ARKANSAS DEPARTMENT OF HUMAN SERVICES

AME BOS Jira – Ticket Guide - RAID

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Last Updated by:

Background

Jira is a web-based tool that is being customized for use 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 into 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 Education about common universal functions, and common Jira functionality is found in the document: **AME BOS Jira Universal Functionality Resources**. Information on Jira data fields is available in the **AME Jira Reference Guide**.

If you have any questions on the Jira efforts or any feedback on RAID or other Jira functionality, please share them with an [redacted] BOS Deputy Director [redacted] (Project Manager).

Introduction to RAID

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 the use of Issue types: **Risks, Action Items, Issues, and Decisions (RAID).** AME BOS inherently requires the management of risks, issues, action items (tasks), and requests for decisions to support operations, enhancement projects, and DDI. Jira RAID will provide a transparent view of the support and management of AME BOS work.

Note For additional information on foundational industry information related to RAID, see the following online resources: Project Management Institute articles on Risk and Issue Management, Decision Logs; and Article from Indeed: Action Item Logs.

AME BOS will use the following decision tree to add currently open or applicable Tickets and future Tickets for management.

Every Ticket should be evaluated to determine the best approach to management as shown in Exhibit 1.

Exhibit 1: RAID Ticket Descriptions*

Action Item	Decision	Risk	Issue
• A discrete, unique, non-recurring task or set of tasks that must be managed to completion within a finite deadline and not duplicative of a project schedule tasks (see PM to confirm).	• Is a ticket to manage the decision process and to document the final decision through the ticket details upon closure. • (If the ticket data elements do not provide enough to convey the background, options, recommendations etc. a Decision Recommendation document, formerly an Issue Paper, should be created and attached)	• An event or condition that has not yet occurred but is on track to occur and when it does, it may potentially affect one or more AME objectives: resources, schedule, scope, cost, functionality, and/or quality. It is documented to define and manage the tasks and activities that need to occur to mitigate the impact or eliminate the risk from occurring at all. If a risk could become an issue if not mitigated.	• An event or condition that has occurred and impacts one or more of the AME objectives. It is documented to define and manage the tasks and activities that need to occur to minimize or eliminate the impact.

* Further evaluation should confirm whether the action would be better tracked in a Project Schedule or another Jira functional stream that is at various levels of completion. Other functional streams identified

are the management of: Audit, Invoice, Incident, Requirements, Test, Defect, Change, Provider Suspense, Deliverables, and Mass Adjustments. A task that is likely to have a significant impact or relationship to a project schedule (enhancement or DDI) milestone or critical path task.

Exhibit 2: Ticket Creation Required Fields for RAID items

Field	Field Description	Action Item or Decision	Risk	Issue
Summary	Concise, clear, unique title where anyone could easily understand what the ticket is about.	x	x	x
Description	An expansion of the summary, complete understanding of the ticket.	x	x	x
Reporter	User who creates the ticket.	x	x	x
Assignee	The Assignee can/will change many times in the life of a ticket. The current assignee is who is responsible for taking the next action. For example: • An HLM to review a ticket in New Status • A Team member doing research while In Progress • A State person to make a decision	x	x	x
DHS Business Owner	For most tickets, the DHS Client that is most interested in the ticket. If the tasks more internal to BOS and a DHS Business Owner does not need notification, you can enter the Reporter, Assignee or BOS Lead in this field.	x	x	x
BOS Lead	The BOS staff member most interested / responsible in the ticket activities.	x	x	x
Due Date	Date ticket (action, decision) should be complete or reviewed (action, risk, issue). Only if it is very difficult to estimate a date, select a due date no more than 90 days from today's date. The date should be updated when a clear date is known. Due date should rarely be in the past. Every effort should be made to update a due date to reflect when something needs to be/ will be completed.	x	x	x
Priority	See applicable data options, not additional description available.	x	N/a	N/a
Probability	See Exhibit 4	N/a	x	N/a
Impact	See Exhibit 3	N/a	x	x
Urgency	See Exhibit 4	N/a	N/a	x
Severity	See Exhibit 5	N/a	x	x
Responsible Module	See applicable data options, not additional description available.	x	x	x
Multiple Module	See applicable data options, not additional description available.	x	x	x
Primary Focus Area	See applicable data options, not additional description available.	x	x	x

Field	Field Description		Action Item or Decision	Risk	Issue
DDI or M&O	**DDI**	Select this value if the ticket is related to only DDI (Design, Development, and Integration) activities.	x	x	x
	DDI and M&O	Select this value if the ticket is related to both DDI (Design, Development, and Integration) and M&O (Maintenance and Operations) activities.			
	M&O	Select this value if the ticket is related to only M&O (Maintenance and Operations) activities.			
	Procurement	Select this value if the ticket is related to Procurement activities.			
	Public Bid	Select this value if the ticket is related to Public Bid activities.			
Source Agency	See applicable data options, not additional description available.		x	x	x
Cause	Open text field		N/a	x	x
Impact	Open text field		N/a	x	N/a
Response	Open text field		N/a	x	x

A Decision ticket will be a means to gain decisions that have been previously sought using Issue Papers. 'Issue Papers' will be renamed 'Decision Recommendations' and may be needed for attachment to a Decision Ticket.

Notifications

At initial rollout, if a user is cited in one of the following fields they should receive notifications of ticket changes: Assignees, Watchers, and Reporter. Currently, enhancement has identified adding notification for the following additional identified users in a ticket: State Business Owner and BOS Lead. *Therefore, the State has requested that DHS Business Owner should be added as a Watcher by the Reporter to ensure they are notified of the new ticket.

Users can also use Jira Filters and Dashboards (with embedded created Filters) to view tickets where they are a user cited.

Vendors Use of Other Ticket Systems

Vendors, such as [redacted], may use their own ticketing systems to track RAID items. Nonetheless, the BOS Team needs to use the AME Program Jira as the primary source of tracking work and should enter a ticket, including the other vendors as Watchers as applicable. The vendor's system ticket number needs to be tracked. The BOS Team should obtain the ticket number from the vendor and enter their ticket number within the description field of the Jira ticket for reference when connecting with the Vendor. In the future, a related field may be added.

Categorization

Several mandatory data fields seek to enable consistent categorization of tickets to assist in management and reporting. These fields are: Responsible Module, Primary Focus Area, Secondary Focus Area(s), AME Project Name, DDI or M&O, and Source Agency. If the combination of these data fields and their available defined data are insufficient:

1. A request can be made for an additional data field or adding new data options within existing data fields.
2. The optional free form text Label field can be used. Caution is needed in its use as the Capitalization, spacing needs to be consistent to enable use as a categorization method. Get direction from your HLM on what labels should be used.

When possible, to support consistency and reporting, the minimum number/variation of data fields and labels is best.

Priority/Severity Ratings, Risks and Issues

When entering a risk, we must estimate probable impact if it occurs (becomes an issue) as well as when entering an issue. The below table provides some ideas on what can be considered to assist in the identification of the impact level in relation to common objectives. The overall impact rating of a risk or issue is defined by selecting the highest of these six categories, rather than the average of them. By choosing the greatest of the effects to determine impact, we can ignore effects that we know in advance will be insignificant.

Exhibit 3: Rating - Impact

Rating:	1 – Low Impact	2 – Medium Impact	3 – High Impact
Resources	Resource deficit is barely noticeable	Major areas are affected by resource deficit	Resource deficit is unacceptable to stakeholders
Schedule	Insignificant to less than 5% overall slippage	Overall slippage between 5% and 15%	Overall slippage greater than 15%
Scope	Scope change is barely noticeable	Major areas are affected by scope change	Scope change is unacceptable to stakeholders
Cost	Insignificant to less than 5% cost increase	Cost increase between 5% and 15%	Cost increases greater than 15%
Functionality	Functionality decrease is barely noticeable, affecting only minor areas	Major areas of functionality are affected	Functionality reduction is unacceptable to stakeholders
Quality	Quality degradation is barely noticeable	Quality reduction requires stakeholder approval	Quality reduction is unacceptable to stakeholders

To assist in prioritizing the risk or issue, a probability (risk) or urgency (issue), needs to be identified. Below is a table to provide some suggestions on how to understand each rating level.

Exhibit 4: Rating - Probability (Risk) or Urgency (Issue)

Rating:	Risk - Probability of Occurrence	Urgency of Responsiveness
1 – Low	Unlikely (0%-25%) that the risk effects are to occur and turn into an Issue.	Issue mitigation (use of a contingency plan) is not a priority.
2 – Medium	Possible (25.1%-74.9%) that the risk effects are to occur and turn into an Issue.	Issue mitigation (use of a contingency plan) should be prioritized to occur as soon as possible.

Rating:	Risk - Probability of Occurrence	Urgency of Responsiveness
3 – High	Highly (75%-99.9%) likely that the risk effects are to occur and turn into an Issue.	Issue mitigation (use of a contingency plan) must occur now.

Based on the assessments performed defining the *Impact Rating* and *Probability (Risk) or Urgency (Issue) Rating* logged in the Jira ticket, the *Severity Rating* is to be used for the prioritization and ranking of a ticket's importance to others.

For initial deployment, the severity must be manually calculated and entered.

Exhibit 5: Severity - Manual Calculation

		Probability (Risk) / Urgency (Issue)		
		1 – Low	2 – Medium	3 – High
Impact	1 – Low	1 - Low	2 - Low	3 - Medium
	2 – Medium	2 - Low	4 - Medium	6 - High
	3 - High	3 - Medium	6 - High	9 - Critical

Note A future enhancement has been planned (post-cloud migration) to automatically calculate severity.

Exhibit 6: Issue (Ticket) Status Descriptions

Status'	Risk or Issue	Action Item	Decision
Create (New)	A risk, issue, or action item has been identified during a meeting or working session and logged in Jira.		A potential decision that may impact AME BOS activities is identified.
(Accept to) In Progress	The manager of the ticket creator must conduct a quality review and then select to "Accept" changing the status to 'In Progress' and assign to the staff that should actively manage the ticket and mitigation strategies.		The manager of the ticket creator must conduct a quality review and then select to "Accept" changing the status to 'In Progress' if additional documentation is needed to make the decision to be made or decision already made. *Alternatively, the manager may choose to change the status to 'Escalated' or 'Approve(d)."*
	Once, 'In Progress' the Assignee should begin work / mitigation efforts.		Once, 'In Progress' the Assignee should work on content to ensure fully documentation of information needed to make the decision to be made or decision already made.
	A ticket should not go "stale" in other words no update in more than two weeks. Assignees should review their tickets every week and make comments or updates as appropriate to show that the ticket is being actively monitored/managed.		
Approval Requested	As an Assignee, can update the workflow to Approval Requested so that it is now in Request Approval from Reporter.		Not applicable.
Reject(ed)	A User can review and change several statuses including "Reject to In Progress" to send back to the		

Status'	Risk or Issue	Action Item	Decision
	Assignee to revise the Issue (Ticket) or continue work before requesting approval again or another status.		
Approve(d)	Not applicable		If the manager evaluates that the decision is adequately documented and does not need any further approvals, the ticket can be marked approved with the decision maker noted as an Owner. If a decisionmaker (Owner upon Escalation) makes a decision they can select "Approved" and cite their final decision. If another decisionmaker is needed to confirm their decision they should be cited as an Owner and tagged in the approval comment.
Close (Approval)	Once it has been verified that the risk or issue no longer requires management, the User selects the "Closed" status button and selects a Resolution which closes the Ticket	Once it has been verified that all tasks have been completed, the User selects the "Closed" status button and Resolution which closes the Action Item	Not applicable.
On Hold	For tickets that are placed in the 'On Hold' Status, the Due Date indicates when the ticket should be re-reviewed. When work is ready to begin again on an 'On Hold' ticket, the Status should be updated to 'In Progress' and the Due Date should be updated to reflect when the next activity needs to be completed.		
Escalate(d)	This status is intended as a Status to assist in filtering and highlighting an Issue (Ticket) for observation by an escalated level of management to make a decision. Escalation choices (Management, Leadership, and Executive) are flexible and are related to the selection of the data fields DDI or M&O, Responsible Module, and others. The person(s) assigned to make the decision must be cited as both "Owners" and tagged in the comment entered when escalated.		
Reopen(ed)	A risk, issue, or action item is reopened if the exact same risk, issue, or action item is needed. If any variation, a new RAI should be created and could be linked to a related Issue (Ticket).		If a decision is being reconsidered, resources can collaboratively agree that a decision formally canceled or closed must be reopened. A decision can be reopened if the previously finalized decision needs to be revisited or if additional analysis is needed before it can be closed again.
Cancel(ed)	Resources agree that the Issue (Ticket) is no longer applicable or was created in error. A reason will be noted in the Resolution field.		

Process Flows, Roles, and Status Descriptions

Exhibit 7: Process Flow & Roles – Risk, Action Item, and Issues

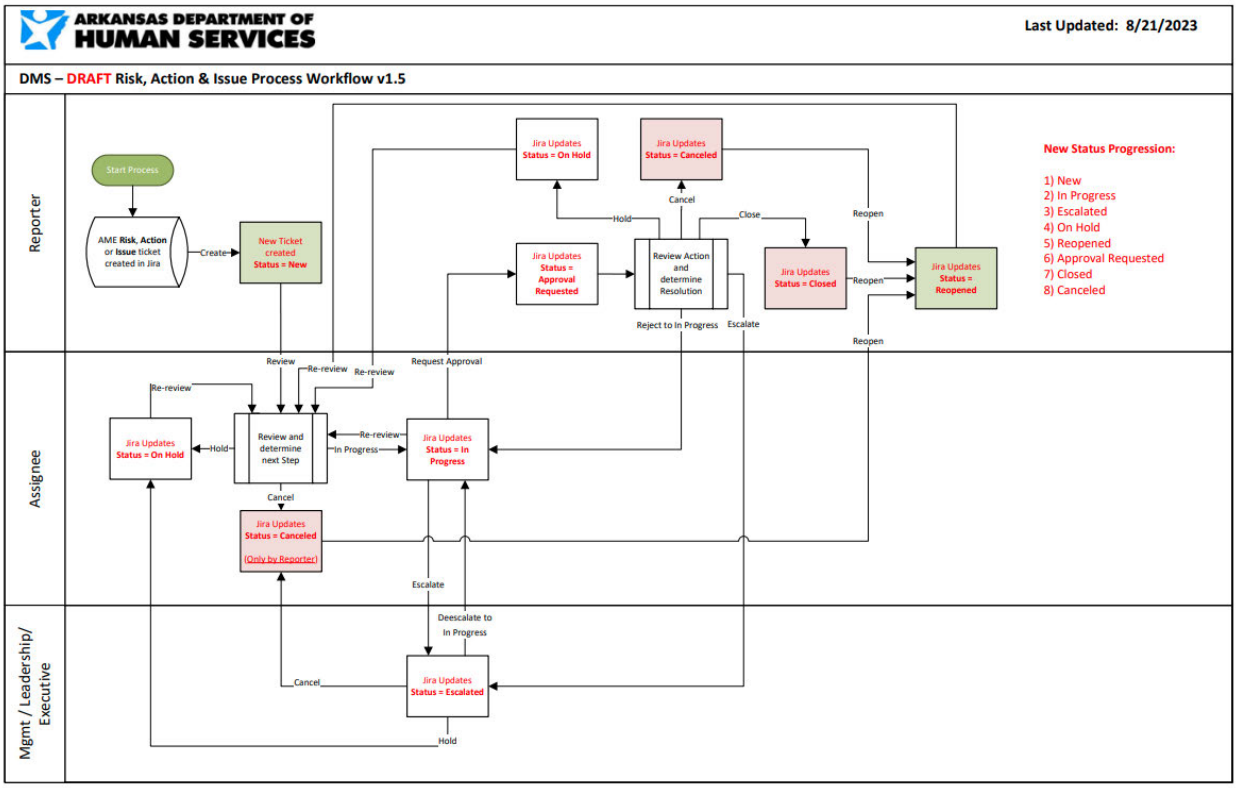

Exhibit 8: Process Flow & Roles - Decisions