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## ***Correspondence Memorandum***

**Date:** January 21, 2025

**To:** IAS Program Management Team

**From:** Michelle Hoehne, Kurt Petrie, Yikchau Sze  
Office of Internal Audit (OIA)

**Subject:** Internal Audit Insurance Administration System (IAS) Program Review  
Monthly Report

### **Background**

This is our continuation of the monthly communication for our IAS Program Review, covering the period from November 26, 2024 – January 14, 2025. OIA's role for this consulting project is to provide feedback on IAS program management and verify that key program outcomes are achieved. OIA is using documentation review and evidence testing to verify the following:

- Management oversight is appropriate
- Status reporting is accurate
- Key risks are identified and properly treated
- Necessary testing is completed
- Other key project milestones are supported and achieved

### **OIA Activities Completed**

As part of the routine, ongoing monitoring OIA completes, we attended the following meetings:

- Biweekly Decisions, Actions, and Questions (DAQ+) Log Review
- Program Management Team (PMT)
- Biweekly Meeting between OIA and IAS General Program Manager and Program Analyst

We reviewed the following items for reasonableness and asked follow-up questions as necessary:

- DAQ+ Log
- IAS Program weekly status reports
- Monthly Portfolio Committee Reports
- Eclipse time tracking and allocation of hours
- Risks and issues documented in Eclipse

Attachment A

- Reporting of End-to-End testing progress<sup>1</sup>

## OIA Items Noted

### Project Reporting Accuracy & Status Updates

Based on our ongoing review of the weekly status reports provided to the IAS Program Sponsor, PMT, and other key IAS staff, we noted some concerns over the accuracy of reporting for project health indicators compared to the schedule status. Despite several of the underlying projects indicating a schedule status of red (behind or trending behind), the project health indicators had a green (on track) health status; or the project health indicators were yellow or red, but the schedule status was on time. We discussed these concerns with the IAS General Program Manager and the Program Analyst and how these schedules can be different because they are measuring different activities. However, without knowing this information, the reader could be confused by the conflicting information presented, making it difficult to accurately assess the true status of a project. For example, the schedule status in the January 3, 2025 weekly status report had the End to End project being 91% complete compared to 83% expected, and a schedule status of trending ahead. However, the project health indicator for the schedule was yellow. Furthermore, the End-to-End Testing at a Glance section at the beginning of the January 3, 2025 weekly status report detailed how cycle 1 testing went, and it is difficult to understand how a reader of that information would conclude that the project is trending ahead of schedule.

We recommend that OEI management work with the PMT members to determine what detail and explanations they require to get an accurate understanding when status, health indicators, and other information are in contradiction with one another. In addition, we recommend that the project health indicators and schedule status be aligned, or an explanation be provided when they are different. Additionally, the purpose of the information presented in each chart and how it should be viewed by the reader should be further clarified.

The “Task Status” was a new section first added to the December 13, 2024 weekly status report. The goal of this section is to provide the reader with information on tasks completed, on time, late, overdue, and scheduled. We obtained documentation to verify that the information reported was accurate. We reviewed the supporting documentation and found that the IAS Program Management Plan (PMP) was included in the reported tasks. The IAS PMP is a work plan that was created to monitor key tasks from the various individual IAS projects, so all of its tasks are already included in the respective IAS projects. Therefore, by including the IAS PMP tasks, all the tasks associated with this project were being double reported. For example, the IAS PMP on a percentage basis was 30% of the late and 80% of the overdue tasks reported in the December 20,

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<sup>1</sup> OIA notes that the weekly status reports have included detailed information on the results of the End-to-End testing. Based on our high-level review, we found the information accurate; however, we plan to test the results in more detail and include them in a subsequent report.

2024 weekly status report. After being notified by the OIA for this double reporting of task counts, the IAS Program Management staff have corrected this issue in the subsequent weekly status report.

#### Program Time Tracking

OIA discussed in its July memo how program time tracking changed after the March 27, 2024 IAS Program Reset meeting. OIA reviewed IAS project time tracking and recording of hours in Eclipse for 2024. We identified several contractors and ETF employees working on the IAS program that had little to no time recorded in 2024. Without fully recording time worked on the IAS program accurately, the budget and total implementation cost, schedule, and potentially other health indicators are inaccurate. OIA did discuss our concern about the lack of contractors recording their time with the IAS Program Manager back in September 2024, and the recording of hours slightly improved after that. At that time, the IAS Program Manager suggested reviewing time recorded in Eclipse monthly going forward. However, it appears that did not occur, other activities took priority, or it occurred and was not effective. Going forward, OIA plans to provide OEI management with its monthly Eclipse time tracking to assist with their assessment.

We recommend that project managers monitor the employees and contractors working on their project(s) and ensure their time is being recorded. We also recommend that OEI management ensure that ETF employees and contractors are recording their time, and project managers are being held accountable for oversight of their project(s).

cc: Strategic Council