Quarterly Report on the iConnect System
Fourth Quarter
(April, May, June)
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. During this reporting period, Sprint 5 (Quality Assurance, Roster Violations, and Event Notifications) final activities were completed, final sprint of project implementation (Sprint 6: Worker Portal) functionality was deployed into production, and project closeout activities were completed as planned. Regularly scheduled executive level meetings were led by the Agency Director and held with the iConnect implementation vendor and iConnect Program team, to discuss the status and progress of implementing remaining functionality as well as project closeout requirements including any remaining deliverables and payment milestones. The iConnect sprint implementation project delivery was formally closed on 06/30/2024.

Planned and Actual Completion Dates

Project Milestones, Deliverables, and Major Tasks						
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.*						
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: After-Action Report from Sprint 5 Deployment – Completed	03/11/2024	04/05/2024	04/15/2024	C	APD and vendor teams met to identify and discuss any opportunity for success and process improvement that can be applied to future go-lives. On 04/05/2024, the draft after-action report from Sprint 5 deployment was disseminated for APD review as planned; and the report was finalized on 04/15/2024.

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T	Sprint 6: Significant Activities – Completed	04/08/2024	05/17/2024	05/28/2024	C	The following significant rollout activities completed during the next reporting period. • End-user Training Delivery • Go-Live • After-action report: APD and vendor teams met to discuss success factors and opportunities from Sprint 6 deployment. On 5/17/2024, the draft after-action report from Sprint 6 deployment was disseminated for APD review as planned; and the report was finalized on 5/28/2024.

iConnect System

Quarterly Report

Reporting Period: April 1 to June 30, 2024

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T	Integration Testing – Plan Validation Rules	10/28/2021	06/30/2024	06/30/2024	C	Plan Validation (PV) Rules set includes numerous individual rules to effectively manage and control a wide array of service authorizations. All planned testing completed during this reporting period.

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T	Enhanced intensive training and technical assistance available for providers to utilize as needed.	07/24/2023	06/30/2024	06/30/2024	C	A continual enhancement of training will remain in effect as needs evolve. Live, in-person training was provided, based on direct feedback from stakeholders to enable providers to continue to support stakeholders as they learn new functionality in the system. Weekly provider technical assistance calls were 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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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	06/30/2024	C	The meetings occurred weekly and were 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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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	06/30/2024	C	This forum provided additional opportunity for designated time to discuss a wide array of topics. These technical assistance calls were 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	06/30/2024	C	The weekly support call forum provided additional opportunity for direct availability to troubleshoot and collect additional information on any technical issues that may arise.

iConnect System

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Reporting Period: April 1 to June 30, 2024

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

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M
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<td>T</td>
<td>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.
Note that this process will continue into the post-project iConnect Program operations phase.</td>
<td>04/18/2023</td>
<td>06/30/2024</td>
<td>06/30/2024</td>
<td>C</td>
<td>Scorecard was used as a performance management tool and was 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.</td>
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<td>M</td>
<td>Focused on enhancing the iConnect user experience, APD launched the iConnect Helpful Tips site to help the users navigate iConnect.</td>
<td>05/01/2024</td>
<td>05/01/2024</td>
<td>05/01/2024</td>
<td>C</td>
<td>This resource is located on the iConnect landing page and will provide helpful tips on how to quickly facilitate an action in iConnect. The tips, which are a direct result of common questions received from training, patterns that are seen via tickets, and general questions, will be updated monthly.</td>
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T	Continued stakeholder engagement- Jointly identified and provided additional enhancements to end users informed by feedback from call forums, tickets, and town halls to provide additional benefits.	04/01/2024	06/30/2024	06/30/2024	C	• Configured, tested, communicated, and deployed into production several iConnect-application enhancements. • Updated existing training materials and created additional training material. • Deployed multiple new user-requested reports.

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 (2023-24 Q4)	$678,421	$504,046	The variance between Planned and Actual Costs this reporting period (and SFY to Date) is due to the following reasons. *The project closeout was negotiated between APD and the iConnect vendor which included the review of the contract's initial scope of work, work performed, remaining deliverables, and related compensation.*
SFY 2023-24 to Date	$1,278,645	$899,581	*Please see the note in the row above (Reporting Period row).*

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.	Closed	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 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

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 (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.
PTAC	Provider Technical Assistance Calls
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 (WSC)	*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