

## APPENDIX E                      SAMPLE STATUS REPORT

\*\* This sample report is a suggested guideline, and models the Status Report Checklist found in Appendix D

**State of XXXXX**

**Project Name/Phase (Planning Development Implementation)**

**Status Report**

**Date Ending: Mm/dd/yy**

### Contents

1	Document Information.....	2
2	Executive Summary.....	2
3	Work Accomplished.....	3
3.1	Work completed for last reporting period.....	3
4	Deliverables in Progress.....	4
5	Planned Activities.....	4
5.1	Work planned for next reporting period.....	4
6	Project Deliverable Status.....	4
7	Open Risks.....	7
8	Project Budget and Actual Expenditures.....	7
9	Contractor Performance Update.....	8
10	Updated Project Schedule of Milestones and Deliverables (Gantt Chart).....	8

## Document Information

Document title:	Project Name Monthly Status Report
Document file name:	
Revision number:	1.0
Issued by:	
Issue date:	04/10/04
Status:	Final

## 1.0 EXECUTIVE SUMMARY

Provide a short summary of current project efforts and notable achievements or variances. For example:  
This document covers work performed and tasks accomplished from (phase/stage) on (date) through (date). The State WIC Program is in the Implementation Phase of installation of a transferred, management information system (XXXX) to replace the state's 32-year old system. The system will be hosted within the State IT environment. WIC is also implementing a WIC Electronic Benefits Transfer (EBT) system, to be hosted externally from the State IT environment to allow WIC benefit delivery via retail grocery locations.

This project was envisioned as two phases. This status report is for Phase Two, the Implementation Phase, and builds on Phase One for which the United States Department of Agriculture Food and Nutrition Service (USDA FNS) has granted approval through acceptance of State WIC's MIS/EBT Implementation Advance Planning Document



(IAPD), and has awarded implementation funding. Phase One was the Planning Phase, which will was fully described in the Planning Advance Planning Document (PAPD).

## 2.0 STATUS OVERVIEW

	Green (controlled)	Yellow (Caution)	Red (Critical)	Reason for Deviation
Scope	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The State is awaiting further guidance on items such as Hearings and Appeals, Notices, Account Transfer, contingency planning, and other major project facets. Additionally, MAGI conversion approval and HIP waiver resolution may present late rework or scope risk.
Costs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Schedule	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Due to account transfer BSD delay and pending online application guidance, requirements and design are affected. Additionally, the State is awaiting aforementioned guidance.

## 3.0 WORK ACCOMPLISHED

Provide a short narrative

### 3.1 WORK COMPLETED FOR LAST REPORTING PERIOD – MM/DD/YY

This section contains the worked completed from since last status report submitted on (date).

Activity Number	Activity name	Previous status	Current Status	Notes

## 4.0 DELIVERABLES IN PROGRESS

This section provides an overview of the major milestones and or deliverables that are in progress at the time of this report.

Deliverable (Milestones)	WBS Number	Planned date	Forecasted date	Actual date	Status

## 5.0 PLANNED ACTIVITIES

This section should have a narrative of upcoming activities at the State level (meetings, reviews, JADs, testing, training, etc.) that pertain to the next reporting period.

### 5.1 WORK PLANNED FOR NEXT REPORTING PERIOD

This section provides an overview of the work being performed during the next reporting period.

Activity Number	Activity name	Previous status	Current Status	Notes

## 6.0 WHAT IS GOING WELL?

- Stage /Gate preparations / State Gate discussions with CMS.
- IEDSS IV&V support and efforts in all aspects of project activities.
- SNAP/TANF paper application finalization.
- Budget.
- Alignment with CMS 7 Standards and Conditions.

## 7.0 KEY ISSUES WITH RESOLUTION STRATEGY (NOTE: MAY ALSO BE ADDRESSED UNDER RISKS)

Key Issue	Resolution Strategy
Deloitte contracts/amendments (DDI/M&O) incomplete	The State and Deloitte have approved amendment 1 to the DDI contract and submitted it for approval. The State is working on negotiation of amendment 2 while focusing heavily on SOW updates. Once this amendment is finalized, then the M&O contract will be addressed.
Cúram Application	The State is trying to determine if the Cúram application is sufficiently appropriate for meeting CMS online application guidance. Application Services is comparing the Cúram application against the CMS online application guidance, and DFR is reaching out to Maryland to determine their thoughts on CMS guidance alignment.

## 8.0 PROJECT DELIVERABLE STATUS

This section is a quick table, which shows the status of the project deliverables as milestones. Two different examples are provided.

QUARTER 2 TOP MILESTONES AND IN-PROCESS ITEMS	BASELINE	NEW EST.	VAR	STATE	STATUS	RISK ID
1 Joint Application Design sessions for IVR and Document Management are in-process.	04/30/12	N/A		Open	GREEN	
2 Benefit Center floor plans completed and approved for two of three planned locations. Plan approval for the final location is in-process.	04/30/12	N/A		Open	GREEN	
3 Procurement activities for the hardware and software required for the IVR solution are in-process.	April 2012	June 2012		Open	YELLOW	88544 - Medium
4 Pre-Screening, My Account and IVR application builds (includes input screens, screen and field help, data collection, messaging speak back, and security settings) are in-process.	05/01/12	N/A		Open	GREEN	
5 System Testing Concludes (Deployment 1 Code)	05/01/12	N/A		Open	GREEN	
6 UAT Initiates (Deployment 1 Code)	05/02/12	N/A		Open	GREEN	
7 Deployment 1 Go Live	05/17/12	N/A		Open	GREEN	

Major Milestones	Original Target Date	Revised Target Date	Actual Date	Status
<b>Planning Project</b>				
<b>Implementation Project</b>				
QA RFP Approved by FNS & Posted		n/a	1/7/2013	Complete
T&I RFP Approved by FNS & Posted		n/a	2/28/2013	Complete
EBT RFP Approved by FNS & Posted		n/a	2/28/2013	Complete
QA RFP Questions due	1/23/2013	n/a	1/23/2013	Complete & answers posted
QA Bidder's Conference	2/7/2013	n/a	2/7/2013	Complete
QA Proposals due	3/11/2013	n/a	3/12/13	Complete
T&I and EBT RFP Questions due	3/20/2013	n/a	3/20/13	Complete
T&I Bidder's Conference	4/4/2013	n/a	4/4/2013	Complete
EBT Bidder's Conference	4/11/2013	n/a	4/11/2013	Complete
QA selection	4/11/2013	n/a	4/8/2013	Complete
T&I and EBT Proposals due	5/1/2013	5/20/2013		In Progress
QA Independent Review	6/12/2013	n/a	4/8/2013	Cancelled by DII
Charter Complete & Final	1/1/2013	5/1/2013	4/29/13	Complete
QA Contracting	4/19/2013	6/3/2013		In Progress
QA Starts	8/12/2013	8/12/2013		
T&I and EBT Proposal Review	6/20/2013			
T&I and EBT selection	6/20/2013			
T&I and EBT IR	7/22/2013			
T&I and EBT Contracting	9/13/2013			
Planning Procurement ends	9/30/2013			
Kickoff	9/30/2012			

## 9.0 OPEN RISKS

This section contains a list of all open risks, risks that have occurred, or are on the verge of occurring.

Risk Number	Risk Name	Risk Date	Status

## 10.0 PROBLEM AREAS/RISK MITIGATION

Risk	Mitigation
<b>Key Issues</b>	<b><i>The issues presented in Section 8(that I added above) present Risks if they are not addressed timely.</i></b>
Aggressive Schedule	Reallocated resources, continue to refine schedule as needed, and continue to closely monitor progress. Deloitte is working at risk pending Amendment 1 finalization, and the legacy vendors (Deloitte – ICES and RCR – FACTS) are working along with the State to support PPACA compliance. IV&V staff on hand to help support efforts.
IAPDU needed	Working with federal partners to ensure appropriate capture of final IEDSS-related contracts and detailed hardware/software listings/costs. Much of the IAPDU has been drafted and is pending State stakeholder review.
Perdue lawsuit requirements	The FACTS, ICES, and State teams are heavily engaged in activities related to Perdue lawsuit compliance. Continuing to integrate Perdue requirement sessions into PPACA compliance activities. Final Perdue items should be rolled out to production in July 2013.
Competing priorities/schedules for external interface trading partners may delay the completion of interface design and testing	<ul style="list-style-type: none"> <li>Define milestone dates for each trading partner interface and identify priority (according to execution frequency) of the interface.</li> <li>State ESB team to proxy conversations with State-based trading partners.</li> <li>Prepare contingency plans for stub testing in the event that trading partners are not ready within the testing timelines.</li> </ul>

## 11.0 PROJECT BUDGET AND ACTUAL EXPENDITURES

A short narrative should be provided to support a table or chart with project costs and expenditures. Two examples are provided.

Project is Over/Under Budget  
 Cost Variance (CV): \$xxx



<b>CAPITAL BUDGET:</b>	<b>ORIGINAL FORECAST</b>	<b>CURRENT FORECAST</b>	<b>EXPENDED TO DATE</b>	<b>ESTIMATE TO COMPLETION</b>	<b>VARIANCE</b>
	\$34,429,920	\$34,429,920	\$3,155,973.61	\$31,273,946.39	0

<b>MIS EBT Implementation Grant Cost and Forecast Summary</b>							
<b>Line Item</b>	<b>FY 2013</b>				<b>FY 2014</b>		<b>FY / Project Total</b>
	<b>Q1 Actual Cost</b>	<b>Q2 Actual Cost</b>	<b>Q3 Actual Cost</b>	<b>Q4 Actual Cost</b>	<b>Q1 Actual Cost</b>	<b>Q2 Actual Cost</b>	
<b>State Costs</b>							
State Staff Time	2500,2 3	10215					
Project Contract Staff	17171.6 3	40831					
Hardware	16192	9451					
<b>State Total</b>	<b>\$35,863 .86</b>	<b>\$60,497.54</b>					

## 12.0 CONTRACTOR PERFORMANCE UPDATE

Provide a short narrative on current contractor performance – this information is used to assist other states when FNS is asked about contractor performance, abilities, adherence to schedule and timelines, communications, quality of deliverables, reporting and correcting errors etc.

## 13.0 UPDATED PROJECT SCHEDULE OF MILESTONES AND DELIVERABLES (GANTT CHART)