

Project Portfolio Executive Summary for April 2017

UW Enterprise Projects

| Projects - Yellow | Sponsor | Oversight Level * | Project Health ** | Overall Risk Rating *** | Budget Rating | Schedule Rating | Scope Rating | Issues Rating | Actual Cost (Project Life) | Budget (Project Life) |
|---------------------------------|--|-------------------|-------------------|-------------------------|---------------|-----------------|--------------|---------------|----------------------------|-----------------------|
| HR/Payroll Modernization | Dave Anderson Mindy Kornberg Cheryl Cameron Ruth Mahan Gary Quarfoth Aaron Powell | 3 - OCIO | Yellow | 10 | 2 | 2 | 3 | 3 | \$56,892,008 | \$75,284,909 |

Project Status:

On time and on budget: In May 2016, the HR/Payroll Modernization program received an additional \$7.8 million in funding and a one-year extension of the go-live timeline (to summer 2017) from the Board of Regents. Since that time, the program has achieved a broad range of key milestones and remains on time and on budget.

Project Status: The program has completed its design phase, with configuration and build complete. A rigorous, multi-layered testing cycle has begun, with positive results indicating that the design and configuration are sound. User Acceptance Testing is taking place and involves about 300 campus participants.

Milestones: Unit and regression testing is complete. Three cycles of integrated End-to-End testing are complete. User Acceptance testing will be complete April 7. Training begins for Central Business Units in April and for intensive system users in May and June.

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| Transportation System Improvement Project | Charles Kennedy | 1 - UW | Yellow | 10 | 4 | 2 | 2 | 2 | \$1,701,831 | \$2,124,474 |

Project Status: Phase 3 Implementation is on plan. The implementation has been broken up into two sub phases. The first is enforcement/citations. This will go live in the first week of May with parking specialists using new citation issuance devices. The customer will only see a slightly different looking citation. The second sub phase is permits which is scheduled to go live in the first half of August. The permits phase is still on plan as well. There is some uncertainty about person data from HRP as it will have just gone live. UW-IT staff is working with the HRP team to ensure that necessary interfaces will be operational.

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UW Medicine Projects

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|---|---------------|-------------------|-------------------|-------------------------|---------------|-----------------|--------------|---------------|----------------------------|-----------------------|
| Pharmacy Inventory Management System | Shabir Somani | 2 - UW | Yellow | 10 | 2 | 2 | 3 | 3 | \$4,592,542 | \$11,369,982 |

Project Status: The Pharmacy Inventory Management System (PIMS) project was re-baselined in late February 2017. The revised Phase 1 go-live for UW Medical Center (UWMC) in February 2018. The new project schedule is based on the following assumptions and dependencies:

- Interfaces (Tecsyst and GHX) are delivered within schedule (this includes the PIMS team approving technical specifications on schedule).
- There are no critical issues found that can't be resolved during the testing phase.
- Facilities work required to install the Carousels is complete by 8/1/17.
- Carousels are delivered and installed the first week in September 2017.

In February, UW Medicine Leadership (UWM) requested a Proof of Concept (POC) demonstration for the project to help validate whether Tecsyst could deliver on the promised functionality and that the functionality did not adversely impact pharmacy staff productivity. Success criteria for the POC have been developed and approved. Planning is underway to perform POC and conference room pilot (i.e., end users performing workflows in the system) activities the week of May 15.

Major activities to date include:

- Held Project Kickoff (9/9/16).
- Completed Planning & Analysis Phase (9/30/16).
- Completed application training for the project team.
- Received approval for \$500K budget variance for additional project resources.
- Recruited for, hired, and onboarded X6 additional project team members (Testing Lead, Pharmacy Techs X2, Curriculum Developer, Report Writer, and Pharmacist).
- Continued to collaborate with Tecsyst in developing strategy to address Items Catalog issue (see Major Risks/Issues below). Onsite workshops held to review Phases 2 & 3 requirements and preliminary design.
- Tecsyst delivered and assisted UW to install EliteSeries v9.4.1.
- Finalized and approved hi-level interface design.
- Signed an SOW with GHX.
- Continued UWM participation in Tecsyst R&D deep dive and review sessions (v9.5).
- Started build and configuration of Elite.
- Tecsyst completed core SOPs.
- Developing test scripts.
- Tecsyst delivered Phase 1 of IDM solution.
- Continued engagement of ongoing external QA consultants - closed all open QA findings and moved project to light-green status.

Upcoming major milestones include:

- Design complete – target 4/7/17
- POC complete – target 5/31/17
- UWMC facilities work complete – 8/1/17
- UWMC carousels install complete – 9/30/17
- UWM pharmacy items build complete – 10/1/17
- Testing complete – target 11/28/17
- UWMC go-live – target 2/4/18

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Major Risks/Issues:

- Risk – UWM executives concerned about Tecsys’ ability to deliver the promised functionality in a way that does not adversely impact pharmacy staff productivity. Mitigation: The project will conduct a Proof of Concept (POC) in May to determine if implementing the UW PIMS/Tecsys solution is still the correct business decision. POC success criteria have been developed and approved; POC planning underway.
- Issue – The current Tecsys EliteSeries data management tools and processes will require a manual build of the Elite Items Catalog, resulting in a large level-of-effort (estimated 3,500-5,000 hours). Mitigation: Tecsys has agreed to develop an automated IDM solution; Tecsys has selected a 3rd party, commercial Pharmacy content provider (Medi-Span) and must provide integration; UWM will continue to manually build the Pharmacy Items Catalog.
- Risk – Although Tecsys has health system industry experience and the solution is highly integrated, specific pharmacy operations components are new to them. Mitigation: Planning for extensive testing of the new Elite software solution, as well as integrated testing with the UWM systems across the enterprise.

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| Projects – Complete | Sponsor | Oversight Level * | Monitor of Benefits/Value Realized |
|---|------------------------------|-------------------|------------------------------------|
| Epic Enterprise Specialty Implementation: Project went live 5/20/14 | Johnese Spisso James Fine | 1 - UW | |

| * Oversight Level Key | |
|-----------------------|--|
| 1 | Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority. |
| 2 | OCIO approval required and regular project reporting. Quality Assurance (QA) reporting required, maybe internal or external. OCIO may recommend project to be full Technology Services Board (TSB) oversight. |
| 3 | High severity and/or high risk, subject to full TSB oversight, which includes TSB approval, written reports to the TSB, periodic status reports to the TSB by the agency director and staff, and submission of other reports as directed by the TSB. External QA reporting required. |

| ** Project Health Key | |
|-----------------------|---|
| Green | Project is on time, on budget, and within defined scope. Overall Risk Rating where 4-9 is Green. |
| Yellow | Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays or scope changes. Overall Risk Rating where 10-14 is Yellow. |
| Red | Major changes to scope, budget or resources have placed project at critical risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope. Overall Risk Rating where 15-20 is Red. |

Note for UW Medicine: project oversight levels 2 & 3 report to UW management

| *** IT Project Risk Ratings | |
|-----------------------------|--|
| Current Risk Rating | Use the scale below to rate current performance on Budget, Schedule and Scope (select appropriate number for each) |
| Budget = | 1 = Performing better than project plan; ahead by 5% or more 2 = Performance is on plan |
| Schedule = | 3 = Behind plan, but within 5% of original targets 4 = Behind plan between 6% to 10% and likely to use/using contingency |
| Scope = | 5 = Greater than 10% behind plan and more than half of contingency used |
| Current Risk Rating | Use the scale below to rate current impact of Issues and other factors relevant to the project (select one number for this measure) |
| Issues = | 1 = No risks or issues identified at this time 2 = Some identified but minor, no impacts anticipated 3 = Some that could impact the project are being managed, with minimal impact anticipated 4 = Significant risks/issues/other factors identified but not yet managed 5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope |