

# Iterative Project Report for Programs & Multi-Year Phased Projects

Submitted to Large Project Oversight on 11/29/23

## GENERAL INFORMATION

**Program/Project Name:** WSI Claims and Policy System (CAPS) Program: Status of Release 11 and Closeout of Release 10

**Agency Name:** Workforce Safety and Insurance

**Project Sponsor:** Tim Wahlin

**Project Manager:** Jennifer Kunz

## PROJECT DESCRIPTION

The Workforce Safety and Insurance (WSI) Claims and Policy System (CAPS) Program (formerly called System Replacement Program) replaces core business applications to improve customer service, enhance system maintainability, provide enhanced reporting and accessibility to information, and enable WSI to remain current with technology. A phased, evolution implementation approach is being used. The program consists of several phases and within each phase there are multiple projects delivering functionality in a production environment, ready to be used.

**Completed** projects in the program include:

- Phase 1 Planning and Analysis occurred from January through June 2015. This phase included a database consolidation analysis and design, a detailed evolution roadmap, a program plan and schedule, and procurements for the next phase.
- Phase 2 Shared Components Refacing involved three projects which refaced shared functionality between CMS and PICS into the new CAPS user interface.
  - Project 1: Releases 0-1 Forms and DB Consolidation (July 1, 2015 - April 8, 2016): delivered forms functionality (specifically adding, viewing, and maintaining forms) in the new CAPS user interface. The underlying databases were also consolidated.
  - Release 2: Work Management Core functionality (April 11 - September 23, 2016): delivered core Work Management functionality including the viewing, maintaining, and launching of work events.
  - Release 3: Work Management Part 2 (September 19, 2016 - February 24, 2017): delivered the remaining Work Management functionality including Reassignment, Tools, and Reports.
- Phase 3 PICS Application Refacing (current phase) began in February 2017.
  - Release 4: Policy Registration (February 27, 2017 – November 9, 2017): delivered functionality including find legal entity; add/maintain legal entity, notes, employees, volunteers, optional coverage, extra-territorial coverage, reciprocity, non-compliance; and calculate premium.
  - Release 5: Policy Maintenance Part 1 (October 2, 2017 – July 23, 2018): delivered functionality including applications (replacing internal Online Applications), verification of non-employment, adjustments, experience rating, large deductibles, and account snapshot.
  - Release 6: Policy Maintenance Part 2 (June 11, 2018 – July 5, 2019): delivered maintain accounting, a general ledger (GL) interface, online payment interface, payment search/entry, and bonds.
  - Release 7: Policy Maintenance Part 3 (May 13, 2019 – August 7, 2020): delivered Safety and Ergonomic Program Elements, Audits, Referrals, Collections, an Analysis of Providers and Legal Entity (LE), and Future State Enhancements.
  - Release 8: Payroll Reporting (May 26, 2020 – August 6, 2021): delivered Payroll Reporting, Account Status Changes, and Consolidated Accounts.
  - Release 9: Policy Stabilization (June 16, 2021 – August 10, 2022): this was the final project of Phase 3 (PICS Application Refacing). It delivered production enhancements to sustain and improve functionality delivered over the past five years.
- Phase 4
  - Release 10: Claim Registration (May 23, 2022 – September 13, 2023): this was the first release of Phase 4 (Claims Refacing). It delivered refaced Claim Registration functionality from the legacy Claims Management System (CMS) into CAPS.

**Current project in progress:**

- Phase 4 Release 11: Claim Maintenance Part 1 began June 26, 2023, and will end August 30, 2024. It will deliver Part 1 of refaced Claim Maintenance functionality from legacy CMS into CAPS. The baseline budget is \$2,535,622 and as of October 31, 2023, was tracking 1% under budget at a cost of \$620,300.

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**Future** efforts in the program include:

- Phase 4 CMS Application Refacing Releases 12-17. The start and end dates for these releases are not yet baselined.
- Phase 5 Implementation Transition and Closeout. This phase will be approximately six months and include transition from contracted resources and closeout of the program.

## Background

From January 2008 through December 2012, extensive efforts were made by WSI to replace the current claims and policy computer systems with a purchased solution from a software vendor. The software vendor contract expired the end of December 2012, and a decision was made not to extend the contract, effectively terminating the course of the initiative prior to successful implementation. Efforts then continued with planning the strategy and determining the best alternative for continuing in order to achieve the original objectives along with any new objectives.

From 2013 through 2014, WSI completed an extensive research and analysis of lessons learned, current/future business processes, and implementation approach options. In 2015 the ESC approved moving forward with an “evolutionary approach” for WSI’s core system replacement/upgrade, the CAPS Program. A vendor analysis was performed, with ServiceLogix identified as the top solution provider. A Notice of Intent to Make a Noncompetitive Purchase (NOI) with ServiceLogix was issued publicly for the Phase 1 Planning Phase. No known bidders were identified and ServiceLogix was awarded the contract. The Alternate Procurement request to OMB was approved.

Upon the successful completion of the Phase 1 Planning Phase with ServiceLogix, a second NOI with ServiceLogix was issued publicly in June 2015 seeking potential bidders to complete Release 1. No known bidders were identified. The Alternate Procurement request to OMB was approved.

From January 2016 through September 2023, Releases 2 – 10 were successfully completed and six additional NOIs were issued over that timeframe, to incrementally cover the costs for the releases through Release 12 of CAPS and Release 8 of myWSI. A correlating Alternate Procurement request to OMB was approved for each. \*Notes: the NOI in February 2020 included the transition to ServiceLogix as vendor for the myWSI program; in June 2023, an amendment to the latest Alternate Procurement request to OMB was approved to incorporate maintenance and operations (M&O) support.

During the planning for each release, a detailed Statement of Work is prepared with ServiceLogix covering the specific scope and reviewed by the OMB procurement officer, then approved by the ESC prior to execution. The contract is amended to include the new SOW.

## BUSINESS NEEDS AND PROBLEMS

The specific primary business needs to be met (with measurements detailed in the next section) through the program are as follows:

- Provide current industry web-based technology for core business systems supporting Injury Services and Employer Services and replace existing client-server-based systems.
- Provide a system with enhanced reporting and accessibility to information.

As described in the project charter, this program also aligns exceptionally well with WSI’s organizational purpose and mission.

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## PROGRAM/PROJECT FORMAT

**Program Start Date:** 7/1/2015

**Budget Allocation at Time of Initial Start Date:** \$5,760,000 for the 2015-2017 biennium. \$8,576,060 for the 2017-2019 biennium. \$6,372,605 for the 2019-2021 biennium. \$7,500,000 for the 2021-2023 biennium. \$4,950,000 for the 2023-2025 biennium.

**How Many Phases Expected at Time of Initial Start Date:** Four phases and 20 projects (releases) were expected, plus a fifth phase for Transition and Program Closeout. In April 2022, the Program Release Roadmap was revisited, and the expected total number of releases reduced to 17. This is due to arranging some of the Claim refacing scope more efficiently, given lessons learned through prior releases.

**Phase Approach Description:** This program consists of several phases and within each phase there are multiple projects (releases) delivering functionality in a production environment, ready to be used. Over the course of each project, the application user interface will be re-faced into a new user interface and the data and programming logic retained, a key success factor. The first project also included the consolidation of the underlying databases. This “Evolutionary Approach” minimizes risk and costs and will replace WSI’s core systems incrementally into production with usable functionality approximately every 12 months.

**Estimated End Date for All Phases Known at Time of Initial Start Date:** The earliest expected end date is 2030 but is dependent upon the detailed planning and baselines of the individual projects.

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## PROGRAM/PROJECT ROAD MAP

The program road map shows the high-level plan or vision for the program/projects/phases. It is intended to offer a picture of the lifespan of all the effort that is expected to be required to achieve the business objectives.

Project/Phase	Title	Scope Statement	Estimated Months Duration	Estimated Budget
<b>PHASE 1 (COMPLETE)</b>	<b>Planning and Analysis</b>		Completed 6/30/15	N/A
<b>PHASE 2 (COMPLETE)</b>	<b>DB Consolidation and Shared Components</b>			
Project 1	Shared Components Releases 0-1 (Forms) and DB Consolidation	COMPLETE: Delivered refaced Work Management Forms functionality into production	Completed 4/8/16 (See next section for Actual Duration)	\$1,630,288 Baseline (See next section for Actual Cost)
Release 2	Work Management Part 1 (Core)	COMPLETE: Deliver refaced Work Management Core functionality into production	Completed 9/23/16 (see next section for Actual Duration)	\$1,640,320 Baseline (See next section for Actual Cost)
Release 3	Work Management Part 2 (Reassignment & Tools)	COMPLETE: Deliver refaced Work Management Reassignment and Tools functionality into production	Completed 2/24/17 (See next section for Actual Duration)	\$1,355,629 Baseline (See next section for Actual Cost)
<b>PHASE 3 (COMPLETE)</b>	<b>Policy (PICS) Application Refacing</b>			
Release 4	Registration	COMPLETE: Delivered refaced PICS Registration functionality into production	Completed 11/9/17 (See Project Baselines section for Actual Duration)	\$1,873,410 Baseline (See Project Baselines section for Actual Cost)
Release 5	Policy Maintenance Part 1	COMPLETE: Delivered refaced PICS Policy Maintenance Part 1 functionality into production	Completed 7/23/18 (See Project Baselines section for Actual Duration)	\$1,835,649 Baseline (See Project Baselines section for Actual Cost)
Release 6	Policy Maintenance Part 2	COMPLETE: Delivered refaced PICS Policy Maintenance Part 2 functionality into production	Completed 7/5/19 (See Project Baselines section for Actual Duration)	\$2,698,860 Baseline (See Project Baselines section for Actual Cost)
Release 7	Policy Maintenance Part 3	COMPLETE: Delivered refaced PICS Policy Maintenance Part 3 functionality into production	Completed 8/7/20 (see Project Baselines section for Actual Duration)	\$2,502,194 Baseline (See Project Baselines section for Actual Cost)
Release 8	Payroll Reporting	COMPLETE: Delivered refaced PICS Payroll Reporting functionality into production	Completed 8/6/21 (see Project Baselines section for Actual Duration)	\$2,658,946 Baseline (see Project Baselines section for Actual Cost)
Release 9	Policy Stabilization	COMPLETE: Delivered enhancements to sustain and improve functionality delivered over the past five years	Completed 8/10/22 (see Project Baselines section for Actual Duration)	\$1,582,398 Baseline (see Project Baselines section for Actual Cost)

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Project/Phase	Title	Scope Statement	Estimated Months Duration	Estimated Budget
<b>PHASE 4</b>	<b>Claims (CMS) Application Refacing</b>		<b>Eight years, Eight Projects / Releases for Phase 4</b>	<b>\$21M (estimate) for entire Phase 4</b>
Release 10	Claim Registration	COMPLETE: Delivered refaced Claim Registration functionality from legacy CMS into CAPS.	Completed 9/13/2023 (see Project Baselines section for Actual Duration)	\$2,449,647 Baseline (see Project Baselines section for Actual Cost)
<b>IN PROGRESS</b>				
Release 11 (In Progress)	Claim Maintenance Part 1	BEGAN 6/26/2023: Deliver the refaced CMS Claim Parties and Maintenance Part 1 functionality into production	13 months	\$2,535,622 Baseline
<b>FUTURE</b>				
Release 12	Claim Maintenance Part 2	Deliver the refaced CMS Claim Parties and Maintenance Part 2 functionality into production		
Release 13	Wages and Reserves	Deliver the refaced CMS Wages and Reserves functionality into production		
Release 14	Payments Part 1	Deliver the refaced CMS Payments Part 1 functionality into production		
Release 15	Payments Part 2	Deliver the refaced CMS Payments Part 2 functionality into production		
Release 16	Medical	Deliver the refaced CMS Medical functionality into production		
Release 17	Field/Fraud/Legal/Rehab	Deliver the refaced CMS Field/Fraud/Legal/Rehab functionality into production		
<b>PHASE 5</b>	<b>Transition, Program Closeout</b>		<b>5 months</b>	<b>\$45,000</b>

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## PROJECT BASELINES

The baselines below are entered for only those projects or phases that have been planned. At the completion of a project or phase a new planning effort will occur to baseline the next project/phase and any known actual finish dates and costs for completed projects/phases will be recorded. The iterative report will be submitted again with the new information.

Project/Phase	Program/Project Start Date	Baseline Execution Start Date	Baseline End Date	Baseline Budget	Actual Finish Date	Schedule Variance	Actual Cost	Cost Variance
Project 1	12/4/2014	7/1/2015	5/19/2016	\$1,630,288	4/08/2016	3.8% ahead	\$1,292,069	20.7% under
Release 2		4/11/2016	9/30/2016	\$1,640,320	9/23/2016	0%	\$1,332,631	18.7% under
Release 3		9/19/2016	2/28/2017	\$1,355,629	2/24/2017	0%	\$1,115,716	17.5% under
Release 4		2/27/2017	10/31/2017	\$1,873,410	11/9/2017	4.0% behind	\$1,660,615	11.3% under
Release 5		10/2/2017	6/29/2018	\$1,835,649	7/23/2018	9.2% behind	\$1,638,705	10.7% under
Release 6		6/11/2018	5/10/2019	\$2,698,860	7/5/2019	16.7% behind	\$2,568,372	13.0% under
Release 7		5/13/2019	8/28/2020	\$2,502,194	8/7/2020	0%	\$2,389,227	4.5% under
Release 8		5/26/2020	6/18/2021	\$2,658,946	8/6/2021	13% behind	\$2,363,616	11% under
Release 9		6/16/2021	5/31/2022	\$1,582,398	8/10/2022	17% behind	\$1,491,079	6% under
Release 10		5/23/2022	8/21/2023	\$2,449,647	9/13/2023	4% behind	\$2,176,495	11% under
Release 11		6/26/2023	8/30/2024	\$2,535,622				
Release 12								
Release 13								
Release 14								
Release 15								
Release 16								
Release 17								

### Notes:

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## OBJECTIVES

Project/ Phase	Business Objective	Measurement Description	Met/ Not Met	Measurement Outcome
		Business Need 1: Provide current industry web-based technology for core business systems supporting Injury Services and Employer Services and replace existing client server-based systems.		
Phase 3	Objective 1.1: Maintain or improve upon existing business functionality/capabilities (i.e., at a minimum, no loss of current process efficiencies and automation)	Measurement 1.1.1: Upon completion of the “Policy Evolution” (including Billing and Workflow) implementation, there will be no measurable loss of policy process efficiencies as measured by operating reports. The most recent operating report prior to the start of the Policy Evolution will be used as the benchmark and will be compared to the first available operating report following the completion of the Policy Evolution.	Met	WSI has continued to test and monitor operation reports after each release and there has been no loss of functionality.
Phase 3		Measurement 1.1.2: Upon completion of the “Policy Evolution” (including Billing and Workflow) implementation, all new policy related process changes, enhancements, and efficiencies identified by the WSI continuous improvement team for inclusion in the Policy Evolution are fully deployed and functioning according to documented requirements.	Met	WSI has continued to meet expectations set by the WSI Continuous improvement team through the CAPS project.
Phase 4		Measurement 1.1.3: Upon completion of the “Claims Evolution” (including Bill Review and Workflow) implementation, there will be no measurable loss of claims process efficiencies as measured by operating reports. The most recent operating report prior to the start of the Claims Evolution will be used as the benchmark and will be compared to the first available operating report following the completion of the Claims Evolution.		This cannot be met until the completion of the Claims Evolution implementation.

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Phase 4		Measurement 1.1.4: Upon completion of the “Claims Evolution” (including Bill Review and Workflow) implementation, all new claims related process changes, enhancements, and efficiencies identified by the WSI continuous improvement team for inclusion in the Claims Evolution are fully deployed and functioning according to documented requirements.		This cannot be met until the completion of the Claims Evolution implementation.
Phase 5	Objective 1.2: Enhance customer and staff accessibility to policy and claims related applications and corresponding data/information	Measurement 1.2.1: Upon completion of the “Policy Evolution” (including Billing and Workflow) implementation, WSI staff (with the appropriate security) will have access to the Policy system from anywhere there is an internet connection.	Met	With each CAPS release WSI has continued to ensure business workflow remains consistent for the users. Through the pandemic, modified teleworking EE’s have continued to be able to work with the CAPS system.
Phase 3		Measurement 1.2.2: Within six months following the completion of the “Policy Evolution” (including Billing and Workflow) implementation, employers will have self-service access to premium and loss data specific to their account for purposes of managing their policies and claim losses.	Met	All employer accounts have access to premium and loss data information for purposes of managing policies and claim losses. This access is part of the administrative role within myWSI.
Phase 4		Measurement 1.2.3: Upon completion of the “Claims Evolution” (including Bill Review and Workflow) implementation, WSI staff (with the appropriate security) will have access to the Claims system from anywhere there is an internet connection.		This cannot be met until the completion of the Claims Evolution implementation.
Phase 4		Measurement 1.2.4: Within six months following the completion of the “Claims Evolution” (including Bill Review and Workflow) implementation, employers, providers, and injured workers will have self-service access to claim related data specific to their account/entity.		This cannot be met until the completion of the Claims Evolution implementation.
Phase 5	Objective 1.3 Improve policy and claims system navigation and ease of use for WSI staff	Measurement 1.3.1 Upon completion of the Policy and Claims Evolution implementations there is a single user interface for accessing policy and claims functionality.		This cannot be met until the completion of the Claims Evolution implementation.
Phase 5		Measurement 1.3.2: Upon completion of the Policy and Claims Evolution implementations WSI staff will be surveyed to determine the user interface ease of use.	Met (for Policy)	WSI Staff have continued to easily use the CAPS system with improvements made in each release and subsequent maintenance releases.



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Phase 3	Objective 1.4 Improve ability to respond to customer and staff requests	Measurement 1.4.1 Within six months following the completion of the “Policy Evolution” (including Billing and Workflow) implementation, there will be a 20% reduction in the turn-around time for completing policy related system change/enhancement requests. Prior to the start of the Policy Evolution a benchmark of the average turn-around time for completing policy related system change/enhancement requests will be established from ITSM and will be compared to the average turn-around time for completing requests after six months following the completion of the Policy Evolution.	Met	Policyholder Services has developed and documented a process for vetting and prioritizing policy related change/enhancement requests. Process was implemented 8/3/2023.
Phase 3		Measurement 1.4.2: Within six months following the completion of the “Policy Evolution” (including Billing and Workflow) implementation, there will be a 10% reduction in the amount of time spent by WSI policy staff in providing employers with reports and information. Prior to the start of the Policy Evolution a benchmark of the average amount of staff time per month spent providing employers with reports and information will be established and will be compared to the average amount of time spent providing reports and information after six months following the completion of the Policy Evolution.	Met	As of June 2022, WSI staff stopped generating and sending monthly reports to employers. Employers now must utilize the report functionality within myWSI. WSI staff will assist Employers with special requests on an ad hoc basis. Staff time spent on providing reports and information has decreased by more than 50%.
Phase 4		Measurement 1.4.3: Within six months following the completion of the “Claims Evolution” (including Bill Review and Workflow) implementation, there will be a 20% reduction in the turn-around time for completing claims related system change/enhancement requests. Prior to the start of the Claims Evolution a benchmark of the average turn-around time for completing claims related system change/enhancement requests will be established from ITSM and will be compared to the average turn-around time for completing requests after six months following the completion of the Claims Evolution.		This cannot be met until the completion of the Claims Evolution implementation.
Phase 4		Measurement 1.4.4: Within six months following the completion of the “Claims Evolution” (including Bill Review and Workflow) implementation, there will be a 10% reduction in the amount of time spent by WSI Injury Services staff in providing employers, providers, and injured workers with reports and information. Prior to the start of the Claims Evolution a benchmark of the average amount of staff time per month spent providing employers, providers, and injured workers with reports and information will be established and will be compared to the average amount of time spent providing reports and information after six months following the completion of the Claims Evolution.		This cannot be met until the completion of the Claims Evolution implementation.

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	Business Need 2: Provide a system with enhanced reporting and accessibility to information			
Phase 5	Objective 2.1 Improve data integrity of/between core business systems supporting Injury Services and Employer Services	Measurement 2.1.1: Eliminate redundant data between claims and policy systems. During database consolidation planning and design identify and document the occurrences of redundant data between claims and policy systems. Upon completion of database consolidation verify that all occurrences of data redundancy have been eliminated.	Met (for Policy)	WSI now has one system on the Policy side for the staff to use to manage employer accounts.
Phase 5	Objective 2.2 Maintain access to all legacy data supporting Injury Services and Employer Services	Measurement 2.2.1: Access to all legacy data (i.e., history data) is available throughout and following project completion without having to access multiple systems.	Met (for Policy)	WSI now has one system on the Policy side to access for managing employer accounts. CMS will still be used until completion of Claims Evolution. Through each release WSI ensures through data conversion that legacy data, as applicable, was retained.
Phase 3	Objective 2.3 Improve reporting and Business Intelligence (BI) capability	Measurement 2.3.1: Upon completion of the “Policy Evolution” (including Billing and Workflow) implementation, an easy method of accessing Policy summary and detail information from a single set of screens is available to WSI employees.	Met	This objective was met with Release 4 – summary screen and real-time
Phase 4		Measurement 2.3.2: Upon completion of the “Claims Evolution” (including Bill Review and Workflow) implementation, an easy method of accessing Claim summary and detail information from a single set of screens is available to WSI employees.		This cannot be met until the completion of the Claims Evolution implementation.

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## POST-IMPLEMENTATION REPORT

Post-Implementation Reports are to be performed after each project or phase is completed. A “PIR” is a process that utilizes surveys and meetings to determine what happened in the project/phase and identifies actions for improvement going forward. Typical PIR findings include, “What did we do well?” “What did we learn?” “What should we do differently next time?”

Project/ Phase	Lesson Learned, Success Story, Idea for Next Time, etc.
Releases 1-9	Refer to prior versions of the Iterative Startup-Closeout Reports for the findings of the Post-Implementation Reports.
Release 10	<p>Several themes emerged from the comments from project stakeholders (Communication, Scope, Training, Testing, and Change Management). General comments included:</p> <ul style="list-style-type: none"> <li>• Excellent go live. BRs from Claims did an amazing job training as well. Process went almost perfect.</li> <li>• Successful implementation overall. Thank you to WSI, NDIT and ServiceLogix teams for their support.</li> <li>• This release went smooth.</li> <li>• Great support regarding chatbot.</li> <li>• Timeline, teamwork, efficient meetings. Excellent Teamwork!!!</li> <li>• I feel like each release does improve and meet more customer needs.</li> </ul> <p>The CAPS functionality meets the needs of WSI end users. Project stakeholders rated the functionality at 2.61 out of 3.00 (Above Adequate/Good). Some specific comments from project stakeholders are included below:</p> <ul style="list-style-type: none"> <li>• I love that we do ‘open all’ from the folder; it is especially handy when you get a call and have to type in the claim number, now everything opens up from there. There’s a lot of things I like so far that moved from CMS. I can’t wait until it all is complete!</li> <li>• The CAPS and myWSI systems compliment the organization’s goal of enhancing the customer experience. The most gained efficiency is the two systems’ ability to exchange information, this has opened the opportunity for customers to determine how much or how little assistance they need from us with a self-service platform. In turn, this has significantly expanded the type of customer service engagements we provide today. Instead of facilitating document requests or processing incoming filled forms, we are sharing instrumental information and learning more about the needs of our customer’s businesses each day. We have opened the door to a tailored experience for each individual customer at the same time finding efficiencies through validations and workflow outlines. We now have confidence in the integrity for the exchange of information.</li> <li>• The systems will also allow the organization the ability to make modifications as business evolves based on internal and external influences. We no longer experience a system that is restrictive but instead supports the activities of staff servicing our customers daily.</li> </ul>

## KEY CONSTRAINTS AND/OR RISKS

- WSI and NDIT resources (business, technical) are limited in the number of staff available.
- WSI and NDIT resources are limited in experience with the current and preferred technologies.
- The full program schedule cannot be established due to the long duration; therefore, schedule management is constrained to each project/release.
- The schedule for Release 11 is aligned with the myWSI Release 7 schedule due to intense integration of the systems, functionality, and team members.
- Future funding appropriations are necessary to complete all projects/releases within the program.
- Cost, schedule, scope, and quality are often in conflict during projects. The sponsor and ESC elected to prioritize these constraints as follows for the program:
  - Quality
  - Scope
  - Schedule
  - Cost