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## ***Correspondence Memorandum***

**Date:** February 20, 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 January 15, 2025 – February 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:

- 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 and provided our review to Program Management to assist in their monitoring
- Risks and issues documented in Eclipse
- Reporting of End-to-End testing progress

Attachment B

## OIA Items Noted

### Overall Project Monitoring and Oversight

The IAS Program Managers are monitoring the individual IAS projects through weekly meetings with the Project Manager (PM), and with the creation of a Program Plan, where all critical tasks are monitored. This Program Plan is only updated monthly due to the length of time it takes to update all the information. However, a lot of changes can happen in one month, so consideration should be given to whether this should be updated more often.

Most of the individual project monitoring is completed by each PM. Within each individual project, PMs can move their workplan tasks back if there is enough bandwidth to complete the task later, if some of the task dependencies allow for overlap, tasks can be further separated out, or other changes have occurred with the project.

Our concern with the previously described monitoring methods is that without the Program Plan being updated more often, and the PM making the determination at the individual project level, a holistic review is not occurring often enough at the overall IAS program level. Furthermore, the timeframe to complete all activity is getting shorter, resulting in some projects being at risk of completing all their tasks within the time remaining.

While we note that PMs are supposed to update their workplans for tasks completed and provide a weekly status update each week, throughout our review we have been discussing concerns about the transparency of some of this information. We note that some of our concerns have been addressed through our discussions with Program Management. However, we still have concerns that the Project Status Chart<sup>1</sup> in the weekly status reports uses the expected percent complete compared to the percent complete to determine the status. The issue is that the Eclipse system calculates the expected percent complete<sup>2</sup> using the project end date, and with most projects having an end date past 7/1/25, the expected percent complete is underestimated and misleading.

IAS Program Managers are working on determining what is included in a go-live readiness decision, but that assessment is not going to be completed until March. The assessment is going to include the core functionality items to ensure they are completed, or if a manual workaround is available. As part of this effort, IAS Program Managers at the end of January completed a compilation of all remaining Benefitfocus and internal ETF development work. OIA plans to review the go-live readiness decision

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<sup>1</sup> Prior to the January 31, 2025 weekly status report, this chart was called the schedule status.

<sup>2</sup> Eclipse calculates the expected percent complete by taking the number of net working days between the planned start date and today's date divided by the number of net working days between the planned start date and planned end date for each individual task and the entire project. It also assumes even completion of a task throughout the entire task's timeframe.

criteria after it is complete. However, OIA has concerns that this has not been completed yet, given how close we are to go-live. Additionally, we note that we are waiting on information to be provided from Program Management regarding the critical path for the program and the contingency planning that is underway.

We recommend:

- that the go-live readiness plan decision criteria is completed as soon as possible and continually reviewed.
- for activities that are going to be completed manually after go-live, that discussions occur with the impacted divisions and/or offices pertaining to the required resources to complete this work.
- that the information reported in the project status chart of the weekly status report accurately reflect the status of the project.

### End-to-End Testing

As mentioned in our prior report, the weekly status reports have included detailed information on the results of End-to-End testing, and we have been monitoring this information for general accuracy as compared to the testing results reported in the IAS E2E Dashboard. Pending additional information from staff, OIA is also performing a review of what is included in the End-to-End testing scripts and scenarios. While this review is in progress, we have concerns that End-to-End testing is likely to be completed prior to completion of some major system development work, such as Direct Pay solutioning, the provision of adequate data for vendors, and full functionality of the COBRA platform. Therefore, we recommend that a comprehensive strategy for testing any processes not included in End-to-End testing, or that failed during testing and were not retested, be compiled and assessed for timing with go-live, along with the impact to the IAS Program.

cc: Strategic Council