April 7, 2021

The Honorable Ronald D. Kouchi,  
President, and  
Members of The Senate  
Thirty-First State Legislature  
Hawaii State Capitol, Room 409  
Honolulu, Hawaii  96813

The Honorable Scott K. Saiki,  
Speaker, and  
Members of The House of Representatives  
Thirty-First State Legislature  
Hawaii State Capitol, Room 431  
Honolulu, Hawaii  96813

Dear President Kouchi, Speaker Saiki, and Members of the Legislature:

Pursuant to HRS section 27-43.6, which requires the Chief Information Officer to submit applicable independent verification and validation (IV&V) reports to the Legislature within ten days of receiving the report, please find attached the report the Office of Enterprise Technology Services received for the State’s Employer-Union Health Benefits Trust Fund Benefits Administration System project.

In accordance with HRS section 93-16, this report may be viewed electronically at http://ets.hawaii.gov (see “Reports”).

Sincerely,

DOUGLAS MURDOCK  
Chief Information Officer  
State of Hawai‘i

Attachment (1)
Hawaii Employer-Union Health Benefits Trust Fund Benefits Administration System (BAS)

MONTHLY IV&V STATUS REPORT
February 23, 2021 | Version 1.0

REPORT FINALIZED
March 25, 2021
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<th>DESCRIPTION</th>
<th>AUTHOR</th>
<th>VERSION</th>
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<tr>
<td>03/05/21</td>
<td>Monthly IV&amp;V Status Report Draft created</td>
<td>Julia Okinaka</td>
<td>0.0</td>
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<td>03/25/21</td>
<td>Monthly IV&amp;V Status Report updated based on comment submitted in Appendix F.</td>
<td>Julia Okinaka</td>
<td>1.0</td>
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EXECUTIVE SUMMARY

BACKGROUND

The State of Hawaii (State), Employer-Union Health Benefits Trust Fund (EUTF) contracted Morneau Shepell Limited (Morneau Shepell) with their Ariel EAS technology solution for the Health Benefits Administration System Modernization Project (BAS Project) on June 1, 2020. EUTF also contracted Segal to provide project management, business process reengineering (BPR), organizational change management (OCM), and quality management. Segal’s subcontractor, ICON Consulting (ICON), is responsible for data consulting and conversion.

The Office of Enterprise Technology Services (ETS) contracted Accuity LLP (Accuity) to provide Independent Verification and Validation (IV&V) services for the EUTF BAS Project. The goal of IV&V is to increase the probability of project success. The benefits of IV&V include identification of high-risk areas early and actionable recommendations.

Following IV&V’s Initial Assessment Report, Monthly IV&V Status Reports are issued to update and evaluate continual project progress and performance. Pre and Post Go-Live Implementation Milestone Reports will be issued prior to and after the deployment/completion of major project milestones.

The project completed build and configuration for Interval 3 and commenced planning and execution for Interval 4. The focus of our IV&V activities for this report included the beginning of a two-month in-depth assessment of testing and review of organizational change management (OCM) and communications management.

The IV&V Dashboard on the following two pages provides a quick visual and narrative snapshot of both the project status and project assessment as of February 23, 2021. Refer to Appendix A: IV&V Criticality and Severity Ratings for an explanation of the ratings and Appendix E: Prior Findings Log for prior report findings.

TIME MANAGEMENT

“Managing your time without setting priorities is like shooting randomly and calling whatever you hit the Target.”
- Peter Turla
Executive Summary

PROJECT ASSESSMENT

SUMMARY RATINGS

OVERALL RATING

Minimal deficiencies were observed. Oversight may be needed to ensure risks stay low and project remains on track.

PROGRAM GOVERNANCE  G

PROJECT MANAGEMENT  G

TECHNOLOGY  G

CRITICALITY RATINGS

HIGH  MED  LOW  PRELIM  POSITIVE

PROJECT BUDGET

* Only includes contracts.

PROJECT PROGRESS

43%

PROJECT TIMELINE

** Revised project schedule approved by EUTF.

** Project schedule is in progress as of February 23, 2021.

*Only includes contracts.

Minimal deficiencies were observed. Oversight may be needed to ensure risks stay low and project remains on track.

PROGRAM GOVERNANCE  G

PROJECT MANAGEMENT  G

TECHNOLOGY  G

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# ASSESSMENT AREA & RATINGS SUMMARY

**AS OF FEBRUARY 23, 2021**

<table>
<thead>
<tr>
<th>DEC</th>
<th>JAN</th>
<th>FEB</th>
<th>IV&amp;V ASSESSMENT AREA</th>
<th>IV&amp;V OBSERVATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td><strong>Overall</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The overall project rating is solid green and reflects the project team’s continued collaboration, teamwork, and dedication to project success. Two IV&amp;V Assessment Categories declined from the prior report due to concerns with requirements and schedule management.</td>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
<td>Project Schedule: The project is experiencing some delays detailed below and needs to be analyzed to see if there is an impact to the overall timeline.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Project Costs: Project contract costs invoiced to-date approximated $3,825,000 and are within the budget.</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Quality: In general, the quality plan and metrics are being collected, reported, and addressed as needed.</td>
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<tr>
<td></td>
<td>G</td>
<td>G</td>
<td><strong>Program Governance</strong></td>
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<tr>
<td></td>
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<td></td>
<td>Project governance is working effectively. The Joint Steering Committee (JSC) convened to discuss project status, schedule, risks, and issues.</td>
<td></td>
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<tr>
<td></td>
<td>G</td>
<td>G</td>
<td><strong>Project Management</strong></td>
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<tr>
<td></td>
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<td></td>
<td>The EUTF, Segal, and Morneau Shepell Project Managers continue to meet regularly and openly discuss project activities, feedback, and deliverables. The project is experiencing some delays including build and configuration for Interval 4, data conversion, environment set up, and Morneau Shepell Segment 1 testing. In addition, the RTM requirements related to reports, communications, data interfaces, and workflows have not been fully identified and assigned to intervals so the level of effort for the overall schedule cannot be planned at this time. The project delays should be analyzed to determine if current milestones are realistic and if there are impacts to the overall timeline (Refer to finding 2021.02.PM01). Segment 1 UAT training was completed, followed by Train-the-Trainer sessions with in-person support provided by Morneau Shepell and Segal. With strong support by the Segal Project Manager, the project effectively keeps project stakeholders informed and engaged through presentations, town hall meetings, training, and surveys. The EUTF Project Manager conducted a preliminary review of the OCM and BPR Plan and worked with Segal to identify a change champion lead and begin documenting specific activities. The project is scheduling and conducting employer and carrier follow-up meetings.</td>
<td></td>
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<tr>
<td></td>
<td>G</td>
<td>G</td>
<td><strong>Technology</strong></td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td>The project is currently in build and configuration for Interval 4 and continues to defer requirements to later intervals. Some Medicare and billing transaction history data records are still outstanding, and Data Conversion Cycle 1 results are still pending approval by EUTF. ICON’s high-level data reconciliation process was approved by EUTF, and more detailed process steps are being determined. Morneau Shepell Segment 1 testing is behind schedule and EUTF UAT testing will commence in early March 2021. Planning and processes for UAT testing has begun including internal testing and defect tracking tools. The UAT environment penetration and vulnerability scan results are still pending delivery and were not provided at the start of UAT testing. In accordance with the Quality Plan, training surveys were administered and communicated timely, resulting in positive feedback related to Ariel’s ease of use. Quality issues related to the Interval 3 demonstration still need to be analyzed for root causes and communicated to stakeholders (Refer to finding 2021.01.IT01).</td>
<td></td>
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FINDINGS AND RECOMMENDATIONS BY ASSESSMENT AREA

OVERALL RATING

The overall rating is assigned based on the criticality ratings of the IV&V Assessment Categories and the severity ratings of any underlying findings (see Appendix A: IV&V Criticality and Severity Ratings). The tables below summarize the criticality ratings for each IV&V Assessment Category in each of the three major IV&V Assessment Areas. The criticality rating for 11 IV&V Assessment Categories are solid green. Two IV&V Assessment Categories declined from the prior report due to concerns with requirements and schedule management.

<table>
<thead>
<tr>
<th>DEC</th>
<th>JAN</th>
<th>FEB</th>
<th>PROGRAM GOVERNANCE</th>
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<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Governance Effectiveness</td>
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<td>G</td>
<td>G</td>
<td>G</td>
<td>Benefits Realization</td>
</tr>
</tbody>
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<thead>
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<th>FEB</th>
<th>TECHNOLOGY</th>
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<tr>
<td>G</td>
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<td>G</td>
<td>System Software, Hardware, and Integrations</td>
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<tr>
<td>G</td>
<td>Y</td>
<td>Y</td>
<td>Data Conversion</td>
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<td>G</td>
<td>G</td>
<td>G</td>
<td>Quality Management and Testing</td>
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<td>G</td>
<td>G</td>
<td>G</td>
<td>Configuration Management</td>
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<td>G</td>
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<td>Security</td>
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<tr>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>Deployment and Operations</td>
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<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Project Organization and Management</td>
</tr>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Requirements Management</td>
</tr>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Cost, Schedule, and Resource Management</td>
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<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Risk Management</td>
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<tr>
<td>G</td>
<td>G</td>
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<td>Communications Management</td>
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<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Organizational Change Management (OCM)</td>
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<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Business Process Reengineering (BPR)</td>
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<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Training and Knowledge Transfer</td>
</tr>
</tbody>
</table>

AT-A-GLANCE

Project keeps stakeholders INFORMED and ENGAGED

Review and Communicate QUALITY PROCESSES and METRICS

Need to increase SCHEDULE MANAGEMENT CONTROL activities
PROGRAM GOVERNANCE

<table>
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<tr>
<th>DEC</th>
<th>JAN</th>
<th>FEB</th>
<th>IV&amp;V ASSESSMENT CATEGORY</th>
<th>IV&amp;V OBSERVATION</th>
<th>FINDINGS</th>
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</thead>
<tbody>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Governance Effectiveness</td>
<td>Project governance is working effectively. The Joint Steering Committee (JSC) convened to discuss project status, schedule, risks, and issues.</td>
<td>0 0 0</td>
</tr>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Benefits Realization</td>
<td>In general, the project and quality metrics are being collected, reported, and addressed as needed. As testing begins, the project’s Quality Plan and applicable metrics should be reviewed and communicated regularly.</td>
<td>0 0 0</td>
</tr>
</tbody>
</table>

Governance Effectiveness

Benefits Realization
### Findings and Recommendations

#### Project Organization and Management

The EUTF, Segal, and Morneau Shepell Project Managers continue to meet regularly and openly discuss project activities, feedback, and deliverables. The Project Managers promote and exercise positive project management practices.

#### Requirements Management

The project involves project stakeholders through daily Joint Stand-up meetings to continue to clarify requirements and business rules. A demonstration of Interval 3 requirements is still not complete and Morneau Shepell continues to defer Interval 4 requirements to later intervals. The RTM requirements related to reports, communications, data interfaces, and workflows have not been fully identified and assigned to intervals so the level of effort for the overall schedule cannot be planned at this time. Requirements management will be reviewed more closely in the upcoming months.

#### Cost, Schedule, and Resource Management

Project contract costs invoiced to-date approximated $3,825,000 and are within the budget. The project is experiencing some delays including build and configuration for Interval 4, data conversion, environment set up, and Morneau Shepell Segment 1 testing. The project delays should be analyzed to determine if current milestones are realistic and if there are impacts to the overall timeline (Refer to finding 2021.02.PM01).
### Findings and Recommendations

<table>
<thead>
<tr>
<th>DEC</th>
<th>JAN</th>
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<th>IV&amp;V ASSESSMENT CATEGORY</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Risk Management</td>
<td>New and existing risks and issues are tracked and openly discussed in project meetings and appropriately escalated to project management. Risks and issues continue to be evaluated for appropriate impact ratings, likelihood ratings, and risk response activities.</td>
</tr>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Communications Management</td>
<td>Segal delivered a Town Hall presentation to keep stakeholders abreast of the project, including discussing survey results and upcoming activities. With strong support by the Segal Project Manager, the project effectively keeps project stakeholders informed and engaged through presentations, training, and surveys. The project is scheduling and conducting employer and carrier follow-up meetings.</td>
</tr>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Organizational Change Management (OCM)</td>
<td>The EUTF Project Manager conducted a preliminary review of the OCM and BPR Plan and worked with Segal to identify a change champion lead and begin documenting specific activities.</td>
</tr>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Business Process Reengineering (BPR)</td>
<td>The EUTF Project Manager conducted a preliminary review of the OCM and BPR Plan. Business process improvements through system functionality continue to be explored and discussed. More targeted BPR activities will be reviewed in upcoming months.</td>
</tr>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>Training and Knowledge Transfer</td>
<td>Segment 1 UAT training was completed, followed by Train-the-Trainer sessions with in-person support provided by Morneau Shepell and Segal. Training surveys were administered and communicated timely.</td>
</tr>
</tbody>
</table>
**Finding #: 2021.02.PM01**

**STATUS: OPEN**

**TYPE: RISK**

**SEVERITY: **

**TITLE: CURRENT SCHEDULE DELAYS**

**Finding:** Current schedule delays may impact the overall project timeline

**Industry Standards and Best Practices:** PMI PMBOK Chapter 6 outlines schedule management tools and techniques for controlling the project schedule including data analysis, critical path analysis, and schedule compression.

**Analysis:** Morneau Shepell has schedule management processes in place to report and track schedule variances. Furthermore, the project already proactively identified and actively reports on project risks related to the pace of intervals, insufficient time, and resources available to build and configure all EUTF requirements, and concern that complex functions and features are not being built early enough to allow for sufficient testing and quality reviews. However, even with these schedule management processes in place, the project continues to experience delays which may impact the overall project timeline and rigid Go-Live date of February 1, 2022:

- The project is experiencing some delays including build and configuration for Interval 4, data conversion, environment set up, and Morneau Shepell Segment 1 testing.
- Requirements tagged to specific intervals continue to be deferred to later intervals. Although the deferral of project requirements were expected in earlier intervals as Morneau Shepell gained a clearer understanding of EUTF needs and expectations, requirements tagged to Interval 4 continue to be tagged to later intervals.
- The RTM requirements related to reports, communications, data interfaces, and workflows have not been fully identified and assigned to intervals so the level of effort for the overall schedule cannot be planned at this time.
- Data conversion for certain records continues to be delayed due to the complexity of the billing data and reliance on the current EUTF BAS Vendor to assist with extraction and correction to data extracts; and need for EUTF resources to map and resolve data extraction issues.

Greater attention and rigor to schedule delays is needed to ensure that schedule delays do not impact the overall project timeline and success of the project.

**Recommendation:** 2021.02.PM01.R1 – Increase schedule management control activities.

- Increase the rigor related to task and schedule delays including root cause analysis, discussions of mitigation plans, and reviews of mitigation tasks effectiveness to ensure schedule delays are timely addressed.
- Regularly reassess and readjust the project schedule estimates and assumptions.
- Consider all options for mitigating risk including adding resources, performing work in parallel, redistributing work in future development intervals, and reprioritizing remaining work.
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>G</td>
<td>G</td>
<td>System Software, Hardware, and Integrations</td>
<td>The project is currently in build and configuration for Interval 4. Carrier interface questionnaires were distributed, and 834 interface file meetings commenced in February.</td>
</tr>
<tr>
<td>G</td>
<td></td>
<td></td>
<td>Data Conversion</td>
<td>Some Medicare and billing transaction history data records are still outstanding, and Data Conversion Cycle 1 results are still pending approval by EUTF. ICON’s high-level data reconciliation process was approved by EUTF, and more detailed process steps are being determined. EUTF, Morneau Shepell, and ICON continue to meet weekly to perform and clarify activities related to data groups, layouts, extracts, mapping, and data quality scripts/reports.</td>
</tr>
<tr>
<td>DEC</td>
<td>JAN</td>
<td>FEB</td>
<td>IV&amp;V ASSESSMENT CATEGORY</td>
<td>IV&amp;V OBSERVATION</td>
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<td>-------------------</td>
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<tr>
<td></td>
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<td></td>
<td>Quality Management and Testing</td>
<td>EUTF UAT testing will commence in early March 2021. Planning and processes for UAT testing have begun including internal testing and defect tracking tools. In accordance with the Quality Plan, training surveys were administered and communicated timely, resulting in positive feedback related to Ariel’s ease of use. Quality issues related to the Interval 3 demonstration still need to be analyzed for root causes and communicated to stakeholders (Refer to finding 2021.01.IT01).</td>
</tr>
<tr>
<td></td>
<td>G</td>
<td>G</td>
<td>Configuration Management</td>
<td>No significant changes for configuration management to report since last month.</td>
</tr>
<tr>
<td></td>
<td>G</td>
<td>G</td>
<td>Security</td>
<td>The UAT environment penetration and vulnerability scan results are still pending delivery and were not provided at the start of UAT testing.</td>
</tr>
<tr>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>Deployment and Operations</td>
<td>Deployment activities are not occurring at this stage of the project.</td>
</tr>
</tbody>
</table>
**Appendix A: IV&V Criticality and Severity Ratings**

**IV&V Criticality and Severity Ratings**

Criticality and severity ratings provide insight on where significant deficiencies are observed and immediate remediation or risk mitigation is required. Criticality ratings are assigned to the overall project as well as each IV&V Assessment Area and IV&V Assessment Category. Severity ratings are assigned to each risk or issue identified.

**Criticality Rating**

The criticality ratings are assessed based on consideration of the severity ratings of each related risk and issue within the respective IV&V Assessment Area and IV&V Assessment Category, the overall impact of the related findings to the success of the project, and the urgency of and length of time to implement remediation or risk mitigation strategies. Arrows indicate trends in the project assessment from the prior report and take into consideration areas of increasing risk and approaching timeline. Up arrows indicate adequate improvements or progress made. Down arrows indicate a decline, inadequate progress, or incomplete resolution of previously identified findings. No arrow indicates there was neither improving nor declining progress from the prior report.

- **A GREEN**, low criticality rating is assigned when the activity is on track and minimal deficiencies were observed. Some oversight may be needed to ensure the risk stays low and the activity remains on track.

- **A YELLOW**, medium criticality rating is assigned when deficiencies were observed that merit attention. Remediation or risk mitigation should be performed in a timely manner.

- **A RED**, high criticality rating is assigned when significant severe deficiencies were observed and immediate remediation or risk mitigation is required.

- **A GRAY** rating is assigned when the category being assessed has incomplete information available for a conclusive observation and recommendation or is not applicable at the time of the IV&V review.

**Terms**

- **Risk**: An event that has not happened yet.
- **Issue**: An event that is already occurring or has already happened.
Severity Rating

Once risks are identified and characterized, Accuity will examine project conditions to determine the probability of the risk being identified and the impact to the project, if the risk is realized. We know that a risk is in the future, so we must provide the probability and impact to determine if the risk has a Risk Severity, such as Severity 1 (High), Severity 2 (Moderate), or Severity 3 (Low).

While a risk is an event that has not happened yet, an issue is something that is already occurring or has already happened. Accuity will examine project conditions and business impact to determine if the issue has an Issue Severity, such as Severity 1 (High/Critical Impact/System Down), Severity 2 (Moderate/Significant Impact), or Severity 3 (Low/Normal/Minor Impact/Informational).

Findings that are positive or preliminary concerns are not assigned a severity rating.

TERMS
POSITIVE
Celebrates high performance or project successes.

PRELIMINARY CONCERN
Potential risk requiring further analysis.

SEVERITY 1: High/Critical level

SEVERITY 2: Moderate level

SEVERITY 3: Low level
# Appendix B: Industry Standards and Best Practices

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<tr>
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<td>Prosci ADKAR: Awareness, Desire, Knowledge, Ability, and Reinforcement</td>
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<td>Business Analyst Body of Knowledge</td>
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Appendix C: IV&V Monthly Status

MAIN IV&V ACTIVITIES AND ACCOMPLISHMENTS

Reviewed Training User Guide drafts, status and workplan updates, survey results, and other project artifacts

Participated in Hawaii EUTF project management, acceptance criteria, data conversion, technical, and joint stand-up meetings

Presented at Joint Monthly Steering Committee Meeting

Facilitated Fiddler and neXpert discussion for Connectivity testing

Reviewed EUTF OCM and BPR Plan; discussed OCM approach and activities with Segal PM


KEY UPCOMING IV&V DELIVERABLES

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## Appendix D: Interviews, Meetings, and Documents

### MEETINGS

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### DOCUMENTS

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Appendix E: Prior Findings Log
The Morneau Shepell technology team:

- Interval 1 and 2 functionalities were demonstrated through a combination of slideshows and live system walkthroughs. Based on feedback received from EUTF, Interval 3 functionalities were demonstrated in the live system; however, there were multiple system errors and problems with prepared sample transactions and data. Morneau Shepell should conduct a formalized analysis to identify root causes and make corrective actions.

- The inability to clearly track issues to resolution in a timely manner may negatively impact client confidence.

- The project team should conduct a project retrospective after each system demonstration to facilitate practical steps for improvement and accurate improved stakeholder buy-in and confidence.

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- The project team should conduct a project retrospective after each system demonstration to facilitate practical steps for improvement and accurate improved stakeholder buy-in and confidence.
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Segal's contract contains responsibilities for data conversion, and quality management services for EUTF. Segal is effectively monitoring and improving Morneau Shepell and BPR activities and project management deliverables but does not clearly define the responsibilities and scope of work. Segal will need to develop and finalize the roles and responsibilities assigned to each team member. This has led to delays due to unclear roles and responsibilities for Morneau Shepell, including OCM, BPR, and quality management. Segal's deliverables are yet to be formally documented and scheduled, which could impact the execution of Segal, ICON, and EUTF responsibilities and activities.

### Recommendation

1. **Create a project schedule for Segal, EUTF, and ICON deliverables.**

   - Provide the appropriate detail of tasks, durations, start dates, and dependencies for various phases.

2. **Clarify purpose, content, and expectations of each of the contracted activities.**

   - Include Segal, ICON, and EUTF's status and activities in existing reports and dashboards.

3. **Provide the appropriate detail of tasks, durations, start dates, and dependencies for various phases.**

   - Include Segal, ICON, and EUTF deliverables.

### Status

- **Closed**

  - Segal and ICON deliverables have been clarified and independent of EUTF. Additional deliverables have been scheduled and communicated.

### Categories and Management

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Segal and ICON deliverables and activities have been clarified and communicated by EUTF. Additional deliverables have been scheduled and communicated to Segal and ICON. The project team identified two risks and one issue and are experiencing some delays related to data conversion. Clarifying ICON deliverables, schedules, and activities will help prevent further issues and delays.

### Recommendation

1. **Provide the appropriate detail of tasks, durations, start dates, and dependencies for various phases.**

   - Include Segal, ICON, and EUTF deliverables.

2. **Clarify purpose, content, and expectations of each of the contracted activities.**

   - Include Segal, ICON, and EUTF's status and metrics in existing reports and dashboards.

3. **Provide the appropriate detail of tasks, durations, start dates, and dependencies for various phases.**

   - Include Segal, ICON, and EUTF deliverables.

### Status

- **Closed**

  - Segal and ICON deliverables, activities, and schedules have been clarified and communicated to EUTF. Additional deliverables and activities have been scheduled and communicated.

### Organization and Management

<table>
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<th>ID</th>
<th>CATEGORY FINDING ID</th>
<th>ASSESSMENT</th>
<th>SEVERITY FINDING</th>
<th>RECOMMENDATION ID</th>
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Management, Organization and Project Management IV&V Assessment Category, this finding also impacts the Planning phase of the project. Segal and ICON's schedules for this stage of the project.

### Recommendation

1. **Provide the appropriate detail of tasks, durations, start dates, and dependencies for various phases.**

   - Include Segal, ICON, and EUTF deliverables.

2. **Clarify purpose, content, and expectations of each of the contracted activities.**

   - Include Segal, ICON, and EUTF's status and metrics in existing reports and dashboards.

3. **Provide the appropriate detail of tasks, durations, start dates, and dependencies for various phases.**

   - Include Segal, ICON, and EUTF deliverables.

### Status

- **Closed**

  - Segal and ICON deliverables, activities, and schedules have been clarified and communicated to EUTF. Additional deliverables and activities have been scheduled and communicated.
Appendix F: Comment Log on Draft Report
## Appendix F: Comment Log on Draft Report

### Hawaii EUTF BAS Project: IV&V Document Comment Log

<table>
<thead>
<tr>
<th>ID #</th>
<th>Page #</th>
<th>Comment</th>
<th>Commenter’s Organization</th>
<th>Accuity Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5, 8, 10</td>
<td>Although the technical requirements are approximately one month behind, Morneau Shepell has determined that this does not have any significant impact to the project. Morneau Shepell will reschedule the completion date in March.</td>
<td>Morneau Shepell</td>
<td>The technical requirements task related to developing acceptance criteria is iterative and the completion date needs to be updated for the iterative cycle. The statements related to late technical requirements were removed on pages 5, 8, and 10.</td>
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