

Information Technology Capital Investment Program  
Project Status Report

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**To:** Information Technology Strategy and Investment Committee  
John Vittner, Office of Policy and Management

**From:** David F. Doukas

**Email:** David.Doukas@ct.gov

**Agency:** Department of Rehabilitation Services

**Project:** Integrated Consumer Service and Reporting System

**Project Manager:** William Viggiano

**Reporting Period:** Project Inception through 12/31/2018

**Total Funds Requested:** \$5,952,200

**Total Funds Allotted to Agency:** \$4,131,382

**Accumulative Total Capital Fund Expenditures to Date:** \$4,131,382

**Brief Project Description/Summary:**

The Department of Rehabilitation Services (DORS) consists of the former Department of Social Services, Bureau of Rehabilitation Services (BRS), the Board of Education and Services for the Blind (BESB), the Commission on Deaf and Hearing Impaired (CDHI), the Worker's Rehabilitation Program of the Worker's Compensation Commission and the Driver Training Unit of the Department of Motor Vehicles. DORS has a requirement to implement an integrated centralized Case Management and Reporting System that will support the business requirements of this recently consolidated state department and the 13 distinct programs it administers. This new system will supersede the existing DORS legacy systems and allow for the standardization of workflow and operating procedures across all DORS programs. Additional benefits of the new system include increased staff productivity and agency workflow processing, improved fiscal processing, reporting, data sharing and providing our Consumers with superior customer service and enhanced self-referral offerings to DORS programs and services.

**Summary of Progress Achieved to Date:**

The project started in January 2014 with the hiring of a certified Project Manager and 3 Business Analysts as the primary project team members. The Project Team successfully created an industry standard formal Project Management Process within DORS that includes; project organization, artifacts, documents, forms, policies and procedures. DORS released the RFP in early September 2014 for vendor review under the title of "Integrated Consumer Services and Reporting System". Due to the lack of vendor responses to the RFP, DORS made a decision to reissue the RFP under the title of a "Case Management System" more in-line with the functionality of the system and we also allowed additional time for vendor review and questions. In November 2014 DAS reissued the newly titled DORS RFP with a mid-December 2014 date for vendors to submit questions.

The RFP period closed in January 2015 with a total of 9 responses being received. After a lengthy period of review, analysis and scoring of the written responses by the project team, vendors were selected for system demonstrations. Demonstrations were performed and the highest scoring proposer was selected for the purposes of negotiating a contract. Prior to contract negotiations commencing between the vendor and DAS the vendor withdrew from consideration and negotiations were not able to begin. DAS would normally commence negotiations with the next highest scoring vendor. However, coincidentally, DAS was in negotiations with the next highest scoring vendor for the same software on behalf of a different state agency. Working with DAS, DORS was successful in adding the SOW and associated costs for the Case Management System to that contract.

Funding for full development and implementation activities was secured in September, 2016. The DORS project management and business analysis team was on-boarded through the end of the calendar year. Department requirements were reviewed and updated in the first quarter of the 2017 calendar year and vendor development activities on the new system commenced on April 1.

Initiated the VR intake and eligibility process and provided a demo to a group of super users for their feedback as they work towards a signoff scheduled for mid-September. Established a group of super users who will be performing application testing while also providing feedback to the core application team. Core application team continuing to work on the VR data model which includes Intake, Eligibility, Individual Plan for Employment, Authorization, Placement, Closure and Post Exit entities.

Phase 1 of the project is focused on replacement of the incumbent Vocational Rehabilitation system with a targeted completion of Feb, 2019. Requirements gathering is in process with the Vocational Rehab data model complete (7 Dec 2017), Childrens Services data model complete (3 July 2018) working towards completion of the Adult Services, and BEP data models. In parallel with data model solicitation, the project team is also working on legacy data conversion mapping / scripting as well as soliciting business rules / work flows that drive the functionality behind the data elements.

Phase 1 has been split into two phases, 1a and 1b, due to schedule delays. Phase 1a consists of BRS and BESB VR and Phase 1b will contain Children Services, Adult Services and BEP. Currently all data models for phase 1 are complete, with Conduent working to deliver the remaining phase 1 deliverables which are business rules, workflows and printable output. Although Conduent has delivered approx 90% of the deliverables mentioned, they are still working on data conversion tasks, which are behind schedule.

**Issues and Risks:**

Project health is tracking yellow due to the schedule at 12 months behind the original planned dates and resource challenges.

**Issue:**

Data conversion activities are at risk as we do not have the current case management system data dictionary and entity relationship diagram.

Due to this standing issue, challenges have occurred due to the need to reverse engineer data entities and table relationships, which take time and resources. Data anomalies also create challenges to the conversion process.

**Issue:**

DORS is assessing duration to complete remaining project deliverables after receiving training on 17 – 18 Jan 2019. These deliverables are printable output, workflows and reports that are not part of the contract with Conduent to create and deliver.

**Next Steps & Project Milestones:**

January 2016, IT Capital Investment Application and Investment Brief revised and submitted.

February 2016, Project presented to IT Capital Investment Committee for “Go vs. No-Go” decision

March 2016, DAS completes vendor contract negotiations

March 2016, Contracted Project Team recruited and on boarded.

April 2016, Scope of Work developed and project terms negotiated with vendor

May 2016, System Development work begins.

June 2016, Updated the investment brief based on current spend/feedback from DAS

July 2016, Attended the Bond Committee meeting and obtained funding for the Case Management system.

October 2016, Project Manager on-boarded

November 2016, Vendor contract negotiations completed and SOW added as an attachment to State contract in place for the Department of Public Health.

December 2016, DORS project team of 2 BAs and a BSA successfully on-boarded and updating of requirements from the RFP to ensure currency with federal and state regulations has commenced.

March 2017, Review and updating of requirements from the 2014 RFP completed.

April 2017, Business REquirements solicitation activities initiated.

Apr 2019, Phase 1a in production

Jul 2019, Phase 1b in production

Feb 2020, Phase 2 programs go live.

Oct 2020, Phase 3 programs go live.