

Iterative Project Report for Programs & Multi-Year Phased Projects

Submitted to Large Project Oversight on 11/5/24

GENERAL INFORMATION

Program/Project Name: myWSI: Status of Release 8 and Closeout of Release 7

Agency Name: Workforce Safety and Insurance

Project Sponsor: Valerie Kingsley

Project Manager: Jennifer Kunz

PROJECT DESCRIPTION

myWSI is a secure portal for employers, medical providers, and (eventually) injured employees to access, submit, and view user specific information related to North Dakota Workforce Safety and Insurance (WSI). To date, the team has completed an initial platform release and multiple feature releases. The myWSI Program is a large, multi-year program with several releases. Each release is baselined and managed as a major project.

Completed projects in the program include:

- Extranet Infrastructure (August 1, 2015 – June 30, 2017): delivered the core infrastructure of an extranet portal developed on a .Net platform, enabling employers and medical providers with the ability to log in to myWSI and view information related to their transactions.
- myWSI Enhancements (July 1, 2017 – September 3, 2019)
 - myWSI Release 1: delivered features for provider bill status, UR-C / UR-Chiro, medical records submission, and common services for notifications, messaging, and alerts.
 - myWSI Release 2.1 and 2.2: delivered features for the employer eAccount (OEA replacement) and additional common services (payment, FileNet integration, forms retrieval), reports integration, and notifications management.
- Release 3 Safety and Ergo (November 19, 2019 – August 7, 2020): delivered functionality into myWSI for the Safety Program and the Ergonomic Initiative and Grant.
- Release 4 Online Payroll Reporting (May 26, 2020 – August 6, 2021): delivered functionality for Online Payroll Reporting, External Forms, integration with CAPS and the existing login architecture, and establishment of future myWSI architecture.
- Release 5 (June 16, 2021 – August 10, 2022): delivered Online Quarterly Payroll Reporting, Online Volunteer Reporting, External Forms (DMP, P12, FL214, Employment Contact Log), Site Reorganization, Invitation Mgmt. improvements, Employer Dashboard, Provider Dashboard (framework only), Integration with Enterprise Identity Management (new NDLogin platform), Account Billing, and Claim View.
- Release 6 (June 6, 2022 – September 13, 2023): delivered Online Application for Insurance, Safety and Ergo Refacing, and Chatbot.
- Release 7 (June 26, 2023 – September 12, 2024): delivered the Provider Dashboard, Medical Form Submission, Medical Records Submission, Utilization Review Refacing, and Technical Enhancements.

Current project in progress:

- Release 8 – Injured Employees: The release began June 27, 2024 and will end September 30, 2025. It will deliver the Injured Employee Dashboard and related functionality. The baseline budget is \$969,761, and as of October 31, 2024 was tracking 3% under budget.

Future efforts in the program include (the start and end dates for these releases are not yet baselined):

- Release 9 and a possible Release 10.

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Background

In late 2010 and early 2011 a communications audit was performed by Flint Communications to review current communication processes inside and outside of WSI. Priority one was an intranet planning and rewrite project which went live in November 2011. Priority two was a rewrite of the current external website which was launched in June 2015.

The third priority was a secure extranet portal for injured employees, employers, and medical providers to view and submit information with WSI. Because of the successful history with the first priority initiative, WSI engaged with Nexus Innovations (Nexus) and NDI to evaluate technology options. The Extranet Project was initiated in August 2015. Nexus was (and continues to be) an approved vendor in the State Vendor Pool contract. WSI followed all procurement requirements to utilize them as a vendor, including Alternate Procurement requests and Work Orders where applicable, and ESC approvals when needed. WSI developed, launched and added various features to its extranet portal (myWSI) with vendor partner Nexus.

In order to reduce complexity, create efficiencies for staff, and improve the integration between the Claims and Policy System (CAPS) and myWSI projects/systems, in January 2020 WSI leadership determined it to be in the best interest of the agency to transition to a single vendor (ServiceLogix) for development and support of both systems. After approval from the Executive Steering Committee to proceed with this procurement strategy (followed by meetings with Nexus and WSI team members) a Notice of Intent to Make a Non-Competitive Purchase (NOI) with ServiceLogix was issued February 7, 2020 on the State Procurement Office web site. The response deadline was February 14, 2020 and there were no questions or responses from other vendors. The Alternate Procurement request for this purchase was submitted to the State Procurement Office and approved February 20, 2020. Additional NOIs have been issued since that time, to *incrementally* cover the costs for both CAPS and myWSI. A correlating Alternate Procurement request to OMB was approved for each NOI.

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.

To date, the team has completed an initial platform release and seven feature releases (the eighth release is in progress). Each release is baselined as a major project and delivers functionality into production, ready to be used.

BUSINESS NEEDS AND PROBLEMS

The specific primary business needs to be met through the program are:

- Support WSI's strategic objective to improve communication.
- Streamline processes related to information from/to external stakeholders.
- Increase availability and usage of information for WSI's stakeholders and partners.

The myWSI Program is in line with WSI's core purpose "to care for injured workers" by offering a secure portal for injured employees, employers, and medical providers to view, update, and submit information related to their interactions with WSI.

PROGRAM/PROJECT FORMAT

Program Start Date: August 1, 2015

Budget Allocation at Time of Initial Start Date: \$469,031 for the 2015-2017 biennium. \$1,032,300 for the 2017-2019 biennium. \$850,000 for the 2019-2021 biennium. \$3,050,000 for the 2021-2023 biennium. \$1,830,000 for the 2023-2025 biennium. The budget request for the 2025-2027 biennium is in progress.

How Many Phases Expected at Time of Initial Start Date: The number of phases/projects was unknown at the initial start date, but WSI and Nexus identified an extensive list of features; the highest priority functionality was implemented (Releases 1-3). After the transition to ServiceLogix in early 2020, a Release Plan strategy was formalized to accommodate all outstanding features (Releases 4-9). In April 2022, the Release Plan strategy was revisited and the anticipated scope for each release was slightly adjusted.

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Phase Approach Description: This program consists of multiple projects (releases) delivering functionality into a production environment, ready to be used.

Estimated End Date for All Phases Known at Time of Initial Start Date: The earliest expected end date is 2027 but is dependent upon the detailed planning and baselines of the individual projects.

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
COMPLETE:				
Project 1 (COMPLETE)	Extranet Infrastructure	Portal framework and login process, integration with existing online applications	Completed 6/30/17	\$504,878 Baseline (See next section for Actual Cost)
Releases 1-2 (COMPLETE)	myWSI Enhancements - myWSI Release 1 - myWSI Release 2.1 and 2.2	Provider bill status, UR-C / UR-Chiro, medical records submission, and common services for notifications, messaging, and alerts Employer eAccount (OEA replacement) and additional common services (payment, FileNet integration, forms retrieval), reports integration, and notifications management	Completed 9/3/2019	\$1,032,409 Baseline (See next section for Actual Cost)
Release 3 (COMPLETE)	myWSI Release 3.1	Safety program, ergonomic (ergo) initiative and grant, and mobile friendly form updates	Completed 8/7/20	\$599,312 Baseline (See next section for Actual Cost)
Release 4 (COMPLETE)	myWSI Release 4 Online Payroll Reporting	Online payroll reporting, external forms, integration with CAPS and the existing login architecture, and establishment of future myWSI architecture	Completed 8/6/21	\$303,350 Baseline (See next section for Actual Cost)
Release 5 (COMPLETE)	myWSI Release 5	Online Quarterly Payroll Reporting, Online Volunteer Reporting, External Forms (DMP, P12, FL214, Employment Contact Log), Site Reorganization, Invitation Mgmt. Improvements, Employer Dashboard, Provider Dashboard (framework only), Integration with Enterprise Identity Management (new NDLogin platform), Account Billing, and Claim View	Completed 8/10/22	\$1,005,843 Baseline (See next section for Actual Cost)
Release 6 (COMPLETE)	myWSI Release 6	Employer Online Application for Insurance, Safety and Ergo Refacing, Chatbot, other Technical	Completed 9/13/2023	\$1,524,361 Baseline (See next section for Actual Cost)
Release 7 (COMPLETE)	myWSI Release 7	Providers (Dashboard, Medical Form Submission, Medical Records Submission, Utilization Review Refacing, other Technical Enhancements)	Completed 9/12/2024	\$783,061 (See next section for Actual Cost)

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Project/ Phase	Title	Scope Statement	Estimated Months Duration	Estimated Budget
IN PROGRESS:				
Release 8 (In Progress)	myWSI Release 8	BEGAN (6/27/2024) Injured Employees (Dashboard, File Access, Forms Submittal, SMS/Text, various Enhancements)	13 months	\$969,761
FUTURE:				
Release 9	myWSI Release 9	General Vendor Access, General Enhancements, Online FROI	12 months	\$675,740
Possible Release 10	myWSI Release 10	TBD	TBD	TBD
Closeout	myWSI Program Closeout	Program closeout and transition	4 months	\$40,000

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	8/1/2015	8/1/2015	6/30/2017	\$504,878	6/30/2017	0%	\$469,031	7.1% under
Release 2		7/1/2017	6/28/2019	\$1,032,409	9/3/2019	9% behind	\$983,891	4.6% under
Release 3		11/19/2019	9/1/2020	\$599,312	8/7/2020	7.7% ahead	\$540,349	4.5% under
Release 4		6/17/2020	6/18/2021	\$303,350	8/6/2021	13% behind	\$287,670	5% under
Release 5		6/16/2021	5/31/2022	\$1,005,843	8/10/2022	17% behind	\$1,046,811	4% over
Release 6		6/6/2022	8/21/2023	\$1,524,361	9/13/2023	4% behind	\$1,383,109	9% under
Release 7		6/26/2023	8/30/2024	\$783,061	9/12/2024	0%	\$695,919	11% under
Release 8		6/27/2024	9/30/2025	\$969,761				
Release 9								

Notes:

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OBJECTIVES

Project/ Phase	Business Objective	Measurement Description	Met/ Not Met	Measurement Outcome
Program	Business Need 1: Support WSI's strategic objective to improve communication			
	Objective 1.1: Create a secure portal for WSI external stakeholders to submit and view up to date information related to their interactions with WSI	Measurement 1.1.1: Upon completion of extranet project, ND injured workers, employers, and medical providers will be able to log in to the extranet portal to submit and view up to date information related to their transactions with WSI. Anticipated Benefit(s): Improved external stakeholder satisfaction; Improvement in processing time and accuracy of data.	Met	The first project (Extranet Infrastructure) successfully produced the outcome of enabling WSI external stakeholders with the ability to log in to myWSI and view information related to their transactions.
	Business Need 2: Streamline processes related to information from/to external audiences			
	Objective 2.1: Review and improve current processes affecting external stakeholders	Measurement 2.1.1: Reduce the number of contacts with WSI staff per thousand policyholders/claims by 10% within the first year of program completion. Anticipated Benefit(s): Customers able to find information more easily; Workload relief for WSI staff	Met (for Policy)	myWSI development has provided employers access to account information and the ability to manage the account. The ability for the employer to self-serve in myWSI has contributed to workload relief for both Employer Services and Customer Service staff.

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	Business Need 3: Increase online interactivity for WSI's stakeholders and partners			
	Objective 3.1: Design a site that is user-friendly, easily navigable and targets appropriate audiences	Measurement 3.1.1: Increase by 10% the number of external stakeholders using available extranet portal features within the first year of program completion. Anticipated Benefit(s) 3.1.1: Improved customer service and internal efficiency.	Met (for Policy)	Employers are required to provide information through our external website. Example, payroll reporting process with myWSI R4 where Employers are required to file their payroll report in myWSI. This covers all types of coverage.
	Objective 3.2: Create the extranet to be adaptable to mobile devices	Measurement 3.2.1: Site accessible via iOS, Android, and Windows devices. Anticipated Benefit(s) 3.3.2: Improved end user experience.	Met	After Releases 1-2.2, WSI external stakeholders can access myWSI via mobile devices.

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POST-IMPLEMENTATION REPORTS

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.
Project 1 and Releases 1-6	Refer to prior versions of the Iterative Startup-Closeout Reports for the findings of the Post-Implementation Reports.
Release 7	The success of the project was rated by project stakeholders at 2.69 out of 3.00 (Good-to-Excellent). Several themes emerged from the comments from project stakeholders (Communication, Requirements, Development, Testing, Training, and Change Management). Some specific comments included: • The BAs from Injury Service along with the team effort with IT & Service Logix have been outstanding. • We have a great team & I am proud to be part of it. • Kudos to the team. These releases are long and very detailed. Encourage people to take time away when they can to ensure balance and avoid burnout. • The project process is really good, the team is getting into a rhythm with injury services. • The base processes that are used do a great job of being innovative, including the Business Areas, and thoroughly testing the new features. Each release includes a lot of things and pushed them through the process well. • The training provided also helped to prepare everyone for the upcoming changes. Having the opportunity to work in the test environment prior to go live really helped to ease anxieties about the transition. The myWSI Release 7 functionality meets the needs of WSI end users. Project stakeholders rated the success of the solution at 2.89 out of 3.00 (Good-to-Excellent). Some specific comments from project stakeholders are included below: • These enhancements move WSI forward and create efficiencies for WSI and our customers. • The current release is very helpful for claims to do its job quickly and efficiently. • Great job overall - all the updates have been a welcome change!

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 8 is aligned with CAPS Release 12 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