



Quarterly Report on the iConnect System
Third Quarter
(January, February, March)
Fiscal Year 2023-24

iConnect System

Quarterly Report

Reporting Period: January 1 to March 31, 2024

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.

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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 4 and 5 were completed with the following functionality components 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)
- ❖ Onboarded additional providers (Therapy Services, Specialized Mental Health Counseling Service, Dietician Services, Consumable Medical Supplies, Durable Medical Equipment, Environmental Accessibility Adaptations, Personal Emergency Response Systems, Transportation)
- ❖ Sprint 5: Roster Violations and Event Notifications
- ❖ Sprint 5: Quality Assurance (includes quality improvement interface with Qlarant)

During the next reporting period, Sprint 6: Worker Portal functionality will 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)

Project Milestones, Deliverables, and Major Tasks						
<i>Provide milestones, deliverables, or major tasks of interest to key project stakeholders. Identify the status of each item listed (Completed, In Progress, Future), and explain any significant variance.</i>						
D M T	Deliverable / Milestone / Task & Description	Planned Start Date	Planned Finish Date	Actual Finish Date (completed)	Status (C=Completed IP= In Progress F=Future)	Variance Explanation / Comment
T	Sprint 4: Significant Activities – Completed	01/02/2024	03/01/2024	03/11/2024	C	The following significant activities were completed during this reporting period. <ul style="list-style-type: none"> • End-user Training (1/5/24 and 1/26/24) • Go-Live to include the Build 8.7.2 Production Deployment and Multi-option External Provider Interface (EPI) (2/1/24) • After-Action Report from Deployment (3/11/24)
D	Provider Activity Upload (via SFTP) – Integration Testing (External) for multi-option EPI	11/06/2023	01/29/2024	01/29/2024	C	User testing with a representation of providers completed during this reporting period.

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M	Go-Live: Sprint 4 <i>This is a production cutover milestone with specific additional functionality deployed into production.</i>	01/01/2024	02/01/2024	02/01/2024	C	End-user training completed and the following functionality deployed with this go-live. <ul style="list-style-type: none"> • Licensure Renewal • Monthly Residential Monitoring • New Provider Application - Licensed Facility • Residential Nursing • Residential Habilitation Service Provider Documentation • Multi-option External Provider Interface • Onboarded Additional Providers of the following service types: <i>(Therapy Services, Specialized Mental Health Counseling Service, Dietician Services, Consumable Medical Supplies, Durable Medical Equipment, Environmental Accessibility Adaptations, Personal Emergency Response Systems, Transportation)</i>

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T	After-Action Report from Sprint 4 Deployment	02/01/2024	03/01/2024	03/11/2024	C	APD and vendor teams met to identify and discuss opportunities for successes and process improvements that can be applied to future Sprints. On 03/01/2024, the draft after-action report from Sprint 4 deployment was disseminated for APD review as planned; and the report was finalized on 03/11/2024.

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T	Impact Sessions – Sprint 5	01/16/2024	01/17/2024	01/17/2024	C	Impact sessions with Providers, WSCs, and APD Staff specific to Sprint 5 functionality 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.
T	Sprint 5: Significant Activities – Completed	01/01/2024	03/11/2024	03/11/2024	C	<p>The following significant activities were completed during this reporting period.</p> <ul style="list-style-type: none"> • Training Material • End-user Training Delivery • Go-Live to include the Quality Improvement Interface with Qlarant (QIO vendor)

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T	Sprint 5: Significant Activities – In Progress	03/11/2024	04/05/2024		IP	The following significant activity is in progress for completion during the next reporting period. <ul style="list-style-type: none"> • After-Action Report from Deployment
T	Sprint 6: Significant Activities - Completed	01/01/2024	03/31/2024	03/22/2024	C	The following significant activities were completed during this reporting period. <ul style="list-style-type: none"> • User Acceptance Testing • APD Training Material Preparation and Review • Train-the-Trainer Delivery

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T	Impact Sessions – Sprint 6	03/05/2024	03/06/2024	03/06/2024	C	Impact sessions with Providers, WSCs, and APD Staff specific to Sprint 6 functionality 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.
T	Sprint 6: Significant Activities – In Progress	04/08/2024	05/17/2024		IP	The following significant activities are in progress and/or planned for completion during the next reporting period. <ul style="list-style-type: none"> • End-user Training Delivery • Go-Live • After-Action Report from Deployment

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T	Integration Testing – Plan Validation Rules	10/28/2021	06/30/2024		IP	Plan Validation (PV) Rules set comprises numerous individual rules to effectively manage and control a wide array of service authorizations. Additional testing is necessary and is ongoing.
T	Consulting services, project management, system architectural analysis and review by APD contracted third-party vendor.	03/24/2023		3/31/2024	C	Work completed 3/31/24.

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T	Enhanced intensive training and technical assistance available for providers to utilize as needed.	07/24/2023			IP	A continual enhancement of training will remain in effect as needs evolve. Live, in-person training is provided, based on direct feedback from stakeholders to enable providers and continue to support stakeholders as they learn new functionality in the system. Weekly provider technical assistance calls are also held with various provider groups, as well as the inclusion of providers (as needed) on direct support calls with the vendor to troubleshoot more technical tickets.

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D M T	Deliverable / Milestone / Task & Description	Planned Start Date	Planned Finish Date	Actual Finish Date (completed)	Status (C=Completed IP= In Progress F=Future)	Variance Explanation / Comment
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			IP	The meetings occur weekly and are led by the APD Director – prime objective to deliver on remaining functionality and ensure stakeholder feedback. Third-party work completed 3/31/24.

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D M T	Deliverable / Milestone / Task & Description	Planned Start Date	Planned Finish Date	Actual Finish Date (completed)	Status (C=Completed IP= In Progress F=Future)	Variance Explanation / Comment
T	Ongoing reoccurring weekly Provider Assistance Technical Calls (PTAC) with APD and stakeholders to solicit feedback regarding iConnect work in progress, ticket submissions from users, general feedback, and Q/A opportunities.	04/19/2023	06/30/2024		IP	Forum provides additional opportunity for designated time to discuss a wide array of topics. These technical assistance calls are held with various provider groups, as well as the inclusion of providers (as needed) on direct support calls with the vendor to troubleshoot more technical tickets.
T	Continue with a dedicated forum, weekly support call with the iConnect vendor to provide technical assistance and to enhance availability for addressing critical issues identified.	03/15/2023	06/30/2024		IP	The weekly support call forum provides additional opportunity for direct availability to troubleshoot and collect additional information on any technical issues that may arise.

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D M T	Deliverable / Milestone / Task & Description	Planned Start Date	Planned Finish Date	Actual Finish Date (completed)	Status (C=Completed IP= In Progress F=Future)	Variance Explanation / Comment
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. Third-party work completed 3/31/24.
T	Hold weekly and reoccurring strategic and performance management meetings with APD leadership and third-party vendor.	04/10/2023	03/31/2024	03/25/2024	C	Weekly in-person meeting with APD executive leadership and third-party vendor to receive intermediate feedback providing the ability for immediate adjustment as needed.

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Planned and Actual Costs Incurred

Expenditures – Planned vs. Actual			
<i>Provide planned and actual cost total for the current reporting period and the fiscal year to date. Provide an explanation of significant variance.</i>			
Period	Planned Cost	Actual Cost	Explanation of Variance
Reporting Period (2023-24 Q3)	\$433,813	\$138,441	The variance between Planned and Actual Costs this reporting period (and SFY to Date) is due to the following reasons. The planned cost includes fixed-price payment milestones previously scheduled for completion during this reporting quarter. APD and the iConnect vendor are discussing and negotiating technology components historically descoped in prior years, items that are in queue as change orders as well as the impacts financially as apart of contract closeout activities. These activities will continue into Q4.
SFY 2023-24 to Date	\$842,875	\$395,535	<i>Please see the note in the row above (Reporting Period row).</i>

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Current Project Risks and Issues

Project Risks <i>Significant risks identified, open, occurring, or closed within the reporting period.</i>					
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 – <i>High</i>	<ol style="list-style-type: none"> 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 and implementation 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) #5: Will remain ongoing as needs evolve.	Program Director & CIO

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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
<i>None this reporting period</i>					

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Glossary of Key Terms

Agency	Florida State Agency for Persons with Disabilities (APD)
APD iConnect	APD client data management system (CDMS) with electronic visit verification for personal care and home healthcare services
CMS	Centers for Medicare & Medicaid Services
Direct Service Provider (DSP)	Agency or solo entity approved to provide Medicaid waiver services to APD consumers.
EVV	Electronic Visit Verification
KPMG	Third-party vendor contracted by the Agency to provide consulting services, project management, system architectural analysis and review.
SaaS	Software as a Service
SFTP	Secure File Transfer Protocol
SFY	State Fiscal Year <i>Florida SFY is July 01 through June 30 of the following year.</i>
UAT	User Acceptance Testing
Waiver Support Coordinator (WSC)	<i>Waiver Support Coordinator is a social worker and helps with monitoring and evaluating the delivery of support services to the APD Medicaid waiver clients.</i>
WellSky	APD iConnect SaaS vendor