17, 2023	Complete
4.	Deliverable – Testing Plan (R2a)	FAST	April 21, 2023	Accepted
5.	Milestone: April Engagement Updates Completed	OED	May 1, 2023	Milestone Canceled
6.	D3.3.31 Monthly Quality Status Report – April 2023	CSG	May 10, 2023	Under Review
7.	Work Product – Test Scenarios (R2a)	FAST	May 16, 2023	Complete
8.	D5.3.6 Security Assessment Schedule (Paid Leave Benefits)	CSG	May 17, 2023	Accepted
9.	Milestone: Preliminary Data Crosswalk Complete	OED	May 18, 2023	Complete
10.	Milestone: Usage Analysis Complete	OED	May 18, 2023	Complete
11.	Work Product – Interface Design Documents (R2a)	FAST	May 19, 2023	Complete
12.	Work Product – Pull List (R2a)	FAST	May 19, 2023	Complete
13.	Work Product – Change Impact Analysis (R2a)	FAST	May 19, 2023	Complete

#	Milestone/Deliverable	Owner	Date Due	Status
14.	Milestone: Development Phase Deliverables Complete (R2a)	FAST	May 19, 2023	Complete
15.	Milestone: Development Phase Complete	FAST	May 22, 2023	Complete
16.	D5.3.5 Security Assessment Plan (Paid Leave Benefits)	CSG	May 26, 2023	Accepted
17.	Deliverable – Training Plan (R2a)	FAST	May 26, 2023	Complete
18.	Milestone: Base Configuration Complete (R2a)	FAST	May 26, 2023	Complete
19.	Milestone: May Engagement Updates Complete	OED	May 31, 2023	Milestone Canceled
20.	Milestone: Testing Phase Complete	FAST	June 2, 2023	Date changed to July 28, 2023
21.	Milestone: Base Configuration Complete (R2b)	FAST	June 9, 2023	Late
22.	D3.3.32 Monthly Quality Status Report – May 2023	CSG	June 12, 2023	Under Review
23.	D5.3.7 Security Assessment Risk Report (Paid Leave Benefits)	CSG	June 29, 2023	Submitted
24.	Milestone: June Engagement Updates Complete	OED	June 30, 2023	Milestone Canceled

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

Table 6 – Upcoming Milestones and Deliverables

#	Milestone/Deliverable	Owner	Date Due
1.	D5.3.8 Security Assessment Executive Presentation – Paid Leave	CSG	July 17, 2023
2.	D4.1.15 Quarterly Quality Assurance Status and Improvement Report – 2nd Quarter 2023	CSG	July 17, 2023
3.	Milestone: Project Planning Tasks Complete (Legacy R2a)	OED	July 17, 2023
4.	Work Product – Test Results (R2a)	FAST	July 21, 2023

#	Milestone/Deliverable	Owner	Date Due
5.	Milestone: Testing Phase Deliverables Complete	FAST	July 21, 2023
6.	Milestone: Testing Phase Complete	FAST	July 28, 2023
7.	Milestone: Training Phase Deliverables Complete	FAST	July 28, 2023
8.	Work Product – Training Material	FAST	July 28, 2023
9.	Work Product – Localized User Documentation	FAST	July 28, 2023
10.	Work Product – Online Help	FAST	July 28, 2023
11.	Work Product – Training Results Report	FAST	July 28, 2023
12.	Milestone: Procurement Management Complete	OED	July 31, 2023
13.	Milestone: Design Datawarehouse Schemas Complete	OED	August 4, 2023
14.	Milestone: Training Phase Complete	FAST	August 4, 2023
15.	D. 3.3.33 Monthly Quality Status Report – July 2023	CSG	August 10, 2023
16.	Milestone: Mainframe Bridging Files Complete	OED	August 14, 2023
17.	Milestone: 2022 Plan Development Complete	OED	August 18, 2023
18.	Milestone: Production Support Phase Deliverables Complete	FAST	August 25, 2023
19.	Work Product – System Maintenance and Support Plan	FAST	August 25, 2023
20.	Milestone: Test Preparation Complete (R2a)	FAST	September 1, 2023
21.	Milestone: Test Preparation Complete (R2b)	FAST	September 1, 2023
22.	D3.3.34 Monthly Quality Status Report – August 2023	CSG	September 13, 2023

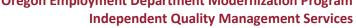| #	Milestone/Deliverable	Owner	Date Due
23.	Milestone: Rollout Phase Deliverables Complete	FAST	September 22, 2023
24.	Work Product – Operations and Support Plan	FAST	September 22, 2023
25.	Work Product – Operations Manual	FAST	September 22, 2023
26.	Work Product – Cutover Checklist/Plan	FAST	September 22, 2023
27.	Work Product – Help Desk/Desk Side Support	FAST	September 22, 2023
28.	Work Product – Updated Disaster Recovery Plan	FAST	September 22, 2023
29.	Milestone: Rollout Phase Complete	FAST	September 22, 2023
30.	Milestone: Production Support Phase Complete	FAST	September 22, 2023
31.	Deliverable – Testing Plan (R2b)	FAST	September 22, 2023

2.2 Analysis by Assessment Area and Quality Standard Categories

Below is the CSG iQMS team's analysis of the UI Modernization Project by assessment area and quality standard categories.

Table 7 – Analysis by Assessment Area and Quality Standard Categories

Assessment Area	Current Analysis
Project Management	The project leadership team continues to periodically review and update the project management plans. With the UI Project nearing its end, UI benefits goes live in less than a year, the priority for annual reviews is not as high, unless the changes are critical or addressing changes needed for the Workforce Project. The project leadership is working closely with business to address issues that arise, and to ensure the different divisions are all informed and engaged with the project.
Customer Involvement / Leadership and Governance	Customer involvement continues to be high. The project is planning more focus groups, with employers and claimant groups. They are ensuring they meet the needs of all customers by providing focus groups in multiple languages and providing in person meetings as well as online meetings. Partner agencies are involved in discussions regarding interfaces and their system needs. The executive sponsor is very involved with the project and continues to support the project and ensure it is a high priority throughout the Agency.
Business Mission and Goals	The UI Modernization Project fits into and directly supports the OED business mission and goals. The project is perceived by internal and external users as necessary.
Technology	The technology is proven technology. The FASTUI solution is implemented in many states.
Facilities and Support	The project team has been growing, which necessitates staff sharing space. This is still working and there are no major concerns regarding the available space. The Modernization team realizes Agency support units are dealing with staffing issues, and plans accordingly, by building in extra time in their plans and schedules to accommodate potential delays.

Assessment Area	Current Analysis
Project Scope	There have been no major changes in scope. The project continues to follow the Governance plan and any change is reviewed and must be approved by the Change Control Board. The project team communicates with affected business areas when clarification is needed and to ensure the business needs are still met with any approved changes. When new requirements are discovered, which was expected and is happening for the still developing Paid Leave program, the changes are managed and prioritized to have the least negative impact on the project and customers.
Project Parameters	This project is a large, complex, multi-year project. It is implementing the functionality for a brand-new benefits program alongside a program with decades of experience. Though the technology is proven and the software is in use in multiple states, the Paid Leave program is unique and there are elements with which no one on the project has experience. The implementation date is set by the legislature.
Requirements Management	The project team continues to review requirements, ensuring they are met by the system and are current and accurate. The team ensures the requirements are verifiable. When new requirements are discovered, they are managed appropriately.
Business Impact / OCM	The UI Modernization Project has a major impact on businesses and claimants, providing account and claim information easily, and allowing them to make changes to their accounts online. It will change the way staff work, eliminating some activities and streamlining others. The Paid Leave program is completely new and has some unique elements. There are ongoing changes as the program develops. The program is dedicated to ensuring accessibility and providing ease of use for all Oregonians. The project team is working with managers to provide guidance and support in meeting the OCM challenges.
Deliverable Quality	Deliverables are produced with no quality issues.
Development and Implementation	While the design for the UI system is well understood, the Paid Leave program is not. The project team does not have a lot of Paid Leave experience as it is a relatively new program nation-wide. During development and implementation, there are times when the project needs to modify their processes or do things a bit differently, such as add touch base meetings, to ensure the new program's needs are meet.
Resources and Staff	Last quarter many resources were added, especially in the area of developers. While this aided the development efforts, it increased the workload and burden on the project's business analysts, and others, to test and work with the developers. The Agency continues to collaborate to develop mitigations for the resource concerns. There are some impacts to the shortage and over-allocated resources, with some meetings not having all the needed individuals represented to move forward. This causes additional work for the meetings owners to gather the needed information and follow up on items.

Assessment Area	Current Analysis
Actual expenditures compared to original (or current baseline) project budget	The UI Modernization Project expenditures continue to be under budget. The Agency continues to monitor and manage the project budget closely.
Project schedule performance compared to original (or current baseline) schedule	The project continues to report no variance for the schedule. The project is on track to rollout per the scheduled date, though, there will be functionality not completed until after rollout.

2.3 Quality Standards High-Level Categories Status

The high-level quality categories from the quality standards that have CSG iQMS risks are:

- Business Mission and Goals – Risk #22
- Design Specification / Management – Risk #18
- Project Management Planning – Risks #23
- Operational Readiness / Support – #17
- Organizational Change Management – Risk #4
- Project Resources – Risk #15 and #21
- Requirements Management – Risk #1

The remaining quality standard categories have no risks or are not currently applicable. These include:

- Data Management
- Development Environment
- Leadership and Governance
- Operating Environment
- Operations
- Planning Oversight
- Platform Components
- Project Parameters
- Quality Management
- Security
- Software Development
- Systems and Acceptance Training
- Training
- User Involvement

3. CSG ıQMS Risks and Recommendations Detail

3.1 New Risks

There were no new risks identified during this reporting period.

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3.2 Previously Reported Risks

The CSG iQMS team is currently monitoring eight previously reported iQMS risks. Below are the risks with the recommendations and the current analysis.

Table 8 – Previously Reported Risks and Recommendations

Previously Reported CSG iQMS Risks							
CSG Risk #1: Requirements Missing **Risk Model ID:** 247 - Functional Requirements Definition **RFP ID**: OR-50* Category: Quality / Requirements Mgmt.		Current	**High Risk Rank**		Previous	**High Risk Rank**	
			High Probability	**High Impact**		**High Probability**	**High Impact**
Risk Trigger: There are missing requirements, and the application does not cover the required functionality.							
Risk Description: The Paid Leave Benefits requirements were recently updated through the Change Control processes. However, there are still undefined business processes and outstanding business decisions. This increases the risk that the application implemented may not meet all the needs of the new program.	**Recommendation:** The CSG iQMS team recommends: The Agency ensure comprehensive requirements have been defined in the requirement documents. The Project ensures the right people are in the Definition meetings. Some processes are not understood by a single person. There may need to be multiple subject matter experts in the meetings to ensure the requirements are included in a definition. The Project ensures adequate time is spent on the pain points for UI Benefits, and process improvement expectations.		**Current Analysis – June 2023:** Not all of the functionality for Paid Leave will be completed when the system goes live, due to a lack of time and missing or misunderstood requirements. The items not completed are put on the pull list. The project team works with business to prioritize those items. Careful consideration is given to what is necessary and what is "nice to have". **Previous Analysis – May 2023:** The Modernization team continues configuring the Paid Leave benefits functionality. There continues to be areas where changes are needed and some of this work is going onto the pull list for completion after rollout. Some of the items on the pull list will have minimal impact as they are for functions that will not be needed at roll out, such as collection related items. Recently there have been some interface needs surfacing that were not initially identified as requirements. These also are being added to the pull list.				

Previously Reported CSG iQMS Risks

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

Risk Trigger: Staff is unable or unwilling to engage with the UI Modernization Project when needed. The staff does not adopt the change.

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 letter templates for UI and Paid Leave benefits. Develop a comprehensive process to review all letters before cutover.

Current Analysis – June 2023: The OCM team continued to attend project meetings to identify business process changes. They are working with business managers on was to inform and involve staff and monitoring the acceptance of the changes. The project team is conducting its second readiness assessment for Rollout 2 now and will be working with managers to analyze and address the findings.

The Paid Leave program continues to hire staff. This does create challenges with training. It is preferable to have policy or business process training first and then Frances training, but it is not always possible.

Previous Analysis – May 2023: IT management is working with staff regarding their job changes once UI is transitioned from the mainframe to Frances, looking at career options and pursuing additional training where needed.

The Modernization OCM group is working with managers, creating infographics for the major business changes, attending staff meetings, and working on staff engagement to prepare for the changes coming. There is anxiousness, not necessarily about the new system, but the changes to the Agency. Staff have been dealing with major changes for over three years, and there is some change fatigue.

Previously Reported CSG iQMS Risks

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

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	Recommendation	Analysis
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 identify and document internal and external interfaces and dependencies and prepare for data migration. Consider other resources to assist with some of the IT support activities, such as the solution vendor, or other vendor. 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 purpose.	**Current Analysis – June 2023:** OED IT has had some delays on Rollout 2b legacy activities due to Frances files and data not being received when needed. The resources are stretched thin, and management is monitoring and developing remediation. The CSG iQMS team will continue to monitor this risk. **Previous Analysis – May 2023:** IT management is talking to retired staff to arrange their availability during the UI benefits conversion and rollout. Other staff are being mentored to take over as leads in the IT area. IT has started the decommissioning activities of the UI tax system as time allows.

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	**Medium Risk Rank**		Previous	**Medium Risk Rank**	
		Medium Probability	**Medium Impact**		**Medium 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 for the implementation of Frances.

Consider careful prioritization of 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 – June 2023: The project and OED IT have reassessed the need for a detailed WBS. They have identified and documented the critical dates and activities, such as testing. They are managing to those dates. The scheduled activities will evolve as they dive into the work and identify additional activities or need to adjust schedule dates. This is the critical information needed and helps to mitigate this risk.

The CSG iQMS team continues to monitor this risk.

Previous Analysis – May 2023: The Modernization team and IT have been meeting regularly to identify tasks and the impact of Frances and Frances Online on individual legacy systems—completion of developing scheduled activities is targeted for July 17, 2023.

Previously Reported CSG iQMS Risks

CSG Risk # 18: Concurrent Paid Leave Implementation **Risk Model ID:** 455 Design Clarity **RFP ID**: OR-52 Category: Quality / Design Specification	Current	**Medium Risk Rank**		Previous	**Medium Risk Rank**	
		Medium Probability	**Medium Impact**		**Medium Probability**	**Medium Impact**

Risk Trigger: Incorporating the PMFLI functionality into Frances negatively impacts OCM, training, or the master schedule.

Risk Description	Recommendations	Current Analysis – June 2023
Risk Description: The business decision to incorporate the PFMLI functionality into the UI Modernization Project has introduced some potential challenges for the project, including: The support staff will be learning both a new system (Frances) and in the case of UI tax staff, a new program (PFMLI) creating the potential need for additional organizational change and training support. There are likely similar impacts to other support functions such as audits and collections. The potential impact on the training schedule and system development effort to facilitate additional requirements of PFMLI. The PFMLI program has not been fully implemented and is in the process of developing the supporting policy and Administrative Rules concurrent with the definition process for Frances introducing the potential for rework.	**Recommendations**: The Modernization team should consider a focused effort to identify the potential impacts to the current project plan and schedule and develop necessary mitigations. The Modernization team and Contributions team should consider planning additional resources or time for training the Contributions team who will need both system training and program training. Consider initiating PFMLI program training as soon as PFMLI contributions are defined. The PFMLI Program should continue developing the business processes and detailed requirements for PFMLI benefits, to ensure PFMLI BAs and subject matter experts are prepared for the Definition phase of Rollout 2.	**Current Analysis – June 2023:** Paid Leave benefits goes live August 14, for filing claims and other activities. Payment of Paid Leave benefits begins September 11. The project team has planned two production support streams. The project team has worked to ensure the new program receives the attention needed for a successful launch. Time was short and there will be things not completed by go-live. There were requirements that were not known until late in development and they will not be ready at go-live. The project team and business are working to prioritize these items. The CSG iQMS team is monitoring this risk. **Previous Analysis – May 2023:** Paid Leave continues finalizing outstanding design or configuration decisions. Significant changes are going onto the requirement "pull list" and may not be available on the initial August 14 rollout date. The Modernization team is working with the business to prioritize the work and if needed to create workarounds. Paid Leave continues to hire and train new staff. They are trying to coordinate the onboarding training, Frances training, and Paid Leave program training to ensure training is cohesive and meets the user's needs.

Previously Reported CSG iQMS Risks

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

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

Risk Description	Recommendation	Current / Previous Analysis
Risk Description: The Contributions and Recovery 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 continue 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 – June 2023:** This is a very busy time for the project, with testing, training, development, production support, conversion, and other activities happening at the same time. It is impacting meetings such as the cutover meetings, where not all the needed individuals are present. Items to address either must be carried over or the meeting owner needs to reach out to the individuals separately for the needed information. Project management is developing strategies to address the resource issues. The CSG iQMS team will continue to monitor. **Previous Analysis – May 2023 -** Resource demands continue to be a concern. Business areas are challenged with competing priorities and struggle to meet task deadlines as daily work and other high-priority activities, such as testing and training, need attention. There is a desire to focus on these activities, but they have limited availability. There are similar resource constraints with support areas supporting the project and competing priorities. Along with project staff who have similar challenges keeping Contributions on track, prepare for the implementation of Paid Leave benefits, and continue the development of UI benefits. All staff members must prioritize and reach out when needing assistance on critical activities.

Previously Reported CSG iQMS Risks

CSG Risk #22: Schedule Missing Key Elements **Risk Model ID**: 058 Project Schedule – Task Dependencies **RFP ID:** OR-7 Category: Schedule / Business Mission & Goals	Current	**Medium Risk Rank**		Previous	**Medium Risk Rank**	
		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 at a sufficient level of detail to include tasks, dependencies, resources, estimated work, and realistic durations. The WBS should be reviewed on a regular basis 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 – June 2023:** The project team has been conducting quality reviews of the master schedule and there are minimal incorrect dates. However, the schedule does not calculate variances for all activities. There are no schedule variances reported on the DAS quarterly reports. The master schedule also is missing some dependencies. There is no concern regarding the go-live for Paid Leave benefits being met. However, there are items that will not be available at go-live. Though the project will work with business to ensure the items with the highest priorities are completed as soon as possible, there is no guarantee of when that will be, due to the focus of the project shifting to UI benefits after rollout support is over. The CSG iQMS team will continue to monitor this risk. **Previous Analysis – May 2023**: The Modernization team has been refining and evaluating the effectiveness of the master schedule. They continue to update and tweak it to improve accuracy and usability.

Previously Reported CSG iQMS Risks

Risk # 23: Cutover Plan Missing Details

Risk Model ID: 046 Cutover Planning - Operational Readiness and Support

RFP ID: OR-45   Category: Project Management Planning

Current	Low Risk Rank		Previous	Low Risk Rank	
	Low Probability	Medium Impact		Low Probability	Medium Impact

Risk Trigger: Cutover activities are not completed timely, there is confusion regarding cutover responsibilities, or there is duplicate data processed or propagated.

Risk Description: The project's R1 formal cutover plan was not completed until right before go-live. It also was not disseminated to all interested parties, as many individuals had not seen it before go-live. The plan does not include a list of roles and responsibilities or a high-level schedule. A cutover plan should include details for the activities related to planning, preparing, and executing the cutover tasks, including details of who is on point, who is to be notified, how to be notified (communications), a mitigation plan or rollback, pre-determined verification points and details for monitoring cutover activities.

Instead of a formal cutover plan, the team leveraged the workbench tool for documenting cutover activities, making it difficult for some to follow. The tool's activity ID sequencing numbering is assigned when creating an activity and does not follow the mainframe's job sequence and timeframes within the tool device. The tool has limitations in exporting information into a usable format which presents another challenge for displaying activities' status to compare against actionable mainframe activities and status.

Recommendation: The CSG iQMS team recommends the project develop a cutover plan for Rollout 2 with details of cutover activities (with assigned owners, timeframes, successors, and predecessors) for turning over systems and job sequencing. Include the types of cutover communications and recipients, rollback procedures or mitigation strategies, verification points, and monitoring activities within the plan. The plan should describe how to lock down the system from a technical perspective, preparing the procedure for operation and release for end users. The plan should also be shared with all individuals included in the cutover process, so they clearly understand their role.

Current Analysis – June 2023: Cutover activities continue with weekly meetings. The Modernization team have drafted an OED R2 Cutover Plan. The project team plans to address the risk listed here and adopt appropriate recommendations in the plan.

The CSG iQMS team will continue to monitor this risk.

Previous Analysis – May 2023: The OED Modernization leadership is working with FAST on modifying the FAST Cutover plan to align with the OED Modernization Cutover Plan. The Modernization team has created an outline of their Cutover plan and are drafting it now. The team has plans to share the drafts broadly to ensure everyone involved in cutover understand the process and approach.

3.3   Risks Resolved During the Reporting Period

During this reporting period, no risks were resolved.

3.4   CSG Issues Raised

As of June 30, 2023, there are no open CSG iQMS issues.

4. DAS EIS PROJECT ASSESSMENT AND PROJECT BUDGET

These reports evaluate the project according to key evaluation criteria established by EIS and establishes a baseline for future EIS project assessment reports.

4.1 Project Assessment Report

4.1.1 Overall Project Health

Total Cost

The CSG iQMS team agrees with the rating of green. Budget for the project is adequate to complete the project. The project tracks and reports budget variances.

Schedule

The CSG iQMS team agrees with the rating of yellow. There is no concern the project will miss its planned implementation dates. The project continues to report no schedule variance, though there are tasks and milestones with variances. The variance reported of zero is only in relationship to the Go-Live date for Rollout 2a.

Scope

The CSG iQMS team agrees with the rating of green for scope. The scope is stable and managed well by the project and Agency. There have been no major changes to scope since adding the Paid Leave functionality, though there is more configuration needed.

Resource

The CSG iQMS team has a risk regrading resources ranked high risk. The Agency and project are working to meet the resource demands of the project while maintain service levels to the customers. Staff are becoming fatigued, and the Agency is looking at ways besides overtime to address the issue.

Deliverables (Work Products) Quality

The CSG iQMS team agrees with the rating of green.

4.1.2   Overall Delivery Risk

Technology

The CSG iQMS team agrees with the rating for low for technology. The technology being deployed is a proven system for UI.

Financial & Business Case

The CSG iQMS team agrees with the rating of low; there is no concern with the project achieving the business case targets.

Business Transition

The CSG iQMS team agrees with the medium rating. The project supports the business areas and there has been additional training for internal users, and education efforts for external users.

Funding

The CSG iQMS team agrees with the low rating for funding.

4.1.3   O&M Risk

Long-Term Supportability

The CSG iQMS team agrees with the low rating for Long-Term Supportability.

Long-Term Maintainability

The CSG iQMS team agrees with the low rating for Long-Term Maintainability.

Project Assessment Report
Version 2.0

Project Name:		UI Modernization
Agency Name:		Oregon Employment Department (OED)
Person completing this form and affiliation:		David Ford, Modernization Program Manager
Date of completing this form:		5/12/2023
Technology Description		Implementation of the FASTUI commercial off-the-shelf (COTS) solution for administration of UI and Paid Leave Oregon contributions and benefits programs
Platforms:		FASTUI COTS built using Microsoft tools and technology to run on industry-standard server platforms and modern web browser clients
% custom:		0%
Funding Description		The Modernization Program is currently funded by American Recovery and Reinvestment Act Funds distributed in 2009, also known as Modernization funds, which reside in the UI Trust Fund. Additional revenue sources include: Supplemental Employment Department Administrative Fund (SEDAF), Penalty and Interest funds collected by the agency, Trade Adjustment Assistance funds. The implementation of the Paid Leave Oregon program is funded by a General Fund loan in the 2021-23 biennium. This loan will be repaid, no later than June 30, 2023, by employer and employee contributions collected by the agency and paid into the Paid Leave trust fund. The Paid Leave Oregon Fund will pay for Paid Leave Oregon benefits, small business grants, and administration costs.

		Rating	Rating	Explanation	Rating Scale^
		(rear view)	(fwd view)		
1	**Overall Project Health**				Red, yellow, green*
1a	Total Cost (Budget)			Overall health of budget remains green.	Red, yellow, green*

1b	Schedule			The schedule was re-baselined to accommodate Rollouts 2a and 2b. The combined MOD IT Project Management team focused on improving schedule quality by adding expertise and reinforcing schedule management procedures; employing early and regularly meetings between IT staff and the Frances team to understand and validate the scope of IT work and resources needed to deploy Frances and to decommission, update or make bridges to legacy and existing systems.	Red, yellow, green*
1c	Scope			All deliverables are expected to meet stated requirements and project scope is stable. The OED IT and Frances teams are actively engaged in breaking down the work required to deploy Frances, and bridge or decommission legacy and existing systems.	Red, yellow, green*
1d	Resource			The project continues to provide resources to assist business operational areas as needed with training and business process changes as part of Rollout 1 support. SMEs from all impacted business areas of the agency regularly attend project meetings and are engaging as needed for Rollout 2 implementation activities. The vendor (FAST) is executing their resource management plan by adding staff for development and training for the benefits rollout. In addition, the Modernization team, Paid Leave, and Contributions & Recovery continue to strategically fill vacancies for their respective teams. The Unemployment Insurance division and IT have hiring freezes due to budget constraints. These constraints are not currently impacting their support for Modernization, but could have an impact if departures occur in key roles.	Red, yellow, green*
1e	Deliverables (Work Products) Quality			All deliverables are expected to be fit for use. Project team is actively managing staff and vendor deliverables and holding firm to expectations tied to contractual agreements and quality standards.	Red, yellow, green*
2	**Overall Delivery Risk**				high, medium, low*
2a	Technology	N/A	Low	All technology being employed is stable.	high, medium, low*

2b	Financial & Business Case	Low	Low	There is no reason to think that the business case targets cannot be achieved.	high, medium, low*
2c	Business Transition	N/A	Medium	Overall business transition is being executed as planned in the new system with a few disruptions to business operations (as expected). We continue to assist the program with monitoring Frances usage, and to provide training to business program areas as well as employers and Third Party Administrators. Production ticketing systems have been deployed and are in use, while ongoing meetings are held with program areas to build skills in creating Frances tickets and to prioritize future changes and enhancements. Frances Business Analysts and Program SMEs reviewed all Frances-generated letters for content accuracy and routed to the State print plant as expected. Impacted business units are gaining experience and growing expertise in doing their day to day work in Frances. The Frances team is working with the business to develop KPI and other reporting from Frances, and training is being developed for business and IT staff to use Frances reporting tools to generate their own data queries. The project will continue to provide operational support and training. This includes providing tools and tips for staff and supervisors, and partnering with executives, managers, and Human Resources where needed.	high, medium, low*
2d	Funding	N/A	Low	All future tasking requires resources that are expected to be available.	high, medium, low*
3	**O&M Risk**				
3a	Long-Term Supportability	N/A	Low	All aspects of the IT investment are supportable and will have an IT support plan produced during the project for long term use. While still in project mode, the Frances team is providing support to critical business areas as needed. This work has included creating the initial business processes for ticket submission and working with program areas to	high, medium, low*

				prioritize requested changes and enhancements to Frances.	
3b	Long-Term Maintainability	N/A	Low	All aspects of the IT investment are maintainable and will have an IT maintenance plan produced during the project for long term use.	high, medium, low*

Notes:

^   See attached description of scale.

*   Explanation not required when "green" or "low".

1a   Total Cost (Budget)

Green = actual is (is expected to be) at or under approved budget baseline, as reported on Project Variance Report.

Yellow = actual is (is expected to be) within 0 to 15% above approved budget baseline, as reported on Project Variance Report.

Red = actual is (is expected to be) more than 15% above approved budget baseline, as reported on Project Variance Report.

1b   Schedule

Green = project completion is (is expected to be) at or before approved schedule baseline, as reported on Project Variance Report.

Yellow = project completion is (is expected to be) delayed with project duration 0 to 15% above approved schedule baseline, as reported on Project Variance Report.

Red = project completion is (is expected to be) delayed with project duration more than 15% above approved schedule baseline, as reported on Project Variance Report.

1c   Scope

Green = all deliverables fulfill (are expected to fulfill) stated requirements.

Yellow = at least one deliverables does not fulfill (is not expected to fulfill) stated requirements.

Red = more than one deliverables do not fulfill (are not expected to fulfill) stated requirements.

1d   Resource

Green = All resources needed by internal and contractor staff are (are expected to be) available.

Yellow = Almost all resources needed by internal and contractor staff are (are expected to be) available.
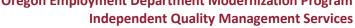
Red = Almost all resources needed by internal and contractor staff are (are expected to be) unavailable.

1e   Deliverables (Work Products) Quality   *(Work Products include all planning and design artifacts.)*

Green = All deliverables are (are expected to be) "fit to use".

Yellow = at least one deliverables is (is expected to be) not "fit to use".

Red = more than one deliverable is not (is not expected to be)"fit to use".

2a | Technology

Low = all technology employed (including development and testing tools) are stable.

Medium = almost all technology employed (including development and testing tools) are stable.

High = Almost all technology employed (including development and testing tools) are unstable.

2b | Financial & Business Case

Low = there is no reason to think that the original business case & ROI targets (if exist) cannot be achieved.

Medium = there is some reason to think that the original business case & ROI targets (if exist) cannot be achieved.

High = there are many reasons to think that the original business case & ROI targets (if exist) cannot be achieved.

2c | Business Transition

Low = Business transition and disruption are well planned with few surprises to business operations expected.

Medium = Business transition and disruption are planned, but surprises to business operations are expected.

High = Business transition and disruption are not planned with surprises to business operations expected.

2d | Funding

Low = All future tasking requires resources that are expected to be available.

Medium = Almost all future tasking requires resources that are expected to be available.

High = Almost all future tasking requires resources that are expected to be unavailable.

3a | Supportability   *(work required to ensure proper operation of specified system functions)*

Low = All aspects of the IT investment are supportable in the long-run.

Medium = Most aspects of the IT investment are supportable in the long-run.

High = Many aspects of the IT investment are not supportable in the long-run.

3b | Maintainability   *(work required to enhance specified system functions)*

Low = All aspects of the IT investment are maintainable in the long-run.

Medium = Most aspects of the IT investment are maintainable in the long-run.

High = Many aspects of the IT investment are not maintainable in the long-run.

4.2 Project Variance Report

Project Variance Report (Version 2.3)											
		Budget Variance									
		Current Budget Variance				Projected Budget Variance at Completion					
Project	Report as of Date	Actual Expenditures	Planned Expenditures	Variance Amount	Variance Percentage	Date Baseline Occurred	Baseline Budget	Estimate At Complete	Variance Amount	Variance Percentage	Comments
UI Mod Project	3/31/2023	$ 43,654,957	$ 45,718,898	$ (2,063,940)	-5%	9/27/2022	$106,410,963	$102,084,372	$ (4,326,592)	-4.2%	The "current budget variance" figures included in this report have been updated to incorporate total project budget and expenditures-to-date rather than solely being focused on current biennium variance. Additionally, the current re-baselined budget includes Contingency. UI Modernization Project is under budget due to staff turn-over, recruitment challenges for technical positions, strategic hiring delays for specific roles, lower than projected SME project hours, and unused contingency. Current and projected budget variance(s) does not have negative impact on the success of project execution.
				$ -	0%				$ -	0.0%	
				$ -	0%				$ -	0.0%	
				$ -	0%				$ -	0.0%	
		Budget Variance Key									
			At or under Original or Re-baselined Cost Estimate								
			Within 0-15% of Original or Re-baselined Cost Estimate								
			More than 15% of Original or Re-baselined Cost Estimate								

		Schedule Variance									
		Current Schedule Variance				Projected Schedule Variance at Completion					
Project	Project Start Date	Actual Date	Earned Date	Variance Amount (Days)	Variance Percentage	Date Baseline Occurred	Baseline End Date	Projected End Date	Variance Amount (Days)	Variance Percentage	Comments
UI Mod Project - R2A - Implement Frances for Paid Leave Oregon benefits	12/28/2018	05/12/23	05/12/23	0	0%	11/7/2022	09/22/23	09/22/23	0	0.0%	The UI Modernization Project rollout 2A is proceeding per planned timelines and milestones. There is no current schedule variance for the planned and projected rollout implementation.
UI Mod Project - R2B - Implement Frances for UI benefits	12/28/2018	05/12/23	05/12/23	0	0%	11/7/2022	03/15/24	03/15/24	0	0.0%	The UI Modernization Project rollout 2B is proceeding per planned timelines and milestones. There is no current schedule variance for the planned and projected rollout implementation.
				Schedule Variance Key							
					At or under Original or rebaselined schedule						
					0-15% of Original or rebaselined schedule						
					More than 15% of Actual or Baseline Date						

5. CATALOG OF REVIEWS

This section identifies the OED Modernization documents and materials reviewed, individuals interviewed by the CSG iQMS team, and the meetings attended during the reporting period, April 1, 2023 through June 30, 2023. The activities in April and May 2023 were previously reported in the Monthly Quality Status Reports and are included here as they are inputs to this quarterly report as well.

5.1 Documents and Materials Reviewed

The tables below identify the OED Modernization documents and materials reviewed by the CSG iQMS team during the 2nd quarter of 2023. Over the course of the project life cycle, materials may be re-reviewed over time as they support the CSG iQMS activities.

Table 9 – Documents and Materials Reviewed in June 2023

#	Documents or Materials Reviewed	File Name
1.	Search and Add to Tickets	Search and Add to Tickets.pdf
2.	Paid Leave Benefit Year Begin Change	Paid Leave BYB Change.pdf
3.	UI Benefits Financial Calculations	UI Benefits Financial Calculations.pdf
4.	Copy of Appealable Letters for R2a	Copy of Appealable Letters for R2a.xlsx
5.	Purification Status Report – June 5, 2023	5-Jun-2023.pdf
6.	OED Modernization Program and UI Project Risk and Issue Report 2023-5-31	OED Modernization Program and UI Project Risk and Issue Report 2023-5-31.docx
7.	Purification Status Report – June 12, 2023	12-Jun-23.pdf
8.	Purification Status Report – June 20, 2023	20-Jun-23.pdf
9.	Paid Leave Oregon Newsletter	Employees, your Paid Leave guide is here!.eml
10.	Paid Leave Oregon Employee Guidebook	Paid-Leave-Oregon-Employee-Guidebook-EN.pdf
11.	Production Freeze for Paid Leave Rollout.	Production Freeze for Paid Leave Rollout.pdf
12.	Amend a Paid Leave Claim Workflow	Paid Leave Amend Update.pdf
13.	Strategies for Overcoming Change Fatigue	Strategies for Overcoming Change Fatigue Infographic.pdf
14.	Paid Leave Benefits Year Begin (BYB) Change	Paid Leave BYB Change.pdf
15.	Successor in Interest – Equivalent Plan	Paid Leave Successor in Interest-EP.pdf
16.	Priority SQR Summary 6.23.2023	Priority SQR Summary 6.23.2023.pdf
17.	Purification Status Report – June 26, 2023	26-Jun-23.pdf

#	Documents or Materials Reviewed	File Name
18.	Change Control Report 2023-05	Change Control Report 2023-05.pdf
19.	Modernization UI Project Rebaselined Budget 2023-04	Modernization UI Project Rebaselined Budget 2023-04.pdf
20.	OED Modernization Program and UI Project Risk and Issue Report 2023-05-31	OED Modernization Program and UI Project Risk and Issue Report 2023-05-31.pdf
21.	Workforce Modernization Project Status Report 2023-05	Workforce Modernization Project Status Report 2023-05.pdf
22.	UI Modernization Project Status Report 2023-05	UI Modernization Project Status Report 2023-05.pdf
23.	2023-05-15 Modernization ESC Minutes (Draft)	2023-05-15 Modernization ESC Agenda with Minutes DRAFT.docx
24.	Paid Leave Overpayment Scenarios	Paid Leave OP Scenarios.docx
25.	Organizational Change Management Infographic	01 Clarc.pdf
26.	The CLARC Model – Communicator	02 Communicator.pdf
27.	The CLARC Model – Liaison	03 Liason.pdf
28.	The CLARC Model – Advocate	04 Advocate.pdf
29.	The CLARC Model – Resistance Manager	05 Resistance Manager.pdf
30.	The CLARC Model - Coach	06 Coach.pdf

Table 10 – Documents and Materials Reviewed in April and May 2023

#	Documents or Materials Reviewed	File Name
1.	Information Gathering – Paid Leave	Information Gathering Paid Leave.pdf
2.	Fact-Finding Question Flow Process	Fact Finding Question Flow.pdf
3.	Paid Leave Intermittent Weekly Claim Process	Paid Leave Intermittent Weekly Claim Process.pdf
4.	UI Modernization Project Stakeholder Engagement Plan V3.0 2023-04-04	UI Modernization Project Stakeholder Engagement Plan V3.0 2023-04-04.docx
5.	Modernization Document Registry 2022-10-24	Modernization Document Registry 2022-10-24.xlsx
6.	OED Modernization Program and UI Project Risk and Issue Report 2023-3-31	OED Modernization Program and UI Project Risk and Issue Report 2023-3-31draft.docx
7.	Priority SQR Summary – April 3, 2023	104220.pdf

#	Documents or Materials Reviewed	File Name
8.	Purification Status Report – April 2, 2023	02-April-2023.pdf
9.	Suspended Payroll Reports	Suspended Reports.pdf
10.	Introduction to Equivalent Plans	Introductions to Equivalent Plans.pdf
11.	Equivalent Plan Modification Process	Paid Leave EP Modification.pdf
12.	Amend a Paid Leave Claim	Amend a Paid Leave Claim.pdf
13.	Paid Leave Benefit Eligibility Review Process	Paid Leave Benefit Eligibility Review.pdf
14.	Purification Status Report – April 10, 2023	10-April-2023.pdf
15.	Purification Status Report – April 17, 2023	17-April-2023.pdf
16.	Workforce Modernization Project Status Report 2023-03	Workforce Modernization Project Status Report 2023-03.pdf
17.	Modernization UI Project Rebaselined Budget 2023-02	Modernization UI Project Rebaselined Budget_2023-02.pdf
18.	R2a Testing Item Status by Week 04-14-2023	R2a Testing Item Status by Week 04-14-2023.xlsx
19.	OED Modernization Program and UI Project Risk and Issue Report 2023-03-31	OED Modernization Program and UI Project Risk and Issue Report 2023-03-31.pdf
20.	UI Modernization Project Status Report 2023.03	UI Modernization Project Status Report 2023.03.pdf
21.	2023-03-20 Modernization ESC Minutes - Draft	2023-03-20 Modernization ESC Agenda with Minutes DRAFT 2023-04-14.docx
22.	R2a Testing Item Status by Week 04-21-2023	R2a Testing Item Status by Week 04212023.xlsx
23.	Purification Status Report – 04-24-2023	24-Apr-2023.pdf
24.	Paid Leave Oregon April Bulletin: Your top five questions	Paid Leave Oregon April Bulletin: Your top five questions.eml
25.	Paid Leave Claim Cancellation Process	Paid Leave Claim Cancellation.pdf
26.	Paid Leave Base Year Wages	Paid Leave Base Year Wages.pdf
27.	R&R Support for Paid Leave	R&R Support for Paid Leave.pdf
28.	Conversion Verification Session 2 Report, April 25, 2023	Session 2 Verification.pdf
29.	Employer Alert: Paid Leave Oregon is Part of Your Combined Payroll Report	Employer Alert: Paid Leave Oregon is part of your Combined Payroll Report.eml

#	Documents or Materials Reviewed	File Name
30.	Modernization UI Project Rebaselined Budget – 2023-03	Modernization UI Project Rebaselined Budget_2023-03.xlsx
31.	Modernization March 2023 Section Budget Report	Modernization March2023 Section Budget Report.xlsx
32.	FTE July 2021 to March 2023	FTE July 21 to March 23.xlsx
33.	March 2023 Document Detail Budget Report	March2023 Document Detail.xlsx
34.	March 2023 Modernization 24-Month Budget Tracker	March2023 MODERNIZATION 24-month budget tracker.xlsx
35.	TPA Improvements Infographic	TPA Improvements.pdf
36.	Paid Leave Cancel DOI or Approved Workflow	Paid Leave Cancel DOI or Approved EP.pdf
37.	Paid Leave Claimant Reports Other Benefits Workflow	Paid Leave Report Other Benefits.pdf
38.	Equivalent Plan Compliance Review and Letters Workflow	Equivalent Plan Compliance Review and Letters.pdf
39.	Production Freeze for Paid Leave Rollout Infographic	Production Freeze for Paid Leave Rollout.pdf
40.	Modernization Update – April 2023	Modernization Update – April 2023.eml
41.	R2a Testing Item Status by Week 04282023	R2a Testing Item Status by Week 04282023.xlsx
42.	Purification Status Report – May 1, 2023	01-May-2023.pdf
43.	Modernization 2023 Bill Tracker	MOD 2023 Bill Tracker Spreadsheet.xlsx
44.	Purification Status Report - May 8, 2023	08-May-2023.pdf
45.	Change Request 121 – Requirement BCH-003	Change Request 121 – Requirement BCH-003.docx
46.	Change Request 120 – Requirement BCH-048	Change Request 120 – Requirement BCH-048.docx
47.	Change Request 119 – Requirement BCH-002	Change Request 119 – Requirement BCH-002.docx
48.	Change Request 109 – PFMLI-GEN-25 – Estimated WBA	Change Request 109 – PFMLI-GEN-25 – Estimated WBA.docx
49.	Change Request 108 – PFMLI-GEN-24 – Pay Estimated WBA	Change Request 108 – PFMLI-GEN-24 – Pay Estimated WBA.docx
50.	R2a R2b Frances Cutover Checklist and Plan DRAFT	R2a R2b Frances Cutover Checklist and Plan DRAFT.docx
51.	Change Control Report 2023-04	Change Control Report 2023-04.pdf

#	Documents or Materials Reviewed	File Name
52.	Modernization UI Project Rebaselined Budget 2023-03	Modernization UI Project Rebaselined Budget_2023-03.pdf
53.	Workforce Modernization Project Status Report 2023-04	Workforce Modernization Project Status Report 2023-04.pdf
54.	UI Modernization Project Status Report 2023-04	UI Modernization Project Status Report 2023-04.pdf
55.	2023-04-17 Modernization ESC Agenda and minutes DRAFT	2023-04-17 Modernization ESC Agenda and minutes DRAFT.docx
56.	OED Modernization Program and UI Project Risk and Issue Report 2023-04-30	OED Modernization Program and UI Project Risk and Issue Report 2023-04-30.pdf
57.	Q3 2022 Penalty and Interest	Q3 2022 Penalty and Interest.pdf
58.	Paid Leave Wage Corrections	Paid Leave Wage Corrections.pdf
59.	Paid Leave Newsletter 5-16-2023– How Paid Leave Supports Families	How Paid Leave Supports Families.eml
60.	R2a Testing Item Status by Week of 05122023	R2a Testing Item Status by Week of 05122023.xlsx
61.	Paid Leave Issue List	Paid Leave Issue List.xlsx
62.	Letters and Timelines – UI Benefits Process Change	Letters and Timelines.pdf
63.	Frances Online Customer Support	Frances Online Customer Support.pdf
64.	Customer Communication.	Customer Communication.pdf
65.	Paid Leave Equivalent Plan Appeal Workflow	Equivalent Plan Appeal.pdf
66.	Paid Leave Equivalent Plan Reapproval Workflow	Paid Leave EP Reapproval.pdf
67.	Employer Assistance Grant Application Workflow	Employer Assistance Grant Application.pdf
68.	Paid Leave Claimant Designated Rep Workflow	Paid Leave Claimant Designated Rep.pdf
69.	Paid Leave Overpayments Process	Paid Leave Overpayments.pdf
70.	OED Modernization Program and Project Risk and Issue Report 2023-04-30	OED Modernization Program and Project Risk and Issue Report 2023-04-30.docx
71.	R2a Testing Item Status by week 05192023	R2a Testing Item Status by week 05192023.xlsx
72.	Purification Status Report – May 22, 2023	22-May-2023.pdf
73.	Purification Status Report – May 29, 2023	29-May-2023.pdf
74.	R2a Testing Item Status by Week 05262023	R2a Testing Item Status by Week 05262023.xlsx

#	Documents or Materials Reviewed	File Name
75.	Modernization UI Project Rebaselined Budget_2023-04	Modernization UI Project Rebaselined Budget_2023-04.xlsx
76.	Modernization April 2023 Section Budget Report	Modernization April2023 Section Budget Report.xlsx
77.	FTE July 2021 to April 2023	FTE July 21 to April 23.xlsx
78.	April 2023 Document Detail Budget Report	April2023 Document Detail.xlsx
79.	April 2023 Modernization 24-Month Budget Tracker	April2023 MODERNIZATION 24-month budget tracker.xlsx

5.2   Interviews Conducted

The tables below list the OED Modernization stakeholders interviewed by the CSG iQMS team during the 2nd quarter of 2023.

Table 11 – Interviews Conducted in June 2023

#	Interviewee	Interview Date	CSG Participants
1.	Kim Keeler	June 5, 2023	Jayne Martin
2.	Jill Coleman	June 5, 2023	Jayne Martin
3.	Allen Spangler	June 7, 2023	Jayne Martin
4.	James Wollenweber	June 7, 2023	Jayne Martin, Joe Mindock, and Digby Morrow
5.	Shaun Skelton	June 7, 2023	Jayne Martin, Joe Mindock, and Digby Morrow
6.	Renee Royston	June 12, 2023	Jayne Martin
7.	Natalie O'Neill	June 12, 2023	Jayne Martin
8.	Ali Rasouli	June 20, 2023	Jayne Martin
9.	Juan Serratos	June 21, 2023	Jayne Martin
10.	Shannon Ball	June 21, 2023	Jayne Martin

Table 12 – Interviews Conducted in April and May 2023

#	Interviewees	Interview Date	CSG Participants
1.	Renee Royston	April 13, 2023	Jayne Martin
2.	Michelle Nguyen	April 19, 2023	Jayne Martin

#	Interviewees	Interview Date	CSG Participants
3.	Juan Serratos	April 19, 2023	Jayne Martin
4.	Shilo Owen	April 27, 2023	Jayne Martin
5.	Martin Kraal	April 27, 2023	Jayne Martin
6.	Heather Whiteis	April 27, 2023	Jayne Martin
7.	Jenna Pourciau	April 27, 2023	Jayne Martin
8.	Lea Cozart	April 28, 2023	Jayne Martin
9.	Leanne Singleton	April 28, 2023	Jayne Martin
10.	Josh Williams	May 2, 2023	Jayne Martin
11.	Kelly Menard	May 11, 2023	Jayne Martin
12.	Renee Royston	May 11, 2023	Jayne Martin
13.	Bill Truex	May 16, 2023	Jayne Martin
14.	Karen Madden Humelbaugh	May 17, 2023	Jayne Martin
15.	Maggie Gleason	May 17, 2023	Jayne Martin
16.	Tammy Hedrick	May 18, 2023	Jayne Martin
17.	Sheri Murphy	May 22, 2023	Jayne Martin
18.	Lisa Schriever	May 22, 2023	Jayne Martin
19.	Alex Kasner	May 24, 2023	Jayne Martin
20.	Vann Keo	May 24, 2023	Jayne Martin
21.	Margaret Ellis	May 24, 2023	Jayne Martin
22.	Josh Westbrook	May 26, 2023	Jayne Martin
23.	Sara Cromwell	May 30, 2023	Jayne Martin

5.3   Meetings Attended

The OED Modernization meetings attended by the CSG iQMS team during the 2nd quarter of 2023 are listed in the tables below.

Table 13 – Meetings Attended in June 2023

#	OED Modernization Meetings	Scheduled Date	CSG Participants
1.	Findings Meeting	June 1, 2023	Jayne Martin
2.	R2 Go Back – Registration, Monetary Determinations, and Identity Verification	June 1, 2023	Jayne Martin
3.	Non-Monetary/Appeal/Assistance Grants	June 5, 2023	Jayne Martin
4.	R2 Definition Sessions – Recovery/Interfaces	June 5, 2023	Jayne Martin
5.	Monthly MOD Staff Meeting	June 6, 2023	Jayne Martin
6.	iQMS Touchbase	June 6, 2023	Jayne Martin
7.	OED Data Warehouse and Frances Data	June 6, 2023	Jayne Martin
8.	R2 Go-Back – Recovery/Interfaces – Equivalent Plan Terminations	June 7, 2023	Jayne Martin
9.	Frances SQR Prioritization Meeting	June 7, 2023	Jayne Martin
10.	Jayne	SJ Touchbase	June 7, 2023	Jayne Martin
11.	Findings Meeting	June 8, 2023	Jayne Martin
12.	R2 Go Back – Registration, Monetary Determinations, and Identity Verification	June 8, 2023	Jayne Martin
13.	Daily E2E Huddle	June 12, 2023	Jayne Martin
14.	UI Modernization Project Risk and Issue Management Team	June 12, 2023	Jayne Martin
15.	Daily E2E Huddle	June 13, 2023	Jayne Martin
16.	MOD Monthly All STAF Meeting	June 13, 2023	Jayne Martin
17.	Conversion and Purification	June 13, 2023	Terri Grenda
18.	Non-Monetary/Appeals/Assistance Grants	June 14, 2023	Terri Grenda
19.	R2 Definition Session – Registration, Monetary Determinations, and Identity Verification	June 14, 2023	Terri Grenda
20.	R2a Pen Testing Daily Status Meeting	June 14, 2023	Jayne Martin, Digby Morrow, and Joe Mindock
21.	R2a Pen Testing Daily Status Meeting	June 15, 2023	Jayne Martin, Digby Morrow, and Joe Mindock
22.	Findings Meetings	June 15, 2023	Jayne Martin

#	OED Modernization Meetings	Scheduled Date	CSG Participants
23.	R2 Go Back Meeting – Registration, Monetary Determination, and Identity Verification	June 15, 2023	Jayne Martin
24.	R2a Pen Testing Daily Status Meeting	June 16, 2023	Jayne Martin, Digby Morrow, and Joe Mindock
25.	R2a Pen Testing Daily Status Meeting	June 20, 2023	Jayne Martin and Joe Mindock
26.	Conversion and Purification	June 20, 2023	Jayne Martin
27.	OED Data Warehouse and Frances Data	June 20, 2023	Jayne Martin
28.	ETA's	June 20, 2023	Terri Grenda
29.	R2a Pen Testing Daily Status Meeting	June 20, 2023	Jayne Martin, Digby Morrow and Joe Mindock
30.	Business Team Weekly Check In	June 21, 2023	Jayne Martin
31.	R2 Definition Sessions – Recovery/Interfaces	June 21, 2023	Jayne Martin
32.	CSG and DAS iQMS Touch Base	June 22, 2023	Jayne Martin
33.	Frances SQR Prioritization Meeting	June 22, 2023	Jayne Martin
34.	R2a Pen Testing Daily Status Meeting	June 22, 2023	Joe Mindock
35.	Modernization Executive Steering Committee	June 26, 2023	Drew Sutter

Table 14 – Meetings Attended in April and May 2023

#	OED Modernization Meetings	Scheduled Date	CSG Participants
1.	Change Control Board	April 4, 2023	Jayne Martin
2.	iQMS Touch Base	April 4, 2023	Jayne Martin
3.	Miscellaneous Questions – Appeals	April 5, 2023	Jayne Martin
4.	Modernization Schedule Management Review	April 5, 2023	Terri Grenda
5.	R2 Definition Session – Financials	April 5, 2023	Terri Grenda
6.	UI Modernization Project Risk and Issue Management Team	April 10, 2023	Jayne Martin
7.	R2 Definition Session – Recovery/Interfaces	April 10, 2023	Jayne Martin
8.	Conversion and Purification	April 11, 2023	Terri Grenda
9.	R2 Definition Sessions – Recovery/Interfaces – Investigations	April 12, 2023	Terri Grenda

#	OED Modernization Meetings	Scheduled Date	CSG Participants
10.	Non-Monetary/Appeals/Small Business Grant Meetings – Letter Questions	April 12, 2023	Jayne Martin
11.	Rollout 2a Bridging Check In	April 13, 2023	Jayne Martin
12.	FIVS and Paid Leave Process Flow	April 17, 2023	Jayne Martin
13.	Modernization Executive Steering Committee	April 17, 2023	Jayne Martin and Drew Sutter
14.	Rollout 2a Bridging Check In	April 17, 2023	Jayne Martin
15.	Frances UI Base Config Demo - Non-Monetary and Appeals	April 18, 2023	Jayne Martin
16.	iQMS Touch Base	April 18, 2023	Jayne Martin
17.	Frances UI Base Config Demo - Overpayments, Recovery, and Interfaces	April 18, 2023	Jayne Martin
18.	R2 Definition Session – Financials	April 19, 2023	Terri Grenda
19.	Frances Paid Leave Super User Training	April 21, 2023	Jayne Martin
20.	Rollout 2a Bridging Check In	April 25, 2023	Jayne Martin
21.	iQMS Touch Base	April 25, 2023	Jayne Martin
22.	Business Team Weekly Check In	April 26, 2023	Terri Grenda
23.	Modernization Schedule Management Review	April 26, 2023	Jayne Martin
24.	Monthly Communications Planning Team	April 27, 2023	Jayne Martin
25.	MOD Budget Meeting	April 27, 2023	Jayne Martin
26.	Self Employment Assistance (SEA)	April 27, 2023	Terri Grenda
27.	OED Modernization Engagement Board	May 1, 2023	Jayne Martin
28.	Appeals Demo	May 1, 2023	Jayne Martin
29.	R2a Pen Testing Pre-Kickoff Meeting	May 2, 2023	Jayne Martin, Joe Mindock, and Drew Sutter
30.	Conversion and Purification	May 2, 2023	Terri Grenda
31.	iQMS Touchbase	May 2, 2023	Jayne Martin
32.	Change Control Board	May 2, 2023	Jayne Martin
33.	Business Team Weekly Check In	May 3, 2023	Jayne Martin

#	OED Modernization Meetings	Scheduled Date	CSG Participants
34.	Non-Monetary/Appeals/Assistance Grants	May 3, 2023	Jayne Martin
35.	Modernization Schedule Management Review	May 3, 2023	Terri Grenda
36.	Seasonal Employment	May 3, 2023	Jayne Martin
37.	Non-Monetary/Appeals/Assistance Grants	May 8, 2023	Jayne Martin
38.	UI Overpayment Repayment Allocation Rules - Follow up + Demo	May 8, 2023	Jayne Martin
39.	R2 Definition Session – Recovery/Interfaces	May 10, 2023	Jayne Martin
40.	Rollout 2a Bridging	May 16, 2023	Jayne Martin
41.	Conversion and Purification	May 16, 2023	Terri Grenda
42.	iQMS Touch Base	May 16, 2023	Jayne Martin
43.	Business Team Weekly Check In	May 17, 2023	Jayne Martin
44.	Non-Monetary/Appeals/Assistance Grants	May 17, 2023	Jayne Martin
45.	Modernization Schedule Management Review	May 17, 2023	Jayne Martin
46.	Modernization Operations and Policy Team	May 18, 2023	Jayne Martin
47.	Frances Online Claimant Portal Focus Group	May 22, 2023	Jayne Martin
48.	iQMS Touch Base	May 23, 2023	Jayne Martin
49.	Business Team Weekly Check In	May 24, 2023	Jayne Martin
50.	Rollout 2A Cutover – May Edition	May 24, 2023	Jayne Martin
51.	Super User Training	May 24, 2023	Jayne Martin
52.	ETA's	May 24, 2023	Jayne Martin
53.	Frances Super User Training	May 25, 2023	Jayne Martin
54.	Monthly Communications Planning	May 25, 2023	Jayne Martin
55.	Findings Meeting	May 25, 2023	Jayne Martin
56.	MODist Open House	May 25, 2023	Jayne Martin
57.	MOD Budget Meeting	May 26, 2023	Jayne Martin
58.	UI Monetary – Go Back Demo Follow Up	May 26, 2023	Jayne Martin
59.	ETA's, ETA's, ETA's…Follow Up	May 26, 2023	Jayne Martin
60.	iQMS Touch Base	May 30, 2023	Jayne Martin

#	OED Modernization Meetings	Scheduled Date	CSG Participants
61.	Business Team Weekly Check In	May 31, 2023	Jayne Martin
62.	Non-Monetary/Appeals/Assistance Grants	May 31, 2023	Jayne Martin

6. QUALITY CONTROL PLAN FOR NEXT MONTH

The quality management activities planned by the CSG iQMS team for the next month, July 2023, are detailed in the tables in this section. The due dates are based on the latest draft of the iQMS Project Schedule.

6.1 Milestones and Deliverables Due

The table below lists the CSG iQMS milestones and deliverables due in July 2023.

Table 15 – Milestones and Deliverables Due

Milestone/Deliverable	Date Due	Status
5.3.8 Security Assessment Executive Presentation – Paid Leave	July 17, 2023	In Progress
4.1.15 Quarterly Quality Status Assessment and Improvement Report – 2nd Quarter 2023	July 17, 2023	In Progress

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

6.2 Planned CSG iQMS Interviews

The table below includes the planned iQMS interviews for July 2023.

Table 16 – Planned iQMS Interviews

#	Interviewee	Date	CSG Participant
1.	Renee Royston	July 13, 2023	Jayne Martin
2.	Kris Araki	TBD	Jayne Martin
3.	Lindsi Leahy	TBD	Jayne Martin
4.	David Gerstenfeld	TBD	Jayne Martin
5.	Karen Madden Humelbaugh	TBD	Jayne Martin
6.	Jennifer Oswald	TBD	Jayne Martin
7.	Maggie Gleason	TBD	Jayne Martin
8.	Blake Ballweber	TBD	Jayne Martin
9.	Lori Graham	TBD	Jayne Martin
10.	Kaitlynn Chritton	TBD	Jayne Martin
11.	Brad McKinney	TBD	Jayne Martin
12.	David Ford	TBD	Jayne Martin

6.3 Planned Meeting Attendance

The CSG iQMS team plans on attending the meetings listed in the below during July 2023.

<p style="text-align:center">**Table 17 – Planned Meeting Attendance**</p>

#	OED Modernization Meetings	Scheduled Date	CSG Participants
1.	ETA Check In	July 5, 2023	Jayne Martin
2.	Daily E2E Huddle	July 6, 2023	Jayne Martin
3.	Daily E2E Huddle	July 7, 2023	Jayne Martin
4.	R2a – Cutover Check In	July 7, 2023	Jayne Martin
5.	Non-monetary/Appeal/Assistance Grants	July 10, 2023	Jayne Martin
6.	ETA Check In	July 10, 2023	Jayne Martin
7.	UI Modernization Project Risk and Issue Management Team	July 10, 2023	Jayne Martin
8.	MODist Open House	July 11, 2023	Jayne Martin
9.	Conversion and Purification	July 11, 2023	Terri Grenda
10.	MOD Monthly ALL STAFF Meeting	July 11, 2023	Jayne Martin
11.	Modernization Schedule Management Review	July 12, 2023	Jayne Martin
12.	R2a Cutover Check In	July 12, 2023	Jayne Martin
13.	R2 Definition – Registration, Monetary Determinations	July 12, 2023	Jayne Martin
14.	OED Modernization Engagement Board	July 12, 2023	Jayne Martin
15.	Change Control Board	July 12, 2023	Jayne Martin
16.	R2 Go Back – Registration, Monetary Determinations	July 13, 2023	Jayne Martin
17.	R2 Definition Session – Financials	July 13, 2023	Jayne Martin
18.	Daily E2E Huddle	July 14, 2023	Jayne Martin
19.	R2a Cutover Check In	July 14, 2023	Jayne Martin
20.	Daily E2E Huddle	July 17, 2023	Jayne Martin
21.	R2a Cutover Check In	July 17, 2023	Jayne Martin
22.	Modernization Executive Steering Committee	July 17, 2023	Jayne Martin, Joe Mindock, Digby Morrow, and Drew Sutter

#	OED Modernization Meetings	Scheduled Date	CSG Participants
23.	Definition Sessions – Recovery/Interfaces	July 17, 2023	Jayne Martin
24.	Daily E2E Huddle	July 18, 2023	Jayne Martin
25.	Conversion and Purification	July 18, 2023	Jayne Martin
26.	iQMS Touchbase	July 18, 2023	Jayne Martin
27.	OED Data Warehouse and Frances Data	July 18, 2023	Jayne Martin
28.	ETA's	July 18, 2023	Jayne Martin
29.	Business Team Weekly Check In	July 19, 2023	Jayne Martin
30.	Daily E2E Huddle	July 19, 2023	Jayne Martin
31.	Non-Monetary/Appeals/Assistance Grants	July 19, 2023	Jayne Martin
32.	Modernization Schedule Management Review	July 19, 2023	Jayne Martin
33.	R2a Cutover Check In	July 19, 2023	Jayne Martin
34.	R2 Definition Sessions – Recovery/Interfaces	July 19, 2023	Jayne Martin
35.	R2 Definition Sessions - Registration, Monetary Determinations, and Identity Verification	July 19, 2023	Jayne Martin
36.	Frances SQR Prioritization Meeting	July 19, 2023	Jayne Martin
37.	R2 Go Back – Registration, Monetary Determinations, and Identity Verification	July 20, 2023	Jayne Martin
38.	Modernization Operations and Policy Team	July 20, 2023	Jayne Martin
39.	Daily E2E Huddle	July 21, 2023	Jayne Martin
40.	R2a Cutover Check In	July 21, 2023	Jayne Martin
41.	R2a Cutover Check In	July 24, 2023	Jayne Martin
42.	Non-monetary/Appeals/Assistant Grants	July 24, 2023	Jayne Martin
43.	R2a Cutover Check In	July 25, 2023	Jayne Martin
44.	Conversion and Purification Meeting	July 25, 2023	Jayne Martin
45.	iQMS Touchbase	July 25, 2023	Jayne Martin
46.	OED Data Warehouse and Frances Data	July 25, 2023	Jayne Martin
47.	MOD Budget Meeting	July 25, 2923	Jayne Martin
48.	Non-Monetary/Appeals/Assistance Grants	July 26, 2023	Jayne Martin

#	OED Modernization Meetings	Scheduled Date	CSG Participants
49.	R2 Definition Session – Registration, Monetary Determinations, and Identity Verification	July 26, 2023	Jayne Martin
50.	R2 Go Back – Registration, Monetary Determinations, and Identity Verification	July 27, 2023	Jayne Martin
51.	Monthly Communications Planning	July 27, 2023	Jayne Martin
52.	MOD R2 – Ongoing Meeting with Araki and Team Leads	July 27, 2023	Jayne Martin
53.	R2a Cutover Check In	July 31, 2023	Jayne Martin
54.	R2 Definition Sessions – Recovery/Interfaces	July 31, 2023	Jayne Martin