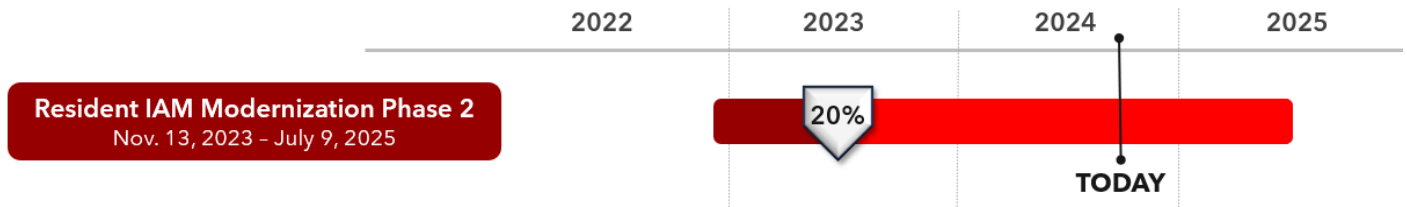


**Project name: Resident IAM Modernization - Phase 2**

**Date: October 8, 2024**

**20% Complete**



**Progress Summary**

The IAM Modernization team has made steady progress this month, with a continued focus on developing Identity Verification (IDV) workflows and confirming data requirements to support the selection of an Identity Verification solution. Recent efforts included re-engagement with the subcommittee to validate the Minimum Viable Product (MVP) and define the relationship between IAM and the Resident Portal initiative. Product exploration sessions with key vendors, Lexis/Nexis and Socure, have informed our approach and driven further alignment across agency partners, including the Department of Health (DOH), Employment Security Department (ESD), and Department of Licensing (DOL). The IAM Program Manager has been hired and is currently being onboarded into the program.

Contracting activities have experienced delays due to ongoing discussions regarding the scope of terms to be negotiated by Carahsoft versus Okta. The procurement team is actively working to clarify these responsibilities to prevent any further impact on project timelines.

**Progress since Sept. 11, 2024:**

**Workflow and Solution Development**

- **Workflow Development and Vendor Engagement:** Conducted product exploration sessions with Lexis/Nexis and Socure to inform the IDV solution selection. Created draft architecture and workflows for the Okta to IDV integration.
- **Vendor Exploration:** Continued exploration of Socure and LexisNexis solutions and provisioned a Socure sandbox environment for further testing and evaluation.
- **Agency Participation:** Identified and confirmed participants from the Department of Health (DOH), Employment Security Department (ESD), and Department of Licensing (DOL) for IDV workflow reviews, targeting October 8 and 10.

**Stakeholder Engagement and Feedback**

- **Subcommittee Re-engagement:** Facilitated productive discussions with the subcommittee on the MVP and its alignment with the Resident Portal initiative.
- **Stakeholder Feedback:** Received feedback from System Integrator (SI) candidates on the updated RACI matrix, focusing on deliverables and role proposals.
- **Engagement Strategy:** Finalized the draft approach for interested party engagement activities.

### Contracting and Legal Review

- **Contract Clarifications:** Obtained clarification on the scope of terms to be negotiated and are in the final stages of negotiation. Target for service terms is 10/16.
- **Contract Vehicle Reconfirmation:** Reconfirmed contracting vehicles for System Integrators based on proposals received.
- **Socure Contracting:** Confirmed the contracting vehicle for Socure's products and services.
- **Privacy Review:** Completed an initial privacy review of the Okta contracting terms, with no concerns noted.

### Technical Environment and Configuration

- **Environment Configuration:** Provisioned and configured the Okta development environment, preparing for further solution testing and integration.
- **OCS Engagement:** Engaged with the Office of Cybersecurity (OCS) to determine next steps in obtaining a Security Information and Event Management (SIEM) solution.

### Project Management and Budget

- **Technology Budget:** Submitted an updated technology budget for review and approval to align with project requirements.
- **Technology Budget Amendment:** Drafted an amendment to the technology budget to reflect updated project needs and strategic changes.
- **Gate Certification:** Submitted request for Gate 1 certification.

### Communication and Content Development

- **Content Development:** Finalized the IAM Insights newsletter, which includes content related to the Resident Portal. Developed materials for the October 10 subcommittee meeting, including the Organizational Change Management (OCM) engagement plan.

### Planned activities – October:

- Conduct focused working sessions with DOH, DOL, and ESD on Identity Verification needs.
- Confirm the IDV MVP from the subcommittee.
- Achieve Gate 1 certification.
- Align on final Okta contract terms.
- Configure Multi-Factor Authentication (MFA) to offer multiple options.
- Develop an FAQ log and repository for stakeholder reference.