

# Technology Services Board

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Portfolio-Policy Subcommittee Meeting

January 11, 2024

9:00 am – 11:00 am

## Current TSB Members

### Industry Members

Tanya Kumar – Oracle

### Legislative Members

Sen. Matt Boehnke – Senate R

Rep. Travis Couture – House R

Sen. Joe Nguyen – Senate D

Rep. Chipalo Street – House D

### Executive Branch (Agency Directors)

Bill Kehoe – State CIO & TSB Chair

David Danner – UTC

Cami Feek - ESD

Tracy Guerin – DRS

### Other Government

Viggo Forde – Snohomish County

TOPIC	LEAD	PURPOSE	TIME
Welcome   Agenda review	Deanna Brocker	Introductory remarks	9:00 a.m.
Review and approve Oct. 12 meeting minutes	Deanna Brocker	<b>Approval</b> of minutes	9:05 a.m.
Draft Charter Review	Deanna Brocker	Member discussion	9:10 a.m.
Technology Business Management Goals for 2024	Derek Puckett	Information	9:30 a.m.
Projects Under Oversight, Their Assigned Tiers, & Relationship of Projects to CIO Portfolio	Amy Pearson Diana Martin	Information and member discussion	9:45 a.m.
Realization of Modernization	Bill Kehoe	Member discussion	10:15 a.m.
Public comment			10:45 a.m.

# Review 10/12/23 Minutes

# Draft Charter Review

# Technology Business Management (TBM) Goals for 2024

## RCWs

RCW [43.105.054](#) - information technology– Standards and policies– Powers and duties of office.

RCW [43.105.220](#) - Strategic information technology plan– Biennial performance reports.

RCW [43.105.225](#) - Managing information technology (IT) as a statewide portfolio

RCW [43.105.235](#) - State agency information technology portfolio.

## Policies & standards

### IT Portfolio

Technology Portfolio Foundation

Technology Portfolio Foundation - Applications

Technology Portfolio Foundation - Infrastructure

Managing Information Technology Portfolios - Projects

### TBM

Technology Business Management (TBM)

TBM IT Expenditure Data Provision Standard

TBM Taxonomy

TBM Reporting Solution



**Updated Technology Portfolio Foundation - Applications policy.**

**Developed application and business capabilities kickstart models.**

- The models equip agencies with cost and portfolio data on their application and business capabilities.
- Agencies can use data to gain additional insight into solutions in place to support their business and services for Washingtonians.

**Introduced Gartner® TIME model toolkit. (TIME = Tolerate, Invest, Migrate, Eliminate).**

- The TIME toolkit helps agencies identify and prioritize modernization efforts.

**Established IT Portfolio Management Community of Practice.**

**Collaborated with One Washington project to ensure continued IT financial reporting in Workday**

Increase agency program maturity

Improve agency practitioner  
knowledge base & support ERP  
transition

Drive agency leadership adoption  
through governance sessions

Report back to refine strategy

# Projects Under Oversight, Their Assigned Tiers, & Relationship of Projects to CIO Portfolio

## Portfolio Snapshot

As of 1/4/24

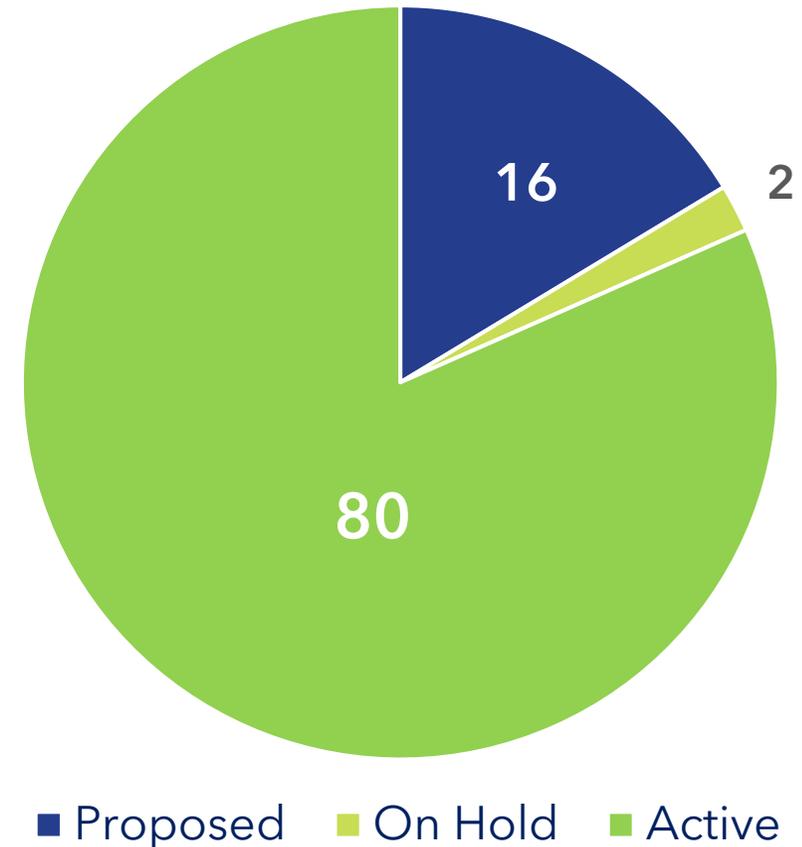
**\$2B** total planned spend

**80** active projects under Oversight

**18** projects > \$20M

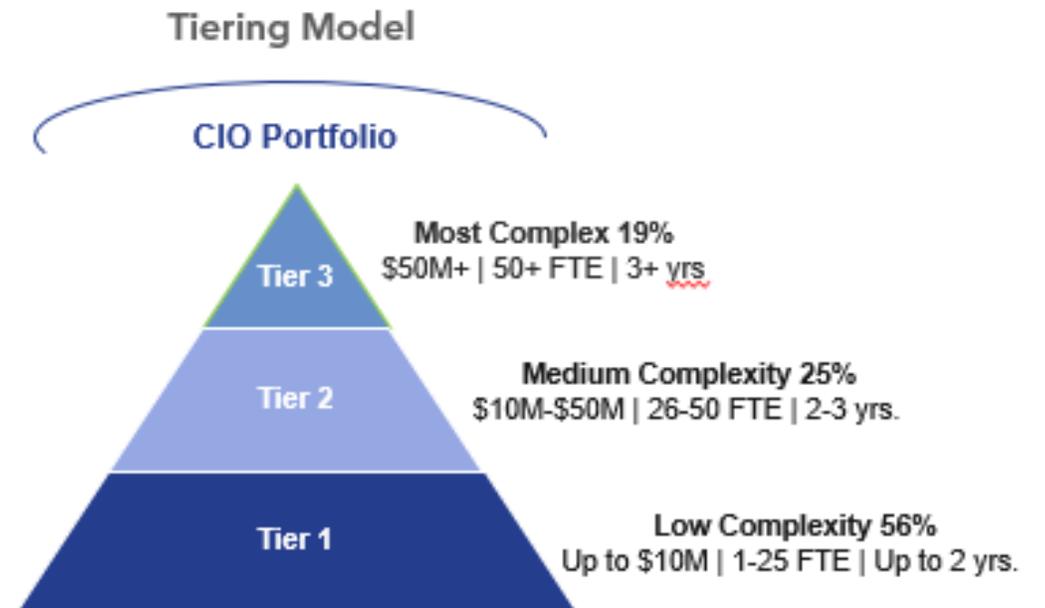
Additional details on [IT Project Dashboard](#)

Project Status



## Tiering Update

- Re-introduced project tiering in 2023 via [Policy PM-01](#).
- Action items & road ahead:
  - Build tiering model & online intake form - done
  - Roll out online tiering form - 1/31/24
  - Assess tiering for all active projects under oversight - in flight - target 1/31/24
  - Share tiering results with partners - Feb 2024
  - Refine model - ongoing



# CIO Portfolio Modernization Programs and Projects, and Future TSB Engagement

Program or Project	Agency	Latest Assessment
One Washington	OFM	●
Workers' Compensation Systems Modernization	L&I	●
Integrated Eligibility and Enrollment	HHSC	●
Enterprise Electronic Health Records Program	DOC, DSHS, HCA	●
988 Program	HCA, DOH	●
WaCares Program	DSHS, ESD, HCA	●
HELMS	DOH	●

- When to engage?
  - At initiation phase to influence direction
  - To celebrate major milestones
  - When seeking guidance on a specific topic
  - When experiencing significant challenges

# Realization of Modernization



## CIO Portfolio of Projects & Programs

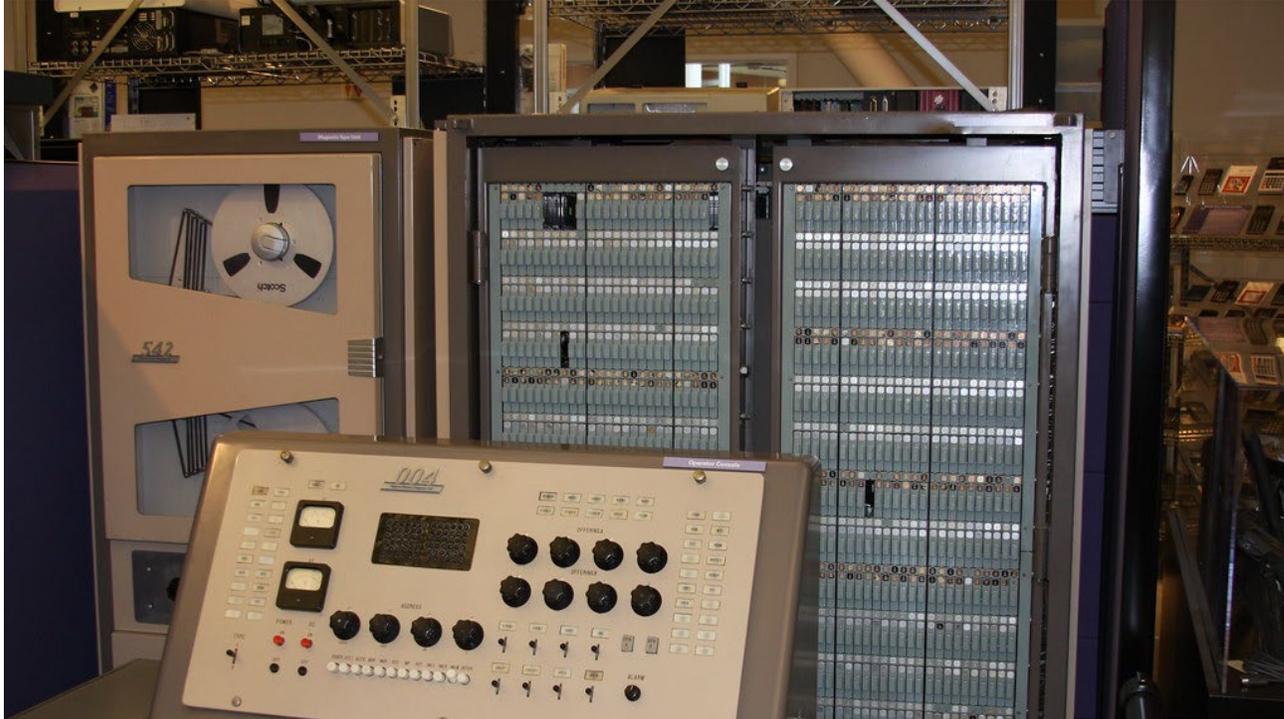
The objective of the CIO Portfolio Strategic Advisory Services is to bring a multi-disciplined, experienced team to the modernization programs.



Enterprise  
EHR Program



# Modernization = From Constraining Technology.....



```
Display User Profile - Basic

User profile . . . . . : YASIRU

Previous sign-on . . . . . : 05/03/13 16:47:27
Sign-on attempts not valid . . . . . : 0
Status . . . . . : *ENABLED
Date password last changed . . . . . : 19/02/13
Password expiration interval . . . . . : *SYSVAL
Set password to expired . . . . . : *NO
Local password management . . . . . : *YES
User class . . . . . : *PGMR
Special authority . . . . . : *JOBCTL
                                *SAVSYS
                                *SECADM

Group profile . . . . . : QPMR
Owner . . . . . : *GRPPRF
Group authority . . . . . : *NONE
Group authority type . . . . . : *PRIVATE

Press Enter to continue.

F3=Exit  F12=Cancel
```

Data difficult to access

Difficult to change

Resource risk

Expensive to maintain

Security risks

Integration with external systems is difficult

Constraint to Business Transformation

# to... Enabling Technology



## Modernization Starts with Defining the Vision for the Customer | The HHS Coalition Vision

*“We envision a world where Washingtonians tell their story one time as the new system and underlying business processes securely guide them through the possibilities.”*

*“We envision a world where HHS Coalition organizations can quickly respond to program, partner, client, and legislative needs, aided by improved technology and business processes.”*

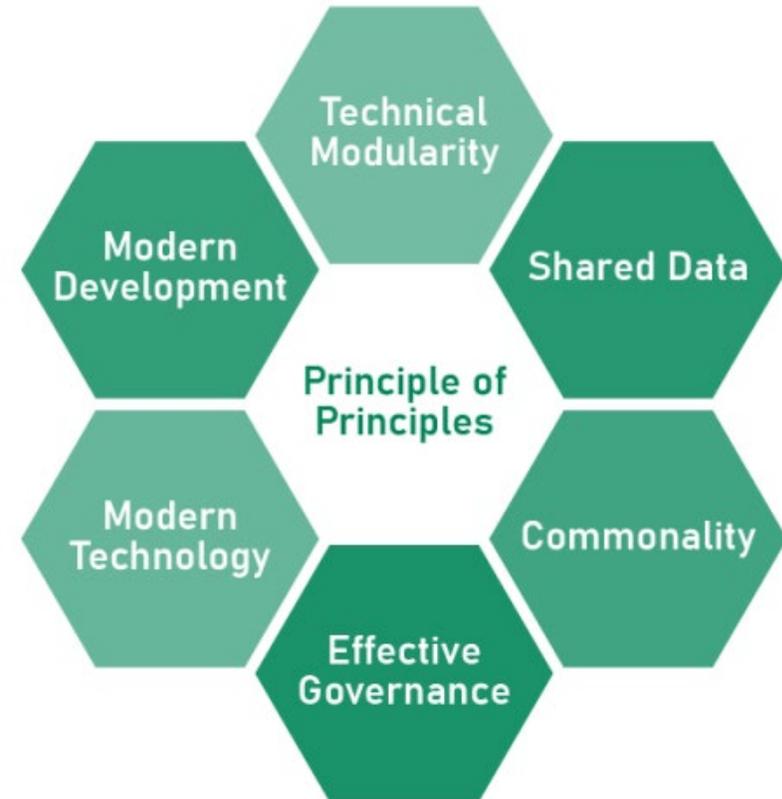


# Develop the Roadmap and Modernization Strategy

# The IE&E Roadmap and Technical Architectural Principles

Dependent on TAD 

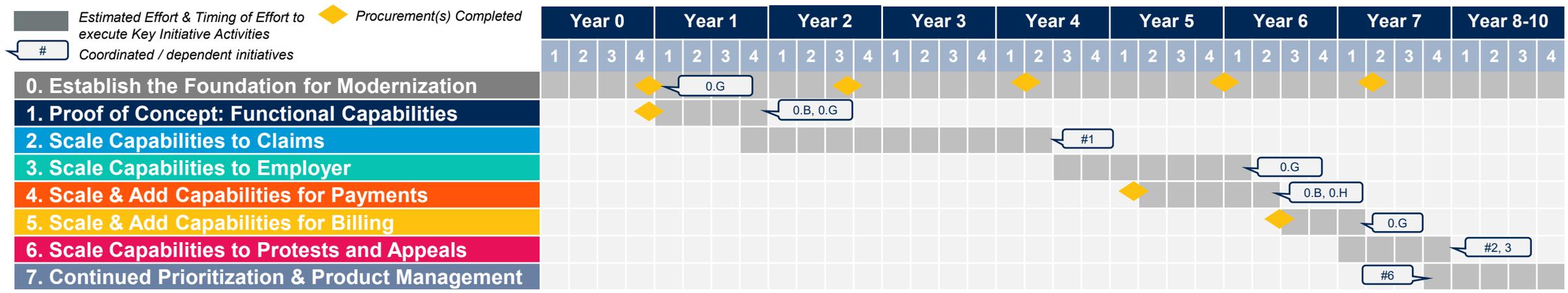
Product Number <sup>2</sup>	Product name <sup>2</sup>
1	Eligibility and enrollment status tracker
2	IE&E data model and data technologies
3	Streamline application submission
4	Modern case management
5	Classical Medicaid consolidated into health portal
6	Change reporting and renewal application
7	Modern notifications and client communications
8	Modernized eligibility business rules
9	Document upload
10	Modernized enrollment and other business rules
11	Assistor management and support products
12	Fully integrated portal and modern business rules
13	Document management system
14	Data warehouse integrated to modern data technologies



# The WCSM Modernization strategy executes Waves of effort, seeking an optimization of L&I's business benefits & risks

Waves of implementation to modernize existing WCSM applications (largely through their replacement) allow for incremental deployments

- Established & Agile **principles maintain long-term focus while allowing L&I to adjust delivery prioritization for changes** (e.g., regulatory)
- Within each Wave, increments focused on specific journeys deliver deployable capabilities** / processes to enable L&I's target state
- Procurement efforts support incremental investments for new capabilities** / support throughout the modernization
- An **initial proof of concept focuses primarily on Self Insurance, with portions of State Fund, processes to prove technologies & internal processes prior to scaling** to larger business opportunities and broader customer reach

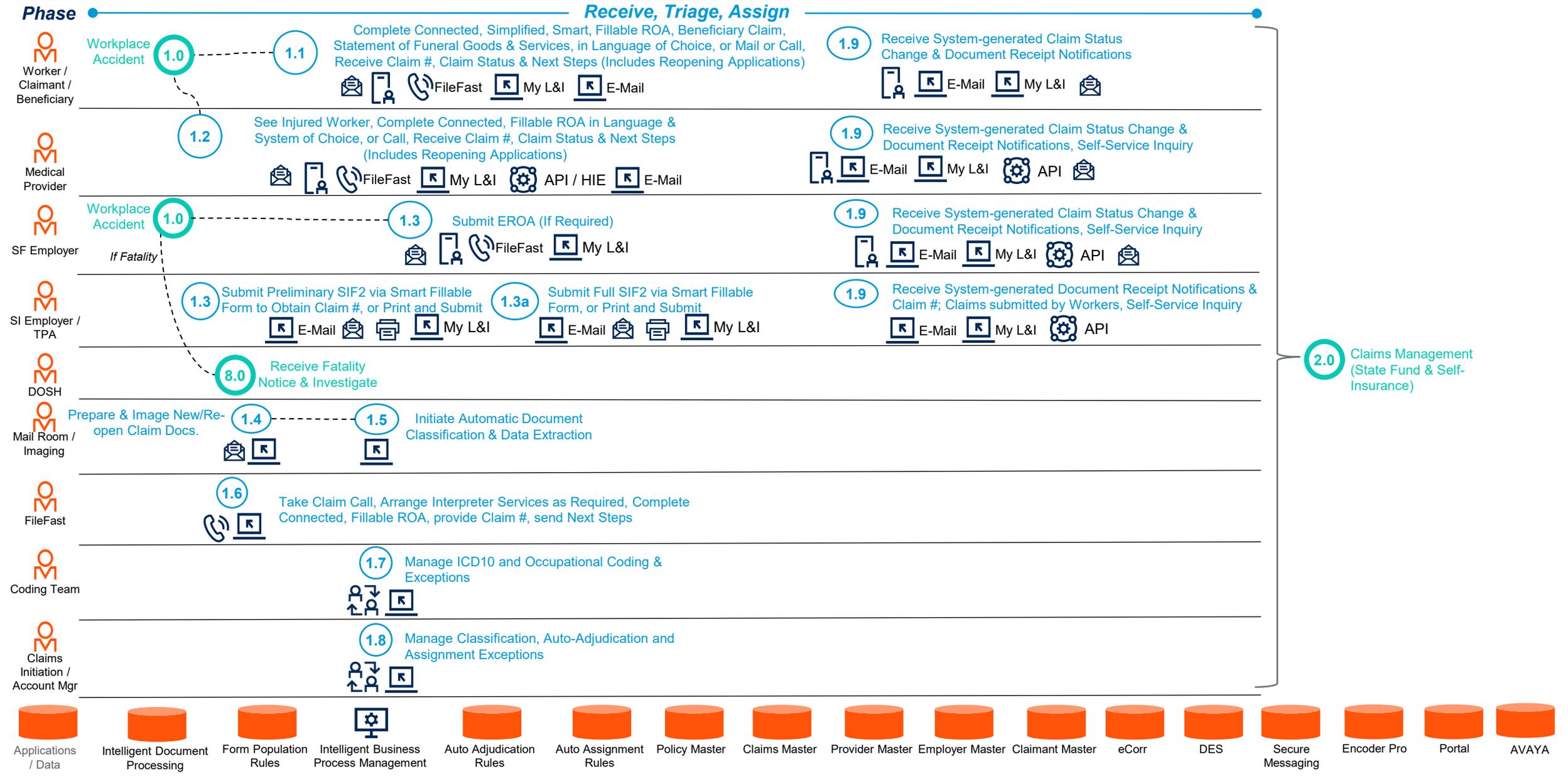


NOTE: An on-going market scan for available software and implementation partners are occurring, with multiple viable alternatives

# Defining The Customer Journey

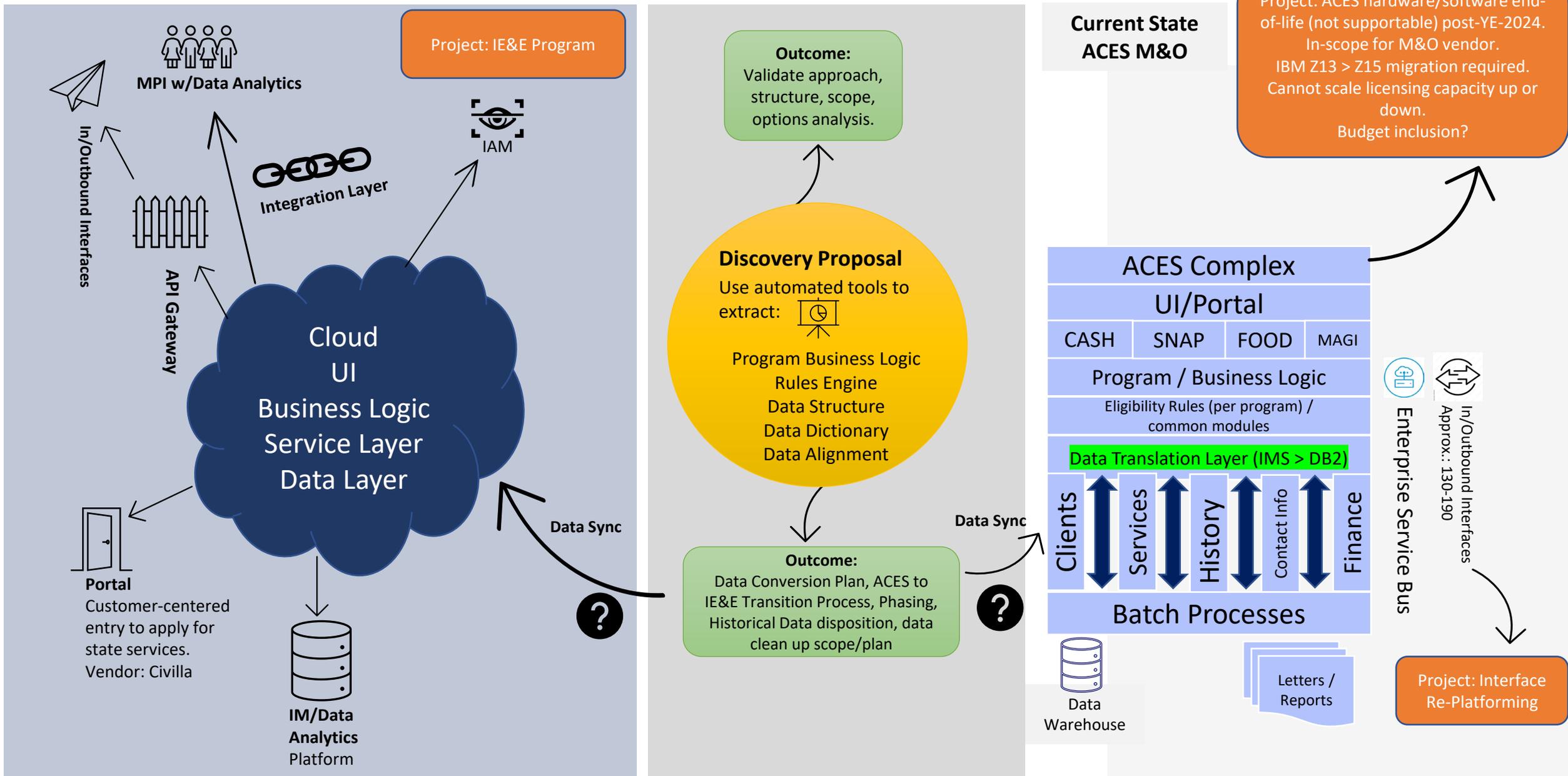
## Current State and Target State

# 1.0 Receive, Triage, Assign New Claims – Target State – Page 1



# Define the Target State Enabling Architecture and Technology to Support the Modernization Strategy

# Integrated Eligibility and Enrollment – Future State Environment - Conceptual Only



# **Develop an Integration Architecture to Connect Data and Functionality Between the Future and the Current Technology**

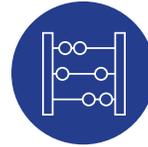
# Architecture Concepts Informing the IE&E Modernization Strategy



## Front-end systems



## Interface systems



## Back-end systems

**Description<sup>1</sup>** Applications (web, app) that allow users to perform actions on their own behalf

Systems that provide interconnections between other modules or systems

Systems that provide data storage and perform calculations

**Examples<sup>1</sup>** HHS portals

API Interface  
MuleSoft

ACES<sup>3</sup>  
databases

ACES ODM<sup>4</sup>

Less tightly coupled

More tightly coupled

## Revised IE&E Roadmap ACES Assumptions

- The ACES application ecosystem is complex and tightly coupled making a phased decommissioning of ACES difficult.
- The ACES mainframe needs to be stabilized and a viable platform to mitigate the risk of failure until IE&E is completed (6-10 years).
- ***The IE&E roadmap will be refreshed with the principle of Integrating with ACES on the backend while incrementally building out IE&E on the front end.***

1. Discussions with IE&E Program Deputy Director, April-June 2023; Discussions with WaTech Leadership, April-June 2023

2. Application Programming Interface

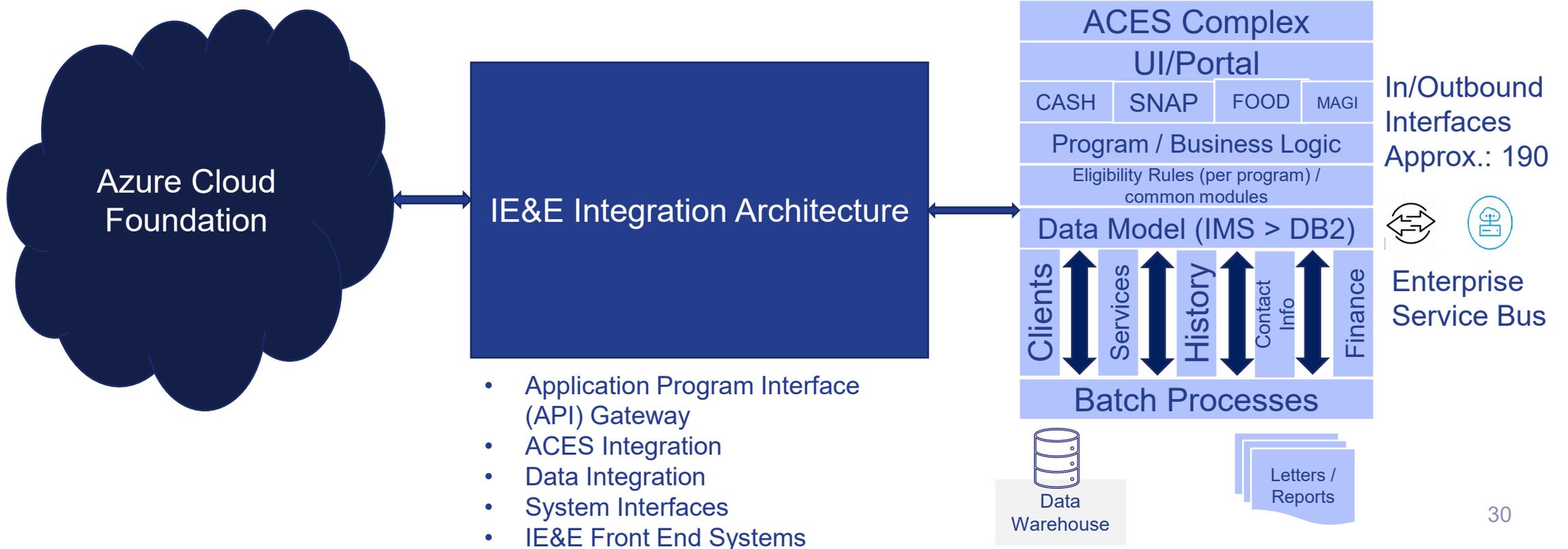
3. Automated Client Eligibility System

4. Operational Decision Manager

Source: Discussions with Data Architecture and Technical Architecture Group facilitators, May -June 2023

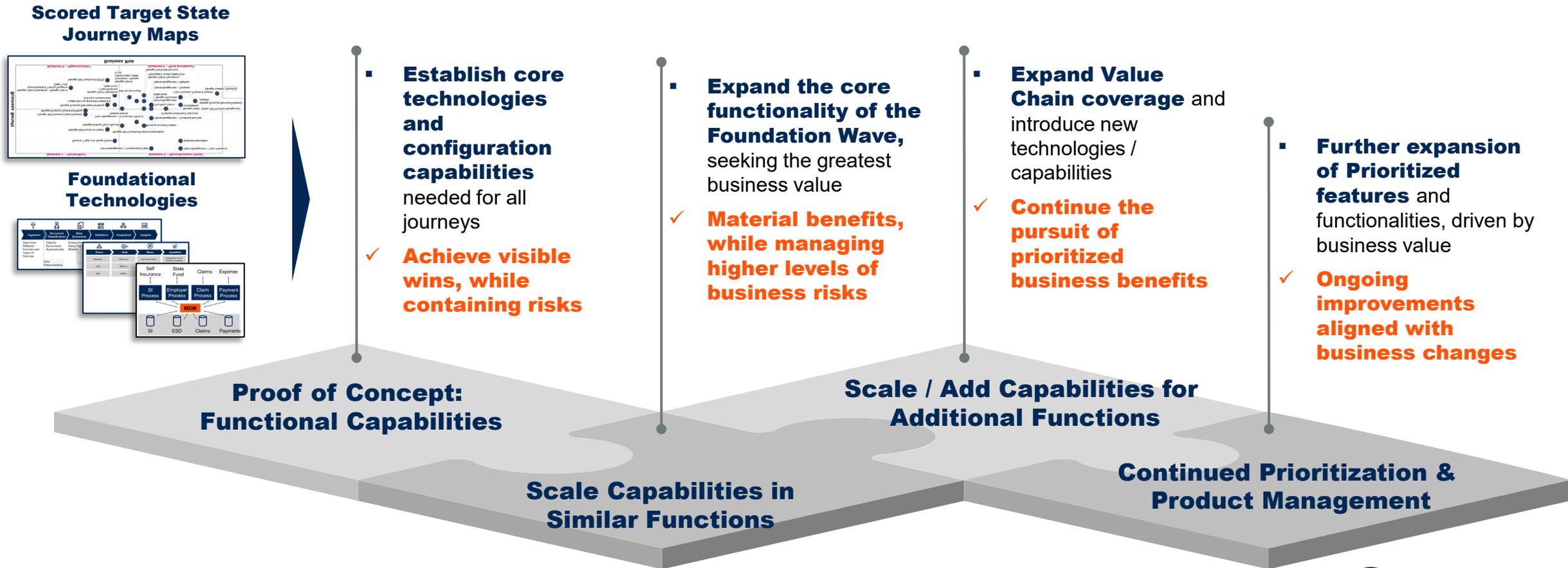
# **Incrementally Build Out the Business Capabilities of the Modernization Strategy While Integrating with the Legacy Environment**

***The IE&E roadmap will be refreshed with the principle of Integrating with ACES on the backend while incrementally building out IE&E front end and integration architecture.***



# The modernization strategy used a structured approach to deliver increasing business benefits over time through Waves of effort

Core to the sequencing of the modernization effort was assessing each L&I target state journey to L&I's prioritized business benefits & risks



# What are the Challenges that Modernization Projects Present to Agencies and the State?



# Public Comment