Iterative Project Report for Programs & Multi-Year Phased Projects

Submitted to Large Project Oversight on 11/10/2022

GENERAL INFORMATION

Program/Project Name: myWSI: Startup of Release 6 and Closeout of Release 5

Agency Name: Workforce Safety and Insurance

Project Sponsor: Valerie Kingsley

Project Manager: Jennifer Kunz

PROJECT DESCRIPTION

myWSI is a secure portal for employers, medical providers, and (eventually) injured employees to access, submit, and view user specific information related to ND Workforce Safety and Insurance (WSI). To date, the team has completed an initial platform release and three feature releases (a fourth release is in progress). The myWSI Program is a large, multi-year program with several releases. Each release is baselined and managed as a major project.

Completed projects in the program include:

- Extranet Infrastructure (August 1, 2015 – June 30, 2017): delivered the core infrastructure of an extranet portal developed on a .Net platform, enabling employers and medical providers with the ability to log in to myWSI and view information related to their transactions.
- myWSI Enhancements (July 1, 2017 – September 3, 2019)
  - myWSI Release 1: delivered features for provider bill status, UR-C / UR-Chiro, medical records submission, and common services for notifications, messaging, and alerts.
  - myWSI Release 2.1 and 2.2: delivered features for the employer eAccount (OEA replacement) and additional common services (payment, FileNet integration, forms retrieval), reports integration, and notifications management.
- Release 3 Safety and Ergo (November 19, 2019 – August 7, 2020): delivered functionality into myWSI for the Safety Program and the Ergonomic Initiative and Grant.
- Release 4 Online Payroll Reporting (May 26, 2020 – August 6, 2021): delivered functionality for Online Payroll Reporting, External Forms, integration with CAPS and the existing login architecture, and establishment of future myWSI architecture.
- Release 5 (June 16, 2021 – August 10, 2022): delivered Online Quarterly Payroll Reporting, Online Volunteer Reporting, External Forms (DMP, P12, FL214, Employment Contact Log), Site Reorganization, Invitation Mgmt. improvements, Employer Dashboard, Provider Dashboard (framework only), Integration with Enterprise Identity Management (new NDLogin platform), Account Billing, and Claim View.

New project starting up:

Release 6: The release began June 6, 2022 and will end August 15, 2023. It will deliver Employer Online Application for Insurance, Safety and Ergo Refacing, Chatbot, and other technical improvements. The baseline budget is $1,524,361. ServiceLogix will provide the leadership for product delivery and support WSI's team with resources. NDIT will continue to support WSI with resources for project management, database administration, and architecture/network support.

Future efforts in the program include (the start and end dates for these releases are not yet baselined):

- Release 7 – Providers (Dashboard, Forms Replacement, Enhanced Chatbot, Admin Tools)
- Release 8 – Injured Employees (Dashboard, File Access, Forms Submittal, SMS/Text, Online FROI)
- Release 9 – General Vendor Access, General Enhancements

Background

In late 2010 and early 2011 a communications audit was performed by Flint Communications to review current communication processes inside and outside of WSI. Priority one was an intranet planning and rewrite project which went live in November 2011. Priority two was a rewrite of the current external website which was launched in June 2015. The third priority was a secure extranet portal for injured employees, employers, and medical providers to view and submit information with WSI.

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BUSINESS NEEDS AND PROBLEMS

The specific primary business needs to be met through the program are:

- Support WSI's strategic objective to improve communication.
- Streamline processes related to information from/to external stakeholders.
- Increase availability and usage of information for WSI's stakeholders and partners.

The myWSI Program is in line with WSI's core purpose "to care for injured workers" by offering a secure portal for injured employees, employers, and medical providers to view, update, and submit information related to their interactions with WSI.

PROGRAM/PROJECT FORMAT

Program Start Date: August 1, 2015

Budget Allocation at Time of Initial Start Date: $469,031 for the 2015-2017 biennium. $1,032,300 for the 2017-2019 biennium. $850,000 for the 2019-2021 biennium. $3,050,000 for the 2021-2023 biennium. The budget request for the 2023-2025 biennium is in progress.

How Many Phases Expected at Time of Initial Start Date: The number of phases/projects was unknown at the initial start date, but WSI and Nexus identified an extensive list of features, and the highest priority functionality was implemented (Releases 1-3). After the transition to ServiceLogix in early 2020, a Release Plan strategy was formalized to accommodate all outstanding features (Releases 4-9). In April 2022, the Release Plan strategy was revisited and the anticipated scope for each release was slightly adjusted.

Phase Approach Description: This program consists of multiple projects (releases) delivering functionality into a production environment, ready to be used.

Estimated End Date for All Phases Known at Time of Initial Start Date: The earliest expected end date is 2026 but is dependent upon the detailed planning and baselines of the individual projects.

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The program road map shows the high-level plan or vision for the program/projects/phases. It is intended to offer a picture of the lifespan of all the effort that is expected to be required to achieve the business objectives.

Project/ Phase	Title	Scope Statement	Estimated Months Duration	Estimated Budget
Project 1 (COMPLETE)	Extranet Infrastructure	Portal framework and login process, integration with existing online applications	Completed 6/30/17	$504,878 Baseline (See next section for Actual Cost)
Releases 1-2 (COMPLETE)	myWSI Enhancements • myWSI Release 1 • myWSI Release 2.1 and 2.2	Provider bill status, UR-C / UR-Chiro, medical records submission, and common services for notifications, messaging, and alerts Employer eAccount (OEA replacement) and additional common services (payment, FileNet integration, forms retrieval), reports integration, and notifications management	Completed 9/3/2019	$1,032,409 Baseline (See next section for Actual Cost)
Release 3 (COMPLETE)	myWSI Release 3.1	Safety program, ergonomic (ergo) initiative and grant, and mobile friendly form updates	Completed 8/7/20	$599,312 Baseline (See next section for Actual Cost)
Release 4 (COMPLETE)	myWSI Release 4 Online Payroll Reporting	Online payroll reporting, external forms, integration with CAPS and the existing login architecture, and establishment of future myWSI architecture	Completed 8/6/21	$303,350 Baseline (See next section for Actual Cost)
Release 5 (COMPLETE)	myWSI Release 5	Online Quarterly Payroll Reporting, Online Volunteer Reporting, External Forms (DMP, P12, FL214, Employment Contact Log), Site Reorganization, Invitation Mgmt. Improvements, Employer Dashboard, Provider Dashboard (framework only), Integration with Enterprise Identity Management (new NDLogin platform), Account Billing, and Claim View	Completed 8/10/22	$1,005,843 Baseline (See next section for Actual Cost)
Release 6	myWSI Release 6	BEGAN 6/6/22: Deliver Employer Online Application for Insurance, Safety and Ergo Refacing, Chatbot, other Technical Improvements	12 months	$1,524,361 Baseline
Release 7	myWSI Release 7	Providers (Dashboard, Forms Replacement, Enhanced Chatbot, Admin Tools)	12 months	$752,481
Release 8	myWSI Release 8	Injured Employees (Dashboard, File Access, Forms Submittal, SMS/Text, Online FROI)	12 months	$837,463
Release 9	myWSI Release 9	General Vendor Access, General Enhancements	12 months	$220,225
Closeout	myWSI Program Closeout	Program closeout and transition	4 months	$40,000

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PROJECT BASELINES

The baselines below are entered for only those projects or phases that have been planned. At the completion of a project or phase a new planning effort will occur to baseline the next project/phase and any known actual finish dates and costs for completed projects/phases will be recorded. The iterative report will be submitted again with the new information.

Project/ Phase	Program/ Project Start Date	Baseline Execution Start Date	Baseline End Date	Baseline Budget	Actual Finish Date	Schedule Variance	Actual Cost	Cost Variance
Project 1	8/1/2015	8/1/2015	6/30/2017	$504,878	6/30/2017	0%	$469,031	7.1% under
Release 2		7/1/2017	6/28/2019	$1,032,409	9/3/2019	9% behind	$983,891	4.6% under
Release 3		11/19/2019	9/1/2020	$599,312	8/7/2020	7.7% ahead	$540,349	4.5% under
Release 4		6/17/2020	6/18/2021	$303,350	8/6/2021	13% behind	$287,670	5% under
Release 5		6/16/2021	5/31/2022	$1,005,843	8/10/2022	17% behind	$1,046,811	4% over
Release 6		6/6/2022	8/15/2023	$1,524,361				
Release 7								
Release 8								
Release 9								

Notes: The Baseline Budget for Release 5 included a $50,000 scope addition approved by the ESC on October 19, 2021.

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OBJECTIVES

Project/ Phase	Business Objective	Measurement Description	Met/ Not Met	Measurement Outcome
Program	Business Need 1: Support WSI's strategic objective to improve communication			
	Objective 1.1: Create a secure portal for WSI external stakeholders to submit and view up to date information related to their interactions with WSI	Measurement 1.1.1: Upon completion of extranet project, ND injured workers, employers, and medical providers will be able to log in to the extranet portal to submit and view up to date information related to their transactions with WSI Anticipated Benefit(s): Improved external stakeholder satisfaction; Improvement in processing time and accuracy of data	Met (2017)	The first project (Extranet Infrastructure) successfully produced the outcome of enabling WSI external stakeholders with the ability to log in to myWSI and view information related to their transactions.
	Business Need 2: Streamline processes related to information from/to external audiences			
	Objective 2.1: Review and improve current processes affecting external stakeholders	Measurement 2.1.1: Reduce the number of contacts with WSI staff per thousand policyholders/claims by 10% within the first year of program completion. Anticipated Benefit(s): Customers able to find information more easily; Workload relief for WSI staff	Met (for Policy)	With prior myWSI releases, employers have been able to access account information and manage their account within myWSI. In R5 continued enhancements were made for management of their account. They are able to find information in myWSI and it assists WSI staff with workload, both Emp Services and Customer Service. Goal is to self-serve

	Business Need 3: Increase online interactivity for WSI's stakeholders and partners			
	Objective 3.1: Design a site that is user-friendly, easily navigable and targets appropriate audiences	Measurement 3.1.1: Increase by 10% the number of external stakeholders using available extranet portal features within the first year of program completion Anticipated Benefit(s) 3.1.1: Improved customer service and internal efficiency	Met (for Policy)	Employers are required to provide information through our external website. Example, payroll reporting process with myWSI R4 where Employers are required to file their payroll report in myWSI. This covers all types of coverage.
	Objective 3.2: Create the extranet to be adaptable to mobile devices	Measurement 3.2.1: Site accessible via iOS, Android, and Windows devices Anticipated Benefit(s) 3.3.2: Improved end user experience	Met (2019)	After Releases 1-2.2, WSI external stakeholders are able to access myWSI via mobile devices.

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POST-IMPLEMENTATION REPORTS

Post-Implementation Reports are to be performed after each project or phase is completed. A "PIR" is a process that utilizes surveys and meetings to determine what happened in the project/phase and identifies actions for improvement going forward. Typical PIR findings include, "What did we do well?" "What did we learn?" "What should we do differently next time?"

Project/ Phase	Lesson Learned, Success Story, Idea for Next Time, Etc.
Project 1	1. It was beneficial to walk through the training with the training handouts. 2. The project managers did a remarkable job in leading the team! 3. Communication overall was very good between ITD, WSI and Nexus. There were some issues, but they were resolved quickly. 4. The team leads were amazing with assistance and always prompt with assistance. 5. Overall, the project went great from my perspective. 6. Congrats on the successful implementation! I look forward to using it myself as an account holder with WSI!
Releases 1-2	1. The training provided was wonderful and I can see the URC UR Chiro applications that were deployed as very valuable to the UR Department. They will help provide better/faster service to the injured workers! 2. Issues were corrected when identified during testing. 3. The technical team members (from multiple areas) completed significant changes/improvements to the environments (getting the myWSI environments set up to mirror the CAPS/WSI legacy applications environment), which was a major accomplishment. 4. There were some snags with the scripts and bugs with Go live, but overall, they were fixable; we just had to all work together (which we did) to figure them out. 5. The frequent technical touch-bases with ITD before Go-live worked well. 6. Very good collaboration across multiple organizations (WSI, Nexus, ServiceLogix, ITD) working on issues together with little friction. 7. Early on, there were a lot of unknowns from the developers' standpoint; as the project progressed it became easier for who to contact, etc. The WSI team also grew its knowledge base on what their capabilities and skills for tasks were. 8. Both teams grew through working together. We learned good communication through difficult situations. 9. Communication was much better between all the teams involved. 10. Training was done very well with good communication throughout the process. 11. Integration testing went better this time because we were able work on integrations earlier than last time.
Release 3	1. A lot of work went into this and I think as we all become accustomed to the changes it will work nicely. 2. I really like the new functionality in MyWSI! 3. Expanding our client base utilizing myWSI. 4. Too soon to tell, each month employers safety audits are completed, and employers will need to learn what to do during that time. 5. This was unique situation where a business unit was doing so much manual work then moving so much to automated and online. Kudos to all the team members - business, tech, vendor, management. 6. Too early in the release to comment. 7. Once customers are signed up and learn the functionality, I believe it will serve them and WSI well. 8. I think once we have a chance to work in all the CRs we'll have a very efficient product for our customers. 9. I really like the Road map approach that was designed by Nexus, it is a great picture to see for the Employer to see where they are at in the process and what needs to be completed.

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Project/ Phase	Lesson Learned, Success Story, Idea for Next Time, etc.
Release 4	1. The new payroll reporting system is a great upgrade. For our employers to not have an access code to start the payroll report is a really good thing. Most of the accountants are pleased that the access code went away. 2. Gathering payroll detail using the same application in a revised payroll report is a major accomplishment. 3. I like the entire payroll reporting update, from the filing to the billing. 4. Having one vendor made requirements gathering much easier. 5. Business identifying communication needs and working on these earlier in the release. 6. I think the communication is getting better with each release. 7. One vendor that has extensive knowledge on insurance industry and quarterly payroll systems that can help the business with best practices. 8. The communication and training were good. 9. Kudos for great teamwork in a remote work environment! 10. The leaders did a great job of keeping us informed of the progress of the project. 11. It was a big release with many moving parts. Thank you to the team! Great job!!
Release 5	The myWSI Release 5 functionality meets the needs of end users. Project stakeholders rated the functionality at 2.41 out of 3.00 (Above Adequate). Some specific comments from project stakeholders are included below: 1. The new dashboard in myWSI is awesome and easier to maneuver through. Sending an invite is so much quicker, simpler, as is adding roles to an existing user. 2. Dave Donavan deserves a special call out for all the work he did with the new ND Login! 3. The communication aspect of the project was very well done. 4. Team support is always golden. 5. I thought the whole thing went well over all other than there was a lot in it too large, scope creep. 6. The communications overall were really good. I think in particular the UAT updates for those involved had a big impact and reduced some of the stress a little. 7. The use case test scenarios seemed to test all areas of the scope of the project. 8. There is some increased functionality when it works properly. I am not sure why things are tested and are found to be working but then are not working when released.

KEY CONSTRAINTS AND/OR RISKS

- The transition of WSI IT leadership is in progress; these staff are also still managing prior responsibilities.
- WSI and NDIT resources (business, technical) are limited in the number of staff available.
- WSI and NDIT resources are limited in experience with the current and preferred technologies.
- The full program schedule cannot be established due to the long duration; therefore, schedule management is constrained to each project/release.
- The schedule for Release 6 is combined with the CAPS Release 10 schedule due to intense integration of the systems, functionality, and team members.
- Future funding appropriations are necessary to complete all projects/releases within the program.
- Cost, schedule, scope, and quality are often in conflict during projects. The sponsor and ESC elected to prioritize these constraints as follows for the program:
  - Quality
  - Scope
  - Schedule
  - Cost