

AHCA Florida Health Care Connections (FX)

<Enter Full Project Name> (Enter
Project Acronym)

Project Management Plan

Version: 001

Date: <Insert Deliverable Draft or Final Submittal Date as Month Day,
Year>

Author: <Author>

Submitted To: AHCA FX Program Administration Team





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Template Revision History

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DATE	VERSION	DESCRIPTION	AUTHOR
11/17/2020	401	Project Management Plan Template Q1/Q2 Refresh – draft <ul style="list-style-type: none">▪ Made minor grammatical updates and corrected references to SEAS deliverables throughout▪ Updated schedule management sections in Section 5 to reference standards rather than provide guidance by default per DET 375 – Remove schedule management process from PMP template▪ Updated Section 18 with DET 374 – Remove references to quarterly benefits realization tracking	FX EPMO Team
12/1/2020	450	Project Management Plan Template Q1/Q2 Refresh – approved refresh final version	Carol Williams

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Revision History

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M/D/YYYY	002	Enter Project Acronym Project Management Plan Final Draft Version (Entry)	Your name here
M/D/YYYY	100	Enter Project Acronym Project Management Plan Approved Baseline Version (Entry)	Your name here

Modifications to the approved baseline version (100) of this artifact must be made in accordance with the FX Artifact Management Standards.

Quality Review History

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Table of Contents

Section 1	Introduction	1
1.1	Purpose of the Project Management Plan	1
1.2	Business Need for the Project	2
1.3	Scope of the Project	2
1.3.1	Scope Statement	2
1.3.2	Out-of-Scope	2
1.3.3	Project Deliverables and/or Milestones	3
1.4	Project Success Criteria	3
1.5	Project Outcomes and Benefits	3
1.6	Critical Success Factors	3
1.7	Project Assumptions and Constraints	4
1.7.1	Assumptions	4
1.7.2	Constraints	4
1.7.3	Project Approach	4
Section 2	Project Organization and Roles and Responsibilities	5
Section 3	Project Governance	6
3.1	Project Governance Overview	6
3.1.1	Enter Project Acronym Project Governance Structure	6
Section 4	Scope Management Plan	8
4.1	Scope Management Overview	8
4.2	Roles and Responsibilities	8
4.3	Developing and Approving Scope Baseline	10
4.3.1	Work Breakdown Structure (WBS)	10
4.4	Validate Scope	12
4.5	Monitor and Control Scope	12
4.6	Project Acceptance and Close Out	13
Section 5	Schedule Management Plan	14
5.1	Schedule Management Overview	14



5.2	Schedule Management Scope Statement	14
5.3	Schedule Management Roles and Responsibilities	14
5.4	Standard Schedule Activities	16
5.4.1	Required Activities	16
5.5	Schedule Management Approach	17
5.5.1	Setting the Initial Schedule Baseline	17
5.5.2	Schedule Updates.....	18
5.5.3	Schedule Baseline Revisions (Re-baselining)	18
5.5.4	Rolling Wave Planning.....	18
5.5.5	Managing Schedule Resource Allocations.....	18
5.5.6	Mitigating Schedule Delays	18
5.5.7	Archiving the Enter Project Acronym Project Schedule	19
Section 6	Cost Management Plan	20
6.1	Cost Management Overview.....	20
6.2	Roles and Responsibilities.....	20
6.3	Cost Planning	20
6.3.1	Cost Estimate.....	21
6.3.2	Cost Baseline	21
6.4	Cost Controlling.....	22
Section 7	Quality Management Plan	23
7.1	Overview.....	23
7.2	Roles and Responsibilities.....	23
7.3	Quality Management Approach	23
7.4	Quality Performance Metrics.....	24
7.5	Analysis and Corrective Actions	26
Section 8	Change Management Plan.....	28
8.1	Change Management Overview	28
8.2	Roles and Responsibilities.....	28
8.3	Change Control Process	29
Section 9	Risk Management Plan	30
9.1	Risk Management Overview	30



9.2	Roles and Responsibilities	30
9.3	Risk Management Process	30
9.4	Identify Risks	31
9.5	Perform Risk Assessment.....	31
9.5.1	Evaluating Probability of Occurrence	31
9.5.2	Assessing Risk Impact.....	31
9.5.3	Calculating the Risk Exposure Score	32
9.6	Plan Risk Responses	32
9.7	Monitoring and Controlling Risk.....	33
Section 10	Action Item Management Plan	34
10.1	Action Item Management Overview.....	34
10.2	Roles and Responsibilities	34
10.3	Action Item Management Process	34
Section 11	Issue Management Plan	36
11.1	Issue Management Overview	36
11.2	Roles and Responsibilities	36
11.3	Identify Issues	37
11.4	Logging Issues	37
11.5	Resolving Issues	37
11.6	Monitoring and Controlling Issues	37
Section 12	Decision Management Plan.....	38
12.1	Decision Management Overview	38
12.2	Roles and Responsibilities.....	38
12.3	Decision Management Process	39
Section 13	Lessons Learned Management Plan.....	40
13.1	Overview.....	40
13.2	Roles and Responsibilities.....	40
13.3	Lessons Learned Process	40
Section 14	Communications Management Plan	42
14.1	Overview.....	42
14.2	Roles and Responsibilities.....	43



14.3	Communication Methods	44
14.4	Project Reporting.....	46
Section 15	Project Stakeholder Management	48
15.1	Overview.....	48
15.1.1	Roles and Responsibilities.....	48
15.1.2	Stakeholder Management Approach	50
Section 16	Document Management Plan	52
16.1	Overview.....	52
16.2	Deliverable Development Roles and Responsibilities.....	52
16.2.1	Document Review and Approval Process	54
16.2.2	Defining the Deliverable Expectations and Acceptance Criteria	54
16.2.3	The Deliverable Expectations Document	54
16.2.4	Deliverable Development.....	54
16.2.5	Deliverable Quality Control	55
16.2.6	Deliverable Review	55
16.2.7	Deliverable Review Period.....	55
16.2.8	Deliverable Revision	55
16.2.9	Deliverable Submissions	55
16.2.10	Approved Deliverables.....	56
16.3	Document Management.....	56
16.3.1	Project Artifact Directory	56
16.3.2	Roles and Responsibilities.....	56
16.3.3	Document Naming Standards	56
16.3.4	Document Version Control.....	56
Section 17	Resources Management Plan	57
17.1	Overview.....	57
17.2	Plan Resources.....	57
17.3	Human Resource Acquisition.....	57
17.4	Manage Resource.....	57
Section 18	Outcome and Benefits Management Plan	58
Section 19	Project Glossary.....	59



Table of Exhibits

Exhibit 2-1: Project Team Roles and Responsibilities	5
Exhibit 4-1: Scope Management Roles and Responsibilities	9
Exhibit 4-2: Example Work Breakdown Structure	11
Exhibit 4-3: Work Breakdown Structure Framework	12
Exhibit 5-1: Schedule Management Roles and Responsibilities	15
Exhibit 5-2: Enter Project Acronym Schedule Management Activities	17
Exhibit 6-1: Cost Management Roles and Responsibilities	20
Exhibit 6-2: State Fiscal Year (SFY) Funding Allowing for Initial Contract	21
Exhibit 7-1: Quality Assurance Roles and Responsibilities	23
Exhibit 7-2: Performance Metrics	26
Exhibit 8-1: Change Management Roles and Responsibilities	29
Exhibit 9-1: Risk Management Roles and Responsibilities.....	30
Exhibit 9-2: Probability of Occurrence	31
Exhibit 9-3: Impact on Project.....	32
Exhibit 9-4: Calculated Risk Exposure	32
Exhibit 10-1: Action Item Management Roles and Responsibilities	34
Exhibit 11-1: Issue Management Roles and Responsibilities	36
Exhibit 12-1: Decision Management Plan Roles and Responsibilities	38
Exhibit 13-1: Lessons Learned Roles and Responsibilities	40
Exhibit 14-1: Communications Plan Roles and Responsibilities	44
Exhibit 14-2: Communication Methods Table	45
Exhibit 14-3: Project Reporting Requirements and Frequency.....	46
Exhibit 14-4: Email Communication Guidelines	47
Exhibit 15-1: Enter Project Acronym Project Stakeholders.....	48
Exhibit 15-2: Stakeholder Management Roles and Responsibilities	50
Exhibit 15-3: Stakeholder Management Approach	50
Exhibit 16-1: Document Management Roles and Responsibilities	53



SECTION 1 INTRODUCTION

1.1 PURPOSE OF THE PROJECT MANAGEMENT PLAN

The *Project Management Plan (PMP)* is a *living* document that is prepared during the Planning Phase of the project. The PMP identifies key elements of the project management strategy and explains how the <Enter Full Project Name> (Enter Project Acronym)> Project Team shall perform project activities in accordance with FX Standards. The PMP provides the:

- Business Need for the Project
- Scope of the Project
- Project Outcomes and Benefits
- Critical Success Factors
- Project Assumptions and Constraints
- Project Organization and Roles and Responsibilities
- Project Governance
- Scope Management Plan
- Schedule Management Plan
- Cost Management Plan
- Quality Management Plan
- Change Management Plan
- Risk Management Plan
- Action Item Management Plan
- Issue Management Plan
- Decision Management Plan
- Lessons Learned Management Plan
- Communications Management Plan
- Project Stakeholder Management Plan
- Document Management Plan
- Resources Management Plan
- Outcome and Benefits Management Plan

While the above subsidiary plans detail how the project will be managed, monitored, and controlled, other artifacts necessary for managing the project as listed in the Project Process Agreement (PPA) are external to this document. Examples of other external artifacts:



- Project Charter
- Enter Project Acronym Project Schedule
- Organizational Change Management Plan
- System Security Plan
- Release Plan
- Test Plan
- Issue Log
- Risk Log
- Training Plan

This document will be stored with all other project artifacts in the FX Projects Repository (FXPR) for key project stakeholders to reference as necessary and in accordance with the FX Artifact Management Standards (AMS). At a minimum, this document will be reviewed and updated (if appropriate) quarterly or in response to an approved change.

1.2 BUSINESS NEED FOR THE PROJECT

The purpose of this project is to <Summarize the business need the project is going to address. Inputs may include the business case and other materials from the Portfolio Management process, the Legislative Budget Request, the contract, and Project Charter.

Summarize the intended outcomes and benefits of the project.>

1.3 SCOPE OF THE PROJECT

1.3.1 SCOPE STATEMENT

The scope of the project is to <Detail the product or service to be delivered at the project completion. The Scope Statement provides a documented basis for making project decisions and for confirming a common understanding of the project.>

1.3.2 OUT-OF-SCOPE

What is out-of-scope is just as important as what is in scope. Project exclusions help to maintain stakeholder expectations. The following are considered out-of-scope for the Enter Project Acronym Project:

- <Clearly state what is out-of-scope for this project>
- <Clearly state what is out-of-scope for this project>



1.3.3 PROJECT DELIVERABLES AND/OR MILESTONES

The Enter Project Acronym Project shall complete the following deliverables and/or milestones in accordance with <Contract or Task Order XXX-###>:

<List the project deliverables as defined in the contract and project milestones.

Note: A Deliverable Expectations Document (DED) shall be completed by the Enter Project Acronym Vendor in accordance with the AMS, reviewed by the Agency and the SEAS Vendor and approved by the Agency prior to the deliverable submission.

1.4 PROJECT SUCCESS CRITERIA

<List the criteria that, if met, means the project was successful. The following examples may or may not be applicable to your project.>

- The Enter Project Acronym Project will be considered a success if the delivered solution delivers stated outcomes
- The Enter Project Acronym Project will be considered a success if the delivered solution meets the FX Procurement Strategy for Enter Project Acronym
- The Enter Project Acronym will be considered a success if the project finishes on budget or below budget
- The Enter Project Acronym will be considered a success if the project finishes on schedule or ahead of schedule
- The Enter Project Acronym will be considered a success if the delivered solution meets the requirements of <Contract or Task Order XXX-###>

<Document any additional areas that will be considered a project success.>

1.5 PROJECT OUTCOMES AND BENEFITS

The Enter Project Acronym Project was chartered to achieve the following outcomes and benefits:

<List the outcomes and benefits identified during the Portfolio Management process.>

1.6 CRITICAL SUCCESS FACTORS

The following conditions must exist for the project to be successful: <Examples may include, and are not limited to:

- *Strong alignment of project objectives with agency strategic plan*
- *Executive support*



- *Proper mix of expert resources*
- *Strong collaboration with key stakeholders*
- *Effective communications>*

1.7 PROJECT ASSUMPTIONS AND CONSTRAINTS

1.7.1 ASSUMPTIONS

Assumptions are factors in the planning process considered to be true. Plans will be inaccurate when assumptions are untrue. The following assumptions are factored into the planning of the Enter Project Acronym Project:

- *<Assumption 1*
- *Assumption 2*
- *Assumption 3*
- *Assumption N>*

1.7.2 CONSTRAINTS

Constraints are limiting factors that will affect the execution of the project. The following constraints are factored into the planning of the project:

- *<Constraint 1*
- *Constraint 2*
- *Constraint 3*
- *Constraint N>*

1.7.3 PROJECT APPROACH

<Each project team shall determine their strategy for producing the required deliverables/work products and describe here. It should be noted that the Agency generally prefers Waterfall. Project Schedule Templates have been developed accordingly.>

<Define Project Approach Here>



SECTION 2 PROJECT ORGANIZATION AND ROLES AND RESPONSIBILITIES

The Enter Project Acronym Project Team is responsible for the execution of work in accordance with the PMP.

Exhibit 2-1: Project Team Roles and Responsibilities below depicts the roles and responsibilities required for the execution of the Enter Project Acronym PMP. The subsidiary plans identify their respective roles and responsibilities. If there are any new staffing requirements this PMP will be updated in accordance with the Quality Management approach described in this document.

<Note: Typical project team roles and responsibilities are provided below. Update the table below to meet the unique needs of the Enter Project Acronym Project.>

ROLE	RESPONSIBILITY
Project Sponsor	<ul style="list-style-type: none"> ▪ Responsible for project alignment with the FX vision and strategy ▪ Responsible for meeting the project's vision, goals, and objectives
Project Director or Manager	<ul style="list-style-type: none"> ▪ Responsible for completing and executing a PMP that adheres to the FX Standards ▪ Executing defined processes in alignment with the FX Enterprise Program Management Office (EPMO) integrated processes ▪ Adhere to compliance requirements detailed in the FX Standards ▪ Responsible for communicating and executing changes and tracking risks, issues, decisions, and lessons learned according to the FX Standards and integrated processes ▪ Responsible for Enter Project Acronym meeting (e.g., status, risk) facilitation
<Complete table with other applicable project roles and responsibilities>	<ul style="list-style-type: none"> ▪ <Add responsibilities as applicable>

Exhibit 2-1: Project Team Roles and Responsibilities



SECTION 3 PROJECT GOVERNANCE

3.1 PROJECT GOVERNANCE OVERVIEW

This section articulates the project-governing framework and the roles and responsibilities of the distinct governing bodies. It describes the key stakeholder groups for the project and defines the decision-making levels and appropriate escalation paths.

3.1.1 ENTER PROJECT ACRONYM PROJECT GOVERNANCE STRUCTURE

The Enter Project Acronym Project governance structure has five decision-making tiers:

- **Level 1 – Enter Project Acronym Project Team:** The Enter Project Acronym Project Team has day-to-day decision-making authority within their respective subject matter area so long as the decision does not impact scope, schedule, cost, other teams, or overturn a decision.
 - › **Escalation to Level 2:** If the Enter Project Acronym Project Team cannot resolve a matter affecting project resources, work, or outcomes within two (2) days, it should be escalated to the Enter Project Acronym Project Manager.
- **Level 2 – Enter Project Acronym Project Manager:** The Enter Project Acronym Project Manager has day-to-day decision-making authority over the project so long as there is no impact to scope, schedule, cost, shared resources, or overturn a decision. The Project Manager should be consulted for matters which span intra- and inter-project teams. Decisions impacting shared resources shall be escalated to the FX Enterprise Program Management Office (EPMO) for coordination of inter-project dependencies.
 - › **Escalation to Level 3:** If the matter has any potential impact to the schedule's critical path, scope, or budget, the Enter Project Acronym Project Manager shall initiate a Project Change Request (PCR), including Project Impact Analysis. The Decision Impact Matrix score will advise the proper routing of the decision, change, or issue (in accordance with the *S-1: FX Governance Plan*). The Project Impact Analysis shall be reviewed with the Enter Project Acronym Project Sponsor.
- **Level 3 – Enter Project Acronym Project Sponsor:** The Enter Project Acronym Project Sponsor has project ownership and provides leadership to the team regarding the strategic direction of the project. The Enter Project Acronym Project Sponsor has programmatic responsibility for the successful implementation of the project. The Enter Project Acronym Project Sponsor is assigned by, and reports project status to, FX Implementation Team, and the FX Director. The Enter Project Acronym Project Sponsor can make decisions if there is no impact to the project scope, cost, or outcome or benefits realization.
 - › **Escalation to Level 4 or 5:** If a decision or issue exceeds the decision-making purview of the Enter Project Acronym Project Sponsor, or the project seeks to revise the baseline Finish Date, the Enter Project Acronym Project Manager shall notify the FX EPMO. The FX EPMO shall facilitate discussion towards resolution or approval as set forth in the *S-1: FX Governance Plan*.



- **Level 4 – FX Implementation Team:** The FX Implementation Team considers, prioritizes, and authorizes projects through the FX Portfolio Management process; identifies staffing for projects with approved charters; has decision-making authority for high impact concerns regarding project schedules, scope, cost, quality, or outcomes.
- **Level 5 – FX Executive Steering Committee:** The FX Executive Steering Committee is responsible for (1) identifying and recommending to the Executive Office of the Governor, the President of the Senate, and the Speaker of the House of Representatives any statutory changes needed to implement the modular replacement to standardize, to the fullest extent possible, the state's healthcare data and business processes; (2) reviewing and approving any changes to the project's scope, schedule, and budget which do not conflict with the requirements of Subsections (1) and (2) of the Implementing Bill; (3) ensuring that adequate resources are provided throughout all phases of the project; (4) approving all major project deliverables; and (5) approving all solicitation-related documents associated with the replacement of the current FMMIS and Medicaid fiscal agent.



SECTION 4 SCOPE MANAGEMENT PLAN

4.1 SCOPE MANAGEMENT OVERVIEW

The *Scope Management Plan* describes how the scope of the Enter Project Acronym Project will be baselined and managed. This section includes:

- Process of developing and approving scope baseline
- Project Scope Statement
- Project Work Breakdown Structure (WBS)
- Process for validating scope
- Process for controlling scope

4.2 ROLES AND RESPONSIBILITIES

Error! Reference source not found. below depicts the roles and responsibilities required for the execution of the Enter Project Acronym *Scope Management Plan*.

ROLE	RESPONSIBILITY
Enter Project Acronym Project Sponsor (AHCA)	<ul style="list-style-type: none"> ▪ Provides executive team approval and sponsorship for the project ▪ Accountable for receipt of project deliverables
<Enter Project Acronym AHCA Contract Manager>	<ul style="list-style-type: none"> ▪ Ensures adherence to scope outlined in contract ▪ Processes contract amendments ▪ Performs initial deliverable receipt criteria review, ensuring the Enter Project Acronym Project artifact adheres to the approved Deliverable Expectations Document (DED) and meets contract requirements
<Enter Project Acronym Project AHCA Implementation Team Lead>	<ul style="list-style-type: none"> ▪ Controls the project scope
FX Implementation Team	<ul style="list-style-type: none"> ▪ Provides recommendations on project (Scope, Budget, Schedule) change
<Enter Project Acronym SEAS Implementation Team Lead>	<ul style="list-style-type: none"> ▪ Provides overall management to the Enter Project Acronym Project ▪ Accountable for confirming SEAS Vendor staff on the Enter Project Acronym Project Team meet SEAS requirements relative to <contract> ▪ Serves as an escalation point within the Project Team



ROLE	RESPONSIBILITY
<p>Enter Project Acronym EPMO Project Manager</p>	<ul style="list-style-type: none"> ▪ Responsible for contributing to and executing a Project Charter and PMP that adheres to the FX Standards ▪ Responsible for contributing to development and management of the Project Schedule ▪ Executes defined change management processes in alignment with the FX EPMO integrated processes ▪ Adheres to change management compliance requirements detailed in the FX Standards ▪ Responsible for communicating and executing changes according to the FX Standards and integrated processes ▪ Responsible for facilitating change requests through the change management approval process
<p><Enter Project Acronym Client Executive, Account Manager, or equivalent></p>	<ul style="list-style-type: none"> ▪ Acts as the main point of contact with the Agency for day-to-day operations ▪ Accountable for Enter Project Acronym Project Team staff including staffing levels, hiring, training, assignments, performance evaluations, and issue resolution ▪ Accountable for the activities of all Enter Project Acronym Project Team staff ▪ Works in collaboration with the Agency, SEAS Vendor, and other Vendors to support the communications and activities necessary to meet the objectives of the Enter Project Acronym project ▪ Responsible for the quality and timeliness of all deliverables, documentation, and reports as described in <contract> ▪ Responsible for all staff the Enter Project Acronym Project Team assigns to complete the requirements under <contract> meet the qualifications needed for the work to which they are assigned. ▪ Serves as an escalation point within the Project Team
<p><Enter Project Acronym Project Manager (Vendor)></p>	<ul style="list-style-type: none"> ▪ Responsible for completing and executing a PMP that adheres to the FX Standards ▪ Responsible for managing activities of all Enter Project Acronym DDI Project Team staff ▪ Executes defined processes in alignment with the FX EPMO integrated processes ▪ Adheres to compliance requirements detailed in the FX Standards ▪ Responsible for communicating and executing changes and tracking risks, issues, decisions, and lessons learned according to the FX Standards and integrated processes ▪ Participates and contributes to the Enter Project Acronym meeting (i.e., status, risk) ▪ Facilitates JAD sessions, Walkthroughs, and other meetings as necessary ▪ Works in collaboration with the Agency, SEAS Vendor, and other Vendors to support the communications and activities necessary to meet the objectives of the Enter Project Acronym project ▪ Responsible for the quality and timeliness of all deliverables, documentation, and reports as described in <contract> ▪ Acts as the Vendor's Contract Manager

Exhibit 4-1: Scope Management Roles and Responsibilities



4.3 DEVELOPING AND APPROVING SCOPE BASELINE

The FX Project life cycle anticipates iterative refinement of the scope and schedule. The initial Enter Project Acronym Project Scope Statement is included in the Project Charter approved on <Month Day, Year>. The *Scope Statement* in Section 1.3.1 of this PMP is the elaboration of the initial Scope Statement based on new information acquired since the Project Charter was approved (e.g., through discovery and WBS sessions). When approved, this PMP will serve as the approved scope baseline and any modifications must be made in accordance with the approved Change Management process.

4.3.1 WORK BREAKDOWN STRUCTURE (WBS)

The Enter Project Acronym Project Team shall develop and use a WBS approach during the Planning Phase to identify and decompose the project scope to confirm that all work is captured—to the best of the team’s knowledge at the time and subject to progressive elaboration. See sample WBS in **Exhibit 4-2: Example Work Breakdown Structure**.

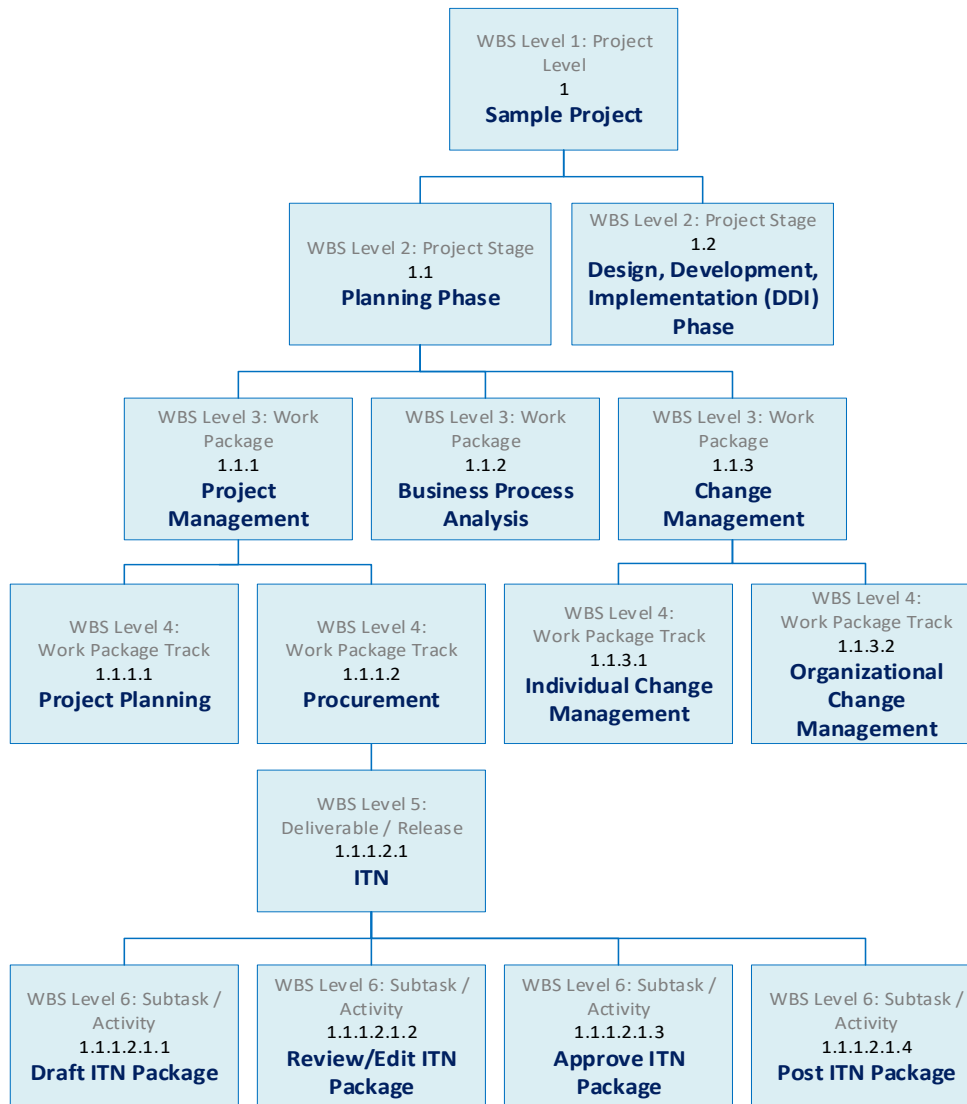


Exhibit 4-2: Example Work Breakdown Structure

The Enter Project Acronym Project schedule shall incorporate all tasks required to complete the entire scope of work for the project according to the following **Exhibit 4-3: Work Breakdown Structure Framework** in the *P-2: FX Project Management Standards*.

WBS LEVEL	WBS LEVEL NAME	WBS LEVEL EXPLAINED
1	<ul style="list-style-type: none"> Project Level 	<ul style="list-style-type: none"> The Project Summary Task, which identifies all known work of the project
1.x	<ul style="list-style-type: none"> Project Stages 	<ul style="list-style-type: none"> Separates project work into distinct project management process groups, as follows: <ul style="list-style-type: none"> Project Management Initiation



WBS LEVEL	WBS LEVEL NAME	WBS LEVEL EXPLAINED
		<ul style="list-style-type: none"> > Planning > Execution > Close Out
1.x.x	<ul style="list-style-type: none"> ▪ Work Package or Work Stream 	<ul style="list-style-type: none"> ▪ Separates each phase (process group) into individual work packages/streams with estimated work (e.g., Business Process Analysis, Development, etc.).
1.x.x.x	<ul style="list-style-type: none"> ▪ Work Package Track 	<ul style="list-style-type: none"> ▪ Further organizes work of individual work packages into separate tracks or workstreams.
1.x.x.x.x	<ul style="list-style-type: none"> ▪ Deliverable ▪ Release 	<ul style="list-style-type: none"> ▪ <u>Deliverable</u>: Identifies the discrete deliverables associated with each workstream track. ▪ <u>Release</u>: Identifies releases within system development.
1.x.x.x.x.x	<ul style="list-style-type: none"> ▪ Subtask/Activity 	<ul style="list-style-type: none"> ▪ <u>Task / Activity</u>: Identifies the tasks and activities required to plan and develop each deliverable.

Exhibit 4-3: Work Breakdown Structure Framework

The Enter Project Acronym Project developed the WBS using the <top-down and/or bottom-up> approach.

<If applicable, the Environmental Readiness Assessment (template found in the FXPR) will use the scope baseline to determine if all final project and/or product requirements have been met prior to Go-Live>. The Project Close Out Report will describe the extent to which the Enter Project Acronym Project Team delivered the required scope and will reference the PMP to confirm all requirements have been met.

4.4 VALIDATE SCOPE

<Depending on the project type, the scope will be validated through work product or deliverable review or Environmental Readiness Assessment, using the documented acceptance criteria, requirements traceability matrix, and other project artifacts.

Use this section to document the method that will be used to validate scope.>

4.5 MONITOR AND CONTROL SCOPE

The scope baseline shall be maintained and monitored as project work progresses. This PMP, specifically the *Scope of the Project* section, the WBS, <requirements, if applicable> and the CRAIDL (Changes, Risks, Action Items, Issues, Decisions, and Lessons Learned) logs shall be considered regularly as part of monitoring scope.

Any proposed change to the scope baseline shall be assessed for full project impact, and change request logged by the Enter Project Acronym Project Manager and evaluated by the Project Sponsor and FX Governance in accordance with the *S-1: FX Governance Plan*.



The Change Control process shall be followed as described in the *Change Management Plan* section.

4.6 PROJECT ACCEPTANCE AND CLOSE OUT

The purpose of the project acceptance and close out is to formally finalize all project activities. This involves confirming all project work has been completed or otherwise dispositioned, documents have been properly approved, versioned, and archived in accordance with the AMS, and resources have been appropriately released from the project.

The FX Project Manager works with the FX EPMO to review project artifacts for completeness and that these are properly archived according to the *Document Management Plan* and the AMS; CRAIDL log items are properly disposed; benefits realization documents (as applicable) are updated for post implementation tracking and assessment; and the transition from implementation to maintenance and operations is successfully achieved.

The FX Project Team, with the help from key stakeholders, shall conduct a post implementation review using the *Post-Implementation Evaluation Plan* (Florida Health Care Connections > Templates > Technology). The FX Project Manager shall conduct a Lessons Learned review session and complete a Lessons Learned summary. Finally, the FX Project Manager shall complete and submit the *Close Out Report* (Florida Health Care Connections > Templates) in accordance with the *Project Close Out* process definition.



SECTION 5 SCHEDULE MANAGEMENT PLAN

5.1 SCHEDULE MANAGEMENT OVERVIEW

The *Schedule Management Plan* explains how the Enter Project Acronym Project Team shall develop and manage the project schedule. It also identifies applicable schedule templates, the process for submitting the schedule for review and baselining, progressively elaborating the schedule, processes for submitting and approving changes to the schedule and to the schedule baseline, and ongoing updating and controlling requirements.

The *Schedule Management Plan* also describes how the project will address variance from baselined schedule parameters. It includes processes for triggering and implementing corrective actions to restore the schedule to its baseline performance targets and to increase the probability the project will meet its objectives.

5.2 SCHEDULE MANAGEMENT SCOPE STATEMENT

This *Schedule Management Plan* includes the policies, procedures, and documentation as described in the following components:

- Development and management of the WBS
- Project-level resource planning, estimating, allocation, and utilization monitoring
- Initial planning and development activities for the creation of the project schedule
- Establishing and obtaining approval for the project schedule baseline
- Ongoing planning and development activities for the continuous elaboration of the project schedule
- Monitoring, controlling, and maintenance of the project schedule
- Process for weekly schedule updates including, at a minimum:
 - › Generating and analyzing schedule data for weekly and monthly project status reports (and other reports when required)
 - › Generating, analyzing, and reporting earned value metrics for tracking schedule performance against baseline parameters
 - › Schedule baseline control and analysis
 - › Schedule performance report descriptions

5.3 SCHEDULE MANAGEMENT ROLES AND RESPONSIBILITIES

The roles and responsibilities associated with developing the Enter Project Acronym Project schedule are listed in **Exhibit 5-1: Schedule Management Roles and Responsibilities** below.



ROLE	RESPONSIBILITY
FX EPMO Schedule Manager	<ul style="list-style-type: none"> ▪ Establish, maintain, and socialize schedule management standards, process definitions, and templates ▪ Recommend and document exceptions to the FX Standards on a case-by-case basis ▪ Develop and evaluate the continuous, recurring processes that represent the appropriate rigor for schedule management based on the phase or stage of the project <ul style="list-style-type: none"> › Collect project schedules for analysis › Collect schedule progress updates from Project Managers › Facilitate analysis of schedule progress updates and changes › Assess proposed schedule changes for adherence to schedule change management requirements defined in the <i>P-2: FX Project Management Standards</i> › Provide schedule analyses to the Project Manager › Facilitate program-level schedule and resource management discussions to resolve any schedule conflicts, or schedule-related risks, and issues ▪ Perform quality control reviews of schedules prior to baselining, then during stage gate reviews or quarterly (whichever comes first) during the course of the project ▪ Maintain schedule management process documentation as needed
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Develop the initial WBS chart by working with the project team to graphically represent the complete scope of work ▪ Adhere to the <i>P-2: FX Project Management Standards</i> for schedule management to develop and maintain the schedule. This includes weekly updates to the schedule and documentation of the changes in the Schedule Release Notes ▪ Respond to questions from the FX EPMO Schedule Manager regarding schedule development, status, performance, and the frequency and accuracy of schedule updates ▪ Support and participate in program-level schedule and resource management discussions to avoid or resolve schedule conflicts, risks, and issues ▪ Participate in schedule change meetings ▪ May propose changes to schedule management process documentation to the FX EPMO Schedule Manager
Project Team members	<ul style="list-style-type: none"> ▪ Contribute to the development of the WBS and project schedule by identifying, sequencing, and estimating work to be performed ▪ Complete work according to baselined dates ▪ Notify Enter Project Acronym Project Manager in advance if a task may not be completed by the deadline
<Other applicable roles>	<ul style="list-style-type: none"> ▪ <Complete for additional entries as applicable>

Exhibit 5-1: Schedule Management Roles and Responsibilities



5.4 STANDARD SCHEDULE ACTIVITIES

5.4.1 REQUIRED ACTIVITIES

The following **Exhibit 5-2: Enter Project Acronym Schedule Management** Activities lists the required Schedule Management activities. The FX EPMO shall evaluate each of these processes on an ongoing basis for quality assurance and continuous improvement.

TASK	CYCLE / FREQUENCY	RESPONSIBILITY
Develop Project Schedule	Startup	<ul style="list-style-type: none"> The Project Manager shall work with the project team to have the draft schedule ready for review by the FX EPMO within 20 business days from contract execution (or Project Charter approval for existing contracts or task orders)
Review Schedule with FX EPMO Schedule Manager for integrated schedule management and FX EPMO performs QC Review	Startup	<ul style="list-style-type: none"> The Project Manager reviews the schedule (tasks) with FX EPMO Schedule Manager: review tasks, timelines, deliverables, and resources Confirm the schedule does not create conflict with other schedules, and identify interdependencies with other schedules The FX EPMO performs a schedule quality review. Findings must be addressed to receive approval to baseline The FX EPMO review includes setting a test baseline to assess schedule metrics at baselining. If SPI or CPI are below .93, the FX EPMO may advise the Project Manager to replan late tasks
Refine Schedule	Startup	<ul style="list-style-type: none"> The Project Manager updates proposed schedule based on feedback from FX EPMO Schedule Manager
Review Schedule with Project Sponsor	Startup	<ul style="list-style-type: none"> The Project Manager reviews the draft schedule with the Project Sponsor
Baseline Schedule	Startup	<ul style="list-style-type: none"> The Project Manager shall work with the project team to have the schedule baselined within 40 business days from contract execution (considering a 10/5/5 review period) or within 25 business days from Project Charter approval for existing contracts or task orders The Project Sponsor approves the final draft of the schedule. At this point, the project schedule may be baselined in accordance with the <i>P-2: FX Project Management Standards</i>
Meet with project stakeholders to capture project status updates	Weekly	<ul style="list-style-type: none"> The Project Manager works with project team members and stakeholders to receive task updates in addition to any other information required to update the schedule and to generate required metrics
Project Schedule updates	Weekly	<ul style="list-style-type: none"> The Project Manager shall update the schedule on a weekly basis in accordance with the <i>P-2: FX Project Management Standards</i>
Perform Project Status Reporting Process	Weekly	<ul style="list-style-type: none"> The Project Manager includes schedule performance metrics in accordance with the <i>P-2: FX Project Management Standards</i>
Facilitate schedule review meetings	Weekly	<ul style="list-style-type: none"> The FX EPMO Schedule Manager facilitates meetings with the Agency, Project Managers, and IV&V to review overall schedule status and task-level information for all active project schedules



TASK	CYCLE / FREQUENCY	RESPONSIBILITY
Attend and support schedule review meetings	Weekly	<ul style="list-style-type: none"> The Project Manager reviews overall schedule status and task-level status updates with the Agency, IV&V, and other project managers
Level Schedule Resources	Weekly	<ul style="list-style-type: none"> The Project Manager reviews the resource allocation in the schedule and manually levels resources across tasks
Program-level schedule monitoring and analysis	Weekly	<ul style="list-style-type: none"> The FX EPMO Schedule Manager generates analysis of program-wide schedule performance using schedule metrics and data provided from all active FX Project schedules
<Add tasks as appropriate>		<ul style="list-style-type: none"> < Complete for additional entries as applicable, or If none, delete this row>

Exhibit 5-2: Enter Project Acronym Schedule Management Activities

5.5 SCHEDULE MANAGEMENT APPROACH

The Enter Project Acronym Project Team shall adhere to the schedule development requirements and standards set forth in the *P-2: FX Project Management Standards*. The project team shall also use the FX Schedule QC Checklist for developing and maintaining the project schedule.

The following inputs are used to develop the Enter Project Acronym Project schedule:

- <Contract or Task Order XXX-###>
- Project Process Agreement
- Project Charter
- Project Scope Statement
- Project WBS
- Resource Calendars
- Shared / Enterprise Resource Pool
- <Project Deliverable Expectations Documents>
- <other>

5.5.1 SETTING THE INITIAL SCHEDULE BASELINE

The Enter Project Acronym Project Team shall use the established scope to develop the project schedule and adhere to the schedule development and baseline requirements in the *P-2: FX Project Management Standards*.



5.5.2 SCHEDULE UPDATES

The [Enter Project Acronym](#) Project Team shall adhere to the corresponding schedule update requirements in the *P-2: FX Project Management Standards* and in the *Process Definition for Weekly Schedule Updates*, located in the FXPR. For updates to the current schedule baseline (as needed for progressive elaboration or rolling wave planning), the [Enter Project Acronym](#) Project Team shall adhere to the corresponding requirements set forth in the *P-2: FX Project Management Standards*.

Upon baselining the schedule, the [Enter Project Acronym](#) Project Team shall adhere to the *Schedule Change Control*, and *Monitoring and Controlling Change* sections in the *P-2: FX Project Management Standards* when making changes to the schedule beyond routine updates.

The [Enter Project Acronym](#) Project Manager is responsible for monitoring the critical path and escalation Risks and/or Issues. The [Enter Project Acronym](#) Project Team will also determine and report if any PCR impacts the schedule's critical path or if such an impact presents an imminent risk.

5.5.3 SCHEDULE BASELINE REVISIONS (RE-BASELINING)

The [Enter Project Acronym](#) Project Manager shall only re-baseline the schedule through an approved PCR and adhere to the re-baselining requirements in the *P-2: FX Project Management Standards*.

5.5.4 ROLLING WAVE PLANNING

The Rolling Wave schedule management approach to updating schedules includes the decomposition of high-level tasks into detailed tasks. The [Enter Project Acronym](#) Project Team shall adhere to the Rolling Wave Planning requirements in the *P-2: FX Project Management Standards* if the schedule includes rolling wave activities.

5.5.5 MANAGING SCHEDULE RESOURCE ALLOCATIONS

The [Enter Project Acronym](#) Project Manager shall monitor and control resource utilization at the project-level as part of the normal process of monitoring and controlling the project schedule and performing schedule updates. The [Enter Project Acronym](#) Project Manager shall adhere to the requirements in the corresponding section of the *P-2: FX Project Management Standards*.

5.5.6 MITIGATING SCHEDULE DELAYS

Similarly, when mitigating schedule delays, the [Enter Project Acronym](#) Project Team shall follow the *Mitigating Schedule Delays*, as well as the *Monitoring and Controlling CRAIDL* sections in the *P-2: FX Project Management Standards*, and the *Risk Management Plan* and *Issue Management Plan* sections of this PMP.



5.5.7 ARCHIVING THE ENTER PROJECT ACRONYM PROJECT SCHEDULE

Upon approval from the Agency that all appropriate tasks in the [Enter Project Acronym](#) Project Schedule are complete, the [Enter Project Acronym](#) Project Manager shall follow the corresponding requirements in the *P-2: FX Project Management Standards* for archiving older versions of the project schedule.



SECTION 6 COST MANAGEMENT PLAN

6.1 COST MANAGEMENT OVERVIEW

The *Cost Management Plan* summarizes the Enter Project Acronym Project’s processes to manage cost:

- Cost Planning
- Cost Estimating
- Cost Controlling
- Cost Close Out

6.2 ROLES AND RESPONSIBILITIES

Exhibit 6-1: Cost Management Roles and Responsibilities outlines the roles and responsibilities associated with the *Cost Management Plan*. This may not be applicable to all projects.

ROLE	RESPONSIBILITY
<Enter Project Acronym Client Executive, Account Manager, or equivalent>	<ul style="list-style-type: none"> ▪ Responsible for notifying the Agency of any changes that will alter the original proposed budget ▪ Reviews invoices prepared by the Enter Project Acronym Project Manager within contract timing requirements
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Notifies Agency of changes that will alter the original proposed budget when the Enter Project Acronym Account Manager is unavailable. Prepares invoice within contract timing requirements
<AHCA Contract Manager>	<ul style="list-style-type: none"> ▪ Responsible for ensuring the budget adheres to the proposed price ▪ Processes any updates on price ▪ Communicates costs to the Agency’s Division of Medicaid for CMS reporting ▪ After deliverable acceptance, prepares for invoice payment ▪ Liaise with the Enter Project Acronym Implementation Team Lead and Enter Project Acronym EP MO Project Manager to prepare and communicate proposed cost changes to the Enter Project Acronym Project Sponsor, AHCA FX Director, and FX Governance in accordance with the <i>Change Management Plan</i> and <i>P-2: FX Project Management Standards</i>

Exhibit 6-1: Cost Management Roles and Responsibilities

6.3 COST PLANNING

After completing the PMP, project schedule baseline, and risk response planning, the Enter Project Acronym Project Team shall re-evaluate the project’s estimated cost. The Enter Project Acronym Project Manager shall consider at a minimum the following when creating a detailed cost estimate:



- Enter Project Acronym Project Team Resources (using the rate card associated with the contract)
- Software/Hardware/Licensing
- Contractual fixed costs
- Risk Contingencies

6.3.1 COST ESTIMATE

<Provide a table of summary cost components with estimated cost in a table here. The following is provided as a model and may be adapted.>

The Enter Project Acronym Project Team shall adhere to the proposed costs outlined in the <contract>. **Exhibit 6-2: State Fiscal Year (SFY) Funding Allowing for Initial Contract** outlines the State Fiscal Year and funding allowance for the initial contract from the <contract>.

STATE FISCAL YEAR	MAXIMUM STATE FISCAL YEAR AMOUNT

Exhibit 6-2: State Fiscal Year (SFY) Funding Allowing for Initial Contract

The Enter Project Acronym Project Manager shall compare the estimated cost in the table above with preliminary budgeted cost approved by FX Governance; for any cost increase or decrease, the project shall submit a PCR according to the *Change Management Plan*. <If contract is fixed price, include following sentence: The Enter Project Acronym Project operates under a fixed price contract; a contract amendment is required to change the contracted amount for vendor services. If the contract is time and materials, include the following sentence: The Enter Project Acronym Project operates under a time and materials contract; a revised Task Order is required to change project costs.> “No-cost” PCRs may be logged when necessary.>

6.3.2 COST BASELINE

Once all allocations and estimates have been approved by the Agency, the project budget is baselined. The project budget baseline may only be changed according to the *Change Management Plan*.



6.4 COST CONTROLLING

The cost baseline will be maintained and assessed as work is iteratively evaluated. The Enter Project Acronym Project Manager shall monitor CPI trends weekly and actual costs at least monthly. The Enter Project Acronym Project Manager shall adhere to the cost management requirements in the *P-2: FX Project Management Standards*.



SECTION 7 QUALITY MANAGEMENT PLAN

7.1 OVERVIEW

The *Quality Management Plan* identifies the standards, processes, and tools the Enter Project Acronym Project Team will use to assure quality work is delivered and the Enter Project Acronym Project achieves the desired project outcomes. This plan also describes the responsibilities and authority for accomplishing quality activities and identifies the required coordination of quality management with other areas of the project and in accordance with the AMS.

7.2 ROLES AND RESPONSIBILITIES

Exhibit 7-1: Quality Assurance Roles and Responsibilities below describes the deliverable submission and review roles and responsibilities for implementing the *Quality Assurance Plan*.

ROLE	RESPONSIBILITY
Enter Project Acronym Project Manager (PM)	<ul style="list-style-type: none"> Manage to standard performance metrics Review and socialize schedule management standards Coordinate the continuous, recurring process that represents the appropriate rigor for schedule management according to the <i>P-2: FX Project Management Standards</i> Planning, analysis, development, implementation, execution, and maintenance of cost activities as required
Work Leads	<ul style="list-style-type: none"> Planning, analysis, development, implementation, execution, and maintenance of process quality activities as required
Enter Project Acronym Project Quality Assurance (QA) Manager/Lead	<ul style="list-style-type: none"> Partners with the project's PM to ensure they meet contract requirements and adhere to quality standards
<Add other roles as appropriate>	<ul style="list-style-type: none"> <Add corresponding responsibilities as appropriate>

Exhibit 7-1: Quality Assurance Roles and Responsibilities

7.3 QUALITY MANAGEMENT APPROACH

Examples of where the Enter Project Acronym Project Team shall conduct quality activities to monitor, measure, and report include: <add to or remove from the list below as appropriate>

- Review of project delivery processes for appropriateness and accuracy
- Review of artifacts (e.g., project schedules, requirements documentation, reporting from FX tools)
- Review of end-to-end requirements traceability ensuring appropriateness and accuracy compliance
- Review of performance metrics



- Review of complete testing traceability, appropriateness, and accuracy compliance to include both functional and non-functional testing
- Collection, review, and integration of project lessons learned

The Enter Project Acronym Project Team shall collaborate and communicate quality standards, measures, processes, and awareness to key project stakeholders as appropriate.

7.4 QUALITY PERFORMANCE METRICS

As part of the Enter Project Acronym Project Team’s continuous assessment of project quality, risks, and overall project status, the Enter Project Acronym Project Manager shall use performance measures to monitor the project’s progress and performance toward the completion of project milestones and for assessing trends in project health. The standard frequency for monitoring and reporting of project schedule metrics, along with performance management metrics, reporting mechanisms, and acceptable values, is detailed in **Exhibit 7-2: Performance Metrics** below.

METRIC / MODEL NAME	GOAL	QUESTION	FORMULA	ANALYSIS LEVEL, FREQUENCY	TARGET VALUES	ANALYSIS REPORTING
% Complete (Percent Duration Complete)	Determine project status based on percentage of its completed duration	How much time is needed to complete the project?	$(\text{Actual Duration} / \text{Total Planned Duration}) \times 100$	Summary Task and Project Levels Weekly Monthly	Actual Duration Complete % is aligned with Planned Duration Complete %.	Project Status Report and/or Meeting

Percent Duration Complete expresses the current status of schedule activities as a percentage of the total scheduled duration that has been completed.

% Work Complete (% Work Complete)	Determine project status based on percentage of its completed work	How much work is needed to complete the project?	$(\text{Actual Work} / \text{Total Planned Work}) \times 100$	Summary Task and Project Levels Weekly Monthly	Actual Work Complete % is aligned with Planned Work Complete %.	Project Status Report and/or Meeting
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Percent Work Complete expresses the current status of schedule activities as a percentage of the total scheduled and assigned work (in resource hours) that has been completed.



METRIC / MODEL NAME	GOAL	QUESTION	FORMULA	ANALYSIS LEVEL, FREQUENCY	TARGET VALUES	ANALYSIS REPORTING
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Schedule Performance Index (SPI)	On Target According to Scheduled Timeframe	Are we meeting our schedule?	Earned Value / Planned Value	Summary Task and Project Levels Weekly Monthly	Between 0.90 and 1.10 with 1.00 as the primary target. Above 1.00 is better than below 1.00.	Project Status Report and/or Meeting
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Schedule Performance Index (SPI) is an earned value metric that measures whether the project is earning value at the scheduled rate. This metric can be used to assist Project Managers in determining if a project will be completed on time, assuming current trends continue.

Cost Performance Index (CPI)	On Target According to Resource-Allocation	Are we utilizing our scheduled resources efficiently?	Earned Value / Actual Cost	Project Level Weekly Monthly	Between 0.90 and 1.10 with 1.00 as the primary target. Above 1.00 is better than below 1.00.	Project Status Report and/or Meeting
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Cost Performance Index (CPI) is an earned value metric that measures the cost-efficiency of work completed by scheduled resources. This metric can be used to assist Project Managers in determining if a project will be completed with its current level of resource allocation, assuming current trends continue.

Start Variance	On Target According to Scheduled Start Dates	Are scheduled tasks starting as planned?	Current Scheduled Start Date – Baseline Start Date	Project Level Weekly Monthly	0.00. Below 0.00 is better than above 0.00.	Project Status Report and/or Meeting
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Start Variance determines the extent to which current scheduled Start Dates are aligned with Baseline Start Dates by measuring the time difference (in days) between an activity's Baseline Start Date and current scheduled Start Date.



METRIC / MODEL NAME	GOAL	QUESTION	FORMULA	ANALYSIS LEVEL, FREQUENCY	TARGET VALUES	ANALYSIS REPORTING
Finish Variance	On Target According to Scheduled Finish Dates	Are scheduled tasks being completed as planned?	Current Scheduled Finish Date – Baseline Finish Date	Project Level Weekly Monthly	0.00. Below 0.00 is better than above 0.00.	Project Status Report and/or Meeting

The *Finish Variance* field contains the amount of time that represents the difference between the Baseline Finish Date of a task or project and its current *Finish Date*.

Number of Open Risks	Ongoing Monitoring and Control of Project Risks	Are risks being identified and mitigated?	Count of Open Project Risks	Project Level Weekly	Trend of total number on regular periodic basis	Project Status Report and/or Meeting
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Open risks are continuously monitored and addressed such that risks with high or increasing exposure values are stabilized, and the overall quantity of risks is decreasing.

Overall Risk Exposure	Mitigate and reduce overall project risk	Are risks being addressed and mitigated?	Sum of all Exposures (Probability x Impact) score for all open risks	Project Level Weekly	Trend of total exposure score on regular periodic basis	Project Status Report and/or Meeting
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Overall risk exposure looks at the project's risk posture according to its average Probability x Impact score for all open risks.

EAC (based on bottom up ETC)	Project to complete within budget	Is the project able to complete <10% over BAC for remaining work	(AC + Bottom-up ETC)/BAC	When CPI <0.9	Value should be less than 1.1	Impact Analysis or Issue Log
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Once CPI slips below acceptable threshold, an Estimate to Complete based on remaining scheduled work at the current pace will be performed to assess if there is a real issue.

Exhibit 7-2: Performance Metrics

7.5 ANALYSIS AND CORRECTIVE ACTIONS

Quality Control is the process of reviewing the results of quality assurance activities and audits and performing root cause analysis where appropriate. This includes applying corrective actions and process improvements to the project's products, services, and processes.



The Enter Project Acronym Project Manager shall use the following rule to control the project when performance metrics deviate outside of standard thresholds. The first rule applies to all metrics.

- Beyond Limits – The current metric result is outside expected range (from baselines, specifications, or thresholds), going by whichever set of limits is most strict.

The Enter Project Acronym Project Team, during the project Planning Phase risk identification activity, should consider potential threats based on performance metrics, log the threats, assess and plan response to minimize probability, and if possible, impact. If any metric results trigger the risk event, the contingency should be to determine the root cause, and where appropriate, documented in the Project Status Report (weekly and/or monthly).

The Enter Project Acronym Project Team shall analyze and determine root causes for metrics with results beyond limits or those with results trending in one direction. The Enter Project Acronym Project Team shall prepare a *Corrective Action Plan* (Florida Health Care Connections > Templates) to address root causes and report that plan to the Project Sponsor and the FX EPMO and during the Project Status Meeting. Any identified corrective actions will be logged in the Action Item Log and tracked to completion.

The Enter Project Acronym Project Manager shall complete a PCR for corrective actions affecting project scope, budget, or schedule.



SECTION 8 CHANGE MANAGEMENT PLAN

8.1 CHANGE MANAGEMENT OVERVIEW

The Enter Project Acronym Project Team and key stakeholders established the scope, schedule, and cost baseline during the Planning Phase of the Enter Project Acronym Project. When the Enter Project Acronym Project Manager determines the project has exceeded acceptable ranges of variance for scope, schedule, or cost, the Project Manager shall communicate the need for change to appropriate project key stakeholders and initiate the PCR process.

The *Change Management Plan* identifies the groups and individuals involved in Change Management, as well as their roles and responsibilities. When properly implemented, Change Management allows informed decisions to be made at the right levels and with consistent documentation.

The change management process detailed in this document is intended to provide the Enter Project Acronym Project with a guide for how the project will identify, document, analyze, escalate, approve, and communicate changes to scope, schedule, and cost. The change management process is used in any situation where a change occurs to the project’s scope, schedule, cost, area of responsibility, or a vendor’s scope of services.

When the Project Manager determines the project has exceeded acceptable ranges of variance for scope, schedule, or cost, he/she shall communicate the need for change to appropriate project stakeholders and initiate the PCR process.

8.2 ROLES AND RESPONSIBILITIES

Exhibit 8-1: Change Management Roles and Responsibilities below describes the change management roles and responsibilities for implementing the *Change Management Plan*.

ROLE	RESPONSIBILITIES
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Log the PCR with assistance from the Enter Project Acronym Project Team ▪ Assess the impact to project with the Enter Project Acronym Project Team ▪ Update the scope, schedule and/or budget baseline after approval of the PCR
Enter Project Acronym Project Team	<ul style="list-style-type: none"> ▪ Identify potential change ▪ Assist the Enter Project Acronym Project Manager in logging the PCR ▪ Support impact analysis



ROLE	RESPONSIBILITIES
Enter Project Acronym Project Change Control Board (CCB) comprised of <ul style="list-style-type: none"> ▪ <Enter Project Acronym Project Sponsor ▪ Enter Project Acronym Project Manager ▪ Enter Project Acronym Project Liaison (AHCA) ▪ FX Director ▪ FX EPMO Lead or designee ▪ Contract Managers (state and vendor) ▪ Vendor Client Executive, Account Manager, or equivalent, if appropriate ▪ Other key stakeholders> 	<ul style="list-style-type: none"> ▪ Review PCR ▪ Evaluate the impact of change ▪ Approve or deny the PCR, or request additional information
<Add other roles as appropriate>	<ul style="list-style-type: none"> ▪ <Add responsibilities as appropriate>

Exhibit 8-1: Change Management Roles and Responsibilities

8.3 CHANGE CONTROL PROCESS

The Enter Project Acronym Project Manager shall follow the change management requirements in the *P-2: FX Project Management Standards* and *S-1: FX Governance Plan* as applicable. A PCR is used to communicate a need for change. The PCR form is available on the Change Log of the FXPR.



SECTION 9 RISK MANAGEMENT PLAN

9.1 RISK MANAGEMENT OVERVIEW

This section describes the approach the Enter Project Acronym Project Team shall use to identify, analyze, and manage risks. Risk Management will be an ongoing process throughout the project life cycle.

9.2 ROLES AND RESPONSIBILITIES

The roles and responsibilities relating to Risk Management are listed in the **Exhibit 9-1: Risk Management Roles and Responsibilities** below.

ROLE	RESPONSIBILITIES
Risk Originator (anyone)	<ul style="list-style-type: none"> Bring risk to the attention of the Project Manager <or Risk Manager, if applicable>
Enter Project Acronym Project Manager <If project large enough for Risk Manager, that role may replace PM>	<ul style="list-style-type: none"> Identify project risk Work with Risk Originator to clearly log the risk Monitor the risk and risk response Confirm all project risks are reviewed at least monthly (confirm risk reviews are documented in the <i>Status</i> field) Collaborate with the FX EPMO CRAIDL Coordinator on integrated risk management Close risk when it is determined the risk can be closed
Enter Project Acronym Project Team, including Project Sponsor	<ul style="list-style-type: none"> Contribute to risk analysis Confirm risk response plans Monitor risks Confirm a risk can be closed
Risk Owner (Identified by FX Project Risk Team)	<ul style="list-style-type: none"> Formulate and execute risk response plan(s) for assigned risk(s) Apprise the Enter Project Acronym Project Manager <or Risk Manager> of the effectiveness of the risk response plan
FX EPMO CRAIDL Coordinator	<ul style="list-style-type: none"> Monitor entire Risk Log for quality of risk statements and response Monitor entire Risk Log to confirm open risks are reviewed at least monthly Advise Enter Project Acronym Project Manager <or Risk Manager> when updates need to be made to project-level risks Address duplicate project risks Coordinate integrated risk management Report on project risks with risk exposures 15+ and/or risks affecting other projects
<Add additional roles as applicable>	<ul style="list-style-type: none"> <Add responsibilities as applicable>

Exhibit 9-1: Risk Management Roles and Responsibilities

9.3 RISK MANAGEMENT PROCESS

The Risk Management process employed by the Enter Project Acronym Project Team involves identifying and categorizing project risks (Identify), validating and logging the risk (Validate/Log), assessing and prioritizing the risks so they are manageable (Analyze),



developing a response strategy and assigning responsibility (Plan), monitoring open risks on a regular basis (Monitor/Track), and communicating the risks and strategies on an ongoing basis throughout the life of the project (Communicate). Risk management processes address individual project risks (those under the control or influence of the project team, such as quality of deliverables, cost, schedule, or technical risks) as well as overall risks (those outside the control of the project team such as governmental legislation or force majeure).

9.4 IDENTIFY RISKS

The Enter Project Acronym Project Team shall use the approved Project Charter, WBS, Risk Breakdown Structure guide, lessons learned from other projects, and discovery activities to identify and evaluate potential events that could positively or negatively impact the project; develop response plans; and manage accordingly.

9.5 PERFORM RISK ASSESSMENT

The Enter Project Acronym Project Team shall facilitate risk assessments with the intent of developing a risk response plan for risks with exposure scores of 15+. The Enter Project Acronym Project Team shall evaluate the risk's probability of occurring and the impact the risk would have, as well as what the triggering point could be.

9.5.1 EVALUATING PROBABILITY OF OCCURRENCE

The Enter Project Acronym Project Team shall use the **Exhibit 9-2: Probability of Occurrence** matrix below to complete the *Probability* field of the risk form.

Probability	Likelihood of Occurring	Numeric Value
Low	Unlikely	1
Medium	Likely	3
High	Very Likely	5

Exhibit 9-2: Probability of Occurrence

The Enter Project Acronym Project Team shall consider whether the associated triggering event is imminent (less than approximately eight weeks) when evaluating probability of the risk to be triggered.

9.5.2 ASSESSING RISK IMPACT

The Enter Project Acronym Project Team shall use the **Exhibit 9-3: Impact on Project** matrix below to assess the impact to cost, schedule, scope, and quality of a potential risk event:



Impact	Dimensions to Consider				Numeric Value
	Cost	Schedule	Scope	Quality	
Low	Impact to cost is below appropriation	No or little impact to project schedule	Minor clarification to existing scope	Project quality is not in jeopardy	1
Medium	Impact to cost is above appropriation by less than 10%	Schedule impact is possible	Scope change is noticeable, but not deemed significant	Impact to quality possible	3
High	Impact to cost is above appropriation by greater than 10%	There is significant impact to schedule and deliverable due dates	There is a signification change in scope	Impact to quality is very likely	5

Exhibit 9-3: Impact on Project

The impact of a risk related to multiple factors will be the average of all relevant factors.

9.5.3 CALCULATING THE RISK EXPOSURE SCORE

The final step in the qualitative risk analysis process is to update the Risk Form with the probability and impact values captured in the previous two steps. Computation of the risk exposure value is automatic within the Risk Log based upon the *Probability* and *Impact* values entered. The formula used for the calculation is as follows:

$$\text{Risk Exposure Score} = \text{Impact value} \times \text{Probability value}$$

Risks with risk score values (15 or greater) are considered having high exposure.

Risk Score		Probability		
		1 - Low	3 - Medium	5 - High
Impact	1 - Low	1	3	5
	3 - Medium	3	9	15
	5 - High	5	15	25

Exhibit 9-4: Calculated Risk Exposure

9.6 PLAN RISK RESPONSES

The Enter Project Acronym Project Team shall prioritize any risk identified as *very likely* (5) or with *high impact* (5) with imminent timelines. The <Project Manager, Risk Manager, or Risk Owner> will then develop strategies to address the project risks. The Enter Project Acronym Project Team shall determine the required activities and resources to address the risks.

The Enter Project Acronym Project Manager shall assess responses for impact to schedule, resources, and scope. The risk response may require project documents (e.g., PMP, project schedule) be updated. If there is impact to schedule, scope, or cost, the Enter Project Acronym Project Manager shall follow the *Change Management Plan* documented in this PMP.



9.7 MONITORING AND CONTROLLING RISK

The Enter Project Acronym Project Team shall continually perform risk identification, risk response planning, and risk monitoring through the life of the project. The Enter Project Acronym Project Team will also track and report on risks identified as high probability/high impact or with imminent trigger dates (less than eight (8) weeks out).



SECTION 10 ACTION ITEM MANAGEMENT PLAN

10.1 ACTION ITEM MANAGEMENT OVERVIEW

Action items are defined as independent tasks, which require follow up, and are not in the project schedule. Action items will be captured in the Action Item Log, located in the FXPR. Action Items will be managed in accordance with the *Action Item Management Process Definition*. <Administrative action items, which may come from team meetings (e.g., call a team member, send file to a team member), do not have to be logged.>

10.2 ROLES AND RESPONSIBILITIES

The roles and responsibilities relating to Action Item Management are listed in **Exhibit 10-1: Action Item Management Roles and Responsibilities** below.

ROLE	RESPONSIBILITY
Action Originator	<ul style="list-style-type: none"> Identify action through discussion of Issue Resolution, Decision, or Change Request Analysis
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> Monitor and report Action Item until complete
Action Owner	<ul style="list-style-type: none"> Complete Action item Update Action Item Log
Project Team	<ul style="list-style-type: none"> Review and update Action Item details Determine best resource to resolve Action Item

Exhibit 10-1: Action Item Management Roles and Responsibilities

10.3 ACTION ITEM MANAGEMENT PROCESS

Once the action item has been logged, the Enter Project Acronym Project Manager shall validate the action item, assign an owner, and confirm a reasonable expected resolution due date.

The Enter Project Acronym Project Manager shall follow up on action items at a minimum during Weekly Status Meetings. The Enter Project Acronym Project Manager shall employ any other techniques necessary for reaching resolution.

Once the action item has been completed, the Named Owner or Project Manager shall update the resolution and update the status to *closed*.

Corrective actions will also be logged in the Action Item Log and marked as corrective actions. The Agency’s Enter Project Acronym Project Liaison, the FX EPMO, or the Enter Project Acronym Project Manager shall log corrective actions depending on the source of the corrective action (i.e., the Agency may record a corrective action to remediate an IV&V finding).



The FX EPMO Quality Coordinator will monitor the progress of corrective actions until they are closed.



SECTION 11 ISSUE MANAGEMENT PLAN

11.1 ISSUE MANAGEMENT OVERVIEW

An issue is a problem affecting the project's scope, schedule, cost, and/or quality. Issues often spawn from risks. Sometimes issues are unanticipated. An issue needs to be addressed and resolved as soon as possible to avoid negative project impacts.

11.2 ROLES AND RESPONSIBILITIES

The roles and responsibilities relating to Issue Management are listed in **Exhibit 11-1: Issue Management Roles and Responsibilities** below.

ROLE	RESPONSIBILITY
Issue Originator	<ul style="list-style-type: none"> ▪ Identify an issue requiring resolution and notify the Enter Project Acronym Project Manager
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Log identified issues in the FXPR Issue Log ▪ Facilitate the identification of issues and action items to resolve the issue ▪ Perform analysis on issues and impact to the scope, schedule, and budget ▪ Identify and assign an Issue Owner for each issue ▪ Confirm identified issues are analyzed and issue resolution plans are approved and implemented as required ▪ Review issues with the project team at the status meetings ▪ Report open issues on status reports ▪ Escalate to Project Sponsor and FX Governance as needed to facilitate timely resolution ▪ Ensure issues are linked to appropriate risks in the Risk Log where appropriate ▪ Assist the Issue Owner with issue resolution and closure
Issue Owner	<ul style="list-style-type: none"> ▪ Collaborate with the Enter Project Acronym Project Manager regarding the status of the issue or action item until it is closed ▪ Participate in discussions with the Issue Originator to fully understand the issue ▪ Research and draft the resolution ▪ Attend status meetings to discuss/report on an issue ▪ Drive the issue to resolution and closure
Project Team	<ul style="list-style-type: none"> ▪ Identify and report project issues to the Project Manager ▪ Assist the Project Manager and Issue Owner in the resolution of issues
<Add other roles as appropriate>	<ul style="list-style-type: none"> ▪ <Add responsibilities as appropriate>

Exhibit 11-1: Issue Management Roles and Responsibilities



11.3 IDENTIFY ISSUES

An issue may be identified in any number of ways. The Enter Project Acronym Project Team will look for any of the following reasons to log an issue:

- A trigger has been activated for a currently identified risk
- A problem is negatively impacting the project for which there is no apparent answer
- An inability of two project entities or functional groups to come to an agreement on an item or process
- An action item with a late due date, which if not completed, will negatively impact the project
- A decision with a late due date, which if not completed, will negatively impact the project
- The need for information external to the project inhibits or stops the development of the project objectives, deliverables, and/or solution until resolved

11.4 LOGGING ISSUES

The Issue Originator shall work with the Enter Project Acronym Project Manager to enter the pertinent information about the issue into the Issue Tracking Log located in the FXPR according to the FX Issue Management Process Definition. If there is an associated decision pending, the assigned Project Manager will link the Decision and Issue together by completing the appropriate fields.

11.5 RESOLVING ISSUES

Once the issue is documented and assigned, the Issue Owner shall analyze the issue and develop a plan for resolution describing the activities that need to be completed to close the issue.

If the Enter Project Acronym Project Team, including the Project Sponsor, are unable to resolve the issue in a timely manner, the Enter Project Acronym Project Manager shall notify the FX EPMO and begin following the escalation process identified in the *Project Governance* section of this document.

11.6 MONITORING AND CONTROLLING ISSUES

Issues shall be tracked in the FXPR and updated during the Enter Project Acronym Project Status Meeting. Open issues are provided as input to the Monthly Status Reporting process detailed in the *Communications Management Plan* section of this document.



SECTION 12 DECISION MANAGEMENT PLAN

12.1 DECISION MANAGEMENT OVERVIEW

The *Decision Management Plan* establishes and implements a defined structure that will facilitate an effective decision-making process using all available information to increase the precision, consistency, and agility of decisions. Decisions will be managed using the governance structure defined in the *FX Manage Decision Process Definition*.

12.2 ROLES AND RESPONSIBILITIES

Exhibit 12-1: Decision Management Plan Roles and Responsibilities identifies the roles and responsibilities of major participants in the decision management process.

ROLE	RESPONSIBILITY
Decision Originator	<ul style="list-style-type: none"> ▪ Identify decisions and notify the Enter Project Acronym Project Manager
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Log identified decisions in the FXPR Decision Log ▪ Facilitate the identification decisions ▪ Perform analysis on decisions for impact to scope, schedule, and budget ▪ Review decisions with the project team at the status meetings until closure ▪ Report new and closed decisions on status reports ▪ Close the decision ▪ Escalate to Project Sponsor, AHCA FX Director, and FX Governance as needed to facilitate timely decision-making ▪ Ensure decisions are linked to appropriate risks, issues, etc. in the appropriate CRAIDL Log
Project Team	<ul style="list-style-type: none"> ▪ Collaborate with the Enter Project Acronym Project Manager regarding the status of the decision until it is closed ▪ Participate in discussions with the Decision Originator to fully understand the decision being made ▪ Draft the decision using the Decision Form template ▪ Attend status meetings to discuss newly logged, open, and closed decisions ▪ Communicate decisions with stakeholders
FX EPMO	<ul style="list-style-type: none"> ▪ Identify and report Program-level decisions and decisions from other projects to the Project Manager ▪ Assist the Project Manager and Decision Owner in the resolution of decisions ▪ Participate in weekly team level meetings as needed to discuss team decisions

Exhibit 12-1: Decision Management Plan Roles and Responsibilities



12.3 DECISION MANAGEMENT PROCESS

The Enter Project Acronym Project Team shall use the Decision Log in the FXPR to record both decisions that have been made and decisions that are needed according to the *Decision Management Process Definition*.

If decision-making is not timely, there may be adverse impacts to the project. To avoid this, the Enter Project Acronym Project Manager shall escalate according to the *Project Governance* section of this document.



SECTION 13 LESSONS LEARNED MANAGEMENT PLAN

13.1 OVERVIEW

The Enter Project Acronym Project Team shall document any lessons learned throughout the life of the project. The Enter Project Acronym Manager shall solicit lessons learned from the team and then document identified lessons using the Lessons Learned Log available in the FXPR. Lessons learned shall be collected throughout the project life cycle and at the end of each significant stage gate. Lessons learned will be recorded using a *start, stop, continue* orientation.

Key lessons learned during the Enter Project Acronym Project will be included in the Project Close Out Report completed during the Project Close Out Phase.

13.2 ROLES AND RESPONSIBILITIES

Exhibit 13-1: Lessons Learned Roles and Responsibilities identifies the roles and responsibilities of major participants in the lessons learned management process.

ROLE	RESPONSIBILITY
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Log identified lessons learned in the FXPR Lessons Learned Log ▪ Facilitate the identification of lessons learned ▪ Review lessons learned with the project team at the status meetings ▪ Ensure lessons learned are linked to appropriate risks, issues, etc. in the appropriate CRAIDL Log
Lesson Learned Originator	<ul style="list-style-type: none"> ▪ Identify lesson learned and notify the Enter Project Acronym Project Manager
Enter Project Acronym Project Team Leads (AHCA, SEAS, and Vendor)	<ul style="list-style-type: none"> ▪ Participate in weekly status meeting to discuss proposed and newly logged lessons learned ▪ Communicate with team members so that they are aware of newly logged lessons learned ▪ Verify the project team is tracking and maintaining lessons learned in the Lessons Learned Log
Project Team	<ul style="list-style-type: none"> ▪ Participate in discussions with the Lesson Learned Originator to fully understand the lesson being logged ▪ Draft the lesson learned using the Lesson Learned Form template ▪ Attend status meetings to discuss newly logged and proposed lessons ▪ Communicate lessons learned with stakeholders
FX EPMO	<ul style="list-style-type: none"> ▪ Identify and report Program-level lessons learned, and lessons learned from other projects to the Project Manager

Exhibit 13-1: Lessons Learned Roles and Responsibilities

13.3 LESSONS LEARNED PROCESS

The Enter Project Acronym Project Team shall document any lessons learned throughout the life of the project. The Enter Project Acronym Project Manager, at a minimum, shall solicit



lessons learned from the team and document using the Lessons Learned Log available in the FXPR at the end of each significant stage gate. Lessons learned will be recorded using a *start, stop, continue* orientation.

Key lessons learned during the Enter Project Acronym Project will be included in the Project Close Out Report completed during the Project Close Out Phase.



SECTION 14 COMMUNICATIONS MANAGEMENT PLAN

14.1 OVERVIEW

The *Communications Management Plan* documents the formal communication process developed for the Enter Project Acronym Project. The *Communications Management Plan* serves three main purposes. First, it describes roles and responsibilities related to communications. Second, it defines the Enter Project Acronym Project specific communication methods. Third, it outlines the multiple vehicles and communication types that will be used for project reporting. Any communications described in the *Communications Management Plan* shall not include Personally Identifiable Information (PII), Protected Health Information (PHI), or confidential information.

This *Communications Management Plan* defines:

- What needs to be communicated
- Who is responsible for communicating with what audience
- When the communication needs to take place
- How information will be communicated

The Enter Project Acronym Project *Communications Management Plan* objectives are to:

- Create and set realistic expectations of the project, the project goals, and expected benefits
- Create an awareness and understanding of the project and build enthusiasm for the expected benefits and goals
- Provide consistent, clear, and accurate information about the project
- Introduce activities to engage and involve project resources and build commitment for the project
- Enable project resources and other stakeholders to provide feedback
- Allow for adjustments to communications based on stakeholder feedback
- Provide relevant and timely information to each stakeholder group to help prepare for the Enter Project Acronym Project changes
- Define and communicate a clear process, roles, and responsibilities that enable accurate and timely information with *one voice*

There are guiding principles that are fundamental assumptions that govern the management of communications. They serve as directional paths to help communicators stay on course and guide the objectives of the *Communications Management Plan*. Key guiding principles include:

- Target communications to specific recipients



- Keep messages concise and deliver them when needed
- Align communication activities with key events and deliverables, where applicable
- Repeat key messages to ensure appropriate level of understanding
- Ensure sensitivity to the current operating environment
- Leverage existing Agency communication channels to distribute messages to key stakeholders
- Use consistent templates and terminology in messages
- Promote two-way communication to create an open dialogue between the project team and key stakeholders
- Provide opportunities for constructive feedback; listen when stakeholders provide it

14.2 ROLES AND RESPONSIBILITIES

Exhibit 14-1: Communications Plan Roles and Responsibilities identifies the roles and responsibilities of major participants that will participate in the execution of the *Communications Management Plan*.

ROLE	RESPONSIBILITIES
Enter Project Acronym Project Sponsor (AHCA)Enter Project Acronym	<ul style="list-style-type: none"> ▪ If an issue or communication exceeds the scope of the project and involves security or topics considered newsworthy to the public, the Project Sponsor is responsible for escalating and coordinating with the Agency's public relations staff and notifying the appropriate Project Director(s) and/or Account Executive(s) ▪ Assist in the development and preparation of key messages for the Enter Project Acronym Project ▪ Deliver certain messages to the team and other stakeholders (including Executive Agency Leadership/Groups) to show executive sponsorship for plans and messages
Enter Project Acronym AHCA Contract Manager	<ul style="list-style-type: none"> ▪ Participate in Agency/Division/Bureau meetings as requested, supported by the FX Organizational Change Management (OCM) Services Team ▪ Contribute key project status information to Enter Project Acronym OCM Services Team, if applicable
Enter Project Acronym AHCA Implementation Team Lead	<ul style="list-style-type: none"> ▪ Member of the OCM Services Team, if applicable ▪ Contribute key project status information to Enter Project Acronym OCM Services Team Lead during bi-weekly Enter Project Acronym OCM meetings, or as otherwise needed ▪ Review all outreach communications produced by OCM Services Communication Lead, as appropriate. Participate, as available, in FX Division Partner meetings led by FX OCM Services ▪ Participate in Agency/Division/Bureau meetings as requested, supported by FX OCM Services Team ▪ Participate in AHCA Division of IT System Change Control Process for Enter Project Acronym needs
	<ul style="list-style-type: none"> ▪



ROLE	RESPONSIBILITIES
Enter Project Acronym OCM Services Team Lead	<ul style="list-style-type: none"> ▪ Member of the OCM Services Team ▪ Collect and synthesize key information on project status including, but not limited to, current and upcoming activities, benefits, and all other information pertinent or of interest to all select Enter Project Acronym -affected audiences
Enter Project Acronym Client Executive, Account Manager, or equivalent, if appropriate	<ul style="list-style-type: none"> ▪ Responsible for assisting the Project Manager with the creation, review, approval, and distribution of general project-related communications ▪ Develop and communicate key messages for the project or communication collateral
Enter Project Acronym Project Manager (or designee)	<ul style="list-style-type: none"> ▪ Responsible for coordinating the creation, review, approval, and distribution of general project-related communications ▪ Develop and communicate key messages for the project or communication collateral ▪ Inform the project team of key messages ▪ Assist team with general communications where appropriate ▪ Work with project team to ensure the identification, validation, and addressing of issues in their general communications ▪ Coordinate updates and maintenance of the Stakeholder Matrix and Meeting Log ▪ Coordinate with the FX OCM Services Team on integrated communications
Enter Project Acronym Training Lead	<ul style="list-style-type: none"> ▪ Member of the OCM Services Team ▪ Contribute key project status information to Enter Project Acronym OCM Services Team Lead during bi-weekly Enter Project Acronym OCM Activities meetings, or as otherwise needed ▪ Review all outreach communications produced by FX OCM Services Communication Lead, as requested
Enter Project Acronym Team Member	<ul style="list-style-type: none"> ▪ Drafting initial message content ▪ Sending emails as required for execution of project work, including Project Manager in the distribution ▪ Routing communications through appropriate channels ▪ Sending meeting invitations as needed
<Add roles as appropriate>	<ul style="list-style-type: none"> ▪ <Add responsibilities as appropriate>

Exhibit 14-1: Communications Plan Roles and Responsibilities

14.3 COMMUNICATION METHODS

Realizing that various stakeholders have diverse needs for information, the Enter Project Acronym Project Team shall use a variety of channels to communicate. During the Enter Project Acronym Project, the Enter Project Acronym Project Team shall leverage effective and familiar communication channels. Where appropriate, the Enter Project Acronym Project Team shall introduce new methods. The channels used differ depending on the stakeholder group, timing, and the message being delivered.

The Enter Project Acronym Project Team uses the channels outlined in Error! Reference source not found. below for Enter Project Acronym Project communications.



METHOD	FREQUENCY	TARGET AUDIENCE	OWNER
Enter Project Acronym Team Status Meetings	<ul style="list-style-type: none"> <Identify frequency: weekly or biweekly> 	<ul style="list-style-type: none"> Enter Project Acronym Project Team IV&V Department of Management Services <Identify audience> 	<ul style="list-style-type: none"> Enter Project Acronym SEAS EPMO Project Manager
Enter Project Acronym Issue and Risk Management Meeting	<ul style="list-style-type: none"> <Identify frequency> 	<ul style="list-style-type: none"> Enter Project Acronym Project Team IV&V <Identify audience> 	<ul style="list-style-type: none"> Enter Project Acronym SEAS EPMO Project Manager
Project status update to FX Governance	<ul style="list-style-type: none"> Upon invitation 	<ul style="list-style-type: none"> Enter Project Acronym Project Team FX Governance (including FX ESC) IV&V <Identify audience> 	<ul style="list-style-type: none"> Enter Project Acronym Project Sponsor supported by the Enter Project Acronym SEAS EPMO Project Manager
Program-level Schedule Review Meeting	<ul style="list-style-type: none"> Weekly 	<ul style="list-style-type: none"> Enter Project Acronym Project Team IV&V <Identify audience> 	<ul style="list-style-type: none"> FX EPMO Schedule Manager
Program-level Resource Coordination Meeting	<ul style="list-style-type: none"> Ad hoc as needed 	<ul style="list-style-type: none"> Enter Project Acronym Project Team <Identify audience> 	<ul style="list-style-type: none"> FX EPMO Lead (or designee)
Integrated CRAIDL Management Meeting	<ul style="list-style-type: none"> Bi-weekly 	<ul style="list-style-type: none"> Enter Project Acronym Project Team IV&V <Identify audience> 	<ul style="list-style-type: none"> FX EPMO CRAIDL Coordinator
Organizational Change Management Activities	<ul style="list-style-type: none"> <Identify frequency> 	<ul style="list-style-type: none"> Enter Project Acronym OCM Services Teams IV&V <Identify audience> 	<ul style="list-style-type: none"> Enter Project Acronym OCM Services Team
FX Portal Updates	<ul style="list-style-type: none"> Monthly 	<ul style="list-style-type: none"> Identified stakeholders 	<ul style="list-style-type: none"> FX OCM Services Communications Lead
FX Email Communications	<ul style="list-style-type: none"> As needed 	<ul style="list-style-type: none"> Identified stakeholders 	<ul style="list-style-type: none"> FX OCM Services Team
<Workstream Kick-off Meeting>	<ul style="list-style-type: none"> Prior to the start of each Workstream 	<ul style="list-style-type: none"> Identified stakeholders 	<ul style="list-style-type: none"> Enter Project Acronym Project Manager
<Town Halls>	<ul style="list-style-type: none"> End of each Workstream and prior to Go-Live 	<ul style="list-style-type: none"> Identified stakeholders 	<ul style="list-style-type: none"> Enter Project Acronym Project Manager
Other Meetings to be determined in collaboration with the Agency	<ul style="list-style-type: none"> As needed 	<ul style="list-style-type: none"> Identified stakeholders 	<ul style="list-style-type: none"> Enter Project Acronym Project Manager

Exhibit 14-2: Communication Methods Table

Note: Official project texts and instant messages should be designed and managed in coordination with the FX OCM Services Team.



All meetings with the Agency and/or project integration meetings shall be recorded in the Meeting Log in the FXPR.

14.4 PROJECT REPORTING

Exhibit 14-3: Project Reporting Requirements and Frequency identifies and describes the project reporting types and frequency for Enter Project Acronym Project.

REPORT	DESCRIPTION	FREQUENCY
Enter Project Acronym Weekly Status Report (WSR)	This is the regularly produced detail Project Status Report delivered	Weekly
Enter Project Acronym Monthly Status Report (MSR) to Department of Management Services (DMS), Executive Office of the Governor's Office of Policy and Budget, and the Appropriations Chairs of the House and Senate	This report is a summary of the month's project activities and progress	Monthly Refer to the <i>P-2: FX Project Management Standards</i> and the <i>Monthly Status Report</i> process definition for details
<ul style="list-style-type: none"> <Enter Project Acronym Performance Reporting> 	<ul style="list-style-type: none"> <The Agency will monitor the Enter Project Acronym Vendor's performance using a Performance Reporting System to oversee the quality of the Vendor's performance, document performance levels in critical areas of the system, facilitate the management of the Enter Project Acronym contract, and enhance the investment made by the Agency and federal government in the administration of the FX Program> 	<ul style="list-style-type: none"> <Monthly>
Ad hoc reports	Ad hoc analyses and ad hoc reports at the written direction of the Agency	As requested by the Agency
<Identify other project reporting>	<Identify description>	<Identify frequency>

Exhibit 14-3: Project Reporting Requirements and Frequency

Agenda and summaries (e.g., meeting minutes) for all meetings will be stored in the Enter Project Acronym Project Artifact Directory in the FXPR.

For project email communications, the Enter Project Acronym Project Team will communicate directly with the corresponding Agency and FX Vendor counterparts with appropriate cc inclusion as identified in **Exhibit 14-4: Email Communication** Guidelines. Over time, inclusion of the Enter Project Acronym AHCA Contract Managers and Implementation Team Leads may ease off if agreed to by the Contract Managers and Implementation Team Leads. In addition, the Enter Project Acronym Project team members will follow the email guidelines outlined in FX Meeting and Email Standards.



	DIRECT RECIPIENT OF EMAIL	CC RECIPIENT OF EMAIL
Contractual Communications	<ul style="list-style-type: none"> Enter Project Acronym AHCA Contract Manager and Enter Project Acronym Contract Manager 	<ul style="list-style-type: none"> Enter Project Acronym AHCA Implementation Team Lead and Enter Project Acronym Account Manager
Formal Communications	<ul style="list-style-type: none"> Implementation Team Leads Project Managers 	<ul style="list-style-type: none"> Agency Agency Implementation Team Leads
Informal Communications	<ul style="list-style-type: none"> Person to Person 	<ul style="list-style-type: none"> As needed

Exhibit 14-4: Email Communication Guidelines

Project resources change throughout the project life cycle. Having a current and easy-to access contact list provides project team members with essential role and contact information to stay connected with project team members. As part of the on and off-boarding process of project team members, the Enter Project Acronym Project Team updates the contact list to include the following information:

- Name
- Email Address
- Role
- Phone Number
- Organization

The Project Contact List is stored in the FXPR.



SECTION 15 PROJECT STAKEHOLDER MANAGEMENT

15.1 OVERVIEW

The intent of project stakeholder management is to identify individuals or groups the Enter Project Acronym Project will impact and develop appropriate strategies for effectively interacting with them. Stakeholder management focuses on communication with stakeholders to understand their communication needs and expectations, addressing issues as they occur, and fostering appropriate stakeholder awareness of project decisions and activities.

The Enter Project Acronym Project includes both direct and indirect Stakeholders. Direct Stakeholders are those organizations, groups, or individuals who have a working role on the project or who are impacted by the output of the project. Indirect Stakeholders are those individuals whose interests are enhanced or threatened by the project. Refer to **Exhibit 15-1: Enter Project Acronym Project Stakeholders** below.

<Update the following list of stakeholders as appropriate for your project.>

DIRECT STAKEHOLDERS		INDIRECT STAKEHOLDERS	
<ul style="list-style-type: none"> ▪ AHCA ▪ CMS ▪ SEAS Vendor ▪ Department of Management Services 	<ul style="list-style-type: none"> ▪ IV&V Vendor ▪ Enter Project Acronym Vendor ▪ All Vendors with Business Rules 	<ul style="list-style-type: none"> ▪ Future Module Vendors ▪ Other State Health and Human Services Agencies ▪ Attorney General's Medicaid Fraud Control Unit ▪ Department of Financial Services (Florida PALM System) ▪ Providers of Medicaid Services ▪ Academic Organizations (supporting HQA) 	<ul style="list-style-type: none"> ▪ State of Florida Legislature ▪ Florida Governor's Office ▪ Third Party Liability Vendors ▪ Recipients of Medicaid Services ▪ Advocacy Organizations

Exhibit 15-1: Enter Project Acronym Project Stakeholders

Update of the stakeholder management activities outlined in this section will occur as needed and in accordance with the Enter Project Acronym Project <i.e., vendor contract> and/or Task Order.

15.1.1 ROLES AND RESPONSIBILITIES

Exhibit 15-2: Stakeholder Management Roles and Responsibilities below describes the Stakeholder Management Roles and Responsibilities.



ROLE	RESPONSIBILITIES
Enter Project Acronym Project Sponsor	<ul style="list-style-type: none"> ▪ Identify project stakeholders ▪ Identify project resources to assist with producing other-than-routine communication collateral ▪ Deliver communications as needed ▪ Act as a champion for non-routine communications ▪ Approve communication content and distribution ▪ Facilitate access to stakeholder groups as needed ▪ Consult and advise with the Enter Project Acronym Project OCM Liaison on stakeholder management strategies ▪ Communicate stakeholder issues with FX Program OCM Lead
Enter Project Acronym SEAS Implementation Team Lead	<ul style="list-style-type: none"> ▪ Identify project stakeholders ▪ Bring stakeholder communication needs to the Enter Project Acronym Project Team for consideration ▪ Participate in production, review, and approval of communication collateral at the request of the Enter Project Acronym Project Sponsor ▪ Engage stakeholders as requested by the Enter Project Acronym Project Sponsor ▪ Notify and communicate stakeholder issues with FX Program OCM Lead
Enter Project Acronym SEAS EPMO Project Manager	<ul style="list-style-type: none"> ▪ Identify project stakeholders ▪ Bring stakeholder communication needs to the Enter Project Acronym Project Team for consideration ▪ Participate in production, review, and approval of communication collateral at the request of the Enter Project Acronym Project Sponsor ▪ Engage stakeholders as requested by the Enter Project Acronym Project Sponsor ▪ Notify and communicate stakeholder issues with FX Program OCM Lead
Enter Project Acronym Account Manager	<ul style="list-style-type: none"> ▪ Identify project stakeholders ▪ Bring stakeholder communication needs to the Enter Project Acronym Project Team for consideration ▪ Participate in production, review, and approval of communication collateral at the request of the Enter Project Acronym Project Sponsor ▪ Engage stakeholders as requested by the Enter Project Acronym Project Sponsor ▪ Notify and communicate stakeholder issues with FX Program OCM Lead
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Identify project stakeholders ▪ Bring stakeholder communication needs to the Enter Project Acronym Project Team for consideration ▪ Participate in production, review, and approval of communication collateral at the request of the Enter Project Acronym Project Sponsor ▪ Engage stakeholders as requested by the Enter Project Acronym Project Sponsor ▪ Notify and communicate stakeholder issues with FX Program OCM Lead



ROLE	RESPONSIBILITIES
Enter Project Acronym FX Program OCM Lead	<ul style="list-style-type: none"> ▪ Stakeholder Management process owner ▪ Collaborate with the FX OCM Lead ▪ Conduct baseline stakeholder analysis for the Enter Project Acronym Project ▪ Facilitate periodic updates to the <i>Stakeholder Management Plan</i>, <i>Communications Plan</i>, and Stakeholder Analysis ▪ Facilitate the development, approval, and distribution of communications collateral to assure appropriate and effective stakeholder communication ▪ Make recommendations to the Project Sponsor and project team on strategies to engage stakeholders, and manage stakeholder concerns ▪ Identify risks associated with project stakeholder management and participate in the development of response plans ▪ Collaborate with FX OCM Lead for FX project messaging and communications with stakeholders
Enter Project Acronym Training Lead	<ul style="list-style-type: none"> ▪ Identify and notify FX OCM Lead as previously unidentified Stakeholders are revealed
Enter Project Acronym AHCA Implementation Team Lead	<ul style="list-style-type: none"> ▪ Identify and notify FX OCM Lead as previously unidentified Stakeholders are revealed
<Add other roles as appropriate>	<ul style="list-style-type: none"> ▪ <Add responsibilities as appropriate>

Exhibit 15-2: Stakeholder Management Roles and Responsibilities

15.1.2 STAKEHOLDER MANAGEMENT APPROACH

The Project’s Stakeholder Management approach consists of the following components shown in **Exhibit 15-3: Stakeholder Management Approach**:



Exhibit 15-3: Stakeholder Management Approach

15.1.2.1 STAKEHOLDER MANAGEMENT APPROACH

Direct and indirect stakeholders have been identified and are noted in the Project Charter and in Section 15.1 above. Extended individual stakeholders for each group are identified by the AHCA FX Director, OCM Services, Enter Project Acronym AHCA Implementation Team Lead, and Enter Project Acronym OCM Representative. Throughout the Enter Project Acronym Project, OCM Services revalidates the FX Stakeholder Analysis to assure that an accurate



stakeholder list is maintained. Enter Project Acronym specific stakeholders are assessed and updated through bi-weekly meetings.

15.1.2.2 STRATEGIES TO MANAGE PROJECT STAKEHOLDERS

The *Project Stakeholder Management Plan* for managing key stakeholders during the phases of the project relies upon the integrated use and monitoring of several project deliverables and work products. The use of the Stakeholder Analysis maintained by FX Program OCM Lead, the *Communications Plan*, and the accompanying *Stakeholder Engagement Plan*, Meeting Table, and Communications Matrix are used to manage all stakeholder communication and feedback.

15.1.2.3 STAKEHOLDER ENGAGEMENT

The Enter Project Acronym Project Team will participate in Stakeholder Engagement as part of the FX Program OCM Lead.

15.1.2.4 STAKEHOLDER MONITORING

OCM Services monitors stakeholders across the project through surveys, assessments, and by monitoring feedback from various communications produced including but not limited to Secretary communications, AHCA / Medicaid / Bureau / Unit meetings, Division Partner questions and requests, and the FX Portal.

<After assessing required stakeholder artifacts in the PPA, the Enter Project Acronym Project Manager (and OCM Lead) should review the OCM Plan Deliverable and detail here what activities the Enter Project Acronym Project Team shall perform.>



SECTION 16 DOCUMENT MANAGEMENT PLAN

16.1 OVERVIEW

This section highlights how the Enter Project Acronym Project Team shall create and maintain documents and to post them in the FXPR in accordance with the *P-2: Project Management Standards*. It also identifies the processes required to store and control FX Project documentation ensuring accessibility to authorized project stakeholders and to provide required document retention and security in accordance with the AMS.

16.2 DELIVERABLE DEVELOPMENT ROLES AND RESPONSIBILITIES

Exhibit 16-1: Document Management Roles and Responsibilities below describes the document management roles and associated responsibilities.

ROLE	RESPONSIBILITY
Enter Project Acronym Project Team Deliverable Developer	<ul style="list-style-type: none"> ▪ Create the Deliverable Expectations Document (DED) ▪ Submit draft DED to the Enter Project Acronym Project Manager for submission to the Agency ▪ Participate in the DED review (or Deliverable Expectations) meeting ▪ Update the DED based on the discussions in the Deliverable Expectations meeting(s) ▪ Submit plan for logical breakup of large deliverables in the DED (if needed) ▪ Develop deliverable ▪ Submit deliverable for review and acceptance ▪ If the deliverable is large, submit deliverable sections for acceptance per the agreed upon plan ▪ Facilitate walk-through to orient reviewers to the deliverable ▪ Work with Work Package Leads to resolve issues ▪ Incorporate review changes to the deliverable ▪ Submit revised deliverable to the Enter Project Acronym Project Manager for acceptance
Enter Project Acronym Project Manager	<ul style="list-style-type: none"> ▪ Coordinate and/or perform preliminary review of deliverables to confirm they meet contract requirements and basic quality standards ▪ Provide written deliverable review comments from reviewers as received to the Enter Project Acronym Deliverable Developer ▪ Store final deliverable and other related documentation in the Enter Project Acronym Project Artifact Directory on FXPR ▪ Review project delivery processes, artifacts, requirements, and reports for appropriateness and accuracy ▪ Store review comments (if applicable) and other related documentation in the FXPR ▪ Confirm comments are addressed prior to resubmission ▪ Collaborate and communicate quality standards, measures, processes, and awareness across the Enter Project Acronym Project Team and stakeholders as appropriate ▪ Submit DEDs and deliverables to the Agency ▪ Submit status reports in accordance with FX Project Status and Schedule Management processes



ROLE	RESPONSIBILITY
AHCA Project Liaison	<ul style="list-style-type: none"> ▪ Select Deliverable Review Team with the Enter Project Acronym Project Sponsor ▪ Review Deliverable ▪ Review Team roles with team members ▪ Identify Deliverable Stakeholders ▪ Participate in Deliverable Expectations Meeting ▪ Review and approve the Deliverable Expectations Documents ▪ Advise on how the Enter Project Acronym Project Team should break up large deliverables into manageable sections ▪ Distribute deliverable to Enter Project Acronym Deliverable Review Team ▪ Manage the Deliverable Review and Acceptance process with the Enter Project Acronym Deliverable Review Team ▪ Synthesize deliverable review comments to ensure consistency, completeness, quality, and accuracy of comments ▪ Act as Point of Contact (POC) for the Enter Project Acronym Project Manager ▪ Facilitate communication among Deliverable Stakeholders ▪ Participate in comment resolution process ▪ Escalate irresolvable issues to the Project Sponsor ▪ Make a formal recommendation to the Project Sponsor on acceptance or rejection of the deliverable
Enter Project Acronym Deliverable Review Team	<ul style="list-style-type: none"> ▪ Participate in Deliverable Expectations Meeting(s) ▪ Participate in deliverable development as a source of information for the Enter Project Acronym Deliverable Developer (Deliverable Review Team members do not do any formal development) ▪ Review deliverable according to assigned role ▪ Identify and record revision comments in required format and within the established review period ▪ Participate in comment resolution ▪ Review updates after the Deliverable Developer has made changes to the draft deliverable confirming the final deliverable meets established expectations
Enter Project Acronym Project Sponsor	<ul style="list-style-type: none"> ▪ Review comments and recommendations for the deliverables from the FX Domain Lead ▪ Facilitate the Enter Project Acronym review process ▪ Coordinate with AHCA Project Liaison on formal acceptance of deliverable ▪ Use appropriate escalation processes as needed for deliverable content issues ▪ Final sign off on all deliverables ▪ Accept or reject the deliverable and communicate the disposition to the Enter Project Acronym Project Manager, Agency, and Vendor Contract Managers, and the FX EPMO
FX AHCA Project Team Contract Manager	<ul style="list-style-type: none"> ▪ Notify appropriate parties of acceptance/rejection of deliverable ▪ Other duties as noted in the AMS
Enter Project Acronym Quality Assurance Manager/Lead	<ul style="list-style-type: none"> ▪ Perform preliminary review of artifacts (including DEDs, deliverables, reports, etc.) to ensure they meet contract requirements and basic quality standards (e.g., format, spelling, and grammar)
<Add roles as appropriate; consider roles in the AMS>	<ul style="list-style-type: none"> ▪ <Add responsibilities as appropriate>

Exhibit 16-1: Document Management Roles and Responsibilities



16.2.1 DOCUMENT REVIEW AND APPROVAL PROCESS

Enter Project Acronym Project Team shall follow three major sub-processes that make up the Deliverable Review and Acceptance process:

1. The **Deliverable Expectations Process** defines the tasks, responsible actors, and outputs for establishing the contractual acceptance criteria, and format and content expectations for project deliverables.
2. The **Deliverable Review Process** defines the tasks, responsible actors, and outputs for the submission, receipt, review, and feedback of draft deliverables and the resolution of review feedback for acceptance of a final deliverable draft.
3. The **Deliverable Acceptance Process** defines the tasks, responsible actors, and outputs for the approval and invoice payment of a final deliverable.

16.2.2 DEFINING THE DELIVERABLE EXPECTATIONS AND ACCEPTANCE CRITERIA

The Enter Project Acronym Project Manager shall facilitate Deliverable Expectations Meeting(s) with key review stakeholders, prior to the start of the deliverable development. The intent of Deliverable Expectations Meeting(s) is to formally establish expectations for the development of the deliverable. Expectations should focus on identifying and agreeing upon the *who, what, why, when, and how* for the development of the deliverable and should include the acceptance criteria for the deliverable under development.

The Enter Project Acronym Project Manager shall facilitate the Deliverable Expectations Meeting(s) in a timely manner sufficient to define, draft, and approve the DED to achieve the scheduled deliverable milestones set in the project's planning stage.

The Enter Project Acronym Project Manager shall update the PMP *Scope Management Acceptance Criteria* section as needed.

16.2.3 THE DELIVERABLE EXPECTATIONS DOCUMENT

The Enter Project Acronym Project Manager shall use the Deliverable Expectations Document (DED) to establish and manage deliverable expectations (i.e., content, format, review team, review timeframe, acceptance criteria for each of the deliverable expectations, and approver(s)). Also recorded in the DED is the developer's approach to meeting the deliverable requirements.

If the approved DED changes project scope, schedule, or cost, the Project Manager shall initiate the Change Control process.

16.2.4 DELIVERABLE DEVELOPMENT

During deliverable development, decisions made by the Enter Project Acronym Project Team (including Project Sponsor) may conflict with the approved DED. When this occurs, the



Deliverable Developer updates the approved DED and submits the revised document to the Enter Project Acronym Project Manager for submission to the Project Sponsor. The Enter Project Acronym Project Manager is responsible for facilitating the review and approval process for the updated DED.

16.2.5 DELIVERABLE QUALITY CONTROL

<Using the *Quality Control* section of the FX Artifact Management Standards (AMS) and the Quality Control Checklist as a guide, define the Enter Project Acronym Project Team's internal quality control process here.>

16.2.6 DELIVERABLE REVIEW

Deliverable Review process is initiated when the Enter Project Acronym Project Manager submits a deliverable for acceptance. The deliverable will be 100% complete and in final format prior to submission. In the case of a phased deliverable, each of the sections will be managed as an individual deliverable. Once the review of each of the sections is complete, a final review will be conducted over the deliverable to ensure there are no gaps between the sections.

The Enter Project Acronym Project Team shall notify the Project Sponsor that the deliverable is posted for review on FXPR. The Enter Project Acronym Deliverable Review Team shall review the deliverable and provide feedback within the timeframe specified in the approved DED. The Enter Project Acronym Project Manager shall log an issue if notification of deliverable acceptance or rejection has not been provided to the Enter Project Acronym Project Team within that time, naming the Project Sponsor as the issue owner.

<Define the method that will be used for capturing Deliverable Review Team comments. The standard is inline comments.>

16.2.7 DELIVERABLE REVIEW PERIOD

The deliverable review period will be established in the respective DEDs. These timeframes will be reflected in the baselined schedule.

16.2.8 DELIVERABLE REVISION

<Define how the team will review and respond to review comments and update deliverable.>

16.2.9 DELIVERABLE SUBMISSIONS

The Enter Project Acronym Project Manager shall, according to contractual obligations, formally submit documents to the Agency, by providing a link to the artifact requiring review, in an email to the Deliverable Review Team identified in the approved DED.

Subsequent submissions for approval will include comments from previous submissions.



16.2.10 APPROVED DELIVERABLES

Upon deliverable approval, a final version will be stored with all comments, tracked changes, and notes removed, with correct naming convention applied as specified in the AMS.

16.3 DOCUMENT MANAGEMENT

16.3.1 PROJECT ARTIFACT DIRECTORY

Enter Project Acronym work products and project artifacts will be stored in the Enter Project Acronym Project Artifact Directory (PAD) [<insert file path>](#) in the FXPR, except for the project schedule and status reports.

- The Project Schedule is stored in the Schedule folder [<insert file path>](#).
- The Weekly and Monthly Status Reports are stored in the Reports Folder [<insert file path>](#).

[<Define here with links to the project folder, a guide for what and where artifacts will be.>](#)

16.3.2 ROLES AND RESPONSIBILITIES

The Enter Project Acronym Project Manager is responsible for managing and controlling the artifact directory in accordance with the *P-2: FX Project Management Standards*. All Enter Project Acronym Project Team members are responsible for ensuring the documents are stored in the directory in a timely manner.

16.3.3 DOCUMENT NAMING STANDARDS

The Enter Project Acronym Project shall follow the naming conventions defined in the AMS.

16.3.4 DOCUMENT VERSION CONTROL

The Enter Project Acronym Project shall follow the corresponding requirements in the AMS.



SECTION 17 RESOURCES MANAGEMENT PLAN

17.1 OVERVIEW

The Enter Project Acronym Project *Resource Management Plan (RMP)* describes how project resources will be planned for and managed.

17.2 PLAN RESOURCES

While working through project initiation and planning activities, the Enter Project Acronym Project Manager determines the resource types, quantity of resources, and other parameters needed to properly resource activities in the Enter Project Acronym Project schedule.

17.3 HUMAN RESOURCE ACQUISITION

The Enter Project Acronym Project Manager is responsible for working with project leadership (Project Sponsor, the vendor's project leadership, and the FX EPMO, if appropriate) to identify and acquire the appropriate staff to deliver the scope of the project. The Enter Project Acronym Project Manager shall work with the Project Sponsor to identify those resources from the Agency needed to fill identified roles and their level of effort will be captured in terms of Percent (%) Utilization.

Human Resource acquisition will continue throughout the project life cycle. The core project team having started during initiation, the Enter Project Acronym Project shall continue to onboard resources at various times prior to specific tasks beginning or as replacements to current resources. If there is a delay in acquiring a resource for scheduled work, the Project Sponsor will be made aware and an issue will be logged and escalated as needed.

17.4 MANAGE RESOURCE

The Enter Project Acronym Project Manager shall work with the project team to minimize impact of non-working time. The project team shall notify the Project Manager as soon as a need for time off is identified and will record time off (of 1 day+) on the Team Member Out of Office Calendar in the FXPR. The Enter Project Acronym Project Manager shall update the project schedule accordingly. Transitioning of staff responsibilities will be the responsibility of the project team to minimize adverse impacts to project due dates and to smoothly transition knowledge and activities.



SECTION 18 OUTCOME AND BENEFITS MANAGEMENT PLAN

FX Governance authorized the Enter Project Acronym Project to achieve the following outcome(s) identified during the Portfolio Management process:

1. <List outcome(s) and associated benefits>

These outcomes and associated benefits (tangible and intangible) are tracked in the Benefits Realization Tracking Workbook. Attainment of outcomes is a criterion of project success and a consideration for whether a project continues. Thus, the Enter Project Acronym Project Manager and the Enter Project Acronym Project Sponsor, and/or FX Governance, will consider the impact a variance or change has on achieving stated outcomes and benefits. If the Enter Project Acronym Project encounters a situation that impacts outcomes and/or benefits, the Project Manager shall notify the FX EPMO, which in turn, shall notify the FX Portfolio and FX Governance teams. The Enter Project Acronym Project Manager shall provide documentation and support upon request.

The Enter Project Acronym Project shall report progress toward outcome and benefits realization as required by the *P-2: FX Project Management Standards* and upon request.



SECTION 19 PROJECT GLOSSARY

For a definition of terms and acronyms used throughout this document, refer to the *FX Projects Glossary* located in the FXPR (Florida Health Care Connections > Project Glossary).