ITC Meeting DRAFT Minutes: April 24, 2025

3:00 pm
Hall of Justice
Pacific Conference Room

COUNTY of VENTURA
Information Technology Services

Meeting called by IT Services	Type of Meeting: Information Technology Governance
Facilitator: Terry Theobald	Scribe: Joanna Peterson

Committee Attendees: Jeff Burgh – Auditor Controller; Theresa Cho – Health Care Agency; Chuck Hughes – District Attorney; Sevet Johnson – CEO; Melissa Livingston – Human Services Agency; Robert Mullane – Resource Management Agency; Bach Nguyen – Health Care Agency; Mike Pettit – CEO; Christine Renshaw – County Counsel

Presenters/Visitors: Joe Bacigalupi – ITS; Gary Gooden – ITS; Shannon Perreyclear – Auditor Controller

WELCOME:

- Terry Theobald welcomed all. Roll was taken, quorum was confirmed, and the meeting was called to order at 3:03 PM

APPROVAL OF MINUTES:

- January 23, 2025, ITC meeting minutes reviewed.
    - Motion to approve minutes as written.
    - First by Chuck Hughes and second by Jeff Burgh
    - All in favor; motion passed.

PUBLIC COMMENTS:

- No Public Comments.

COMMITTEE COMMENTS:

- No Committee Comments.

AGENDA REVIEW:

- None

RECEIVE, RATIFY, AND FILE REPORT ON NEW PROJECTS REVIEWED/APPROVED BY CIO:

- None

NEW PROJECTS FOR REVIEW AND APPROVAL BY THE INFORMATION TECHNOLOGY COMMITTEE:

- Countywide IT Systems Disaster Recovery Services
    - Motion to approve.
    - First by Melissa Livingston and second by Robert Mullane
    - All in favor; motion passed.

UPCOMING PROJECTS:

	• None

RECEIVE AND FILE – STATUS OF OPEN PROJECTS:

• Terry Theobald provided a briefing on the Status and Closure Reports of projects.

0 new projects (0 previously)

4 active projects within budget and on schedule (4 previously):
- Regional Radio Project – Information Technology Services
- VCIJIS 2.0 – Information Technology Services Department
- Accela Land Management System Upgrade to Managed Services – RMA
- VCFMS Adv4 Upgrade and Cloud Transition – Auditor-Controller

5 active projects within budget and not on schedule (6 previously):
- Integrated Property Tax Assessment and Collection System – Assessor / Auditor Controller / Tax Collector
- CityWorks Implementation – Public Works Agency
- Ambulatory Care Clinic Integration (CPM) and Experian eCare NEXT – Health Care Agency
- Enterprise Content Management – Public Defender's Office
- Medical Grade Network – Health Care Agency

0 project on schedule and not within budget (1 previously):

1 project not within budget and not on schedule (0 previously):
- Kronos/UKG WFD Project – Health Care Agency

2 projects were completed and closed (1 previously)
- Retirement Health Premium Coverage Payments – ACO/HR
- Physician Documentation and Generative AI Solutions – Health Care Agency

COUNTYWIDE IT POLICIES FOR REVIEW:

Review and Approval of Countywide Information Technology Policy and Standards Manual Policies.
- Updates on Policies in Work
  - AI Policy
    - Developing countywide AI policy.
    - Split into countywide usage and employee guidelines (to be part of acceptable use policy).
  - Cellular Phone Policy
    - Updating to include BYOD and AI usage.
    - Subcommittee meeting in May to finalize updates.
  - Acceptable Technology Use Policy
    - Under review by the technical advisory group.

CIO REPORT:

.Gov Update

- Larger websites will begin migration in May.
- Meeting with Natalie (PIO) and Mike Pettit next month to confirm readiness.
- Migration aims to start in May as announced.
- IT services emails now use venturacounty.gov domain.
- Some generic email addresses (e.g., ITadmin@ventura.org) need updating to .gov.
- Guidance will be updated once changes are complete.
- Starting in May, pending CEO's office approval, agencies will gradually migrate.
- Goal to finish migration by mid-to-late summer.

REVIEW OF ACTION ITEMS:

	• None
CLOSING COMMENTS/ REQUESTED AGENDA ITEMS FOR NEXT MEETING:	
	Closing Comments: • No closing comments. Requested Agenda Items for Next Meeting: • No requested agenda items for the next meeting.

	• Motion to adjourn.
	    ○ First by Jeff Burgh and second by Chuck Hughes
	    ○ All in favor; meeting adjourned at 3:36 PM

	• Next meeting is scheduled for July 24, 2025, at 3:00 PM, Hall of Justice, Pacific Conference Room

——— Information Technology Committee ———

County of Ventura
I.T. Project Assessment Questionnaire
Form Revised March 13, 2023

Agency/Department:	IT Services	Project Name:	IT Disaster Recovery Remediation
Project Manager:	Joe Bacigalupi/Gary Gooden	Project Sponsor:	Terry Theobald
Project Manager Contact:	Joe.bacigalupi@ventura.org, gary.gooden@ventura.org	Date:	4/4/2025

EXECUTIVE PROJECT DESCRIPTION

Project Description: The current county Disaster Recovery (DR) process requires additional enhancements to modernize and ensure successful restoration of critical county systems. DR plans and strategies have been developed in the past but have not been consistently tested and no longer reflect today's information technology DR industry standard or our current infrastructure demands. As a result of a multi-agency outage in 2019, actions were taken to establish backup and recovery infrastructure at the Fire Communication Center (FCC). While periodic restoration testing was performed, consistent annual failover testing of the county's critical systems were not performed, which would have included user functionality testing. Additionally, there are other critical services that need to be accounted for from a DR perspective. This project will seek to enhance our Disaster Preparedness from a Business Continuity perspective, and as such we are proposing a new DR site in a Co-Lo (Co-Location) facility that provides fully hosted DRaaS services for failover and recovery of the county's most critical systems. Disaster Recovery as a Service (DRaaS) is a cloud-based service model that enables organizations to back up their data and IT infrastructure in a third-party cloud environment. In the event of a disaster, whether natural or man-made, DRaaS allows businesses to regain access to their IT systems and data quickly, ensuring minimal disruption and maintaining business continuity

OBJECTIVES AND OUTCOMES

Measurable Outcomes:

1.) Implement a Disaster Recovery as a Service (DRaaS) Plan for our customers and constituents to ensure business continuity for the county's most critical systems during a time of crisis.

2.) Limit any loss of connectivity to critical county systems for our constituents during a disaster by achieving successful Recovery Time Objective (RTO).

RTO Definition: RTO is the maximum acceptable amount of time that a system, application, or function can be down after a disaster occurs. It represents the time within which the business process must be restored.

Measurable Outcome: A DRaaS plan should ensure that the RTO is minimized. For example, if the RTO is set at 2 hours, the measurable outcome would be the actual downtime experienced during a disaster recovery event. A successful DRaaS plan would consistently achieve an RTO close to or less than the target.

3.) Limit any loss of critical data for our constituents during a disaster by achieving a successful Recovery Point Objective (RPO).

RPO Definition: RPO is the maximum acceptable amount of data loss measured in time. It determines how far back in time the recovery process must go.

Measurable Outcome: The DRaaS plan should aim to reduce data loss to be within the acceptable limits set by the RPO. For instance, if the RPO is 15 minutes, the measurable outcome would be the amount of data lost during an actual disaster, ensuring it does not exceed the specified RPO.

Impacts to Other Departments

All supported agencies within the county that utilize our centrally hosted VM farm, backup services, and storage (FileNet) will have their data at the new DR site.

Business Continuity Plan:

This project will ensure that the county has an IT DR program in place that is functional and effective for our most critical applications utilizing a DRaaS Plan.

Benefits of DRaaS Plan:

1. Cost Efficiency

DRaaS eliminates the need for organizations to invest in and maintain their own disaster recovery infrastructure. By leveraging the cloud-based services of a DRaaS provider, businesses can reduce capital expenditures and operational costs associated with traditional disaster recovery solutions.

2. Scalability

DRaaS offers scalability, allowing organizations to adjust their disaster recovery resources based on their changing needs. Whether a business grows or downsizes, the DRaaS solution can be scaled accordingly, ensuring optimal resource allocation and cost-effectiveness.

3. Rapid Recovery

One of the primary advantages of DRaaS is its ability to provide rapid recovery in the event of a disaster. With predefined RPOs and RTOs, businesses can quickly restore their IT systems and resume operations, minimizing downtime and potential revenue loss.

4. Enhanced Security

DRaaS providers employ advanced security measures to protect data during transit and storage. This includes encryption, access controls, and regular security audits. By entrusting disaster recovery to a reputable DRaaS provider, organizations can enhance their overall data security posture.

5. Compliance and Regulatory Requirements

Many industries have strict compliance and regulatory requirements regarding data protection and disaster recovery. DRaaS solutions often come with certifications and adherence to industry standards, helping organizations meet their compliance obligations and avoid penalties.

PROJECT DETAILS

Scope and Deliverables:

1.) Implementation of DRaaS (Disaster Recovery as a Service) outside of our geographical plane. Developing a secondary DR data center site to host critical infrastructure that has significant geographical distance from the primary data center is a necessary requirement in a DR strategy.

2.) Implementation of Colocation services for our enterprise Cohesity backup infrastructure, Oracle Database Appliance, and NetApp Storage. To leverage the recent investment in our backup Cohesity infrastructure, Oracle Database Appliance, and NetApp Storage environment that is currently housed at the FCC, IT Services will identify a DRaaS organization that will allow us to move and install our backup Cohesity environment, Oracle Database Appliance, and NetApp Storage.

3.) Implementation of new redundant circuit and the attendant hardware and licenses for firewalls. This is a high availability firewall cluster running next generation firewall technology and an unlimited remote access VPN license. This solution includes 24x7x365 premium vendor support and will be managed by the Counties Security Team for monitoring, adds, moves & changes, troubleshooting and firmware/code upgrades.

4.) Ensure that VM level Replication is working. ITSD will partner with a DRaaS vendor that can support a redundant backup VM environment to be used for DR failover, in the event the County lost their primary data center located at the HOA. This will include data from critical systems that will be replicated to this redundant VM environment to ensure no loss of data.

5.) Conduct true periodic annual fail-over testing of each critical production application from HOA to the DRaaS location. With the planning and coordination from a DR Manager (or Project Manager), ITSD will implement annual fail-over testing of the county's most critical application to the designated DRaaS data center site and run production operations utilizing the combination or our CoLo infrastructure and the selected DRaaS vendor's infrastructure.

6.) Run the production environments at the hosted DRaaS service provider for a certain amount of time. This deliverable is in conjunction with Deliverable #5, to ensure that all critical applications can run successfully as production environments hosted by selected DRaaS vendor.

Key Components of a DRaaS Plan:

1. Data Backup and Replication

A core element of DRaaS is the regular backup and replication of data to the cloud. This ensures that in the event of a system failure or data loss, the most recent data is available for restoration. Organizations should determine the appropriate backup frequency and retention policies to meet their Recovery Point Objectives (RPOs) and Recovery Time Objectives (RTOs).

2. Disaster Recovery Site

The DRaaS provider typically offers a disaster recovery site where the organization's critical systems and data are replicated. This site serves as a secondary location that can take over operations seamlessly if the primary site is compromised. The recovery site should be geographically distant from the primary site to mitigate the risk of regional disasters.

3. Network Configuration

Proper network configuration is essential to ensure smooth failover and failback processes. This includes setting up secure and reliable connections between the primary and disaster recovery sites, ensuring data synchronization, and maintaining network performance during a disaster recovery event.

4. Testing and Validation

Regular testing and validation of the DRaaS plan are vital to ensure its effectiveness. Organizations should conduct periodic disaster recovery drills and simulations to verify that the plan works as intended and that all stakeholders are familiar with their roles and responsibilities during a disaster.

5. Monitoring and Reporting

Continuous monitoring and reporting are crucial for maintaining the integrity and performance of the DRaaS solution. Organizations should implement monitoring tools to track the status of data backups, replication processes, and system health. Timely reports help in identifying potential issues and taking corrective actions proactively.

Project Management Methodology

☒ Yes, we will be using the Project Leadership Academy Project Methodology (based on PMI Best Practices)

☐ We will be using an alternate methodology

❖ Alternate Methodology:

Project Plan

☐ Attached – We will be able to develop a project plan once the vendor of choice is selected and the project officially starts (post ITC and post Board of Supervisors)

PROJECT RISK, STAFFING AND STATUS

Risk Assessment Chart

Risk Description	Probability	Impact	Mitigating action
Incompatibility: DR site may not support all production workloads due to hardware/software mismatches	Medium	High	Standardize platforms and validate compatibility during planning
Data Replication Failure: Replication processes may fail or lag, leading to data loss	Medium	High	Use proven replication tools; test frequently; monitor replication status
Underestimated Budget: Hidden or unexpected costs exceed original budget	Medium	High	Conduct comprehensive cost analysis prior to preparing any documentation for the Board of Supervisors

Insecure Configuration: DR systems are improperly secured, exposing them to attacks	Medium	High	Apply production-equivalent security controls; audit configurations
Third-Party Vendor Risk: Vendor providing DR services may fail to deliver or go out of business	Medium	Low	The preferred vendor will be thoroughly vetted, and we will have defined SLA's and also exit clauses
Schedule Slippage: Project implementation takes longer than planned	High	Medium	If we use formal project management methods; track milestones and dependencies, then slippage should be sufficiently mitigated
Access Mismanagement: Inappropriate user permissions in DR systems	Medium	Medium	We will need to enforce least privilege and regularly review access controls
Network Latency or Bandwidth Issues: Connectivity between primary and DR sites may be insufficient	Medium	High	Perform network capacity planning and conduct bandwidth tests
Environmental Failures: Power or cooling issues at the DR site	Low	High	Preferred vendor site will be properly vetted for redundant power, cooling, and other disaster-rated facilities

Project staffing

Project Leads	
Title	**Name**
Project Sponsor	Terry Theobald
Project Manager	Joe Bacigalupi/Gary Gooden
Vendor Representative	

Internal Project Team	
Number of Staff:	8-15
Vendor Project Team	

Number of Staff:	3-10

Project Deliverables

Significant Project Task	Planned	Completed	Not Applicable	By Whom (Internal Staff, IT Services, Vendor, etc.)
Project Work Plan/Schedule	☒	☐	☐	**IT Services and Vendor**
Project Scope Definition	☐	☒	☐	**IT Services**
Project Requirements	☐	☒	☐	**IT Services**
System Build or Buy Analysis	☐	☒	☐	**IT Services**
County Tech. Standards Assessment	☐	☒	☐	**IT Services**
Software Procurement List	☐	☐	☒	
Software Development Plan	☐	☐	☒	
Hardware Procurement List	☒	☐	☐	**IT Services**
Equipment Site Preparation Plan	☒	☐	☐	**IT Services/Vendor**
Equipment Installation/Setup Plan	☒	☐	☐	**IT Services**
Software Install/Implementation Plan	☐	☐	☒	
Hardware Maintenance Plan	☒	☐	☐	**IT Services/Vendor**
Software Maintenance Plan	☐	☐	☒	
Licensing/Contract	☒	☐	☐	**IT Services**

PROJECT FUNDING: REQUIREMENTS AND SOURCES

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*ITC approval of this IPAQ does <u>not</u> include project funding. It is the responsibility of the submitting Department to obtain the funding necessary for the project. *

Cost: See attached DRaaS Rate Calculation Spreadsheet on pg. 9

PROJECT SAVINGS/EXPENSE REDUCTIONS

Estimated Savings: No savings identified

Project Assessment Questionnaire Cost Estimates

Item Category	Quantity/Description	Total $ Amount (Break out by FY in following columns)	FY 1 Cost	FY 2 Cost	FY 3 Cost	FY 4 Cost	FY 5 Cost	Ongoing/ Replace- ment Costs
One-Time DRaaS Vendor Installation Costs	DRaaS Vendor Setup Cost	$ 10,000	$10,000					
One-Time Network Equipment Costs	$250k in firewall hardware, switches/router, software and remote access VPN licensing	$ 250,000	$250,000					
One-Time Network Circuit Costs	Circuit Installation Costs	$ 3,000	$3,000					
Annual Support Costs	Annual Network Support Costs	$ 210,000	$42,000	$42,000	$42,000	$42,000	$42,000	
Annual Support Costs	Annual DRaaS Vendor Support Costs	$ 1,500,000	$300,000	$300,000	$300,000	$300,000	$300,000	
Annual Support Costs	Annaul Circuit Support Costs	$ 200,000	$40,000	$40,000	$40,000	$40,000	$40,000	
FTE Cost	DR Manager Position	$ 1,000,000	$200,000	$200,000	$200,000	$200,000	$200,000	
Project Totals		3,173,000	845,000	582,000	582,000	582,000	582,000	0

County of Ventura

IT Project Assessment Questionnaire

Evaluation Form

Department: IT Services

Project Name: DR Remediation

Project Contact/ Sponsor: Terry Theobald

Phone Number: 805-654-2744

Date: 4/4/2025

ITC approval of this IPAQ does not include project funding. It is the responsibility of the submitting Department to coordinate project funding with the County Executive Office.

1. Consistent with standards –	Yes ☒	No ☐	N/A ☐
2. Consistent with Policy –	Yes ☒	No ☐	N/A ☐
3. Leverages existing Countywide IT investments –	Yes ☒	No ☐	N/A ☐
4. Adequate Project staff, budget, and time –	Yes ☒	No ☐	N/A ☐

☐ See attached page

Comments/IT Services recommendations:

RECOMMEND APPROVAL AS PROPOSED.

Terry Theobald, CIO

Information Technology Committee

County of Ventura

ITC Project Status Report

Form Revised April 29, 2021

Agency/Department:	IT Services	Project Name:	Regional Radio System
Project Manager:	James Norris	Report Preparer:	James Norris
Report Preparer Contact:	Jim.norris@ventura.org	ITC Meeting Date:	4/24/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

To add a new 700 MHz Radio System and a new Microwave Network to support the new system and the current VHF radio system. The Sheriff's Office and several other local Police Departments and other government entities associated with public safety will be the primary users of the system. Fire may eventually begin to also use the 700 MHz Regional Radio System.

PROJECT SCOPE

Have there been any material changes in the project scope?

☒ *No, there have not been any changes in the project scope currently.*

☐ Yes, the project scope has increased to purchase

1a. Effects on budget: None

1b. Effect on schedule: None.

1c. Project Sponsor Approval:

PROJECT SCHEDULE

1. Is this project on schedule?

☒ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☐ *No, the project is not on schedule.*

    1a. Reasoning for change in schedule:

    1b. Revised implementation date:

    1c. Attach revised schedule:

PROJECT BUDGET

PROJECT BUDGET

Percentage of Budget Spent

$13,520,479, 37%
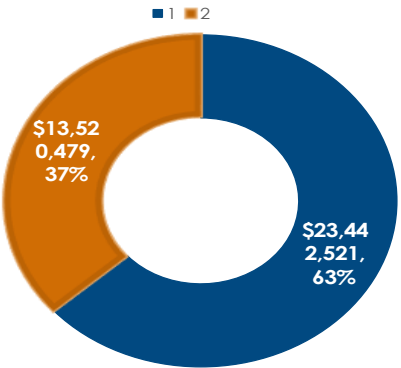
$23,442,521, 63%

Summary

IMPLEMENTATION COST
$36,963,000

TOTAL EXPENSES TO DATE
$13,520,479

PROJECT BALANCE
$23,442,521

TOTAL 5-YEAR COST
$17,500,000

1. *Is the project on budget?*

☐ *Yes, the project is tracking to the original approved budget.*

☒ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

☐ *No, the project is not on budget.*

    1a. Reasoning for budget change:

    1b. Attach revised budget:

RISK ASSESSMENT

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1. *Have any new risks been identified? NO*

Information Technology Committee

<table>
<tr><td rowspan="3">
COUNTY of VENTURA</td><td colspan="2">County of Ventura

ITC Project Status Report

Form Revised April 29, 2021</td></tr>
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Agency/Department:	Ventura ITSD	Project Name:	VCIJIS 2.0 Project
Project Manager:	Shekhar Iyer	Report Preparer:	Mike Kerr & Shekhar Iyer
Report Preparer Contact:	805-662-6642	ITC Meeting Date:	3/20/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

The current Ventura County Integrated Justice Information System (VCIJIS) application resides on a legacy platform that presents sustainability risks and limits opportunities to benefit from technology innovations. The VCIJIS 2.0 project will modernize VCIJIS via a hybrid architecture, as well as preserve and expand cross-agency data sharing between the Ventura County Sheriff's Office, District Attorney's Office, Public Defender's Office, Probation Agency, and Superior Court of California. The hybrid architecture will consist of off-the-shelf solutions, migrating some modules to the new and supportable architecture, and introducing a robust integration platform which will enable the various solutions to share information. This integration platform, in conjunction with the hybrid model, enables a phased approach for implementing the selected solutions for each justice agency, and allows other off-the-shelf products or in-house developed systems to be added in the future.

PROJECT SCOPE

Have there been any material changes in the project scope?

   ☒ *No, there has not been any changes in the project scope currently.*

   ☐ *Yes, the project scope has increased/decreased.*

       1a. Effects on budget:

       1b. Effect on schedule:

       1c. Project Sponsor Approval:

PROJECT SCHEDULE

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1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☒ *No, the project is not on schedule.*

1a. Reasoning for change in schedule:

Although some milestone dates have changed, the overall project completion date (FY 27) has not changed.

Previous ITC reports have identified specific reasons for the original changes, while this report highlights an additional factor contributing to the existing ones.

➢ The integration platform, designed with input from Gartner, Microsoft, and Quartech and implemented by Quartech, proved to be an over-engineered solution for the immediate need of data exchanges with the Versaterm RMS system. As a result, it had to be rearchitected to a simpler Azure-based solution.

➢ *Latency issues caused due to the firewall vendor's (Checkpoint) equipment software resulted in delays moving the CAD system to Versaterm AWS cloud.*
  o *Checkpoint is actively working on resolving this issue in the upcoming software upgrade.*

➢ *Availability of Sheriff's subject matter experts to properly configure Versaterm's RMS module has resulted in delays to the configuration and roll out.*
  o *New Command staff is committed to plan for SME time to bring the RMS rollout back on track.*

1b. Revised implementation date: For the milestone(s) that were impacted.

Integration Azure Setup: Mar 2025.

Probation Agency Vendor BOS Approval: Apr 2025

Sheriff JMS Vendor BOS Approval: Apr 2025

CAD Go Live on Cloud: May 2025

RMS Go Live on Cloud: May 2025

1c. Attach revised schedule:

The overall project completion date (FY 27) has not changed, although the schedule for Probation and Sheriff has the following adjustments.

<u>Probation Agency Solution:</u> Apr 2027

<u>Sheriff Office - Records Management System:</u> Sept 2025

<u>Sheriff Office - Jail Management System:</u> Apr 2027

<u>Lift & Shift – VCIJIS Migration:</u> Dec 2025

PROJECT BUDGET – AS OF AP 08 FY 25
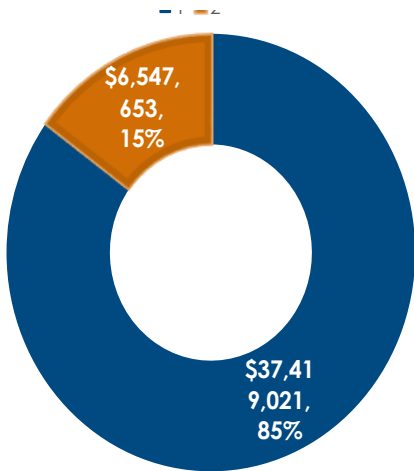
$43,966,674

TOTAL EXPENSES TO DATE

$6,547,653

PROJECT BALANCE

$37,419,021

TOTAL 5-YEAR COST

$43,966,673
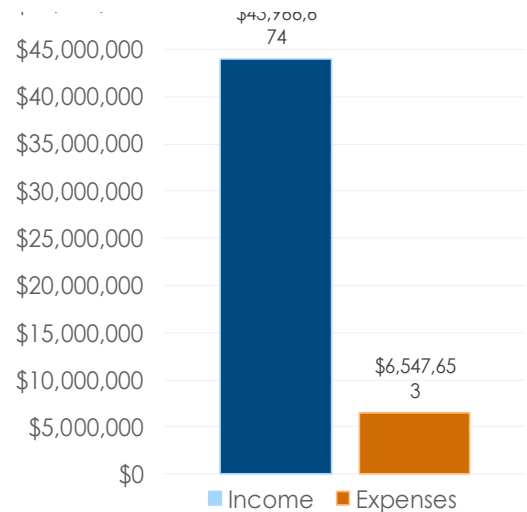
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1. *Is the project on budget?*

   ☒ *Yes, the project is tracking to the original approved budget.*

   ☐ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

   ☐ *No, the project is not on budget.*

1a. Reasoning for budget change:

1b. Attach revised budget:

RISK ASSESSMENT

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1. *Have any new risks been identified?*

    Yes

    -   *DCIO Mike Kerr is leaving the county and Pat Patterson (new Assistant Chief Information Officer) is stepping in to the overall project representing all agency solutions 3 weeks into joining ITSD.*

    -   *Availability of County Subject Matter Experts (SMEs) to complete User Acceptance Testing (UAT) for the migrated VCIJIS product within the 4-week timeline to validate all workflows.*

        ➢ *Communicating with agency heads 6 months in advance to allocate test resources to mitigate this risk.*

        ➢ *The vendor is bringing in a group of testers to assist in documenting the workflows to be tested as part of the UAT.*

        ➢ *Automated tools, such as PowerAutomate, are being explored to capture workflows for potential automation in testing some or all workflows.*

Information Technology Committee

County of Ventura

ITC Project Status Report

Form Revised April 29, 2021

Agency/Department:	RMA / Operations	Project Name:	Accela Cloud
Project Manager:	Chuck Chanin	Report Preparer:	Chuck Chanin
Report Preparer Contact:	Chuck.chanin@ventura.org	ITC Meeting Date:	4/24/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

Migrate Accela to Accela's managed service product in their cloud. Includes migrating all data.

PROJECT SCOPE

Have there been any material changes in the project scope?

☒ *No, there has not been any changes in the project scope currently.*

☐ *Yes, the project scope has increased/decreased.*

    1a. Effects on budget:

    1b. Effect on schedule:

    1c. Project Sponsor Approval:

PROJECT SCHEDULE

1. Is this project on schedule?

☒ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☐ *No, the project is not on schedule.*

    1a. Reasoning for change in schedule:

    1b. Revised implementation date:

    1c. Attach revised schedule:

PROJECT BUDGET

What is the total initial cost to implement solution? (Implementation Cost Only): $354,000

Annual costs: $480,000 in year 1, then $593,166 thereafter

Five (5) Year Cost: $5.3 Million

Means of Determination: Proposed contract

Available Funding: From RMA, Fire, Public Works

PROJECT BUDGET

Percentage of Budget Spent

■1 ■2

$0, 0%
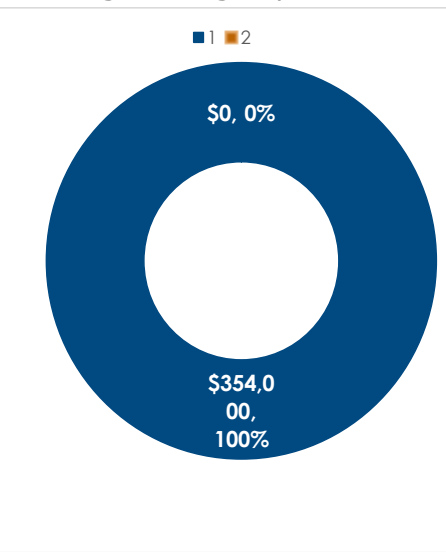
$354,0 00, 100%

Summary

IMPLEMENTATION COST

$354,000

TOTAL EXPENSES TO DATE

$0

PROJECT BALANCE

$354,000

TOTAL 5-YEAR COST

$5,300,000

$400,000
$350,000 — $354,000
$300,000
$250,000
$200,000
$150,000
$100,000
$50,000
$0 — $0

■ Income ■ Expenses

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1. Is the project on budget?

☒ *Yes, the project is tracking to the original approved budget.*

☐ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

☐ *No, the project is not on budget.*

    1a. Reasoning for budget change:

1b. Attach revised budget:

RISK ASSESSMENT

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1. Have any new risks been identified? No

Information Technology Committee

County of Ventura

ITC Project Status Report

Form Revised April 29, 2021

Agency/Department:	AUDITOR-CONTROLLER'S OFFICE	Project Name:	VCFMS Adv4 Upgrade and Cloud Transition
Project Manager:	Joanne McDonald	Report Preparer:	James Li
Report Preparer Contact:	805-645-1359	ITC Meeting Date:	4/24/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

Project Description

The current version (3.10) of the Ventura County Financial Management System (VCFMS) was deployed in Production in 2015 and this version is nearing end of support by the vendor, CGI. This project will upgrade the County's current VCFMS release to Adv4 and transition the County to the Advantage Cloud. The project will provide the County:

- A major version upgrade to VCFMS which includes a mobile first, role-based, intuitive, and modernized user experience. New capabilities include business roles, home pages, and a unified application experience.

- Planning, setup, and testing of steady-state operations in the CGI Advantage Cloud.

- Project team familiarization training.

- Updated VCFMS Interfaces.

- Updated VCFMS Forms.

- Support services to migrate the current VCFMS Reports from InfoAdvantage to Advantage Insight Essential (Power BI)

- Data migration script development, testing, and execution.

- VCFMS Adv4 application configuration.

- Configurations of the Advantage Intelligence Suite which includes Engage Hub (Flow), Sofia, and Advantage Assistant.

- Integrated system test planning, test scripts creation, and execution.

- User acceptance testing support.

- Performance testing.

- Trainer and End-User Training.

- Mock Conversion.

- Production Cutover.

PROJECT SCOPE

Have there been any material changes in the project scope?

☒ *No, there has not been any changes in the project scope currently.*

☐ *Yes, the project scope has increased/decreased.*

 1a. Effects on budget:

 1b. Effect on schedule:

 1c. Project Sponsor Approval:

PROJECT SCHEDULE

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1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

☒ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☐ *No, the project is not on schedule.*

*The upgrade went live on December 9, 2024, after a delay from the original target date of September 23, 2024. EngageHub, part of the Advantage Intelligence Suite, required the development of additional APIs to meet the County's requirements and is expected to be completed by **May 31, 2025.***

Key milestones revised in March 2025

 September 13, 2023: Project kick-off meeting (completed)

 November 1, 2024: Sprint-based critical-path tasks completion (completed)

 November 6, 2024: Build phase completion extended (completed)

November 25, 2024: Go / No Go decision (completed)

December 9, 2024: Production cutover revised (completed)

February 9, 2025: Post go-live support end (completed)

May 31, 2025: Release of the remaining feature (target)

PROJECT BUDGET

PROJECT BUDGET - ACTUAL	As of	03/31/2025
Percentage of Budget Spent	**Summary**	**Amount**
99.46%	Implementation Cost	**$5,950,551.00**
	Total Expenses to Date	**$5,918,551.00**
	Project Balance	**$32,000.00**
	Total 5-Year Cost	**$10,992,600.00**

1. Is the project on budget?

☐ *Yes, the project is tracking to the original approved budget.*

☒ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

☐ *No, the project is not on budget.*

1a. Reasoning for budget change:

1b. Attach revised budget:

A contract amendment for $560,351 was approved by the BOS requiring the use of the $300,000 project contingency and an additional $260,351 in funding which brings the total implementation cost to $5,950,551.

RISK ASSESSMENT

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1. Have any new risks been identified?

Yes.

EngageHub, part of the Advantage Intelligence Suite, required the development of additional APIs to meet the County's requirements. As a result, it was not ready by the end of post-go-live support on February 9, 2025. The APIs are currently available for testing. Any issues identified during testing could result in additional delays beyond the new target date of May 31, 2025.

Information Technology Committee

County of Ventura

ITC Project Status Report

Form Revised April 29, 2021

Agency/Department:	Assessor/Auditor-Controller/Treasurer-Tax Collector	Project Name:	Integrated Property Tax Assessment and Collection System
Project Manager:	Jeffrey Wineman	Report Preparer:	Jeffrey Wineman
Report Preparer Contact:	805-662-6644	ITC Meeting Date:	4/24/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

On March 12, 2013, the Board of Supervisors authorized a contract with an outside vendor to provide an integrated property tax system. The contract was terminated in November 2015 after a thirty-two-month delayed start date. There were no expenses incurred under that contract.

The County pursued an in-house solution. The project was presented and approved by the ITC on February 24, 2016 and the Financial Planning Committee on March 8, 2016. The Board approved and authorized for the Integrated Property Tax Assessment and Collection System on March 15, 2016.

- It is the goal of this project to replace all of the existing County property tax systems with a new, current state of technology, Property Tax System. The new system will be comprehensive, integrated and provide the means for the Assessor, Auditor-Controller, and Treasurer-Tax Collector, to more efficiently administer their statutory mandates and meet the increasing needs and expectations of their stakeholders and the public.

- The County is currently operating a number of aging systems and legacy applications to perform the functions of Assessment, Computation of Taxes, Tax Collection and Apportionment. The County developed these systems over the last 30 years on what are now antiquated computer platforms and with various software architectures.

- The main programs based on Model 204 and COBOL, are running on an IBM mainframe. In addition, there are other more recent supplemental applications built using client/server and web-based technologies. Many of these applications the departments independently developed with proprietary software such as PowerBuilder, Microsoft Excel and Access.

- The age of the numerous systems restrict flexibility and limits the availability of skilled resources to maintain the legacy technology. This situation creates a high risk for a revenue

system failure with insufficiently trained resources for maintenance and repair.

- Due to the fact approximately 90% of the County's General Purpose Revenue is collected using the Property Tax System, it is imperative that the County of Ventura maintains continuity of operations through the replacement of this core business system.

- This goal will be achieved by:

  o Retaining knowledge from existing employees and formalizing it in the system

  o Improving workflow, streamlining business processes, and enhancing information exchange among the three departments

  o Increasing access to information for County use

  o Upgrading technological capabilities to take advantage of current industry standards (for example, browser-based interfaces)

  o Effective management of computer platform costs

PROJECT SCOPE

Have there been any material changes in the project scope?

☒ *No, there has not been any changes in the project scope currently.*

☐ *Yes, the project scope has increased/decreased.*

PROJECT SCHEDULE

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1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☒ *No, the project is not on schedule.*

Mainframe operations completed on July 12, 2023. Production began on ORBIT July 24, 2023. This project was extended to December 31, 2024 to complete remaining project deliverables. Not all the remaining deliverables were completed by December 31. 2024. The open deliverables include ARC functionality, Teeter apportionment, RPTTF worksheet changes, daily balancing reports, and IT staff operations training. Propose extending contract completion to June 30, 2025.

   1B. Revised implementation date: June 30, 2025

   1c. Attach revised schedule:

ID	Task Name	Start	Finish
1	Property Tax Assessment and Collection System	Wed 6/1/16	Mon 6/30/25
2	Project Start	Wed 6/1/16	Wed 6/1/16
3	Business Analysis AS-IS Completed	Mon 10/3/16	Fri 5/26/17
4	Iteration Plan Started	Mon 5/8/17	Mon 5/8/17
5	Iteration Development	Mon 5/8/17	Fri 1/10/20
17	Assessor Module OASIS	Sat 2/1/20	Mon 10/31/22
18	System Testing	Sat 2/1/20	Tue 8/31/21
19	User Acceptance Testing	Mon 5/3/21	Fri 10/1/21
20	Go Live	Mon 10/4/21	Mon 10/4/21
21	System Test Support	Mon 11/1/21	Mon 10/31/22
22	Auditor-Controller Tax Collector Module ORBIT	Sat 2/1/20	Sat 9/30/23
23	Development Release 1	Sat 2/1/20	Thu 4/2/20
28	Development Release 2	Fri 4/3/20	Mon 6/1/20
33	Development Release 3	Sat 5/30/20	Sun 7/26/20
38	Development Release 4	Mon 7/27/20	Wed 9/16/20
43	Development Release 5	Thu 9/17/20	Sat 11/7/20
48	Development Release 6	Sun 11/8/20	Sat 12/26/20
53	System Testing	Fri 1/1/21	Sat 4/30/22
54	User Acceptance Testing	Mon 4/11/22	Fri 4/28/23
55	Conference Room Pilots	Sat 4/1/23	Wed 5/31/23
56	Transition	Sat 7/1/23	Sat 7/15/23
57	Go-Live	Sat 7/22/23	Mon 7/24/23
58	System Test Support	Tue 8/1/23	Mon 6/30/25

PROJECT BUDGET

IMPLEMENTATION COST	$19,000,000
$18,798,008	$18,800,000
	$18,600,000
TOTAL EXPENSES TO DATE	$18,400,000
$17,807,714	$18,200,000
	$18,000,000
PROJECT BALANCE	$17,800,000
$990,294	$17,600,000
TOTAL 5-YEAR COST	$17,400,000
$0	$17,200,000

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1. Is the project on budget?

☐ *Yes, the project is tracking to the original approved budget.*

☒ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*
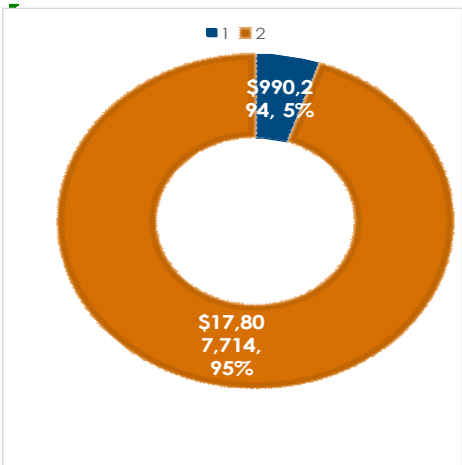
☐ *No, the project is not on budget.*

    1a. Reasoning for budget change:

    1b. Attach revised budget:

RISK ASSESSMENT

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1. *Have any new risks been identified? No*

Risk: The ability to maintain production velocity and the ability to fix bugs quickly.

   Risk impact: High

   Probability: High

   Mitigation: Very tight visibility on upcoming production tasks. Pre-testing functionality prior to usage for the first time. Prioritizing testing and bug fixes.

— Information Technology Committee —

	County of Ventura
	ITC Project Status Report
	Form Revised April 29, 2021

Agency/Department:	Public Works Agency	Project Name:	Cityworks Implementation
Project Manager:	Sean Hanley	Report Preparer:	Sean Hanley
Report Preparer Contact:	805-378-3046 sean.hanley@ventura.org	ITC Meeting Date:	4/24/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

Ventura County Water and Sanitation Department is a local water and sanitation retailer in the County of Ventura. The Department has an estimated 250 miles of potable water pipeline and 180 miles of sewer pipeline as well as a small recycled water system. The Department also operates numerous pump stations, regulating stations, reservoirs and revenue meters. The Department currently uses cloud based Sedaru Enterprise Asset Management Software to primarily track maintenance, scheduling, and work history.

Sedaru recently announced it will be ending service with limited contract extensions. Ventura County Water and Sanitation's contract is set to expire February of 2024 with a limited option to extend the contract until June of 2024.

The Department is looking to implement Cityworks as a new system of record to track asset maintenance, management, work history, and scheduling information. This includes dynamic interactive reporting, streamlined work management processes, and service request tracking. The system will seamlessly display Esri GIS information that enables effective and efficient delivery of services within the Asset Management Program.

The project will consist of Cityworks' Software as a Service (Saas) online annual subscription and implementation services through Centricity who is a Cityworks Business Partner.

PROJECT SCOPE

Have there been any material changes in the project scope?

☒ *No, there have not been any changes in the project scope currently.*

☐ *Yes, the project scope has increased/decreased.*

    1a. Effects on budget:

    1b. Effect on schedule:

    1c. Project Sponsor Approval:

PROJECT SCHEDULE

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1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☒ *No, the project is not on schedule.*

    1a. Reasoning for change in schedule: It was discovered that data was missing from the old Sedaru software. Request was made for missing data but caused minor delay. History transfer is making progress and is now in a test environment for our review before going live.

    1b. Revised implementation date: 6/30/25

    1c. Attach revised schedule: See attached schedule.

PROJECT BUDGET
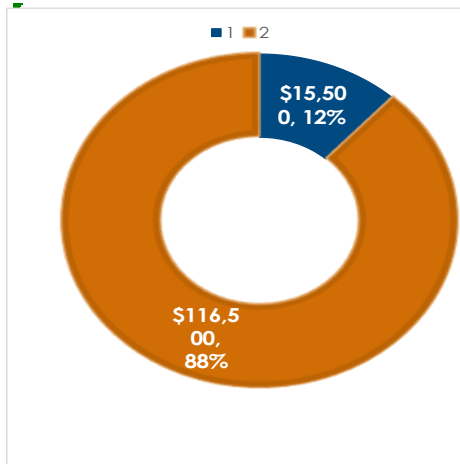
IMPLEMENTATION COST

$132,000

TOTAL EXPENSES TO DATE

$116,500

PROJECT BALANCE

$15,500

TOTAL 5-YEAR COST

$348,290
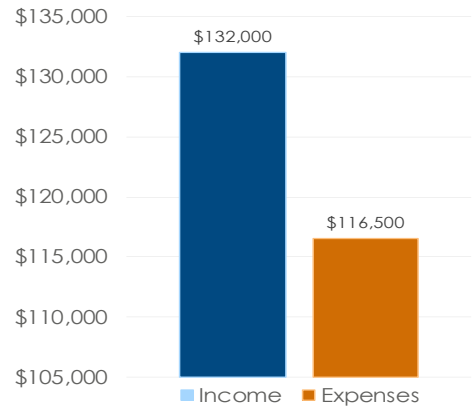
1. Is the project on budget?

☒ *Yes, the project is tracking to the original approved budget.*

☐ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

☐ *No, the project is not on budget.*

1a. Reasoning for budget change:

1b. Attach revised budget:

RISK ASSESSMENT

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1. *Have any new risks been identified? No.*

Task Description	Assigned To	Status	Est. Start	Est. End
1. Workflow Review Meetings	Centricity/Ventura County	Complete	01/03/24	01/5/24
2. Initial Cityworks Database Configuration	Centricity	Complete	01/08/24	04/15/24
3. Database Review	Centricity/Ventura County	Complete	05/01/24	05/24/24
4. Additional Cityworks Information Configuration	Centricity	Complete	03/25/24	04/19/24
5. Conduct Admin Training	Centricity	Complete	05/28/24	05/28/24
6. Conduct End User Training	Centricity	Complete	05/29/24	05/31/24
7. Cityworks Roll Out Support	Centricity	Current	06/03/24	06/06/24
8. Ad-Hoc Support	Centricity	Pending	06/07/24	Until Hours Exhausted (40 hrs)
9. Cityworks Storeroom Setup	Centricity	Complete	02/1/24	03/1/24
10. Historical Data Migration	Centricity	In Progress	04/1/24	06/30/25
11. Centricity Locates (DigAlert) Configuration	Centricity	Complete	04/15/24	04/30/24
12. Trimble Unity Configuration	Centricity	Complete	05/15/24	06/06/24

———— Information Technology Committee ————

County of Ventura

ITC Project Status Report

Form Revised April 29, 2021

Agency/Department:	VCHCA Ambulatory Care	Project Name:	VCHCA Ambulatory Care Clinic Integration CPM & Experian eCare NEXT
Project Manager:	Michelle Galles	Report Preparer:	Michelle Galles
Report Preparer Contact:	Michelle.galles@ventura.org	ITC Meeting Date:	3/27/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

The VCHCA Ambulatory Care clinic integration effective July 1, 2021, has resulted in the need for process improvements, standardization, and centralization of existing workflow to improve patient access and the patient experience. Based on recommendations, from the clinic integration assessment, HCA created a work group to explore benefits associated with implementing the CPM solution. Based on AmbCare requirements to support workflow and process improvements, implementation of CPM, Experian eCare Next and RevElate is recommended to support hospital and clinic patient registration, scheduling and RCM.

Experian eCare NEXT is an integrated solution suite of Experian Health products (containing Premium Eligibility, Registration Quality Assurance/RQA, Patient Estimates, and Coverage Discovery, that creates an intelligent and automated patient access workflow in a single user interface.

PROJECT SCOPE

Scope: VCHCA will implement CPM with eCareNext-Experian to support end to end process improvement. Personalized and comprehensive outpatient healthcare services are provided at 40 clinic sites throughout Ventura County; of these, 18 are Federally Qualified Health Centers (FQHCs).

VCHCA will implement Patient Status Orders automation as the clinical source of truth. Automation of the Patient Status Orders ensures a clinically driven revenue cycle by aligning clinician orders directly to the patient's status, allowing organizations to request and retain appropriate reimbursement.

Patient Access Optimization includes the work effort to transition staff to a new user experience within the Revenue Cycle executable for Patient Access roles across acute and ambulatory venues of care from the Scheduling Appointment Book and Access Management Office applications.

Admission Order Optimization includes the work effort to eliminate manual touches to the registration conversations and drive workflow and compliance with automated Patient Status Orders within Powerchart for Provider, CM and Nursing roles across the acute venues of care.

- The new scheduling workflows are simplified with a single user experience.
- Scheduling workflows across support a centralized call center by providing a comprehensive picture of a patient's past, future, and requested appointments across the health system.
- New patient check-in enhancements such as Patient Tracking, inclusive of patient photo, key encounter information, statuses, and financial responsibility presented face up
- Improved Scheduling Request Queues show more face-up patient information.
- Automated queues that make it easier for staff to schedule requests.
- More integrated clinical and patient access document management process
- Take advantage of the new Patient appointment preferences – including provider sex, time of day, reminder type – which are easily saved to create a more streamlined appointment scheduling process and experience.
- The Related appointments alert function ensures same day, linked, and future series appointments stay tied when canceling or rescheduling which are especially important with complex oncology regimens.
- Experian eCareNEXT platform with Registration Quality Alerts (RQA), Premium Eligibility, Patient Estimates, Self-service Patient Estimates and Coverage Discovery© which align with the County supported Revenue Cycle operational goals and objectives, projected return on investments and provide high-level implementation timeline plan. eCare NEXT is a suite of Experian Health products that integrate with patient access solutions in real time, through triggered interactions, or through a work queue.
- Patient Status Orders accomplish real time updates to include.
  - Encounter Updates through clinical Documentation
  - Compliance Confidence
    - Reduction in Insurance Defense Audits and Service Level Denials
    - Eliminates Human Error.
    - Ensures monitored procedures are excluded from observation hours.
  - Reduced Manual Work Steps
    - Updates are not dependent on communication with Registration.
    - Reduces charge audit interventions.
  - Provides real-time updates in all Oracle Cerner products.
    - Eliminate delays in updates and transparency.
-

Have there been any material changes in the project scope?

    ☒ *No, there has not been any changes in the project scope currently.*

    ☐ *Yes, the project scope has increased/decreased.*

1a. Effects on budget:

1b. Effect on schedule:

1c. Project Sponsor Approval: Bach Nguyen

PROJECT SCHEDULE

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1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☒ *No, the project is not on schedule.*

1a. *Experian Patient Estimates (PE) is live for Acute and Ambulatory is delayed. Self-Service PE has been built for 18 payers. Testing is complete, with one issue pending Experian. Go-live is blocked by two open issues (#041469405 & #04146431), pending Patrick O'Connor's input.*

1b. *Gold Coast's new portal is technically live. However, the 270 file is missing PCP, Aid, and County Code. Gold Coast proposed two solutions to Edifecs; a decision is expected by 3/25.*

1c. *PM Lisa Giraudi received the SOAP spec. TPA has been secured from Procurement. Experian has opened a JIRA; ETA for the build is pending.*

1d. *Cerner IDs are required to complete automated eligibility for Imperial and VCHCP. Alignment has been built, mapped, and is live. BAA is executed for Imperial; TPA execution is pending to open the JIRA.*

1e. *Revised schedule is attached with updated Experian dates*

VCHCA
AC_CPM_eCareNext_

CPM
OPT-0302375.xlsx

CM_ProjectPlan_Stat
us_03.24.2025.xlsx

PROJECT BUDGET

PROJECT BUDGET

Percentage of Budget Spent

- 1
- 2
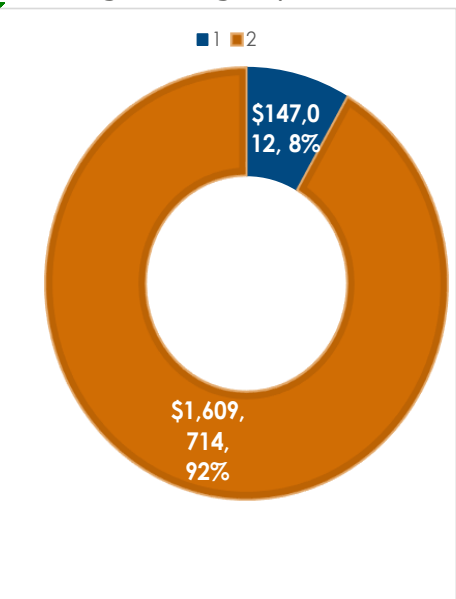
$147,012, 8%

$1,609,714, 92%

Summary

IMPLEMENTATION COST

$1,756,726

TOTAL EXPENSES TO DATE

$1,609,714

PROJECT BALANCE

$147,012

TOTAL 5-YEAR COST

$3,931,488
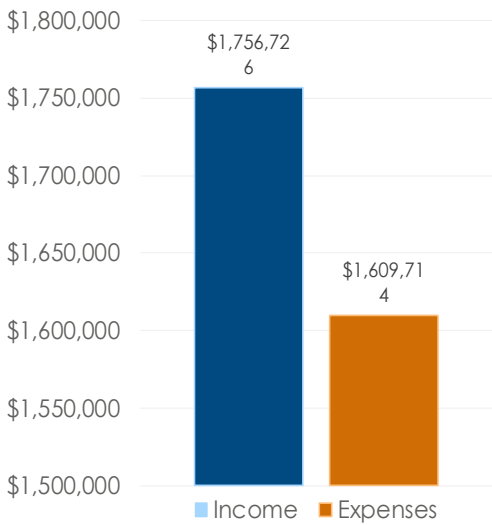
$1,800,000

$1,756,726

$1,750,000

$1,700,000

$1,650,000

$1,609,714

$1,600,000

$1,550,000

$1,500,000

- Income
- Expenses

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1. Is the project on budget?

⊠ *Yes, the project is tracking to the original approved budget.*

☐ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

☐ *No, the project is not on budget.*

> *1a. Reasoning for budget change:*

> *1b. Attach revised budget:*

RISK ASSESSMENT

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1. Have any new risks been identified? IT 1 event should have been cancelled due to Registration Conversation build incomplete. These findings were brought to the attention of the CIO and Oracle Health. A new timeline has been established with Oracle Health Cerner and Experian. There are no risks with the new timeline and we are tracking to a February 5th Go Live.

Task Name	Duration	Start	Finish	% Complete
Experian Contract Manager (CM) H Hospital & MG Physician	**367 days**	**Tue 7/9/24**	**Thu 12/4/25**	**57%**
VCHCA Initiation & Planning	**186.5 days**	**Thu 8/1/24**	**Fri 4/18/25**	**90%**
Pre Kick-Off Project Manager Client Introduction	1 day	Thu 8/1/24	Thu 8/1/24	100%
Portal Setup	2 days	Fri 8/2/24	Mon 8/5/24	100%
Experian-VCHCA Client Technical Call	1 day	Thu 8/22/24	Thu 8/22/24	100%
Create Contract Manager JIRAs	1 day	Fri 9/20/24	Fri 9/20/24	100%
Validate Connectivity with Experian Integration Engineer	20 days	Fri 8/23/24	Thu 9/19/24	100%
sFTP Configuration	1 day	Tue 10/1/24	Tue 10/1/24	100%
Confirm existing sFTP setup for Acute/Hospital 835/837	1 day	Wed 10/2/24	Wed 10/2/24	100%
Setup separate sFTP for the Medical Group for 1500 claims with McKenna data center	30 days	Wed 10/2/24	Fri 4/18/25	50%
Download Client Contract into Client Folder on the Share drive	1 day	Fri 8/23/24	Fri 8/23/24	100%
Review Client contract	2 days	Mon 8/26/24	Tue 8/27/24	100%
Notify Enrollment Department @ Passport	1 day	Wed 8/28/24	Wed 8/28/24	100%
Send enrollment information to CHIP	2 days	Thu 8/29/24	Fri 8/30/24	100%
Obtain CHIP confirmation email	1 day	Mon 9/2/24	Mon 9/2/24	100%
Enable Pic Pharm	2 days	Tue 9/3/24	Wed 9/4/24	100%
Schedule Project Kick-Off	0.5 days	Thu 9/5/24	Thu 9/5/24	100%
Onboarding (initial set up of IDs and internal test user)	10 days	Fri 8/23/24	Thu 9/5/24	100%
Experian/Client Estimates Kick-Off	1 day	Thu 9/19/24	Thu 9/19/24	100%
Schedule Weekly Project Team Meetings	1 day	Fri 9/20/24	Fri 9/20/24	100%
Vendor Project Plan review	3 days	Wed 11/6/24	Mon 11/11/24	100%
Payer Credentials Review	5 days	Fri 9/20/24	Thu 9/26/24	100%
Create enhanced payer creditials template	5 days	Fri 9/20/24	Thu 9/26/24	100%
Discovery	52.5 days	Wed 10/23/24	Wed 1/29/25	100%
Weekly Project Team Meeting	**85.25 days**	**Wed 10/23/24**	**Wed 2/19/25**	**100%**
Weekly Project Team Meetings	**175.25 days**	**Mon 2/24/25**	**Mon 10/27/25**	**12%**
Contract Build Dependency (PE)	245 days	Tue 7/9/24	Tue 6/17/25	73%
CMH & CMG Build & Configuration	**202.25 days**	**Wed 10/23/24**	**Fri 8/1/25**	**56%**
Decision of Historical Data for Hospital & Physician Claims	0.25 days	Wed 10/23/24	Wed 10/23/24	100%
Identify Split Claim Scenarios & ID Methodology	10 days	Wed 10/23/24	Wed 11/6/24	100%

Task	Duration	Start	Finish	%
Review Technical Specs & Questionaire for Hospital & Medical Groups	20 days	Wed 10/23/24	Wed 11/20/24	50%
Request DBA for Extract File from Cerner	1 day	Wed 10/23/24	Thu 10/24/24	100%
Identify DBA Scope	10 days	Thu 11/7/24	Thu 11/21/24	100%
Open JIRA in Cerner	1 day	Thu 11/21/24	Fri 11/22/24	100%
Obtain OD & SOW from Oracle	64 days	Thu 11/21/24	Wed 2/19/25	100%
Obtain Approval of OD & SOW	3 days	Thu 2/20/25	Tue 2/25/25	75%
Complete JIRA for DBA assignment & scope	90 days	Fri 11/22/24	Fri 3/28/25	25%
Set up Extract Manager to send standard financial extract files to vendor Experian and provide twelve (12) months of file transfer monitoring service.	30 days	Fri 3/28/25	Fri 5/9/25	0%
DBA create Extract file per Scope for CM MG	45 days	Fri 3/28/25	Fri 5/30/25	0%
Populate Contract Definition Grid	4 days	Wed 10/23/24	Tue 10/29/24	100%
Submit Contracts & Create Cases	40 days	Tue 10/29/24	Tue 12/24/24	100%
Define Split Claims & How to Identify	10 days	Wed 10/23/24	Wed 11/6/24	100%
Submit Payer Mapping Codes	10 days	Wed 10/23/24	Wed 11/6/24	100%
Submit Provider Specialty List	10 days	Wed 10/23/24	Wed 11/6/24	100%
Submit ANSI codes (if applicable)	10 days	Wed 10/23/24	Wed 11/6/24	100%
Complete Client Business Analysis (If applicable)	15 days	Tue 10/29/24	Tue 11/19/24	100%
Payor Contract Definition & Internal Testing	40 days	Tue 12/24/24	Tue 2/18/25	50%
Contract Manager Hospital (CMH)	**81 days**	**Wed 10/23/24**	**Thu 2/13/25**	**92%**
Open SR to pull Supplemental Data	1 day	Wed 10/23/24	Thu 10/24/24	100%
Create Historical data pull for 7/1/23 forward for CMH	10 days	Thu 10/24/24	Thu 11/7/24	100%
Setup Daily file creation and submission via sFTP for CMH	5 days	Thu 10/24/24	Thu 10/31/24	100%
Initial Data Extract	15 days	Thu 11/7/24	Thu 11/28/24	100%
Validate Data Extract	5 days	Thu 11/28/24	Thu 12/5/24	100%
Load Historical Data 7/1/2023-	10 days	Thu 12/5/24	Thu 12/19/24	100%
Review & Build UB Grid	5 days	Wed 10/23/24	Wed 10/30/24	100%
Data Reconciliation and Integrity Validation	10 days	Thu 1/30/25	Thu 2/13/25	50%

Complete CMH Build	0 days	Thu 2/13/25	Thu 2/13/25	0%
Contract Manager Medical Group (CM MG)	**45 days**	**Fri 5/30/25**	**Fri 8/1/25**	**0%**
Create Historical data pull for 7/1/23 forward for CM MG	5 days	Fri 5/30/25	Fri 6/6/25	0%
Setup Daily file creation and submission via sFTP for CM MG	5 days	Fri 6/6/25	Fri 6/13/25	0%
Initial Data Extract	15 days	Fri 6/6/25	Fri 6/27/25	0%
Validate Data Extract	5 days	Fri 6/27/25	Fri 7/4/25	0%
Load Historical Data 7/1/2023-	10 days	Fri 7/4/25	Fri 7/18/25	0%
Data Reconciliation and Integrity Validation	10 days	Fri 7/18/25	Fri 8/1/25	0%
Complete CMG Build	0 days	Fri 8/1/25	Fri 8/1/25	0%
Testing	**146.25 days**	**Wed 1/22/25**	**Thu 8/14/25**	**30%**
Claim Status - Testing	20 days	Thu 3/13/25	Thu 4/10/25	0%
Request (5) claim examples from client for each payer	10 days	Wed 1/22/25	Wed 2/5/25	100%
Provide EOB Claim Examples	10 days	Wed 2/12/25	Wed 2/26/25	100%
Capture screen shots of claim examples per payer	10 days	Wed 2/26/25	Wed 3/12/25	100%
Process Test File	10 days	Wed 3/12/25	Wed 3/26/25	0%
Internal BA/Programmer Test File Review (Confirmation)	10 days	Wed 3/26/25	Wed 4/9/25	0%
ClientTest File Review	10 days	Wed 4/9/25	Wed 4/23/25	0%
CMH Data Reconciliation & Integrity Validation	10 days	Wed 4/23/25	Wed 5/7/25	0%
CM MG Data Reconciliation & Integrity Validation	9 days	Fri 8/1/25	Thu 8/14/25	0%
Testing Complete	0 days	Thu 8/1/24	Thu 8/1/24	0%
Training CMH & CMG	**147.25 days**	**Wed 1/22/25**	**Fri 8/15/25**	**96%**
Identify Super Users	0.5 days	Wed 1/22/25	Wed 1/22/25	100%
Identify End Users	0.5 days	Wed 1/22/25	Wed 1/22/25	100%
Create Training Request	1 day	Wed 1/22/25	Thu 1/23/25	100%
Prepare for Training	1 day	Thu 1/23/25	Fri 1/24/25	100%
Setup Super Users	10 days	Wed 1/22/25	Wed 2/5/25	100%
Schedule Super Users	2 days	Wed 2/5/25	Fri 2/7/25	100%
Super User Training	3 days	Mon 3/10/25	Thu 3/13/25	100%
End User Training	3 days	Mon 3/10/25	Thu 3/13/25	100%
Schedule Knowledge Transfer Training	1 day	Thu 3/13/25	Fri 3/14/25	100%

Knowledge transfer: Consultant to Trainer	1 day	Thu 3/13/25	Fri 3/14/25	100%
Prepare for Go Live Workshop Training	1 day	Fri 3/14/25	Mon 3/17/25	100%
CMG Training	1 day	Thu 8/14/25	Fri 8/15/25	0%
Training Complete	0 days	Fri 8/15/25	Fri 8/15/25	0%
Go Live CMH & CM MG	**130.75 days**	**Mon 3/17/25**	**Tue 9/16/25**	**0%**
CMH Go Live	**26 days**	**Mon 3/17/25**	**Tue 4/22/25**	**0%**
Go-Live Contract Management System in Production	1 day	Mon 3/24/25	Tue 3/25/25	0%
CMH Enable Payors	1 day	Mon 3/24/25	Tue 3/25/25	0%
Go Live Training Workshop	13 days	Mon 3/17/25	Thu 4/3/25	0%
CMH Monitor Transactions	20 days	Tue 3/25/25	Tue 4/22/25	0%
CMH Go Live Support	20 days	Mon 3/24/25	Fri 4/18/25	0%
CM MG Go Live				**0%**
Go-Live Contract Management System in Production	1 day	Mon 8/18/25	Tue 8/19/25	0%
CM MG Enable Payors	1 day	Mon 8/18/25	Tue 8/19/25	0%
CM MG Monitor Transactions	20 days	Tue 8/19/25	Tue 9/16/25	0%
Identify Post Go Live Support Resources	1 day	Tue 8/19/25	Wed 8/20/25	0%
CM MG Go Live Support	20 days	Tue 8/19/25	Tue 9/16/25	0%
Go Live Complete	0 days	Tue 9/16/25	Tue 9/16/25	0%
Power Reporting (PR)	**156.75 days**	**Fri 4/25/25**	**Tue 12/2/25**	**0%**
CM Hospital Power Reporting (PR)	**62 days**	**Fri 4/25/25**	**Tue 7/22/25**	**0%**
Client Discovery Call	1 day	Fri 4/25/25	Mon 4/28/25	0%
PR Data Collection	**3 days**	**Mon 4/28/25**	**Thu 5/1/25**	**0%**
Report Specifications	1 day	Mon 4/28/25	Tue 4/29/25	0%
Client/ PMS / HIS Details	1 day	Tue 4/29/25	Wed 4/30/25	0%
End - User Details	1 day	Wed 4/30/25	Thu 5/1/25	0%
PR Build	**15 days**	**Thu 5/1/25**	**Thu 5/22/25**	**0%**
Submit database / report creation	2 days	Thu 5/1/25	Mon 5/5/25	0%
Build report based on PMS Template	10 days	Mon 5/5/25	Mon 5/19/25	0%

Validate report based on PMS Template	3 days	Mon 5/19/25	Thu 5/22/25	0%
Power Report Training				**0%**
PR Training	3 days	Mon 6/2/25	Thu 6/5/25	0%
Power Reporting Go Live	**31 days**	**Mon 6/9/25**	**Tue 7/22/25**	**0%**
PR Go Live	1 day	Mon 6/9/25	Tue 6/10/25	0%
PR Report Monitoring/Support	30 days	Tue 6/10/25	Tue 7/22/25	0%
CM Medical Group Power Reporting (PR)	**54 days**	**Wed 9/17/25**	**Tue 12/2/25**	**0%**
Client Discovery Call	1 day	Wed 9/17/25	Thu 9/18/25	0%
PR Data Collection	**3 days**	**Thu 9/18/25**	**Tue 9/23/25**	**0%**
Report Specifications	1 day	Thu 9/18/25	Fri 9/19/25	0%
Client/ PMS / HIS Details	1 day	Fri 9/19/25	Mon 9/22/25	0%
End - User Details	1 day	Mon 9/22/25	Tue 9/23/25	0%
PR Build	**15 days**	**Tue 9/23/25**	**Tue 10/14/25**	**0%**
Submit database / report creation	2 days	Tue 9/23/25	Thu 9/25/25	0%
Build report based on PMS Template	10 days	Thu 9/25/25	Thu 10/9/25	0%
Validate report based on PMS Template	3 days	Thu 10/9/25	Tue 10/14/25	0%
Power Report Training	**3 days**	**Tue 10/14/25**	**Fri 10/17/25**	**0%**
PR Training	3 days	Tue 10/14/25	Fri 10/17/25	0%
Power Reporting Go Live	**31 days**	**Mon 10/20/25**	**Tue 12/2/25**	**0%**
PR Go Live	1 day	Mon 10/20/25	Tue 10/21/25	0%
PR Report Monitoring/Support	30 days	Tue 10/21/25	Tue 12/2/25	0%
Power Report Complete	0 days	Tue 12/2/25	Tue 12/2/25	0%
Transition to Support	**161.75 days**	**Tue 4/22/25**	**Thu 12/4/25**	**0%**
CM Hospital Closure and Transition	**1 day**	**Tue 4/22/25**	**Wed 4/23/25**	**0%**
Transition to Optimization Team	1 day	Tue 4/22/25	Wed 4/23/25	0%
Transition to Relationship Management	1 day	Tue 4/22/25	Wed 4/23/25	0%
Claims Status Closure and Transition	1 day	Tue 4/22/25	Wed 4/23/25	0%
CM Physician Closure and Transition				**0%**

Transition to Optimization Team	1 day	Tue 9/16/25	Wed 9/17/25	0%
Transition to Relationship Management	1 day	Tue 9/16/25	Wed 9/17/25	0%
Claims Status Closure and Transition	1 day	Tue 9/16/25	Wed 9/17/25	0%
CM Power Reporting Closure and Transition				**0%**
Transition to Optimization Team	1 day	Tue 12/2/25	Wed 12/3/25	0%
Transition to Relationship Management	1 day	Wed 12/3/25	Thu 12/4/25	0%
Transition to Support Complete	0 days	Thu 12/4/25	Thu 12/4/25	0%

Information Technology Committee

	County of Ventura
	ITC Project Status Report
	Form Revised April 29, 2021

Agency/Department:	Public Defender	Project Name:	Laserfiche
Project Manager:	Araceli Correa	Report Preparer:	Araceli Correa/Scott Burns
Report Preparer Contact:	805-477-7138	ITC Meeting Date:	1/23/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

The Public Defender Laserfiche-based Enterprise Content Management (ECM) system will provide a more organized and retrievable electronic method for receipt, creation, storage, and circulation of documents and other electronic content. The system also will improve and automate numerous business processes.

Laserfiche ECM will allow for the more efficient, electronic flow of information in cases as the Public Defender's Office moves toward eliminating hard copy case files. Agencies will be able to submit legal discovery to the Public Defender's Office electronically, including reports, photographs, and video evidence. Internal handling of case documents will be primarily electronic, eliminating time spent reproducing, transporting, and locating hard files.

In addition, business processes currently performed manually will be automated using Laserfiche software. The system will be used for electronic organization, workflow improvement, and data retention, particularly in the areas of fiscal services, human resources, and management. ECM will streamline numerous repetitive processes, creating efficiency, eliminating paper waste, reducing traditional storage needs, and ensuring the preservation of essential official documents.

PROJECT SCOPE

Have there been any material changes in the project scope?

☒ *No, there has not been any changes in the project scope currently.*

☐ *Yes, the project scope has increased/decreased.*

PROJECT SCHEDULE

---

1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☒ *No, the project is not on schedule.*

1a. Reasoning for change in schedule: Resource availability for Public Defender's Office and Vendors due to COVID has delayed project activities including digitization, media processing, and Laserfiche workflow. Issues were identified. We need to extend the project closure date to December 2025 because we need more time to scan the files and create a Probate Intake window in our system.

1B. Revised implementation date: Revised implementation dates are indicated in the project schedule below.

1c. Attach revised schedule:

Task Description	Status	Est. Start	Est. End
1. Project Kickoff	Complete	January 2019	January 2019
2. Laserfiche RIO Licensing Purchasing	Complete	May 2019	March 2020
3. Laserfiche Repository Design and Implementation	Complete	April 2020	January 2022
4. Digitization of Historical Files (Viatron)	Complete	May 2020	June 2022
5. Media Processing	Complete	June 2021	June 2022
6. VCIJIS/Laserfiche Integration	Complete	July 2021	November 2021
7. Laserfiche Workflow for District Attorney Discovery	Complete	May 2021	December 2021
8. Laserfiche Forms Design and Implementation	Cancelled	November 2021	October 2022

Task Description	Status	Est. Start	Est. End
9. Laserfiche Training of Staff	Completed	November 2022	November 2022
10. Scan/Digitize Mental Health Cases	Completed	October 2022	December 2023
11. Scan/Digitize Probate and Family Contempt Cases	In Progress	January 2024	December 2025
12. Close Project	Pending		

PROJECT BUDGET

PROJECT BUDGET

Percentage of Budget Spent
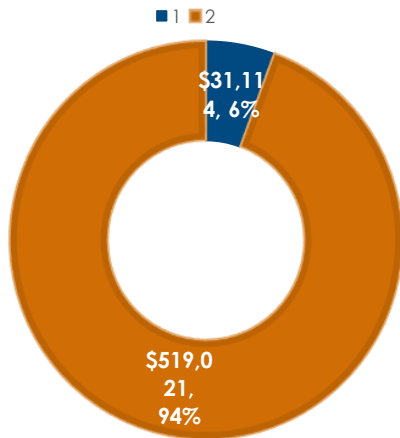
$31,114, 6%

$519,021, 94%

Summary

IMPLEMENTATION COST

$550,135

TOTAL EXPENSES TO DATE

$519,021

PROJECT BALANCE

$31,114

TOTAL 5-YEAR COST

$657,159

1. Is the project on budget?

☒ *Yes, the project is tracking to the original approved budget.*

☐ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

☐ *No, the project is not on budget.*

  1a. Reasoning for budget change:

  1b. Attach revised budget:

RISK ASSESSMENT

1. *Have any new risks been identified?*

   ☐ *No, no new risks have been identified.*

   ☒ *Yes, new risks have been identified.*

   A critical workflow was terminated because the server had insufficient resources. This workflow sends a list of cases that are transferred from Escrow to PD repository daily. This email notification is business critical and without it, our employees would not be able to complete their job. ECS investigated the issue and found that the Tax Collector agency was processing an abnormally large amount of data (21 zipped folders size unknown) and recommended to increase the Messaging Queue Memory from 1GB to 2GB.

   This is the first time that a critical workflow is terminated, but we can't have this happen again. We're working with County IT to figure out if a shared server environment will work for us because we've had other issues as well. It seems like the server might not have enough resources to support a multi-agency environment.
   We are monitoring the situation and looking to explore our options.

   From: workflow@ventura.org <workflow@ventura.org>
   Sent: Wednesday, December 25, 2024 6:00 AM
   To: PD IT <PDIT@ventura.org>
   Subject: 1 workflow has been terminated since 12/24/2024 6:00 AM

   ## The following workflows have been terminated since 12/24/2024 6:00 AM Pacific Standard Time

   - PD Cases from Escrow Filing – Email Notification V2 (1 Instance)

   ### PD Cases from Escrow Filing – Email Notification V2

#	Initiator	End Time	Error	Instance
1		12/24/2024 2:06 PM [4 m 35 s]	An error occurred while sending to the queue: There are insufficient resources to perform this operation. (–1072824281, 0xc00e0027).Ensure that MSMQ is installed and running. If you are sending to a local queue, ensure the queue exists with the required access mode and authorization. [InvokeWorkflow]	313c9761–ac64–43c0–9502–32a641309cd7

   Top

   Generated by Laserfiche Workflow

—— **Information Technology Committee** ——

County of Ventura

ITC Project Status Report

Form Revised April 29, 2021

Agency/Department:	HCA	Project Name:	Medical Grade Network
Project Manager:	Mark Rose	Report Preparer:	Bach Nguyen, HCA CIO
Report Preparer Contact:	Mark.Rose@ventura.org	ITC Meeting Date:	4/24/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

Project Description

Healthcare business requires a network infrastructure designed and configured specially for healthcare to support not only the Electronic Health Records system, but also patient care systems, medical systems, patient monitoring equipment, biomedical equipment, and patient care technologies. Due to the importance of patient care and patient safety, this network infrastructure needs to be a "Medical Grade Network" (MGN) that addresses the unique requirements of the mission critical healthcare organizations. As a healthcare provider and Level II Trauma Center, the medical center cannot tolerate a moment of downtime. The MGN is designed and built around the needs of patients to improve health outcomes and to be highly resilient, high performance, highly scalable, highly accessible, highly secured, and highly responsive to meet the healthcare real time and dynamic needs. It has been a de facto standard in healthcare for two decades and widely adopted by most healthcare organizations.

This project is to replace our aging and outdated wired and wireless network infrastructure at the VCMC campus to support our digital transformation effort to a smart hospital by deploying the new Software Defined Network (SDN) architecture and the latest Wi-Fi standard 6e with Cisco DNA Center and SDA (Software Defined Access). The new architecture will allow IT staff to more efficiently support and deploy new services by virtually grouping and securing those services. It will also provide real time notification of any problems as well as proactively address issues ahead of time, and HCA will deploy the appropriate management systems to monitor and manage the IT network and wireless infrastructure.

The current network infrastructure was not designed specifically for healthcare and currently unable to support healthcare workflows, telemedicine, and mobile devices for patient care. It also lacks the performance and redundancy required for healthcare. Many of the critical equipment are also already end-of-life and no longer supported by vendors, and many are becoming obsolete within the next 3-4 years.

PROJECT SCOPE

Scope and Deliverables
- Scope: HCA IT will design and implement the new Software Defined Network on the VCMC and Santa Paula campuses, including the 5-story AFMC building, and integrate the network into the current County's network.
- Deliverables:
  - Redundant campus core switches
  - Redundant building distribution core switches
  - Redundant Internet firewalls and routers
  - Data center pod
  - Redundant data center core switches
  - Redundant wireless controllers with new wireless access points supporting Wi-Fi 6e
  - External and internal firewalls
  - New wireless access points with coverage into patient rooms to support point-of-care workflows
  - Access layer chassis and workgroup switches with fully redundant power supply and fiber path
  - Cisco DNA Center for management and Cisco ISE for authentication

HCA IT will implement this project in partnership with IT Services to ensure proper integration of the Medical Grade Network into the current County's network, adherence to countywide standards. With this partnership, IT Services will also augment HCA IT workforce for the implementation and ongoing management and support of this network.

Have there been any material changes in the project scope?

  ☒ *No, there has not been any changes in the project scope currently.*

  ☐ *Yes, the project scope has increased/decreased.*

        1a. Effects on budget:

        1b. Effect on schedule:

        1c. Project Sponsor Approval:

Project Updates

- *All the MGN UPS equipment has been shipped and received at VCMC.*
- *MDF UPS installed. Waiting for Electrical and HVAC work to be completed so the UPS can be energized and tested so the PDU's can be installed in the racks.*
- *Facilities electrical and HVAC designs for the Server Room and IDF's have been approved by HCAI. Vendor onboard to install the UPS. Site walks and plan review completed.*
- *New Data Center electrical design will be completed pending load testing.*
- *Facilities electrical, mechanical, structural and technology engineering designs for the new Data Center are in progress and estimate submitting to HCAI by the end of January 2025*
- *Working on engineering design documents to submit to HCAI for the HRW future wireless network and a new MDF at SPH.*
- *Finalized SDA design and detailed project plan for testing, deployment and migration. Plans to convert the HCA IT Building to SDA once the remaining equipment is received.*
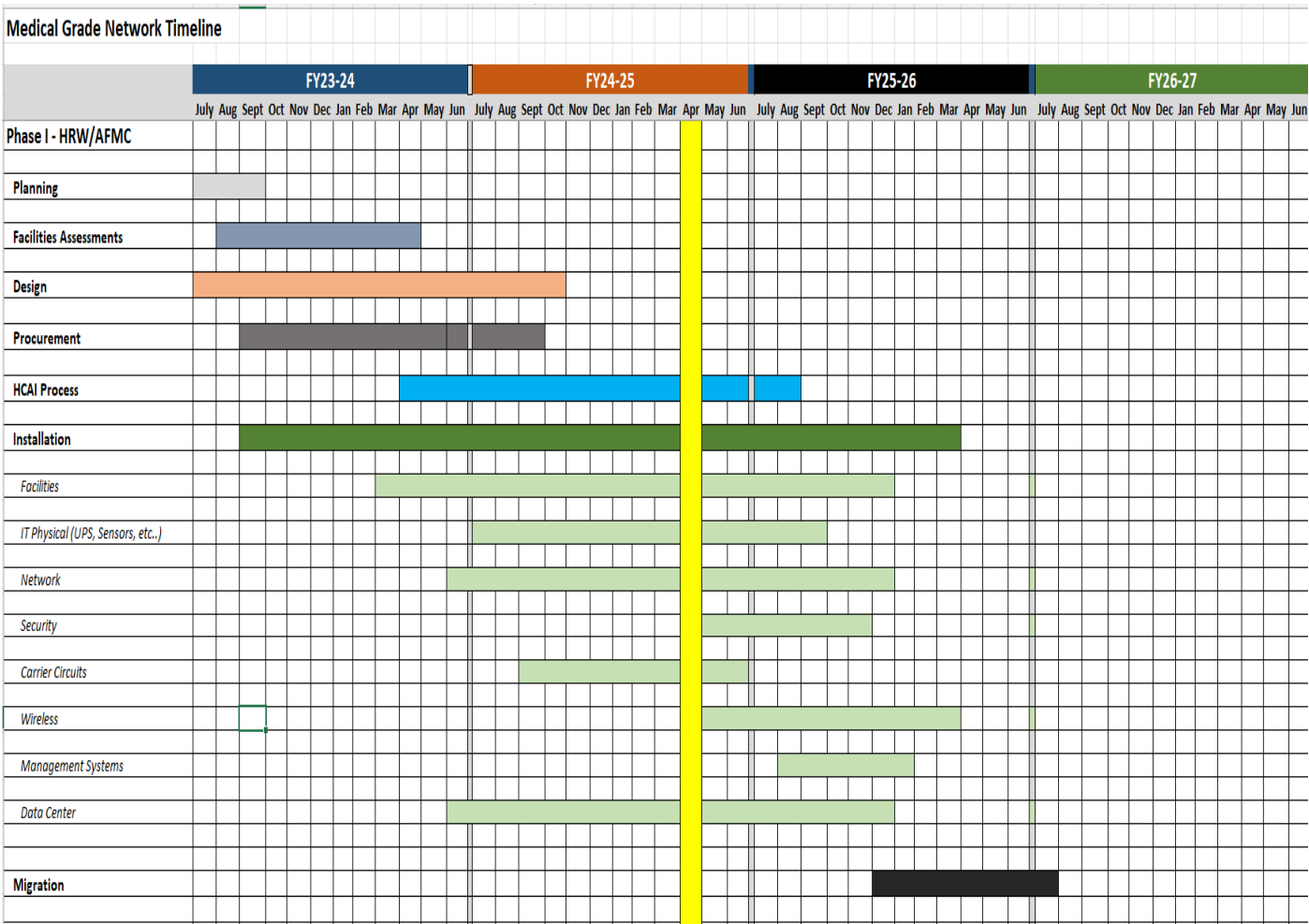
PROJECT SCHEDULE

1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

☐ *Yes, the project is tracking to a revised schedule previously presented to the ITC.*

☒ *No, the project is not on schedule.*

1a. Reasoning for change in schedule: The MGN equipment has all been received, some are held at HCA, and some are held by County IT. HCA IT and County IT are working on the implementation plan and equipment deployment locations, and the details of ongoing management of the MGN as agreed upon in the MOU.
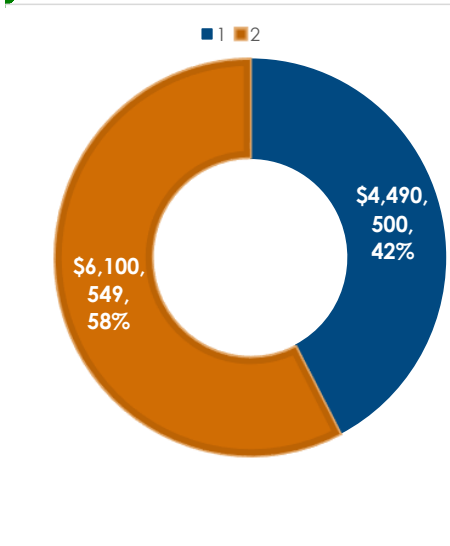
1b. Revised implementation date: TBD

1c. Attach revised schedule: Tentative schedule below. A revised schedule will be developed once the remaining issues about equipment locations and the implementation plan are resolved between HCA IT and County IT

Medical Grade Network Timeline

	FY23-24	FY24-25	FY25-26	FY26-27
	July Aug Sept Oct Nov Dec Jan Feb Mar Apr May Jun	July Aug Sept Oct Nov Dec Jan Feb Mar Apr May Jun	July Aug Sept Oct Nov Dec Jan Feb Mar Apr May Jun	July Aug Sept Oct Nov Dec Jan Feb Mar Apr May Jun

Phase I - HRW/AFMC

Planning

Facilities Assessments

Design

Procurement

HCAI Process

Installation

  Facilities

  IT Physical (UPS, Sensors, etc..)

  Network

  Security

  Carrier Circuits

  Wireless

  Management Systems

  Data Center

Migration

PROJECT BUDGET

PROJECT BUDGET

Percentage of Budget Spent

$4,490,500, 42%

$6,100,549, 58%

Summary

IMPLEMENTATION COST
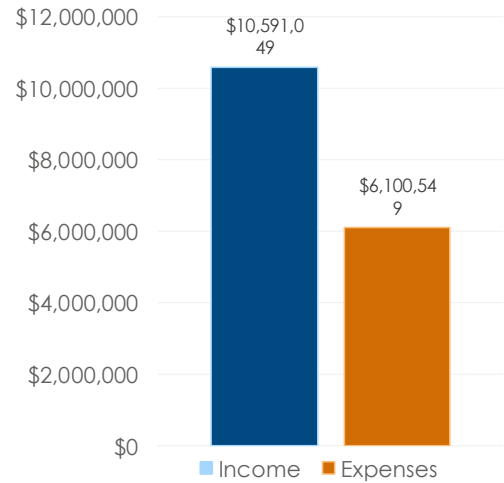
$10,591,049

TOTAL EXPENSES TO DATE

$6,100,549

PROJECT BALANCE

$4,490,500

TOTAL 5-YEAR COST

$12,044,598

1. Is the project on budget?

☒ *Yes, the project is tracking to the original approved budget.*

☐ *Yes, the budget is tracking to a revised budget previously presented to the ITC.*

☐ *No, the project is not on budget.*

 1a. Reasoning for budget change:

 1b. Attach revised budget:

RISK ASSESSMENT

1. *Have any new risks been identified?*

Information Technology Committee

County of Ventura

ITC Project Status Report

Form Revised January 10, 2023

Agency/Department:	HCA Information Technology	Project Name:	Kronos/UKG WFD Project
Project Manager:	LaFonda Keels	Report Preparer:	LaFonda Keels
Report Preparer Contact:	(562) 305-7907	ITC Meeting Date:	4/24/2025

PROJECT OVERVIEW (AS APPROVED BY THE ITC)

The Health Care Agency (HCA) Kronos Time and Attendance System Project, change request and new approach to implement the latest Kronos/UKG Product, Workforce Dimension, as an HCA Enterprise implementation, was approved in June 2021. A quarterly project status report, addressing the questions below, is required to be submitted for ITC review until the project implementation is complete.

Project Overview (as approved by the ITC Subcommittee):

The primary goal of this project is to save over $1,000,000 annually in labor costs for the HCA organization with the highest impact costs saving realized for the two VC hospitals (VCMC and Santa Paula hospital) and the Ambulatory Care Clinics. The Kronos solution will be implemented for all HCA organizations. Secondarily, it will provide management visibility to improve resourcing and provide more equitable use of overtime among staff and allow the hospital to meet regulatory compliance requirement related to patient: nursing ratios.

Hourly staff at the Ventura County Medical Center and Santa Paula Hospitals complete their timecards, manually. These are then reviewed and signed by management and forwarded to Payroll. This process is not only time consuming but introduces errors into the entry process. Further, because the attendance information by unit is not readily available in any automated system, management does not have an ability to easily compare the attendance data to the schedule. This can result in registry staff being scheduled in departments that often have sufficient staff. The costs of error handling of the existing process, staff overtime costs and unnecessary use of registry personnel have been estimated more than $1,000,000 annually. The other departments in the Agency will also derive benefit from the system at only a reasonable incremental cost and were therefore included in the project.

PROJECT SCOPE

Have there been any material changes in the project scope?

☒ *No, there has not been any changes in the project scope currently.*

☐ *Yes, the project scope has increased/decreased.*

> *1a. Effects on budget:*

> *1b. Effect on schedule:*

> *1c. Project Sponsor Approval:*

PROJECT SCHEDULE

---

1. Is this project on schedule?

☐ *Yes, the project is tracking to the original approved schedule.*

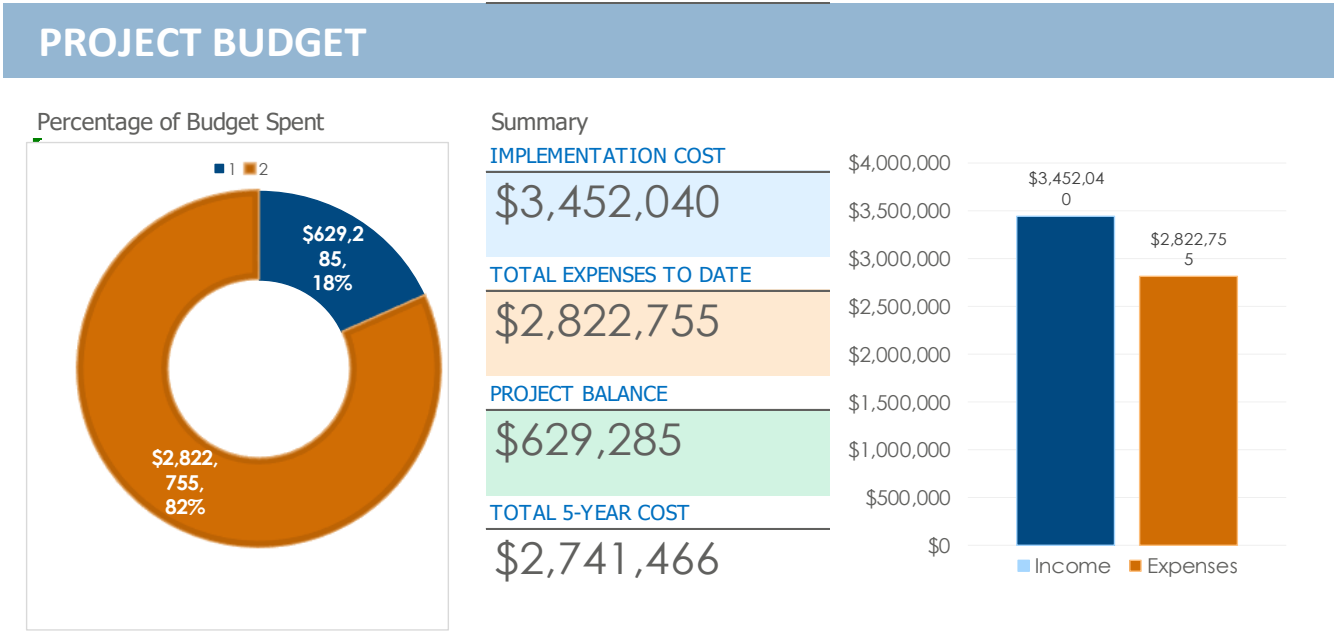☐ *Yes, the project is tracking to the revised schedule.*

☒ *No, the project is not on schedule.*

High Level Project Plan

WBS	Task Name	Start	Finish
1	**Unit Testing**	**12/29/22**	**01/26/23**
2	**System Integration**	**01/20/23**	**04/27/23**
3	**Regression Testing**	**05/06/24**	**06/05/24**
4	**Parallel Testing**	**06/23/24**	**07/29/25**
	Wave 1	**06/23/24**	**03/01/25**
	Wave 2	**02/16/25**	**04/26/25**
	Wave 3	**TBD**	**TBD**
	Wave 4	**TBD**	**TBD**
6	**Production Cut-Over**	**TBD**	**TBD**
7	**End-User Training *(will occur based on go-live date)***	**TBD**	**TBD**
7	**Go-Live Wave 1 *(includes hypercare)***	**TBD**	**TBD**
8	**Go-Live Wave 2 *(includes hypercare)***	**TBD**	**TBD**
9	**Go-Live Wave 3 *(includes hypercare)***	**TBD**	**TBD**
10	**Go-Live Wave 4 *(includes hypercare)***	**TBD**	**TBD**

PROJECT BUDGET

Percentage of Budget Spent

Summary

IMPLEMENTATION COST	$3,452,040
TOTAL EXPENSES TO DATE	$2,822,755
PROJECT BALANCE	$629,285
TOTAL 5-YEAR COST	$2,741,466

1. Is the project on budget?

☐ Yes, the project is tracking to the original approved budget.

☒ Yes, the budget is tracking to a revised budget previously presented to the ITC.

☐ No, the project is not on budget.

    1a. Reasoning for budget change: Extended Timeline

    1b. Attach revised budget:

RISK ASSESSMENT

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1. Have any new risks been identified? HCA Resource Constraints

RETIREE HEALTH PREMIUM COVERAGE PAYMENTS

AUDITOR-CONTROLLER

RETIREE HEALTH PREMIUM COVERAGE PAYMENTS

PROJECT CLOSURE REPORT

Richard W. Whobrey

04/24/2025

Version 01

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RETIREE HEALTH PREMIUM COVERAGE PAYMENTS

AUDITOR-CONTROLLER

EXECUTIVE SUMMARY

SCHEDULE AND COSTS

Start Date: 4/24/2024

Original Completion Date: 6/30/2025

Implementation Date: 12/20/2024

Actual Project Completion Date: 1/31/2025

Original Budget: $687,750.00

Actual Cost: $294,700.00

Number of Project Personnel (High Water Mark): Linda Fischer (PRJ Functional Consultant); BK Bleakley (PRJ Consultant/Project Manager); Arvin Pineda (PRJ Technical Consultant); Kamran Hasan (PRJ Technical Consultant); Kim Tallman; Kelly Akers; Patti Dowdy; Jen Coray

MEASURABLE OUTCOMES

BASELINE MEASURES

Enhance and build out VCHRP to accommodate the processing of 110-120 Retiree Health Premium Coverage Payments each month in VCHRP to fulfill IRS audit requirements to withhold Federal and State Payroll taxes from each payment and issue W-2's for these payments at the end of each calendar/tax year.

REALIZED OBJECTIVES

Enhance and build out VCHRP to accommodate the processing of 110-120 Retiree Health Premium Coverage Payments each month in VCHRP to fulfill IRS audit requirements to withhold Federal and State Payroll taxes from each payment and issue W-2's for these payments at the end of each calendar/tax year. 100% of objective was accomplished.

RETIREE HEALTH PREMIUM COVERAGE PAYMENTS

AUDITOR-CONTROLLER

SCHEDULE AND COST DISCUSSION

DETAILED SCHEDULE ISSUES

None.

INCOMPLETE ITEMS

None.

ADDED ITEMS

None.

DETAILED COST ISSUES

None.

LESSONS LEARNED

WHAT WENT RIGHT?

Detailed requirements gathering and documentation.
Capitalizing on existing functional and system infrastructure.

WHAT WENT WRONG?

There is still a strong reliance on manual processing and communication between different functional teams. The level of automation could have been better but would have prolonged the project and increased costs.

OTHER ISSUES

None.

MAINTENANCE PLAN

The functional teams have developed, implemented, and are using a plan to onboard new retirees eligible for the payments and offboard retirees that have received their max number of payments, utilizing existing processes for onboarding and terming employees.

Physician Documentation and Generative AI Solutions

PHYSICIAN DOCUMENTATION AND GENERATIVE AI SOLUTIONS

PROJECT CLOSURE REPORT

Michelle Galles

1/11/2025

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Physician Documentation and Generative AI Solutions

HCA IT

EXECUTIVE SUMMARY

SCHEDULE AND COSTS

Start Date: 10/15/2024

Original Completion Date: 12/13/2024

Implementation Date: 12/9/2024

Actual Project Completion Date: 12/13/2024

Original Budget: $310,000.00

Actual Cost: $310,000.00

Number of Project Personnel (High Water Mark):
Stanley Patterson, MD
Michelle Galles, RN

MEASURABLE OUTCOMES

BASELINE MEASURES

Adoption is being monitored via Oracle/Cerner Lights On and Oracle/Cerner Advance analytics, providing measurable insights into provider workflow efficiency, productivity, and return on investment.

REALIZED OBJECTIVES

SCHEDULE AND COST DISCUSSION

DETAILED SCHEDULE ISSUES

NA

INCOMPLETE ITEMS

NA

HCA IT

ADDED ITEMS

NA

DETAILED COST ISSUES

NA

LESSONS LEARNED

WHAT WENT RIGHT?

The Oracle Clinical Digital Assistant (OCDA) has significantly enhanced clinical operations, delivering benefits such as improved documentation accuracy and timely completion of clinical notes, which has reduced after-hours workloads. Providers now spend more time with patients, improving the quality of care and fostering stronger provider-patient relationships. Additionally, OCDA's multi-language support has expanded accessibility, enabling personalized care for diverse patient populations. These successes highlight OCDA's impact in streamlining workflows and improving overall efficiency in clinical operations.

WHAT WENT WRONG?

NA

OTHER ISSUES

MAINTENANCE PLAN

Oracle Health will return in April for an optimization event focused on enhancing the Oracle Clinical Digital Assistant (OCDA). The event will provide tailored support, refine workflows, and address feedback to help providers fully leverage OCDA's capabilities, including real-time transcription and AI-driven suggestions. The event aims to streamline documentation, boost productivity, and maximize value for clinical operations and patient care.

Informatics will use Oracle/Cerner Lights On and Advance analytics to monitor OCDA performance, tracking metrics like documentation time and workflow efficiency. These insights help optimize clinical workflows and ensure OCDA delivers measurable benefits for providers and patients.