

# Technology Services Board

## Portfolio & Policy Subcommittee Meeting

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October 10, 2024

9 - 11:00 am

## Current TSB members

### Industry Members

Kelly Dyer - LexisNexis

James Feore - Aardvark Intelligence

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 - Utilities & Transportation  
Comm.

Cami Feek - Employment Security Dept.

Tracy Guerin - Dept. of Retirement Systems

### Other Government

Viggo Forde - Snohomish County

TOPIC	LEAD	PURPOSE	TIME
Welcome   Agenda review	Deanna Brocker	Introductory remarks	9:00 a.m.
Review and approve July 11 meeting minutes	Deanna Brocker	Approval of minutes	9:05 a.m.
Healthcare Enforcement and Licensing Management System (HELMS) Briefing	Brett Putney	Program briefing & Board feedback	9:10 a.m.
WaCares Briefing	Sam Pulley	Program briefing & Board feedback	9:40 a.m.
Policies & Standards Review	Rob Allred Diana Martin	Review and Board feedback	10:10 a.m.
Subcommittee Status	Deanna Brocker Bill Kehoe	Discussion and Board feedback for recommendation to full Board	10:30 a.m.
Public comment			10:55 a.m.
Adjournment			11:00 a.m.

# Review July 11, 2024 minutes

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# HELMS briefing

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# Healthcare Enforcement & Licensing Management Solution (HELMS)

## Project Overview & Concerns

The Department of Health needs to replace its legacy licensing and enforcement system (ILRS). HELMS will transform licensing and enforcement processes, interactions with participants and interested parties, improve public access to information and support electronic records management.

### Current Concerns:

- Recent scope decisions enough to mitigate risk: scope deferment (Nursing Education Programs, Image Access/scanning), limited change requests and delay of minor platform releases.
- Recent schedule extension enough to complete Credentialing: new go-live Feb 19, 2025.
- Current budget shortfall of \$12.8M: Decision Package requests pending.

## Current Project Health Assessment: Yellow and improving

⚠ Scope

⚠ Schedule

⚠ Budget

⚠ Overall

## What is HELMS?

Healthcare Enforcement and Licensing Management System (HELMS) is a **new electronic licensing system** that will replace the old and outdated legacy system, as well as sixteen current applications that are unable to match the growing requirements and expectations of customers.



500,000 healthcare professionals practicing in 86 professions across 359 credential types



2,500 educational and training programs



Nearly 12,000 facilities across 21 facility types

Key areas include:

- **Licensing & Credentials**
- **Education Programs**
- **Recognized Designations**
- **Enforcement & Inspections**



Modernize IT services, processes, and capabilities to support business solutions and are aligned with public health practices



Integrate online transactions into a single system



Increase our ability to share confidential and restricted data with healthcare providers with more robust security



Expand the mobile capabilities for the professions and the public



Provide tools to better analyze and mine data, find insights and patterns, and predict outcomes to improve healthcare analytics and support decision-making



## Key Activities

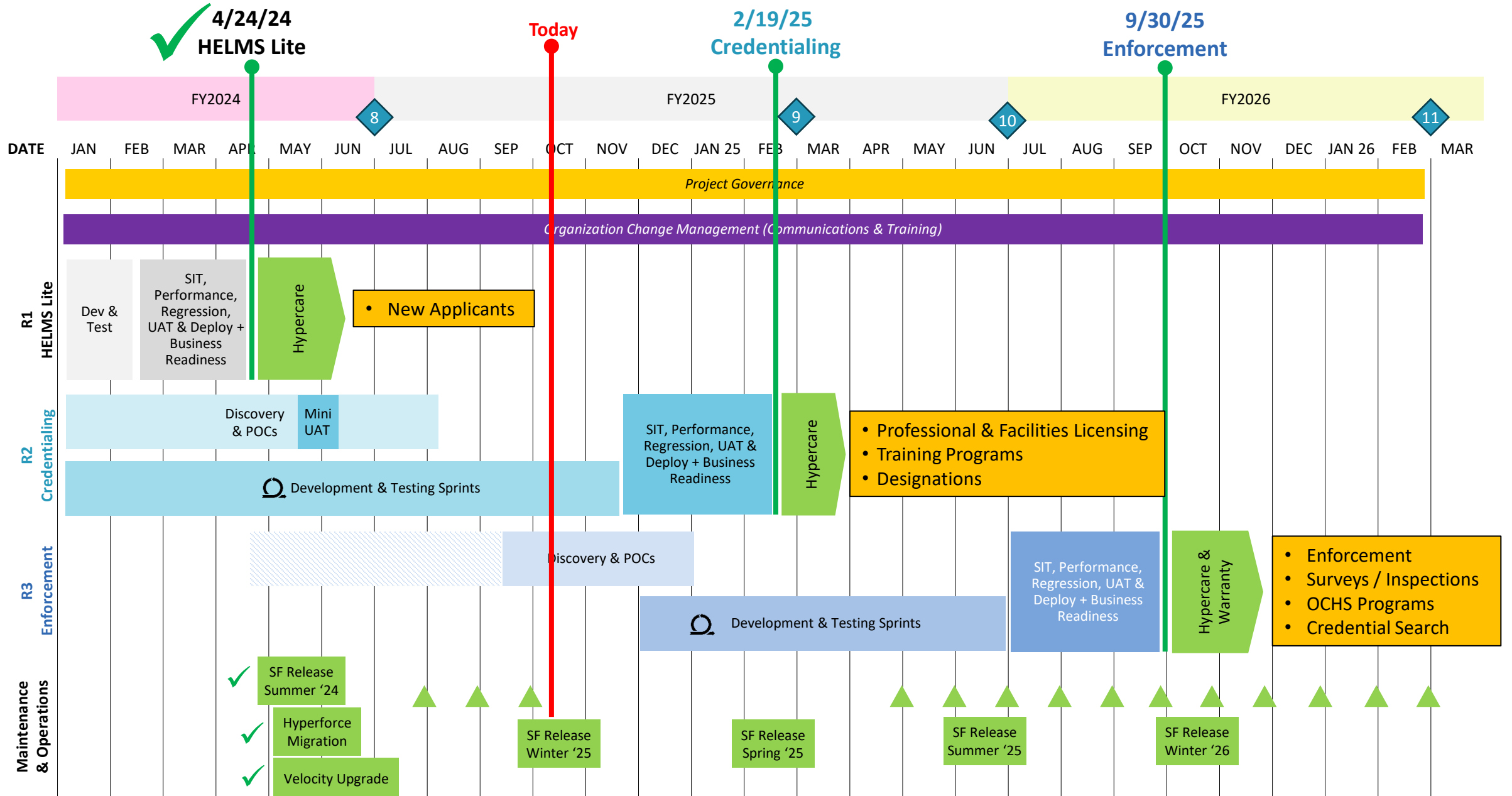
- Carahsoft / MTX contract extension secured in June
- R3 Development & Test Prep activities in progress
- Actively managing scope and prioritizing critical path functionality for R2
- Continuing Deployment and Business Readiness planning activities
- Taking steps to derisk R2 Go-Live
- Continued focus on OCM Activities with Stakeholders, Boards and Associations
- R3 Discovery in progress



# HELMS Summary Schedule

**KEY**

- Go-Live
- Monthly Releases
- Decommissioning Activities TBD
- Stage Gate End Date



Risk	Mitigating Actions
Dual Systems btw. R2 and R3 impacts the Business & Data Integration complexity	<ul style="list-style-type: none"> <li>• Reduced time between R2 and R3 as much as possible; extended timeframes may impact business metrics</li> <li>• Assessing business impacts and creating OCM and training plans to minimize impacts</li> <li>• Working with partner agencies to setup new data integrations</li> </ul>
Budget Shortfall will impact ability to complete Release 3	<ul style="list-style-type: none"> <li>• Submitted a Supplemental for FY25 and Decision Paper for 25-27 Biennium</li> <li>• Working with Legislative Analysts to provide add'l. details where needed and awaiting funding decisions</li> </ul>
Strengthen OCM Efforts	<ul style="list-style-type: none"> <li>• Extended duration and limited communications in past have created skepticism and fatigue</li> <li>• Added experienced resources to the OCM team and coordinating with professions and key stakeholders</li> <li>• Finalizing training plans and have a formal training advisory committee with HSQA, partner boards and commissions</li> </ul>
Achieve Necessary Velocity	<ul style="list-style-type: none"> <li>• Added skilled Salesforce resources to our development teams and prioritized work on critical path items</li> <li>• Closely monitoring team activities to complete development and testing activities</li> </ul>
Release 2 Workstream overlaps with Release 3 that may impact R3 Release Date	<ul style="list-style-type: none"> <li>• Separate workstream team stood up for Release 3 Discovery</li> <li>• Closely monitoring time commitments for those resource that split btw. R2 and R3</li> <li>• Planning proper staffing and segmentation of our development and test preparation teams once Discovery &amp; Solutioning Phases completed in Dec. 2024</li> </ul>
Salesforce Platform bugs may impact the HELMS timelines	<ul style="list-style-type: none"> <li>• Working w/ Salesforce to ensure we have adequate support in case future releases introduce bugs that impact our schedule and timelines</li> </ul>
External State Projects May Impact HELMS Timelines	<ul style="list-style-type: none"> <li>• Monitoring external projects: SAW Replacement may create additional efforts required. Potential changes due to OneWA</li> <li>• Working closely with partners to understand those timelines and assess impact to HELMS</li> </ul>

**Questions?**

# WaCares Fund briefing

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# WaCares Fund Program

## Project Overview & Concerns

A multi-agency effort to make long-term services and support benefits available to assist eligible Washingtonians with meeting their needs for long-term care. It provides an insurance benefit funded through an employee payroll premium.

### Current Concerns:

- Cross-Agency Communication: Increased collaboration between project teams to mitigate risk in a fast-paced development environment.
- Risk Management: Stronger focus on risk capturing and mitigation planning over the program's life-cycle is needed to drive confidence in Scope and Schedule.
  - Establish key milestones for go-live criteria.
  - Cross-agency development team communication is critical during design finalization.
- Initiative 2124: If passed, would provide that employees must elect to keep coverage and could opt-out at any time.

## Program Health Assessment

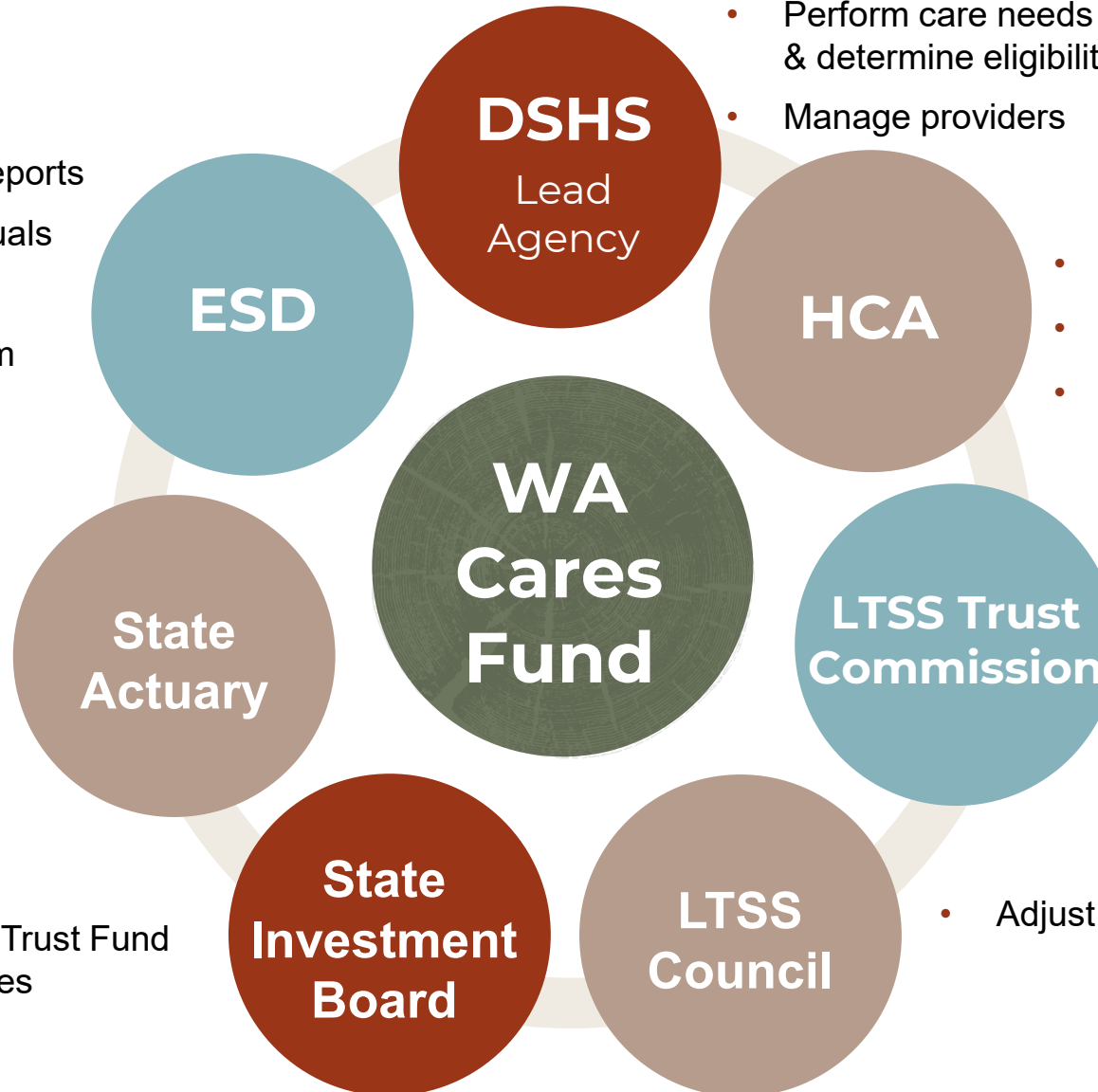
 **Scope**     **Schedule**     **Budget**     **Overall**     **Quality Assurance (ISG)**

# WCF Program Structure

- Collect premiums & wage reports
- Determine Qualified Individuals
- Process exemptions
- Process opt-in requests from self-employed individuals

- Provide actuarial analysis to assess ongoing solvency

- Invest Trust Fund reserves



- Educate public and address questions/complaints
- Process applications
- Perform care needs assessments & determine eligibility
- Manage providers

- Pay providers
- Track benefit usage
- Coordination of Benefits

- Make recommendations to legislature & agencies
- Monitor expenses

- Adjust benefits annually up to inflation

Overall	Schedule
Scope	Budget



### Technology Highlights:

- Leverage ProviderOne
  - Design underway
- Leverage ESD Leave and Care systems
  - Qualified Individual Determination build underway
- Selected Salesforce for the Benefits Application and Management System (BAMS) and Customer Relationship Management (CRM) System.
  - CRM Lite Launched in March
  - BAMS Configuration Underway

### Other Key Activities:

- Integration Test planning to begin
- Pilot planning underway
- Rule-making underway
- Budget Requests underway

## Risk

## Mitigating Actions

Users don't understand program or interactions with the new systems

- Ensure adequate staffing, training and OCM.
- Heavy emphasis for solutions is on user journey and experience.
- Early involvement and change management with Providers.

Lack of common CRM across agencies

- Emphasis on user experience and self-service.
- Develop processes and procedures for customer hand-offs between agencies.

Anticipate a significantly high demand at go-live

- Conduct a pilot starting January 1, 2026.
- Ensure all systems production ready by January 1, 2026.
- DP includes funding for DSHS to hire contracted resources as demand requires at go live.

Law changes that impact the scope of WCF

- Establish cross-agency legislative team that tracks potential law changes.
- Alert partner agencies of potential changes that may have impact on WA Cares Fund.
- Bill and fiscal impact and analysis process.



Risk	Mitigating Actions
Funding needed to operationally support program	<ul style="list-style-type: none"><li>• Clearly articulate funding needs in budget requests.</li><li>• Communicate that this is a self-funded program with expectations around service levels.</li></ul>
Provider availability	<ul style="list-style-type: none"><li>• WA Cares is partnering with broader provider recruitment efforts within the agency.</li><li>• Allowing for different types of supportive services and provider types.</li></ul>

## Other Considerations?

# Policies & Standards

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## Highlights:

- FirstName.LastName@agency.wa.gov.
- Applies to all state-assigned individual email addresses.
- FirstName can be legal or preferred, and LastName can include multiple surnames.
- Sub-addressing (first.last+billing@agy.wa.gov).
- Must be unique within the agency; resolve duplicates with a middle initial or number.

## **PM-03 Project Quality Assurance Policy**

- Cleanup language for clarity; Assessment timeline (45 days); Align recommendations with risk.

## **PM-03-02-S Minimum Project Quality Assurance Activities - Readiness**

- Formatting update only.

## **PM-03-03-S Minimum Project QA Activities Standard**

- Minimal changes to allow for more robust content (must vs should; at a minimum).

## **RESCIND: PM-02 Managing Information Technology Projects**

- Content over time became redundant with other policies.

# Subcommittee Status

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Public comment