State of Arkansas – Division of Medical Services

ARKANSAS DEPARTMENT OF HUMAN SERVICES

AME BOS Training – Deliverable Management

Vendor Role

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Deliverable Management

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Introduction

The PMT deliverable management approach builds on each phase throughout the project, so it is important to consistently document and capture all information. Using a consistent documentation method allows for resources outside of this project to easily understand the information since it will be in a standardized and familiar format.

Deliverable management will be maintained and managed in Jira.

The Jira Deliverable Review Management Tracking (DRMT) is designed to help manage the deliverable review efforts in an organized and systematic fashion. The information helps management understand the total review efforts for deliverables and the status of each deliverable.
A separate Jira DRMT project will be defined for each State vendor, and only contain applicable items for their engagement with AME.

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Plan Deliverable Timelines

Once the deliverables are identified and the content defined, it is important to define the timelines around each deliverable.

- Upon receipt of a vendor's initial or updated schedules, the forecasts for the submission and review periods will be documented.
- The AME PMT will be proactive in looking for opportunities to stagger submissions and reviews to ensure the submission schedule meets any criteria identified in the project artifacts (RFP, negotiated contract items, etc.).
- Planning the timelines is important for those involved in the development and review of the deliverables. It allows resources to balance their workloads and dedicate time to the activities that they are responsible for completing.

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Review Timeframes

The deliverable review timeframes are defined by three activities and are managed in the Integrated Schedule and informed by each vendor's contractual obligations. Some deliverables may be larger or more technical requiring more time. The common timeframe recommended is10/5/5 with details of each below:

- The time allotted to the reviewing team for the initial review – 10 business days. (Initial Review Start and Deadline dates)
- The time allotted to the Owner to complete revisions to the deliverable based on the review team feedback – 5 business days (Revising Start and Deadline dates)
- The time allotted to the reviewing team to re-review (subsequent review) the deliverable – 5 business days (Revision Review Start and Deadline dates)
- As part of AME's deliverable review management, Jira will track these review cycle time frames. Initial Review Start and Deadline dates, Revising Start and Deadline dates, and Revision Review Start and Deadline dates will be tracked within Jira, and available for reporting and dashboard use to monitor.

Note: Based on best practice, an average review cycle is one review per DED (if applicable) and two reviews per Deliverable. If a DED or deliverable requires additional review cycles, it is recommended to hold a walkthrough and subsequent reviews to expedite revisions regardless of the defined timeframes.

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Deliverable Review Comments

As part of the review process, the review team will provide comments and recommendations regarding the outcome of their review. The preferred method of documenting these is to use the inline review features of the supporting application (i.e. MS Word, Excel, etc.) used to view/edit the deliverable artifacts.

Reviewers will enter comments directly into the attachments using these features if available. This enables collaboration during the review, providing visibility into existing items/comments identified.

- Using the supporting applications reviewing tools, responses to the entered comments are to be added when the item is addressed.
  This may be done by the:
  - Review Coordinator, during review summarization
  - Approver, during decision determination
  - Document Owner (Vendor) when revising deliverables for resubmission
  - Reviewer(s), when confirming the revisions during subsequent reviews
- If the format of the deliverable artifacts does not support entering comments directly in the object (such as a PDF format), a Deliverable Comment Log spreadsheet will be used to track the comments and their response actions.

Deliverable Management

Team Files

Team Files is a Jira plug-in that allows connecting directly to an external file storage.
For Deliverables, SharePoint has been identified as the storage site that will be used.

With Team Files, direct access to the storage site is provided.

- Access the Jira ticket to upload into SharePoint. (No direct navigation into the SharePoint site is necessary)
- Allows collaboration and real-time access of the attachments.

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Deliverable Submission

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Deliverable Submission

Submission Process

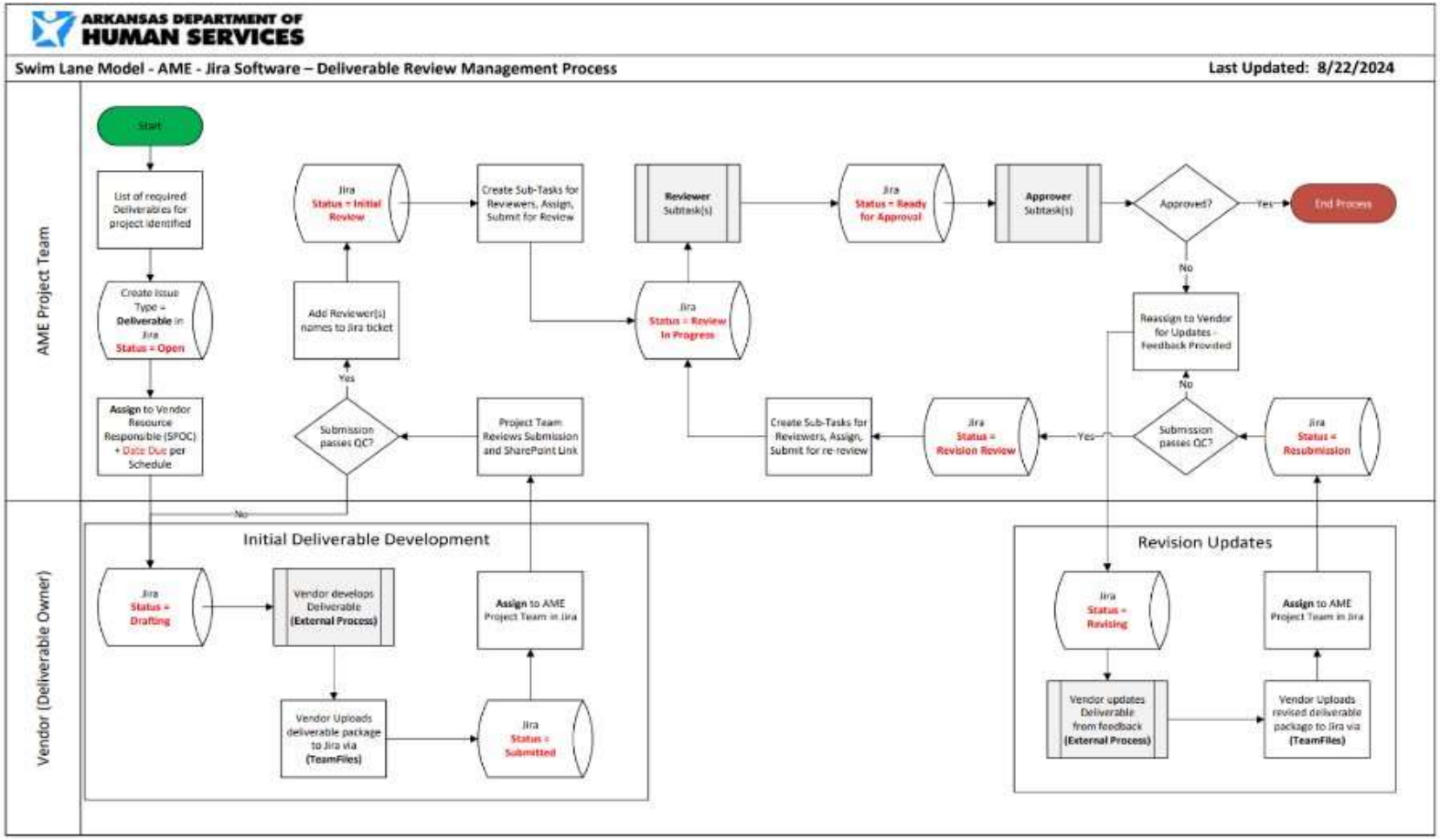
- Deliverable artifacts (including DEDs) that will have formal review and approval will be uploaded directly to the Jira DRMT. The Vendor is responsible for managing the deliverable submission process. Once submitted, the deliverable review process begins.

- The Vendor will upload the Deliverable Package (deliverable and supporting templates and artifacts as applicable) to the associated Deliverable Issue Ticket in Jira. The Vendor will assign the Deliverable Issue Ticket to the PMT owner which will initiate the deliverable for review.

- If the deliverable requires more than an initial review for approval, the Vendor will update the applicable documents and then resubmit the applicable documents via the Deliverable Issue Ticket in Jira.

Deliverable Submission

Submission Process



Deliverable Submission

New Submission

Once the Deliverable Package is ready for submission

1. Log into the Jira DRMT
2. Open the applicable Jira ticket for the deliverable
3. Attach the Deliverable Package to the Jira ticket using the Team Files upload feature
4. Assign the Jira ticket to the listed PMT Review Coordinator and Submit

The Deliverable is now in the Deliverable Review Phase

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Deliverable Submission

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Resubmission

When a Deliverable Package requires rework because it was not approved when the review cycle was completed by the Approver, the Vendor will resubmit the Deliverable Package after addressing comments both in the Deliverable Comment log and the Deliverable. The Vendor must ensure the Document History has been updated and reflects the appropriate version indicators (see points below) that reflect the recent updates.

- A Major version is indicated by a whole number. Major versions indicate initial version submitted. i.e. version 1.0 represents the initial version submitted to the State.
- A Minor version is an incremental version and would be shown as x.1, x.2, etc., until the document is approved. Minor versions identify the revised submissions.

The Vendor must follow the steps outlined in the DRMT Ticket Guide and related documentation in the Jira Resources repository to resubmit the applicable documents from the Deliverable Package.

Revisions to be done within a resubmission should be focused on addressing the comments found during the prior review activity. The Vendor will update the deliverable as needed and provide feedback for each comment on how it was addressed (in either the direct comment or comment log, whichever method is being used to capture comments for this deliverable).
As identified in the Review Timeline section, 5 business days are allowed for this activity.

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Deliverable Submission

Submit Revision

Address the revisions:
Access Jira and review the comments to address.

Once the Deliverable Package is ready for resubmission

1. Log into the Jira DRMT
2. Open the applicable Jira ticket for the deliverable
3. Attach the updated Deliverable Package to the Jira ticket using the Team Files upload feature
4. Assign the Jira ticket to the listed PMT Review Coordinator and Submit

The Deliverable is now in the Deliverable Revision Review Phase

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Additional Resources

The following additional resources are available for review.

Jira Deliverable Management State PowerPoint
Jira Deliverable Management Training Document
Jira Deliverable Management Job Aid
Jira Deliverable Management Swim Lane
Jira Reference Guide
Jira Deliverable Management State Training Recording

For support/issues: contact [redacted]

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Questions?