

# 2017 Q2 LFC Report

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH				
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																				

AGR	Agricultural Licensing System		Executing	Ames, Gregory		4/29/2012	11/1/2013	11/1/2017	\$1,136,347	\$1,167,427		\$580,000			\$580,000	\$819,854	No	No	No	No					
				Gray, Andy																					

**Description**  
 Upgrade existing Licensing and Registration system to allow web based licensing, registrations, inspections and enforcement activities.

**Project Objectives**  
 Augment or replace existing hardcopy and email processes. Provide customers with an alternate method for registering products and renewing licenses. Provide department staff with alternative methods for entering inspection and enforcement data.

**Agency Comments**  
 Current Estimate was updated to reflect an additional \$25,000 for hardware expenses. The departemnt purchased rugged mobile devices rather than the less expensive tablets for in-field inspections.

Planned Value	Rebaselined Date
\$940,051	
Earned Value	
\$940,051	CPI
Cost Variance	1.15
\$120,197	
Schedule Variance	SPI
\$0	1.00

COR	MSP Perimeter Fence Security		Executing	Fletcher, Michael		3/8/2016	12/31/2016	6/30/2017	\$550,000	\$530,000	\$550,000				\$550,000	\$20,000	No	No	No	No					
				Salmonsens, Jim																					

**Description**  
 To have a fully functioning Security Perimeter Fence.

**Project Objectives**  
 Engineering firm was consulted and a site visit of MSP campus/fence was conducted.

**Agency Comments**  
 RFP draft was received from consulting engineering firm on 11-9-16. RFP draft is being reviewed and will be available within 30 days. RFP is in State Pocurement, should be sent out by 5/14/17. Also, made a change to the Primary Sponsor. Leroy Kirkegard has retired and Michael Fletcher has replaced him.

Planned Value	Rebaselined Date
\$555,000	
Earned Value	
\$550,000	CPI
Cost Variance	1.03
\$530,000	
Schedule Variance	SPI
\$5,000	0.99

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DEQ	Coal Electronic ePermitting System		Executing	Dorrington, Christopher		6/27/2016	6/28/2019	6/28/2019	\$1,750,000	\$1,750,000			\$1,400,000	\$350,000	\$1,750,000	\$174,000	No	No	No	No				
				Eichhorn, Ashley																				

**Description**  
Develop an on-line permit and coal application.

**Project Objectives**  
The Coal Program along with the Office of Surface Mining Reclamation and Enforcement (OSMRE) will form a partnership to create an end-to-end solution for a Coal ePermitting System. This project is phase 1 of 5. Phase I includes developing ePermit, web-enabling MT client-based coal database and incorporating OSMRE's two legacy database systems.

**Agency Comments**  
DEQ and its contractors continue to make progress on phase 1 since our last quarterly report.

Planned Value	Rebaselined Date
\$586,250	
Earned Value	
\$586,250	CPI
	3.3
Cost Variance	
\$412,250	SPI
Schedule Variance	1.0
\$0	

DEQ	FACTS - Phase 1		Executing	Davis, Tim		6/30/2015	6/30/2018	1/31/2019	\$980,000	\$1,175,131		\$1,157,488		\$350,000	\$1,507,488	\$949,500	No	No	Yes	No				
				Sharma, Pranav																				

**Description**  
Fees, Applications, and Compliance System (FACTS). Develop an on-line system for water protection permit applicatons, payments and reporting requirements for the life of the permits.

**Project Objectives**  
The Water Protection Bureau (WPB) is replacing its current legacy system(s). The new system will align with State standards; include new and/or refined business functionality required by State and federal law, and meet business requirements identified during WPB's 2013 business process assessment.

**Agency Comments**  
DEQ and its contractor continue to make progress since the last quarterly report. The change in budget includes the approved Contract Modification. The following were added in scope per Contract Modification:  
1. CROMERR-compliant user sign on using Share CROMERR Services (SCS)  
2. User Management System  
3. Permit & Fact Sheet development  
4. Environmental Assessment form creation  
5. Compiling of permit data blocks from application and Fact Sheet development using GEM Box software

Planned Value	Rebaselined Date
\$949,500	12/7/2016
Earned Value	
\$949,500	CPI
	1.00
Cost Variance	
\$0	
Schedule Variance	SPI
\$0	1.00

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DEQ	Remediation Information Management System (RIMS)		Executing	Chambers, Jenny Stolp, Staci	Yes	1/23/2012	6/30/2016	6/29/2018	\$4,270,000	\$5,344,000	\$700,000	\$1,880,000	\$40,000	\$2,724,000	\$5,344,000	\$3,342,449	No	No	Yes	Yes				
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**Description**  
Replacement of legacy system supporting Waste Management and Remediation Division and Petroleum Tank Compensation Board with updated state standard technology.

**Project Objectives**  
Improve the availability and quality of information supporting the Remediation Programs, Underground Storage Tank Progeram, and Petroleum Compensation Board. This will enable these programs to deliver timely and accurate services, facilitate information sharing with internal and external stakeholders, measure performance and quality, improve program management, and maintain information security.

**Agency Comments**  
DEQ is using internal and contracted augmentation staff to complete the project. In February 2017, DEQ implemented a portion of TREADS to support State Superfund time tracking and cost recovery. In the summer of 2017, DEQ plans a limited implementation of the Sample Data Management module of TREADS.

Planned Value	\$3,473,600	Rebaselined Date	11/16/2016
Earned Value	\$3,473,600	CPI	1.04
Cost Variance	\$131,151	SPI	1.00
Schedule Variance	\$0		

DLI	STAARS Phase 2		Executing	Nordlund, Brenda Warren, Kimberly	Yes	2/25/2014	2/28/2017	6/30/2017	\$3,535,083	\$3,535,083		\$3,535,083			\$3,535,083	\$2,305,731	No	No	No	No				
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**Description**  
Additional work related to the Status, Tax Accounting, Audit, and Reporting System (STAARS), a new UI Tax reporting system.

**Project Objectives**  
To finish implementing, enhancing, and improving the STAARS system.

**Agency Comments**  
The reduction in the amount expended from last LFC report was due to a credit. Revised delivery date was extended to June 30, 2017 to align with the last remaining vendor payment.

Planned Value	\$2,236,954	Rebaselined Date	
Earned Value	\$2,236,954	CPI	1.00
Cost Variance	\$0	SPI	1.00
Schedule Variance	\$0		

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				Project Manager																				

DOA	Claims and Lawsuit		Executing	Dahl, Brett		11/1/2013	6/30/2017	6/30/2017	\$947,900	\$947,900					\$947,900	\$947,900	\$872,895	No	No	No	No				
				Fox, Barry																					

**Description**  
 Claims and Lawsuit Application for RMTD.

**Agency Comments**

**Project Objectives**  
 Migrate from Oracle Forms to sustainable technology; streamline Claims workflow; clean up legacy data; Enhance database structures.

Planned Value	\$833,204	Rebaselined Date	
Earned Value	\$852,162	CPI	.98
Cost Variance	(\$20,733)	SPI	1.02
Schedule Variance	\$18,958		

DOA	Data Protection Initiative		Closing	Pizzini, Lynne	Yes	10/15/2013	6/30/2015	12/31/2016	\$2,000,000	\$2,244,540	\$2,000,000				\$244,540	\$2,244,540	\$2,188,235	No	No	No	Yes				
				Frohlich, Joe																					

**Description**  
 Implementation of a statewide data protection system through user access control and verification. This initiative includes multi-factor authentication, comprehensive security controls for multiple identity stores, robust auditing capabilities, and the ability to integrate various agency systems together to manage and exchange data. This project will involve a statewide risk assessment and penetration test that will highlight vulnerabilities and generate requirements for improving security. This information will be used for an additional funding request to the 2015 Legislative Session.

**Agency Comments**  
 This project is complete and will be closed by the next reporting period.

**Project Objectives**  
 The following will be deliverables for this project: 1) Establish the "Gold source" for employee data. 2) Implementation of Access Control and Verification system. 3) Integration of access Control and verification system with various other identity stores. 4) Implementation of self-service password reset system. 5) Implementation of multi-factor authentication. 6) Enterprise Security Risk Assessment Report.

Planned Value	\$2,000,000	Rebaselined Date	
Earned Value	\$2,244,540	CPI	
Cost Variance	\$56,305	SPI	1.12
Schedule Variance	\$244,540		

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				Project Manager																				

DOA	Data Protection Initiative Phase 2		Executing	Pizzini, Lynne	Yes	7/1/2015	6/30/2017	6/30/2017	\$800,000	\$887,200	\$800,000				\$800,000	\$679,413	No	No	No	Yes					
				Frohlich, Joe																					

**Description**  
 The goal of this project is to enhance information security statewide to better protect state government information systems which include citizen and other confidential data.

**Project Objectives**  
 Establishment of the Montana Information Security Advisory Council. Development of the Enterprise Security Program. Implement a statewide information security training and awareness program. Implementation of the web firewall product for all state web applications.

**Agency Comments**  
 This project is supporting the Enterprise Security program. Progress is being made in implementing best security practices for all agencies. This project is near completion and will be closed by the next reporting cycle.

Planned Value	\$800,000	Rebaselined Date	
Earned Value	\$887,200	CPI	1.30
Cost Variance	\$207,787	SPI	1.10
Schedule Variance	\$87,200		

DOA	FileNet to Perceptive Content Migration Project		Executing	Baldwin, Ron		6/25/2015	9/30/2016	8/31/2017	\$2,592,498	\$2,592,498				\$2,592,498	\$2,592,498	\$2,300,000	Yes	No	No	No					
				Hinman, Audrey																					

**Description**  
 Establish infrastructure for a multi-tenant Enterprise Content Management solution to include production, test and development environments.

**Project Objectives**  
 Implement multi-tenant Enterprise Content Management solution. Migrate DLI MWorks to enterprise service. Migrate all current IBM FileNet customers to Perceptive Content. Support and train current FileNet customers.

**Agency Comments**  
 Delays have been caused due to defects in the delivered software, for which we are working with the vendor. There are five customers being effected by this software defect.

Planned Value	\$2,592,498	Rebaselined Date	
Earned Value	\$2,300,000	CPI	1.00
Cost Variance	\$0	SPI	0.89
Schedule Variance	(\$292,498)		

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				Project Manager																			

DOA	Network Technology Services Bureau - Network and Equipment		Executing	Baldwin, Ron Troupe, Jody		10/15/2015	6/30/2017	6/30/2017	\$4,821,000	\$4,779,325					\$4,821,000	\$4,821,000	\$4,012,324	No	No	No	No				
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**Description**  
Enhance the SummitNet network.

**Project Objectives**  
Enhance the SummitNet network with CORE, aggregation, monitoring and security equipment upgrades to support higher bandwidth application needs. Upgrade voice, data, video and software equipment that is End of Life. Upgrades will support additional security, bandwidth, and new applications/ services implemented by State Agencies.

**Agency Comments**  
Upgraded core/aggregation network to 10Gb, and internet portals to 2Gb (Helena) and 1Gb (Billings) in Spring 2016. NTSB finished installing all End of Life/End of Support identified for replacement for FY16/17 and will begin working on the FY18/19 list. NTSB is now working to identify all legacy Frame Relay and Layer 2 DSL circuits that need to be upgraded due to being End of Life.

Planned Value	\$4,821,000	Rebaselined Date	
Earned Value	\$4,821,000	CPI	1.20
Cost Variance	\$808,676	SPI	1.00
Schedule Variance	\$0		

DOA	SABHRS Financials Upgrade		Executing	Grey, Cheryl Lake, Jerri		1/1/2015	9/30/2016	5/15/2017	\$960,379	\$722,875					\$960,379	\$960,379	\$650,992	No	No	Yes	No				
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**Description**  
Upgrade the SABHRS Financials system.

**Project Objectives**  
Upgrade the SABHRS Financials system from 9.1 to 9.2 to provide additional functionality to our users and maintain support.

**Agency Comments**  
The project was re-baselined after the 2015 session due to SB 123 (State Fund removed from FY to CY budgeting).

Planned Value	\$650,992	Rebaselined Date	6/1/2015
Earned Value	\$650,992	CPI	1.00
Cost Variance	\$0	SPI	1.00
Schedule Variance	\$0		

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				Project Manager																			

DOJ	Driver Services Contract Replacement		Closing	Garcia, Sarah	No	4/29/2015	12/31/2015	2/15/2017	\$2,604,218	\$2,604,218	\$2,586,414	\$1,724,276			\$4,310,690	\$2,604,218	No	Yes	Yes	No				
				Schaefer, Sky																				

**Description**  
 Replace the existing scheduling, card production, automated knowledge and road testing solution used in Driver License Bureau locations across the state.

**Project Objectives**  
 Replace the existing scheduling, card production, automated knowledge, road testing and provide additional road test tablets for staff to use while conducting motor cycle and class D road tests.

**Agency Comments**  
 All phases of this project have been completed.

Planned Value	\$2,444,920	Rebaselined Date	12/30/2016
Earned Value	\$2,619,218	CPI	1.00
Cost Variance	\$15,000	SPI	1.07
Schedule Variance	\$174,298		

DOJ	FullCourt Enterprise Data Exchange (FEDEX)		Planning	Huseby, Butch	Yes	8/1/2015	12/31/2018	12/31/2018	\$340,000	\$340,000		\$340,000			\$340,000	\$15,516	Yes	No	Yes	No				
				Palmer, Amy																				

**Description**  
 The primary purpose of FEDEX is to maintain a complete and accurate criminal history record in conjunction with the deployment of the FullCourt Enterprise system by the Office of Court Administrator. The two systems share information regarding court actions with state and local law enforcement and maintain the accuracy, timeliness and completeness of criminal history records.

**Project Objectives**  
 Replace two existing batch court data exchanges with realtime web services to file dispositions with the Computerized Criminal History System. Construct new exchanges for protection orders, arrest/bench warrants, and no contact orders. As courts transition to FullCourt Enterprise include data exchanges at go-live.

**Agency Comments**  
 This report includes three phases: II - IJIS Upgrade, III - Protection Orders, IV - Warrants which are funded by HB10 - LRIT funding. Funding for additional exchanges is sought under other FEDEX project phases. For instance Phase I - Justice Court Records System for MVD, is funded by the MDT Traffic Records Committee.

Planned Value	\$16,000	Rebaselined Date	5/10/2017
Earned Value	\$16,000	CPI	1.03
Cost Variance	\$484	SPI	1.00
Schedule Variance	\$0		

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				Project Manager																				

DOJ	Montana Criminal History Improvement Project -		Executing	Huseby, Butch Palmer, Amy	Yes	10/1/2015	3/31/2017	9/29/2017	\$1,729,455	\$1,729,455			\$1,556,469	\$172,986	\$1,729,455	\$1,068,277	Yes	No	Yes	Yes					
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**Description**  
 Improve Montana's criminal records systems and related systems to improve the functioning of the State's criminal justice system.

**Project Objectives**  
 Enable charge level functionality for successful electronic data exchanges between OCA & DOJ. Update data exchanges to NIEM 3.0 conformance. Enable staging of orphan dispositional information and messaging to local arrest agencies to submit biometrics and charge information. Pave the way for future data exchanges with OCA, DOC, DOJ, & other agencies.

**Agency Comments**  
 The Montana Criminal History Improvement received a six months extension of the grant deadline until Sept 30, 2017. The detailed design for the new Sexual and Violent Offender Registry completed the final review cycle of the Detailed Design. A training contractor was recently hired via RFP. Application development continues with expectation of user acceptance testing in July-Sept. Go live postponed until completion of the NCHIP 2016 grant.

Planned Value	\$1,035,895	Rebaselined Date	4/1/2017
Earned Value	\$1,035,895	CPI	.97
Cost Variance	(\$32,382)	SPI	100
Schedule Variance	\$0		

DOJ	Montana Enhanced Registration & Licensing Info. Network (MERLIN)		Executing	Garcia, Sarah Cochrane, Mike	No	3/31/2012	6/30/2016	12/31/2019	\$14,186,963	\$14,186,963	\$1,079,104	\$1,946,096		\$5,657,890	\$8,683,090	\$7,889,432	No	No	No	No					
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**Description**  
 Integrate 3M Corp, Driver Record and Issuance Verification Solution (DRIVS) functionality into the existing MERLIN Motor Vehicle Registration, Dealer Licensing and Registration, and Accounting system.

**Project Objectives**  
 Unify vehicle & driver customer accounting. Integrated driver licensing & records management. Incorporate driver, vehicle registration, dealer licensing, and accounting transactions. Move driver information from DOA mainframe to MERLIN database.

**Agency Comments**

Planned Value	\$8,348,630	Rebaselined Date	
Earned Value	\$8,348,630	CPI	
Cost Variance	\$459,198	SPI	1.05
Schedule Variance	\$0		1.0

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				Project Manager																				

FWP	WIS/PR		Executing	Kujala, Quentin		7/1/2015	6/30/2017	6/30/2017	\$1,300,000	\$1,300,000					\$1,300,000		\$1,300,000	\$877,455	No	No	No	No				
				Clarmoli Wilson, Tina																						

**Description**  
 The Wildlife Division has identified enhancements and new development needs for its biological-focused applications that will improve the ability to collect, analyze, and manage species data. Work accomplished through this project will help ensure the continued viability of Wildlife's important data management systems.

**Project Objectives**  
 The objective of this effort is to improve the overall efficiency, data integrity, and functionality of WIS to support the ongoing management of diverse species.  
 Goal #1: Finish development of production applications.  
 Goal #2: Develop additional applications to further Wildlife's ability to manage diverse species.

**Agency Comments**  
 The project schedule coincides with the grant period. The PR grant allows FWP to match based on our ability to provide internal resources. The project schedule and delivery are tied to that level of effort and have been projected through the end of the grant period.

Planned Value	\$877,455	Rebaselined Date	
Earned Value	\$877,455	CPI	
Cost Variance	\$0	SPI	1.00
Schedule Variance	\$0		1.00

HHS	ACA E&E Phase 4		Closing	Runkel, Robert	Yes	4/1/2016	10/30/2016		\$4,911,837	\$4,911,837	\$504,304				\$4,407,534		\$4,911,838	\$5,003,389	No	Yes	No	No				
				Katsilas, Justyn																						

**Description**  
 The purpose of this project is to enhance the current CHIMES system to implement the Service First Rollout and filing unit changes for the Help Act.

**Project Objectives**  
 To meet changes in federal and state regulations, support multiple workload models, and streamline/automate application and enrollment processes for SNAP/TANF/EA/MA/HMK.

**Agency Comments**  
 All tasks/functionality for this effort have been successfully implemented. Please see attached PI report.

Planned Value	\$4,859,837	Rebaselined Date	
Earned Value	\$4,859,837	CPI	
Cost Variance	(\$143,552)	SPI	0.97
Schedule Variance	\$0		1.00

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				Project Manager																				

HHS	Enterprise Services Phase 1		Executing	Fuller, Stuart	Yes	2/8/2015	12/31/2015	12/31/2017	\$2,355,750	\$2,355,750	\$241,867			\$2,113,882		\$2,355,749	\$1,460,912	No	No	Yes	No				
				Katsilas, Justyn																					

**Description**  
 Enhance the Enterprise Architecture to implement additional business intelligence and data analytics for processing timeliness, backlogs, task throughput, error rates, and work participation. Pursue several security initiatives to protect client data in the database and on file servers, implement SIEM, and require multi-factor authentication.

**Project Objectives**  
 To enhance security of data in CHIMES and the EDX, as well as support the reporting and analytics needs of CHIMES data.

**Agency Comments**  
 Work on schedule for SIEM implementation on new environments and CHIMES MFA Roll-out.

Planned Value	Rebaselined Date
\$1,524,979	11/1/2016
Earned Value	CPI
\$1,603,990	
Cost Variance	1.10
\$143,078	
Schedule Variance	SPI
\$79,011	1.05

HHS	Enterprise Services Phase 2		On-Hold	Fuller, Stuart	Yes	10/8/2015	10/29/2016	12/31/2017	\$6,537,575	\$6,094,872	\$625,767			\$5,469,105		\$6,094,872	\$4,710,345	Yes	No	No	No				
				Katsilas, Justyn																					

**Description**  
 To meet changes in federal and state regulations, enhance the Enterprise Services of DPHHS.

**Project Objectives**  
 The purpose is: 1) Implementation and operations for a Medicaid Aged, Blind, or Disabled Asset Verification System (M-ABD AVS). 2) Procure vendor to provide modern data management, data exchange, web services, PM, and reporting capabilities to support expanded health care services and 3) Upgrade to enterprise version of MuleSoft.

**Agency Comments**  
 The CHIMES integration with the upcoming AVS System is the only remaining item for this effort, which is dependant on the AVS System Implementation project that is currently on hold. An RFP for an AVS product/vendor was posted, and responses scored. With the current legislative budget process, we have hit the pause button on the AVS Vendor onboarding process as we evaluate our fiscal position for the following years. Anticipate an update / decision on the AVS System Implementation project for the next report in September.

Planned Value	Rebaselined Date
\$4,353,682	
Earned Value	CPI
\$4,353,682	.92
Cost Variance	
(\$356,663)	
Schedule Variance	SPI
\$0	1.00

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Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager															Yes					

HHS	Enterprise Services Phase 3		Executing	Runkel, Robert Katsilas, Justyn	Yes	7/1/2016	5/31/2017	12/31/2017	\$3,362,547	\$3,362,547	\$330,635			\$3,031,912		\$3,362,547	\$2,373,583	Yes	No	Yes	No				
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**Description**  
 The purpose of this project is to replace the Department's existing Content Management function with the State's Enterprise Content Management System. This project will also support that Additional CMS Security Initiatives for EDX and CHIMES, and implement core messaging services that support troubleshooting and statistical transaction analysis on the EDX.

**Project Objectives**  
 To enhance data analytics, support state/federal requirements, increase user effectiveness in CHIMES, and transition to an ECM.

**Agency Comments**  
 ECM conversion & Enhanced DMS planned to start in June 2017 and end in December 2017. EDX Phase 2 effort planned to be completed by end of 2017. MARS-E 2.0 Requirements for New CHIMES Environments dependant on completion of the Implementation of these 9 new environments, targeted to be completed in December 2017.

Planned Value	\$1,888,619	Rebaselined Date	9/1/2016
Earned Value	\$2,154,648	CPI	
Cost Variance	(\$218,935)	SPI	1.14
Schedule Variance	\$266,029		

HHS	Joint Enterprise Data Sharing Enterprise Database (Phase I)		Executing	Fuller, Stuart Katsilas, Justyn		4/1/2016	2/28/2017	6/30/2017	\$803,507	\$803,507	\$79,006	\$724,500			\$803,506	\$637,880	Yes	No	Yes	No				
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**Description**  
 Implement and automate both data and HELP Act report generation through the EDX to increase accuracy, reduce manual effort and amount of time to generate reports. Transition data from E&E system to web services, transform data from DLI, and provide data, reports, and an end-user interface to the Department's Business Intelligence Platform.

**Project Objectives**  
 To enhance BI and Data Analytics capabilities and support state/federal regulation changes.

**Agency Comments**  
 In progress with coordination of DLI, DPHHS, & OPI working towards the goal of providing federally required reporting on clients from multiple agencies in one data source/report. Timeline delayed due to changes in guidance from federal partners, changing federal regulations, and delays on depend. Waiting for clarification on changes, and what impact those changes would have on schedule and related systems. Delays also encountered due to system changes of related systems not being completed, resulting in the added complexity and time to manually create test files. Please see the Supplemental report describing details for re-baseline of schedule.

Planned Value	\$750,570	Rebaselined Date	5/15/2017
Earned Value	\$723,156	CPI	
Cost Variance	\$85,276	SPI	.96
Schedule Variance	(\$27,414)		

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH				
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																				

HHS	Medicaid Eligibility & Enhancement and CHIMES MA/HMK EA Integration		Executing	Runkel, Robert Katsilas, Justyn	Yes	6/20/2013	12/31/2015	12/31/2017	\$26,882,679	\$26,882,680	\$2,760,075			\$24,122,605		\$26,882,680	\$24,552,008	No	No	Yes	Yes				
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**Description**  
Enhancements to the Department's integrated eligibility systems with newer technology and updates.

**Project Objectives**  
To improve user functionality in CHIMES, meet changes in federal and state regulations, and streamline/automate application and enrollment processes for SNAP/TANF/EA/MA/HMK.

**Agency Comments**  
One development task is remaining for this effort, the Enhanced DMS Integration. There is a dependency of Enhanced DMS Integration item on full implementation of ECM Tool (Perceptive) by SITSD and HELP Act activities. Last item targeted for end of 2017, assuming full implementation of ECM Tool by 07-01-2016.

Planned Value	Rebaselined Date
\$22,951,546	9/1/2016
Earned Value	CPI
\$25,538,546	1.04
Cost Variance	SPI
\$986,538	1.11
Schedule Variance	
\$2,586,747	

HHS	Montana Family Safety Information System (MFSIS) (Child Welfare)		Executing	Runkel, Robert Keck, Lori	No	2/15/2016	10/31/2016	10/31/2017	\$1,533,819	\$1,533,819	\$766,910	\$766,910			\$1,533,819	\$1,533,819	\$1,617,811	Yes	No	Yes	No				
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**Description**  
The purpose of this project is to replace the case management, intake and investigations business functions from the CAPS mainframe system. These major business functions will have the biggest impact to users and provide the greatest opportunity to streamline and automate tasks for the CFSD staff.

**Project Objectives**  
In response to the limitations of CAPS and to comply with recommendations from an October 2015 Legislative Audit Report, CFSD determined the need to implement a new CCWIS compliant system to replace CAPS. The new system will be modular and will operate concurrently with CAPS until all functionality has been completed and CAPS has been retired.

**Agency Comments**  
Development continues to move forward focusing on intake and investigation with the primary focus being intake. The MFSIS team is working on writing the necessary user stories and testing various panels and reporting bugs as they are identified. A revised cost estimate will be provided within 30-60 days of this report. Additional funding is being sought. More development resources have been added in recent months and project performance has increased with an SPI greater than 1.0. The project is 73% complete and on track for a Phase 1 delivery of 10/31/2017.

Planned Value	Rebaselined Date
\$1,040,921	10/31/2016
Earned Value	CPI
\$1,070,339	.66
Cost Variance	SPI
(\$547,472)	1.03
Schedule Variance	
\$29,418	

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH				
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																				

HHS	MPATH - Program Level Report		Planning	Dalton, Mary	Yes	1/1/2017	9/30/2022		\$73,255,288	\$73,255,288	\$7,716,969			\$65,538,319		\$73,255,288	\$519,217	No	No	No	Yes				
				Buska, Jeff																					

**Description**

The Department of Public Health and Human Services (DPHHS) has initiated the Montana Program for Automating and Transforming Healthcare (MPATH) to procure software and services to replace the State's aging legacy Medicaid Management Information System (MMIS). DPHHS will acquire discrete modules that align with the Final Rule for Mechanized Claims Processing and Information Retrieval Systems as described in 42 CFR 433.111, and successfully meet the goals and business needs identified by DPHHS during the modularity planning process.

**Project Objectives**

The MPATH modularity blueprint includes the following modules: Systems Integration Services, Provider Services, Enterprise Data Warehouse Services, Data Analytics Services, Financial Support Services, Claims Processing and Management Services, Care Management Services, Customer Care Services, and Pharmacy Support Services. DPHHS will be developing and releasing RFP's related to these modules over the next two years.

**Agency Comments**

Planned Value	\$0	Rebaselined Date	
Earned Value	\$0	CPI	
Cost Variance	\$0	SPI	1
Schedule Variance	\$0		1

HHS	MPATH - Systems Integration Services		Planning	Dalton, Mary		3/6/2018	9/30/2022		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	No	No	No	Yes				
				Buska, Jeff																					

**Description**

Montana Program for Automating and Transforming Healthcare (MPATH) includes the Systems Integration Services (SI) module. The SI Services module encompasses integration and interoperability services, data management between modules, shared database services, and web service transactions.

**Project Objectives**

The state will obtain Systems Integration Services. Systems Integration Services will encompass three areas of the modularity technology platform; interoperability and enterprise integration, technical coordination, and the creation and maintenance of the operational data store. The Systems Integration Services Contractor will provide an enterprise technology platform and a diverse and flexible set of integration and interoperability services which are needed to support a variety of infrastructures, applications and technical solutions. The Systems Integration Services Contractor will also provide real-time web based entry and maintenance of member and benefit plan information for select Montana Healthcare Programs and support the receipt and creation of X12 transactions. Finally, the Systems Integration Services Contractor will provide Master Client/Provider Index functionality to uniquely identify and manage members, providers and other entities within the Montana Healthcare Programs enterprise

**Agency Comments**

CMS approved the Montana Healthcare Programs Modularity Implementation Advanced Planning Document (IAPD) November 7, 2016. CMS approved the Systems Integration Services RFP on March 20, 2017. The Systems Integration Services RFP was released on Friday, May 12, 2017.

The Actual Start Date and the Total Project Funding will be updated when the Systems Integration Services vendor is selected and the contract is signed.

Planned Value	\$0	Rebaselined Date	
Earned Value	\$0	CPI	
Cost Variance	\$0	SPI	1.00
Schedule Variance	\$0		1.00

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH			
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Re-Baselined Post-IMP	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																			

HHS	MT Bear Phase 4		Executing	Runkel, Robert Katsilas, Justyn	No	1/2/2017	5/31/2017	4/30/2017	\$464,146	\$464,146	\$47,654		\$416,492		\$464,146	\$252,220	No	No	No	No				
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**Description**  
 MT Bear Phase 4 is for additional operational analytics and business intelligence, expansion of integration layer to support more robust ad hoc reporting capabilities, and upgrading to the latest version of the Pentaho software product and associated regression testing.

**Project Objectives**  
 Provide more data and metrics for analytics of CHIMES data. This effort includes an update of the existing MT BEAR reports / data models to a new version to use a more current and supported version of the Pentaho Platform.

**Agency Comments**  
 This effort has been completed, but leaving open for the processing of final invoices. Expect to close and provide PI Report in Next LFC Reporting period. While the effort is complete, not all invoices have been fully processed on the fiscal side, resulting in an excessive CPI.

Planned Value	\$460,000	Rebaselined Date	
Earned Value	\$460,000	CPI	
Cost Variance	\$207,780	1.82	
Schedule Variance	\$0	1.00	

HHS	Pharmacy Benefits Manager for MMIS ( FlexibleRx )		Closing	Dalton, Mary Buska, Jeff		4/2/2012	3/2/2015	12/3/2015	\$65,500,000	\$6,867,517	\$875,608		\$5,991,909		\$6,867,517	\$6,867,517	No	No	No	Yes				
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**Description**  
 Replace the legacy mainframe pharmacy system with the new FlexibleRx Pharmacy Benefits Management system that improves claims processing efficiency and increases the flexibility of the system to allow the Pharmacy Program staff to quickly respond to changing program requirements and member pharmacy needs.

**Project Objectives**  
 Implement a modern, configurable Pharmacy Benefits Management system that will administer pharmacy benefits for all members of the Montana Healthcare Programs.

**Agency Comments**  
 DPHHS CMS certification process began on 12/5/2015. DPHHS received CMS Certification of the FlexibleRx system on February 15, 2017. DPHHS will submit a project post implementation report before the Septmeber 2017 LFC meeting.

Planned Value	\$6,867,517	Rebaselined Date	
Earned Value	\$6,867,517	CPI	
Cost Variance	\$0	1.00	
Schedule Variance	\$0	1.00	

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH				
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																				

HHS	Predictive Modeling		Executing	Runkel, Robert Katsilas, Justyn	Yes	1/2/2017	5/31/2017	4/30/2017	\$319,146	\$319,146	\$32,767	\$286,379			\$319,146	\$252,208	No	No	No	No					
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**Description**  
 Predictive Modeling Extension is for utilizing a predictive model based on supervisor reviews and errors noted from scheduled review processes (e.g., PERM and QC), queuing cases for pre-authorization review and “nudging” system users in both the Self-Service Portal and Worker Portal throughout the data entry workflows when error prone situations are identified.

**Project Objectives**  
 Support a pre-authorization supervisor review functionality guided by a predictive model based on SNAP overpayment errors, and extend it to incorporate additional cases details from other quality control reviews.

**Agency Comments**  
 This effort has been completed, but leaving open for the processing of final invoices. Expect to close and provide PI Report in Next LFC Reporting period. This was originally reported within the ACA E&E Phase 2 project, but was removed from scope in September LFC. Department decision identified validity and opportunity to engage in this project, so was re-added as a separate project for clarity in reporting to LFC.

Planned Value	\$315,000	Rebaselined Date	
Earned Value	\$315,000	CPI	
Cost Variance	\$62,792	SPI	1.25
Schedule Variance	\$0		1.00

HHS	TANF Strategic Planning		Closing	Runkel, Robert Katsilas, Justyn	No	12/1/2016	1/31/2017		\$1,681,575	\$1,681,575	\$1,443,009		\$238,556		\$1,681,575	\$1,681,575	No	Yes	No	No					
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**Description**  
 This is a non-ACA enhancement effort under the CHIMES SNAP/TANF contract to make system changes to support TANF Strategic Planning, including TANF Presumptive, change WoRC to Pathways, Light Engagement Activities, Replace Barrier Reduction with "bridge", and WoRC Contractor Priority Items.

**Project Objectives**  
 The objective of this effort is to increase transparency in TANF workload and benefit processing; provide workflow efficiencies; and allow for enhanced reporting and data metrics for applying strategy to improve effectiveness in the administration of the TANF benefit.

**Agency Comments**  
 This effort has been completed. Please refer to PI Report. This was originally reported within the ACA E&E Phase 2 project, but was removed from scope in September LFC. Department decision identified validity and opportunity to engage in this project, so was re-added as a separate project for clarity in reporting to LFC.

Planned Value	\$1,681,575	Rebaselined Date	
Earned Value	\$1,681,575	CPI	
Cost Variance	\$0	SPI	1.00
Schedule Variance	\$0		1.00

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH					
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined IV-V	Scope	Schedule	Budget	Risk		
				Project Manager																					
HHS	WIC EBT Vendor Services		Executing	Harwell, Todd Giono, Becky	No	9/24/2015	5/31/2017	9/30/2017	\$662,670	\$662,670	\$0				\$662,670	\$662,670	\$610,301	No	No	Yes	Yes				

**Description**

This project is intended to develop a WIC EBT system. Services includes an EBT contractor that will support the WIC benefit transactions in all aspects, including card creating/distribution, redemption, reporting, settlement, merchant, retailer, and participant support services.

**Project Objectives**

The objective of this project is to utilize EBT contractor services for Montana's WIC program to provide a broad range of EBT services and functions to support the electronic delivery of benefits to eligible participants in the State.

**Agency Comments**

The effort reported here is specific to the WIC DDI EBT Vendor Services effort. The project is progressing on target with issues/risks being mitigated. Pilot start date on target for June of 2017.

Planned Value	\$541,012	Rebaselined Date	11/1/2016
Earned Value	\$596,403	CPI	
Cost Variance	(\$13,898)	SPI	1.10
Schedule Variance	\$55,391		

JUD	Court Technology Improvement		Executing	McLaughlin, Beth Mader, Lisa		7/1/2015	6/30/2017	6/30/2017	\$834,000	\$834,000	\$834,000					\$834,000	\$321,292	No	No	No	No				
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**Description**

Courtroom Technology Improvement Project

**Project Objectives**

Hardware/equipment technology project to continue modernization efforts in MT courts to meet the unique needs of the Branch, IT standards & ADA. Maintain current technologies, continue upgrading courts/courtrooms with video/audio, and provide equipment/technology necessary for courts/judges/public to fully benefit from statewide E-filing.

**Agency Comments**

Planned Value	\$325,260	Rebaselined Date	
Earned Value	\$325,260	CPI	1.01
Cost Variance	\$3,968	SPI	1
Schedule Variance	\$0		

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH			
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined IV-V	Scope	Schedule	Budget	Risk
				Project Manager																			

JUD	FullCourt Enterprise Statewide Case Management Upgrade		Planning	McLaughlin, Beth Mader, Lisa		4/14/2015	9/30/2016	8/16/2017	\$2,539,355	\$2,586,445	\$561,810			\$1,772,635		\$2,334,445	\$1,852,542	No	No	No	No			
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**Description**  
FullCourt Enterprise Statewide Case Management Upgrade

**Project Objectives**  
FullCourt Enterprise Statewide Case Management Upgrade - centralize 192 individual distributed oracle databases throughout Montana to a single database hosted in Helena with SITSD.

**Agency Comments**

Planned Value	Rebaselined Date
\$1,961,208	
Earned Value	
\$1,961,208	CPI
	1.05
Cost Variance	
\$108,666	
Schedule Variance	
\$0	SPI
	1

JUD	Montana Courts Electronic Filing System		Executing	McLaughlin, Beth Mader, Lisa		3/7/2013	6/30/2017	1/31/2018	\$1,745,660	\$2,015,660	\$1,828,669			\$487,263		\$2,315,932	\$1,557,360	No	No	Yes	No			
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**Description**  
Electronic Filing of Cases in Montana Courts via an E-Filing Web Portal

**Project Objectives**  
The Efiling portal will improve access to MT court systems; 24/7 standard/secure electronic filing/serving docs; reduce doc storage/retrieval costs; reduce data entry; improve quality/consistency of court records; increase productivity-simultaneous access to case files; reduce catastrophic loss risk; secure pymt processing of statutory filing fees/costs.

**Agency Comments**

A contract amendment is being negotiated with the vendor at this time. This will adjust the milestones without adjusting the total cost. Once the amendment is completed, the project will be re-baselined with a revision delivery date projected for 1/31/2018.

Planned Value	Rebaselined Date
\$1,595,311	10/7/2016
Earned Value	
\$1,595,311	CPI
	1.02
Cost Variance	
\$37,951	
Schedule Variance	
\$0	SPI
	1.00

GENERAL PROJECT INFORMATION						SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH			
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																				

LEG	Legislative Session Systems Replacement		Executing	Fox, Susan Murray, Susan		5/15/2013	12/31/2017	12/31/2017	\$6,146,000	\$6,384,976	\$6,146,000				\$6,146,000	\$4,735,715	No	No	No	No				
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**Description**  
Replacement, upgrade and consolidation of legislative systems supporting bill drafting, the engrossing and enrolling of bills, amendment processing, House and Senate journals and committee minutes, and replacement of the database that stores the Montana Code Annotated.

**Project Objectives**  
The LEG IT Plan adopted by the Legislative Council identifies IT systems that are at or near obsolescence and need replacement. This project addresses the need to design and modernize core Legislative technology that is more than 27 years old.

**Agency Comments**

Planned Value	\$5,088,976	Rebaselined Date	
Earned Value	\$5,088,976	CPI	
Cost Variance	\$353,261	SPI	1.07
Schedule Variance	\$0		1.00

MDT	Maintenance Management System (MMS)		Executing	Swartz, Jonathon Warren, Mike	No	3/4/2013	9/27/2016	10/27/2017	\$2,000,000	\$2,850,000		\$2,529,893			\$2,850,000	\$1,729,352	Yes	No	Yes	No				
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**Description**  
The purpose of this project is to purchase a commercial off-the-shelf (COTS) product that meets the MDT business need for a comprehensive, integrated Maintenance Management System (MMS).

**Project Objectives**  
1) Advance the strategic approach to managing the MDT Maintenance Program.  
2) Improve MDT Maintenance Program efficiencies.  
3) Maintain or improve the customer satisfaction index."

**Agency Comments**

The MMS Vendor fell behind schedule completing the final development activities. MDT worked with vendor's executive management to resolve the problems. The vendor replaced the Project Manager with a more senior Project Manager and additional technical staff, at no cost to MDT (firm, fixed price contract). MDT did not compromise on project scope or quality, and will not. The new vendor PM revised the project schedule to provide adequate time to address the remaining tasks. This, coupled with commitment and oversight by MDT senior management, effectively negates any increase to project risk. The new project schedule resulted in the new baseline. This was anticipated and noted in the prior LFC submission. The difference between Planned Value and Earned Value is a result of lower than anticipated MDT soft costs. The project is currently in the second cycle of user acceptance testing.

Planned Value	\$1,775,318	Rebaselined Date	1/2/2017
Earned Value	\$1,729,352	CPI	
Cost Variance	\$0	SPI	1.00
Schedule Variance	(\$45,966)		.97

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH				
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Re-Base-lined Post-IMP	I-V	Scope	Schedule	Budget	Risk	
				Project Manager																				
MDT	RSS (Aerial Photography)		Closing	Kailey, Dwane Dennis, Aaron		7/1/2015	6/30/2016	6/30/2017	\$868,469	\$1,193,469			\$1,119,519	\$73,950		\$1,193,469	\$738,200	No	No	No	No			

**Description**

MDT has contracted with Vexcel-imaging to provide services to acquire, implement, train, and support an RSS to meet MDT's aerial survey and mapping business needs. The immediate operational need is an RSS that supports MDT's business, functional, and technical requirements/framework as identified. Focus will be on future growth and capability. DOA, STISD has instructed MDT to store all RSS data at The State Data Center. The infrastructure between the State Data Center and MDT is now complete and functional. The State Data Center requirement did not delay the project however added unanticipated costs (\$190K), time (12 months) and complexity. UAT for project was signed off on March 31, 2017 and is now in the 90-day warranty period. Current warranty period is scheduled to end June 30, 2017. There are less than a dozen warranty defects that need to be fixed.

**Project Objectives**

MDT has established a number of goals for the airborne sensing program.  
 - Replace existing analog camera, film processing, film scanning, and current softcopy suite used for photogrammetry with a new RSS.  
 - Ensure that MDT provides same or improved services and products.  
 - Satisfy goal of integrating different types of remote sensing data.  
 - The ability to store and retrieve data from The State Data Center.

**Agency Comments**

- Engineering Leadership has extended the User Acceptance Testing (UAT) to ensure appropriate and thorough testing is accomplished for the camera and all the software associated with the overall system.  
 - The Original Estimate of \$868,469 only included vendor costs from MDT's contract with Vexcel. Added into the Current Estimate is Internal Labor.  
 - The UAT testing is using actual federal aide projects, therefore, a portion of the labor costs will be reimbursed via FHWA.  
 - Internal hours from 11/18 until project completion have been rebaselined to a total of 2,700 hours at an internal cost of \$50 per hour. Of this number, 1,700 hours will be reimbursed via FHWA at a rate of 87%  
 - The original RSS Project was funded through State Special Revenue at \$868,469 for external costs only.  
 -The State Data Center requirement added \$190,000 in unanticipated costs to upgrade infrastructure.

Planned Value	Rebaselined Date
\$738,200	11/18/2016
Earned Value	CPI
\$738,200	
Cost Variance	1.0
\$0	
Schedule Variance	SPI
\$0	1.0

OPI	ART II Grant		Executing	Emerson, Christine Draur, Bitsey		10/1/2015	9/30/2018	9/30/2018	\$1,514,918	\$1,514,918	\$17,729		\$1,497,189		\$1,514,918	\$622,449	No	No	No	No			
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**Description**

The purpose of the grant funding is to decrease administrative errors in LEAs and schools identified by the OPI that are experiencing, or likely to experience, program administrative errors. Train School Food authority in school meal programs processes and newly implemented system.

**Project Objectives**

Purchase and implement a replacement Child Nutrition System, train users, reduce administrative errors, streamline data collection, reporting, and claiming.

**Agency Comments**

Planned Value	Rebaselined Date
\$686,741	
Earned Value	CPI
\$686,741	
Cost Variance	1.10
\$64,292	
Schedule Variance	SPI
\$0	1.00

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH				
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																				

OPI	DCA Enhancements		Closing	Emerson, Christine		1/20/2014	12/31/2015	12/31/2016	\$983,912	\$983,912	\$13,000			\$970,912		\$983,912	\$983,752	No	Yes	No	No				
				Draur, Bitsey																					

**Description**  
Perform enhancements to the Direct Certification Application

**Project Objectives**  
Include additional data sources, provide training, and do general enhancements

**Agency Comments**

SIMS Phase 2 went live 8/22/2016, three months behind schedule. Rolling Hold back payments will not be completely paid until a year after phase 3 is complete. A post-implementation report will be submitted by the Secretary of State's office in September 2017.

Planned Value	\$983,752	Rebaselined Date	
Earned Value	\$983,752	CPI	1.00
Cost Variance	\$160	SPI	1.00
Schedule Variance	\$0		

SOS	Information System Management (SIMS) - Phase 2		Closing	Stapleton, Corey		7/1/2013	4/25/2016	8/22/2016	\$2,800,964	\$2,800,964	\$2,800,964					\$2,800,964	\$2,787,615	No	No	No	No				
				English, Kellee																					

**Description**  
Replace aging and outdated legacy mainframe

**Project Objectives**  
Replace numerous, redundant, antiquated, and siloed systems with web-based, image and text searchable system. Provide enhanced customer service, eliminate manual resource hours utilized for records and information management

Planned Value	\$2,800,964	Rebaselined Date	
Earned Value	\$2,673,916	CPI	1.00
Cost Variance	\$0	SPI	0.95
Schedule Variance	(\$127,048)		

GENERAL PROJECT INFORMATION					SCHEDULE DATES			TOTAL ESTIMATED COSTS		APPROPRIATED BUDGET AMOUNTS					EXPENDED	OTHER				HEALTH				
Agency	Title	Overall	Current Phase	Sponsor	HB10 Funded	Actual Start date	Original Delivery Date	Revised Delivery Date	Original Estimate	Current Estimate	General Fund	State Special Revenue	Federal	Other	Total	Total	Supplemental	Post-IMP	Re-Baselined	IV-V	Scope	Schedule	Budget	Risk
				Project Manager																				

TRS	M-Trust Enhancements		Executing	Graham, Shawn Fournier, Jane	No	1/17/2017	9/30/2018	9/30/2018	\$1,281,010	\$1,281,010				\$1,281,010	\$1,281,010	\$78,063	No	No	No	Yes					
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**Description**  
The enhancement project encompasses a group of specific changes that will allow TRS to take full advantage of the recently completed technology upgrade to streamline business processes and significantly enhance staff productivity, compliance, and customer service.

**Project Objectives**  
Improve TRS staff efficiency and productivity by reducing manual, off-system work.  
Improve customer service by providing more information accurately and timely and by reducing the time taken to provide routine customer services.  
Improve data quality and auditability.

**Agency Comments**

Planned Value	\$106,112	Rebaselined Date	
Earned Value	\$144,858	CPI	
Cost Variance	\$66,795	1.85	
Schedule Variance	\$38,746	SPI	1.37

TRS	M-Trust Technical Upgrade		Closing	Graham, Shawn Fournier, Jane	No	10/10/2013	4/22/2016	12/16/2016	\$2,550,000	\$2,718,099				\$2,718,099	\$2,718,099	\$2,639,670	No	Yes	Yes	Yes					
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**Description**  
Upgrade TRS' pension management system from PowerHouse/Open VMS to Adobe ColdFusion.

**Project Objectives**  
Move all business functions currently provided by TRS' Pension+ system to a modern, web-based, supported technical platform. This move will achieve a number of business objectives: reducing risk, reducing the cost of maintenance and enhancements, improving staff productivity, improving data quality, and improving customer service.

**Agency Comments**

This project has been completed with all work completed and deliverables accepted December 16, 2016.

Planned Value	\$2,718,099	Rebaselined Date	1/1/2016
Earned Value	\$2,718,099	CPI	1.03
Cost Variance	\$78,429	SPI	1.0
Schedule Variance	\$0		