Quarterly Report on the iConnect System
Second Quarter
(October, November, December)
Fiscal Year 2023-24

Purpose

The Fiscal Year 2023-24 General Appropriations Act, Chapter 2023-239, Laws of Florida, includes proviso language for the iConnect system directing the Agency for Persons with Disabilities (APD) to provide quarterly project status reports to the Chair of the Senate Appropriations Committee, the Chair of the House Appropriations Committee, and the Executive Office of the Governor's Office of Policy and Budget. The reports must include progress made to date for each project milestone and contract deliverable, planned and actual completion dates, planned and actual costs incurred, and any current project issues and risks.

Progress To-date

Overview of Project Progress During Reporting Period

The iConnect Program's goal is to provide a system that elevates the client by uncovering opportunities to increase quality engagements and service delivery, enabling the system of care to achieve a state of thriving. Currently, iConnect is being used by the APD Staff, the Waiver Support Coordinators (WSC), and a significant number of Providers. Progressively, during 2024, additional functionality will be rolled out to include additional providers. Concurrently, external stakeholder communication will continue to be enhanced to inform the rollout process.

During this reporting period, Sprint 3 completed with the following functionality deployed into production.

- ❖ Sprint 3: Behavior Workflows (Behavior Analysis Service Provider Documentation, Behavior Assistant Service Provider Documentation, Reactive Strategy Reporting)
- ❖ Sprint 3: Provider Service Level Designations (Behavior Focus)

During the next reporting period, Sprint 4 is scheduled to rollout with the following functionality to be deployed into production.

- ❖ Sprint 4: Licensure Renewal
- ❖ Sprint 4: Monthly Residential Monitoring
- ❖ Sprint 4: New Provider Application - Licensed Facility
- ❖ Sprint 4: Residential Nursing
- ❖ Sprint 4: Residential Habilitation Service Provider Documentation
- ❖ Sprint 4: Multi-option External Provider Interface (EPI)
- ❖ Additional remaining providers onboarding for existing functionality relating to: (Therapy Services, Specialized Mental Health Counseling Service, Dietician Services, Consumable Medical Supplies, Durable Medical Equipment, Environmental Accessibility Adaptations, Personal Emergency Response Systems, Transportation)

During the next reporting period, additional activities within Sprint 5: Roster Violations and Arrest Notifications functionality and Sprint 6: Worker Portal functionality will also be completed.

Executive level meetings led by the Agency Director are ongoing with the vendors to discuss the status and progress on implementing the remaining functionality, and risks/issues that need to be addressed.

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Planned and Actual Completion Dates (Current and Next Reporting Periods)

<table>
<tr><th colspan="7">Project Milestones, Deliverables, and Major Tasks

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<tr>
<th>D
M
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<th>Planned Start Date</th>
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</tr>
<tr>
<td>M</td>
<td>Go-Live: Sprint 3
<i>This is a production cutover milestone with specific additional functionality deployed into production.</i></td>
<td>10/05/2023</td>
<td>10/16/2023</td>
<td>10/16/2023</td>
<td>C</td>
<td>The following functionality deployed with this go-live.
• Behavior Workflows (<i>Behavior Analysis Service Provider Documentation, Behavior Assistant Service Provider Documentation, and Reactive Strategy Reporting</i>)
• Provider Service Level Designations (<i>Behavior Focus</i>)</td>
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<tr><td>T</td><td>After-Action Report from Sprint 3 Deployment</td><td>10/16/2023</td><td>11/09/2023</td><td>11/17/2023</td><td>C</td><td>APD and vendor teams met to identify and discuss opportunities for successes and process improvements that can be applied to future Sprints. On 11/17/2023, the after-action report from Sprint 3 deployment was finalized and will be utilized to inform future sprint rollouts.</td></tr>
<tr><td>D</td><td>Provider Activity Upload (via SFTP) – Integration Testing (Internal)</td><td>07/13/2021</td><td>11/03/2023</td><td>11/03/2023</td><td>C</td><td>Configuration validation and internal testing with the training materials completed during this reporting period.</td></tr>
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T	Impact Sessions	12/05/2023	12/06/2023	12/06/2023	C	The following significant activities were completed during this reporting period. • Impact Sessions with Providers, WSCs and APD Staff, specific to Sprint 4 functionality. Impact sessions were held to preview the upcoming functionality to end-users, gather stakeholder considerations for implementation impacts, communication preferences, and opportunities for providing additional support and training.

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T	Sprint 3: Significant Activities - Completed	10/01/2023	10/16/2023	10/16/2023	C	The following significant activities were completed during this reporting period. - End-user Training - Go-Live
T	Sprint 4: Significant Activities - Completed	10/01/2023	12/08/2023	12/08/2023	C	The following significant activities were completed during this reporting period. - User Acceptance Testing - Training Material Preparation and Review - Train-the-Trainer Delivery

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D M T	**D**eliverable / **M**ilestone / **T**ask & Description	Planned Start Date	Planned Finish Date	Actual Finish Date *(completed)*	Status *(C=Completed IP= In Progress F=Future)*	Variance Explanation / Comment
T	Sprint 5: Significant Activities - Completed	10/01/2023	12/29/2023	12/29/2023	C	The following significant activities were completed during this reporting period. • Configuration Testing and Validation • Training Materials • User Acceptance Testing
D	Provider Activity Upload (via SFTP) – Integration Testing (External)	11/06/2023	01/29/2024		IP	User testing with a representation of providers planned and initiated during this reporting period. Testing will complete prior to Sprint 4 go-live.

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T	Sprint 4: Significant Activities	01/01/2024	02/01/2024		F	The following significant activities are in progress and/or planned for completion during the next reporting period. • End-user Training • Go-Live
T	Sprint 5: Significant Activities	01/01/2024	03/11/2024		F	The following significant activities are in progress and/or planned for completion during the next reporting period. • Training Material • End-user Training Delivery • Go-Live

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T	Sprint 6: Significant Activities	01/01/2024	03/31/2024		F	Significant activities related to testing and training are in progress and/or planned for completion during the next reporting period including: • User Acceptance Testing • APD Training Material Preparation and Review • Train-the-Trainer Training Delivery
D	Integration Testing – Plan Validation Rules	10/28/2021	06/30/2024		IP	Plan Validation (PV) Rules set includes numerous individual rules to effectively manage and control a wide array of service authorizations. Additional testing is necessary and is ongoing.

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D **M** **T**	**D**eliverable / **M**ilestone / **T**ask & Description	Planned Start Date	Planned Finish Date	Actual Finish Date *(completed)*	Status *(**C**=Completed* ***IP**= In Progress* ***F**=Future)*	Variance Explanation / Comment
T	Consulting services, project management, system architectural analysis and review by APD contracted third-party vendor.	03/24/2023	03/31/2024		IP	Monthly status reports are required by the vendor; Deliverables ongoing.

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T	Enhanced intensive training and technical assistance available for providers to utilize as needed.	07/24/2023			IP	Ongoing enhanced training approach is being taken. Live, in-person training is provided, based on direct feedback from stakeholders to help enable providers and to help continue to support stakeholders as they learn new functionality in the system. Weekly provider technical assistance calls are held with various provider groups, as well as inclusion of providers (as needed) on direct support calls with the vendor to troubleshoot more technical tickets.

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T	Regular executive-level performance meetings with Agency, iConnect vendor, and third-party vendor to continue review and management of weekly commitments, project timeline, deliverables, risks, decision points, stakeholder feedback, and other key objectives.	03/23/2023	06/30/2024		IP	The meetings occur weekly and are led by the APD Director – prime objective to deliver on remaining functionality and ensure stakeholder feedback.
T	Ongoing reoccurring weekly Stakeholder Engagement discussions with APD, iConnect vendor, third-party vendor, providers, and stakeholders to solicit feedback regarding iConnect work in progress, ticket submissions from users, general feedback, and Q/A opportunities.	04/19/2023	03/31/2024		IP	Forum provides additional opportunity for designated time to discuss a wide array of topics.

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T	Continue with a dedicated forum with the iConnect vendor to provide technical assistance and to enhance availability for addressing critical issues identified.	03/15/2023	06/30/2024		IP	Forum provides additional opportunity for direct availability to troubleshoot and collect additional information on any technical issues that may arise.
T	Regularly review the established iConnect scorecard which displays accomplishments and roadblocks from each week, schedule for the upcoming week, decisions needed, and progress week over week.	04/18/2023			IP	Scorecard is used as a performance management tool and is a standing agenda item on the weekly executive leadership meeting with APD, iConnect vendor and third-party vendor.

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<tr><td>T</td><td>Hold weekly and reoccurring strategic and performance management meetings with APD leadership and third-party vendor.</td><td>04/10/2023</td><td>03/31/3024</td><td></td><td>IP</td><td>Weekly in-person meeting with APD executive leadership and third-party vendor to receive intermediate feedback providing the ability for immediate adjustment as needed.</td></tr>
</table>

Planned and Actual Costs Incurred

Expenditures – Planned vs. Actual *Provide planned and actual cost total for the current reporting period and the fiscal year to date. Provide an explanation of significant variance.*			
Period	Planned Cost	Actual Cost	Explanation of Variance
Reporting Period (2023-2024 Q2)	$204,531	$124,921	The variance between Planned and Actual Costs this reporting period (and SFY to Date) is due to the following reasons. 1. Actual cost of Contracted Staff and Trainers was slightly lower than the planned cost.
SFY to Date (07/01/2023 – 12/31/2023)	$409,062	$257,094	*Please see the note in the row above (Reporting Period row).*

*The amount reflected is the one-time, non-recurring cost and does not include any recurring maintenance costs.

Current Project Risks and Issues

Project Risks *Significant risks identified, open, occurring, or closed within the reporting period.*					
Risk Description	Status *(Open /* *Occurring /* *Closed)*	Project Impact *(H, M, L)* and Description of Impact	Mitigation Strategy	Mitigation Status	Owner
As additional functionality is rolled out, and with additional users going live, the likelihood of latent issues surfacing increases in the short-term. However, improvements have been made in both the resources committed, process, and communication as well as the IT testing environment.	Open	Impact – *High*	1. Activation of additional resources from both Agency and iConnect vendor. 2. Onboarded third party vendor to provide to continue project timeline, deliverables, risks, decision points, stakeholder feedback, and other key objectives. 3. Logically grouped related functionality for testing and rollout. 4. Enhancement of the user acceptance testing by expanding timeframes and subject matter deployment. 5. Development of process improvements for testing and stakeholder communication. 6. Co-location with both Agency and the iConnect vendor to conduct joint configuration sessions, testing, knowledge transfer, and resolution. 7. Utilization of weekly executive performance meetings to escalate risk, solutions, and decisions for consideration. 8. Monitoring of user submitted Helpdesk tickets for any underlying system issues. 9. Creation and review of the after-action report to inform and continuously enhance future functionality deployment.	Completed *(#1, #2, #3, #4, #5, #6, #7, #8, #9)* Ongoing progress *(#5,)*	Program Director & CIO

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Risk Description	Status *(Open / Occurring / Closed)*	Project Impact *(H, M, L)* and Description of Impact	Mitigation Strategy	Mitigation Status	Owner
If Vendor Data Center migration of the non-production sites to Azure (cloud service), takes longer than planned duration, it could disrupt the planned production cutover(s) of iConnect additional functionality deployment Sprints.	Closed	Impact – *High*	1. Plan, execute, monitor, test, and control migration activities regularly and consistently. 2. Engage APD and proactively define a least disruptive migration schedule. 3. Escalate to appropriate levels of management within WellSky and with the Agency (when issue is not resolved within reasonable time).	Completed 11/20/23 (All)	Vendor Client Success Executive

Project Issues					
List key issues identified, open, occurring, or closed within this reporting period.					
Issue Description	Status *(Open / Closed)*	Project Impact *(H, M, L)* and Description of Impact	Resolution Approach	Resolution Date	Owner
None this reporting period					

Glossary of Key Terms

Agency	Florida State Agency for Persons with Disabilities (APD)
APD iConnect	APD client data management system; originally known as CDMS.
CDMS	*See APD iConnect*
CMS	Centers for Medicare & Medicaid Services
Direct Service Provider	Agency or solo entity approved to provide Medicaid waiver services to APD consumers.
DSP	Direct Service Provider
EVV	Electronic Visit Verification
KPMG	Third-party vendor contracted by the Agency to provide consulting services, project management, system architectural analysis and review.
PCS	Personal Care Services *PCS is an EVV classification and in the APD iConnect context it comprises Personal Support and Respite services to APD Medicaid waiver clients.*
SaaS	Software as a Service
SFTP	Secure File Transfer Protocol
SFY	State Fiscal Year *Florida SFY is July 01 through June 30 of the following year.*
UAT	User Acceptance Testing
Waiver Support Coordinator	*Waiver Support Coordinator is a social worker and helps with monitoring and evaluating the delivery of support services to the APD Medicaid waiver clients.*
WellSky	APD iConnect SaaS vendor
WSC	Waiver Support Coordinator