ARKANSAS DEPARTMENT OF HUMAN SERVICES

# AME BOS Jira – Ticket Guide – Change Management

**Date:** June 4, 2024
**Last Updated by:**

## Background

Jira is a web-based tool that is being customized for the tracking and management of project and operational tasks and activities of the Medicaid Enterprise. Early adopters will be the State (DHS/DMS) and the [redacted] Team. The long-term vision for Jira is to be the tool utilized by all Vendors supporting the Medicaid Enterprise; therefore, users should assume any information entered in the tool could be viewed by any stakeholder and that Jira will be considered the primary source of management information above any other tool used. While Jira identifies everything logged in the system as an Issue, hereafter the term will be Ticket and there will be various types of tickets logged and tracked within the tool.

**Note** Foundational Jira functionality will support many of the functions and processes that will be used. For learning common universal functions review the document: **AME BOS Jira Universal Functionality Resource**. Information on Jira data fields is available in the **AME BOS Jira Reference Guide**.

If you have any questions on the Jira efforts or any feedback on Change Management (CM) or other Jira functionality, please share to JiraCloudSupport@dhs.Arkansas.gov

## Introduction to Change Management (CM)

To support an agile rollout of functionality, this document was created and will be updated to provide information necessary to understand the business processes related to CM. This new business process is intended to replace the previous Jira Medicaid Enterprise Change Management (MECM) that primarily monitored change related to one vendor/system and provide a more streamlined workflow for initiating, performing, reviewing and approval of action within the CM business streams for multiple vendors/systems. AME BOS inherently requires the management and monitoring of change tickets and associated Service Level Agreements (SLA's) that pertain to certain points of the change lifecycle. Jira CM will provide a transparent view of the support and management of Vendor, State, and AME BOS work while enhancing communications between affected stakeholders.

**Note** For additional information on foundational industry information related to CM, see the following online resources: Project Management Institute articles on CM can be found in the Learning Library (pmi.org)

### Change Management Process

CM is the process of initiating, reviewing, and approving/rejecting Change Requests (CR) and managing resulting changes to requirements and other project documentation.

The overall CM process is supported by the completion of several steps conducted by different groups of authority and fulfilment responsibilities. At a high level a Change Control Board (CCB) (or other defined governance group) will approve proposed work, vendors will perform research and analysis to determine a level of effort (LOE) and scope via requirements gathering and submit to the State Business Owner (SBO) for final approval. Once approved an iterative approach to development and testing is conducted with approval checkpoints until the change is delivered to production and the CM is closed.

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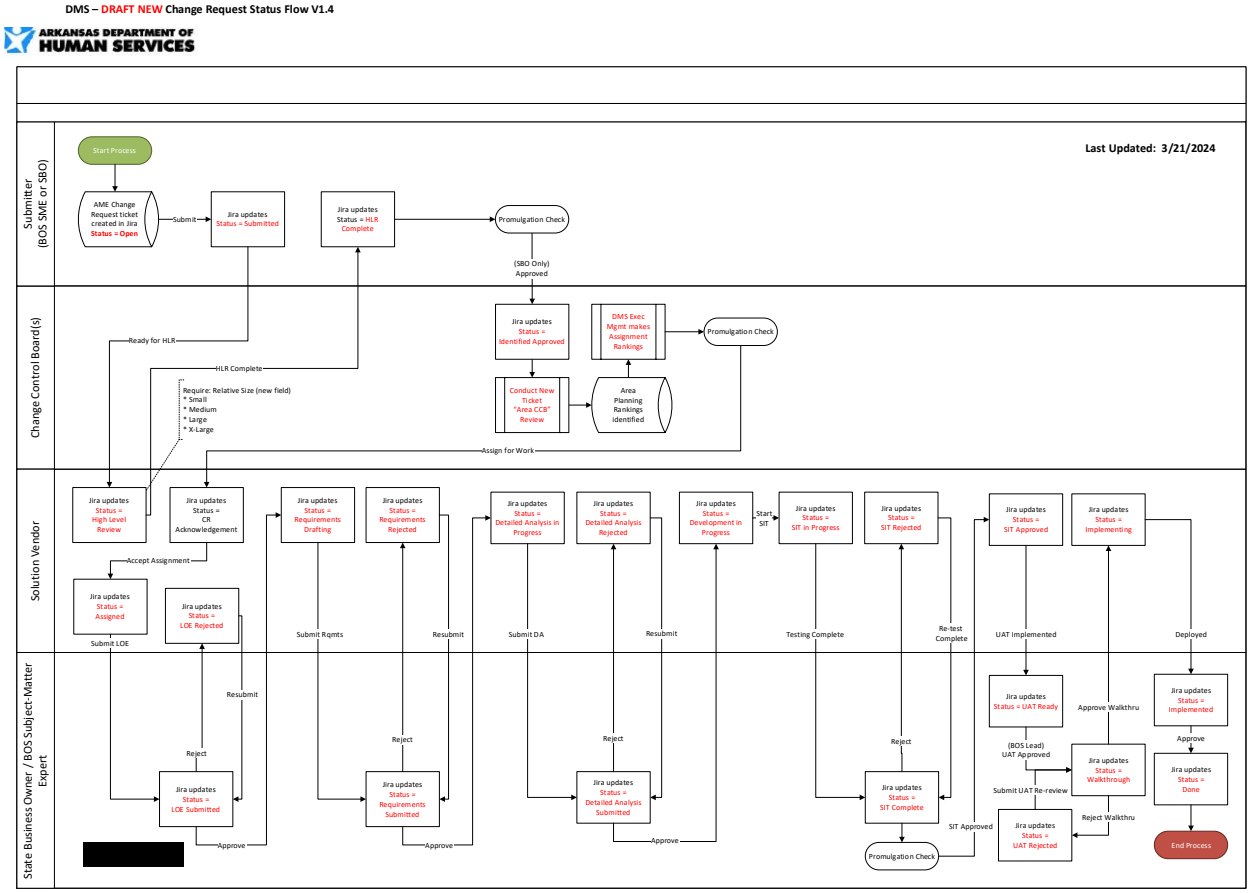
Research conducted for a CR is captured in the impact analysis, including the impact of the change to the project scope, schedule, and/or cost[1]. Also, the impact analysis contains any assumptions made to support this CR. Once the template is completed, it is attached to the associated JIRA CR ticket.

An illustration of the CR workflow process is provided in **Exhibit 1**.

### Exhibit 1: CR Workflow




## SLAs (Service Level Agreements)

Throughout the flow, there are SLA (Service Level Agreements) duration calculations. These are general and may not be applicable to every vendor. This variation in contractual requirements should be considered when reviewing data, dashboards.

## CR Fields

CR Tickets contain different fields than other tickets. Depending on the step of the workflow fields may become required. Exhibit 2 provides a listing of the fields, and if applicable, when they are required. More detailed field descriptions and information can be found in the AME BOS Jira Reference Guide.

[1] As Jira is being implemented as an enterprise tool that necessitates use by several Vendors / Companies. It is encouraged for every user to exercise caution and use safeguards such as providing documents via links on secure / user access restricted repositories to limit access to sensitive information such as financial costs.

**Exhibit 2: CR Ticket Fields**

| Required Field | Required? | Additional Information |
|---|---|---|
| Project | Creation | AME Program Tracking |
| Issue Type | Creation | Change Request |
| Summary | Creation | N/A |
| Description | Creation | N/A |
| Reporter | Creation | N/A |
| Assignee | Creation | Like other tickets, for a new ticket, the initial Assignee should be the users Manager for Quality Review.<br><br>The Assignee represents the current person responsible for the current action, transitioning to the next status. |
| DHS Business Owner | Creation | CCB: The State owner of the change who is responsible for approving their Change Ticket through its life cycle at specific stages. SBOs will participate in the Focus Area CCBs. |
| DHS Contact(s) | No | N/A |
| BOS Led | Creation | CCB: The [redacted] staff person who is responsible for coordinating the Change Ticket through its life cycle. BOS Leads will be participants in the Focus Area CCBs and participate as Focus Area CCB Co-Leads by assignment. The BOS Lead is also responsible for conducting and approving the User Acceptance Test (UAT) phase of the lifecycle. |
| BOS Contact(s) | No | N/A |
| Identified On | No | N/A |
| Due Date | No | The Date ticket should be complete or reviewed.<br>Only if it is very difficult to estimate a date, select a due date no more than 90 days (about 3 months) from today's date. The date should be updated when a clear date is known.<br><br>*This is a change from the MECM process that needs to be communicated to all stakeholders. More date fields may be added through future enhancements. |
| Labels | No | N/A |
| Priority | Creation | N/A |
| Responsible Module | Creation | N/A |
| Multi-Module | Creation | N/A |
| Module Impacted | Conditional On Creation | Only if multi-module = 'Yes' |

| Required Field | Required? | Additional Information |
|---|---|---|
| Primary Focus Area | Creation | See table below. |
| Secondary Focus Area | No | N/A |
| AME Project Name | No | N/A |
| DDI or M&O | Creation | N/A |
| Source Agency | Creation | N/A |
| Attachment | No | N/A |
| Linked Issues | No | N/A |
| Issue | No | N/A |
| Release | No | N/A |
| Impact Statement | No | N/A |
| CMS Approval Date | No | N/A |
| CMS Approval Required | No | N/A |
| External Reference ID | No | N/A |
| Focus Area Priority | No | The Focus Area Priority is a numeric value from 1 - 15. The intent is that each value will only be used 1 time so that there is an ascending order from 1 (highest priority) to 15 (lowest priority). When more than 15 tickets are found within a Focus Area, priority 15 can be utilized more than once to group all the lowest priority tickets. 15 can also be utilized to reflect that a ticket has been reviewed but is not ready for consideration on assignment. |
| Relative Size | Transition from High Level Review | High-level estimate of work assigned by the vendor to assist SBO's and CCB with ranking |
| AME Ranking | Transition From Identified - Approved | Ranking assigned from Executive CCB for prioritization of work |
| Detailed Analysis | No | N/A |
| Estimated Completion Date | No | N/A |
| Estimated Start Date | No | N/A |
| Implemented Date | No | N/A |
| LOE Estimate | Transition From Submit LOE | Vendor will be prompted to provide the Level of Effort (LOE) estimate in terms of hours |
| Mandating Authority | No | N/A |
| Missed LOE SLA Reason | Transition From Submit LOE SLA Breach | User will be prompted when performing workflow transition |
| Missed Requirements SLA Reason | Transition From Submit Requirements Analysis SLA Breach | User will be prompted when performing workflow transition |
| Missed Detailed Analysis SLA Reason | Transition From Submit Detailed Analysis SLA Breach | User will be prompted when performing workflow transition |
| SIT Start | Transition From Submit Detailed Analysis | User will be prompted when performing workflow transition unless already provided |

| Required Field | Required? | Additional Information |
|---|---|---|
| UAT Start | Transition From Submit Detailed Analysis | User will be prompted when performing workflow transition unless already provided |
| PROD Implementation | Transition From Submit Detailed Analysis | User will be prompted when performing workflow transition unless already provided |
| Production Override Date | No | N/A |
| Promulgation Date | No | N/A |
| Promulgation Required | No | N/A |
| Reason for Request | No | N/A |
| Request Type | No | N/A |
| SIT Rejection Reason | Transition to Reject SIT Test | N/A |
| Walkthrough Rejection Reason | Transition to Reject Walkthrough | N/A |
| Missed SIT Start Reason | Transition From SIT Complete – SLA Breached | User will be prompted when performing workflow transition |
| Missed UAT Start Reason | Transition From UAT Complete – SLA Breached | User will be prompted when performing workflow transition |
| Missed PROD Implementation Reason | Transition From Implemented – SLA Breached | User will be prompted when performing workflow transition |
| Comment | Any Workflow Transition | Required anytime the workflow is advanced |

**Primary Focus Area**

In conversion from MECM (Jira Server) to Change Request (Jira Cloud), the selections for Primary Focus Area (aka Focus Area Name) were consolidated. The following table provides traceability.

| Primary Focus Area (Current) | Focus Area Name (Past, used in MECM) |
|---|---|
| Buy-In | Buy-In |
| Claims | Claims |
| Client/Member/Recipient | Eligibility and Demographics for Clients /Members /Recipients /Beneficiaries |
| Communications Mgmt | Communications Management |
| Contact Tracking Mgmt System (CTMS) | Contact Tracking Management System |
| Conversion | Conversion |
| Decision Support System (DSS) | Decision Support System /Data Warehouse Reporting |
| Document Mgmt | Document Management, formerly Imaging and EDMS |
| Electronic Data Interface (EDI) | Electronic Data Interface system |
| Electronic Visit Verification (EVV) | Electronic Visit Verification area, including Home Health and Personal Care Services (PCS) |
| EPSDT | Early and Periodic Screening, Diagnostic, and Treatment (EPSDT) area |
| Financial | Financial |
| Financial Federal Reporting (e.g. MAR) | Federal Reporting of Financials, Waivers, Enrollments, etc. such as from the Management and Administration Reporting System (MARS) |
| Interfaces | Interfaces area, formerly interChange (iC) Connections, includes Service Oriented Architecture (SOA) |
| Leadership | various areas of AME leadership |
| Letters/ Notifications | all areas relating to Letters/ Notifications |
| Long Term Care (LTC) | Long Term Care / Level of Care |
| Managed Care (MC) | Managed Care |
| Mobile Data Platform & Patient Access Interoperability | Mobile Data Platform & Patient Access Interoperability |
| Pharmacy | Pharmacy, Drugs |
| Portal | web portals or web applications, such as Provider, Member, Home Care Agency |
| Prior Authorization | Prior Authorization system |
| Program Integrity | Program Integrity, includes Fraud and Abuse |
| Project Mgmt | Project Management |
| Provider | all areas relating to Provider |
| Quality Assurance | Quality Assurance, formerly Quality Management Utility |
| Reference | Reference code values and their descriptions, includes Benefit Plan Administration (BPA) |
| Security Mgmt | Security Mgmt |
| Technology | Technology, includes Commercial Off The Shelf (COTS) tools, cycle support |
| Third Party Liability (TPL) | Third Party Liability insurance |

| Primary Focus Area (Current) | Focus Area Name (Past, used in MECM) |
|---|---|
| Transformed Medicaid Statistical Information System (T-MSIS) | Transformed Medicaid Statistical Information System |
| User Interface | System User Interfaces |
| Voice Response | Voice Response tool |
| Waivers | Waiver programs |

## Workflow Status Descriptions

As highlighted in **Exhibit 1** a CM Ticket will transition through several statuses. **Exhibit 3** provides detailed descriptions of each status.

**Exhibit 3: Change Management Ticket Status Descriptions**

| Status Name | Definition |
|---|---|
| Open | This status is the result of a new ticket being created. |
| Submitted | The ticket has been assigned for initial review after creation. |
| High Level Review (HLR) | The vendor receives the ticket and begins assessment of the scope of work. |
| HLR Complete | The SBO receives the ticket back with the vendor's assessment of relative size of work |
| Identified – Approved | This status represents the ticket being under review with the Change Control Boards (CCB). |
| CR Acknowledgement | Vendor receives the approved work from the CCB and can begin assignments needed |
| Assigned | This status represents the vendor is actively working on the Level of Effort (LOE). |
| LOE Submitted | The SBO has the LOE from the vendor and is required to Approve or Reject. |
| LOE Rejected | This status represents the vendor receives the LOE back from the SBO and must provide additional information to resubmit. |
| Requirements Drafting | The vendor is drafting detailed requirements. |
| Requirements Submitted | This status represents the SBO has the Draft Requirements from the vendor and is required to Approve or Reject. |
| Requirements Rejected | The vendor receives the Requirements Draft back from the SBO and must provide additional information to resubmit. |
| Detailed Analysis – In Progress | Vendor performs detailed analysis work to generate test and implementation dates. |
| Detailed Analysis Submitted | The SBO will receive the Detailed Analysis from the vendor for evaluation to approve or reject. |
| Detailed Analysis Rejected | The vendor receives the Detailed Analysis back from the SBO and must provide additional information to resubmit. |
| Development in Progress - | Vendor is performing development work |
| SIT in Progress | Vendor conducts SIT level testing. |
| SIT Complete | This status is used for the client to conduct a review of SIT Results. |
| SIT Rejected | When client rejects SIT Results the Vendor will need to retest or address client concerns and resubmit SIT Results |

| Status Name | Definition |
|---|---|
| SIT Approved | Vendor will begin code migrations and configurations for a UAT Environment to support UAT. |
| UAT Ready | This ticket status is used for the designated UAT team to conduct the UAT. |
| Walkthrough | The SBO inspects the UAT Results |
| UAT Rejected | When a client rejects UAT Results the UAT Team will need to retest or address client concerns. |
| Implementing | The vendor will execute the implementation plan for the change to go to production. |
| Implemented | Change has been migrated to production for validation. |
| Done | Tickets are approved and closed. |