

# Converge Program Update

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# Agenda

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# Overview

Critical Readiness Activities	Overall Status
Data Readiness	On Track
Payroll Office Readiness	On Track
Security	On Track
Service Readiness (e.g., People, Process, Platform)	On Track
Participant Communications	On Track

# Data Readiness

## Test Load Data Progress

- Test Load 4 started 2/25 as planned
- Test Load 4 will prove-out data analysis and correction processes installed as a result of Test Load 3
- Test Load 4 will confirm and identify additional process and system efficiencies required to minimize production conversion timing

## Highlights & Key Outcomes

- FRTIB's transmission of test load 4 data matched our expectations
- Continuing to analyze and simulate our conversion processes to gain efficiencies where possible

# Payroll Office Readiness

- **Interconnection Security Agreements (ISAs)**



- 56% of ISAs have been signed and fully executed as of 3/15
- Target date for completing all ISAs is by the end of April

- **Secure Connection Testing**



- Secure connection testing activities are in-progress
- 100% of Secure Connections established and “Hello World” testing is complete
- Data Testing is now underway in parallel with Phase 2 Agency Training

- **Memorandum of Understanding / Credentialing**



- Memorandums of Understanding (MOU) documents have been signed for all 92 original Payroll Offices
- Agencies added after November are pending MOUs; targeting end of March for completion

# Payroll Office Readiness (cont.) / Security

## • Credentialing



- 100% of identified Agency authorizers have been ID verified
- 96% of Authorizers and 92% of Agency users have been credentialed

## • Training



- Computer-based training has been completed by 74% of Agency users
- Agency Phase 2 (Hands-On) Training is underway in parallel with Data Testing efforts
  - ✓ Target to complete all Phase 2 training is 5/20



## • Security

- Authority to Operate was granted on 2/28

# Service Readiness

- **User Acceptance Testing**

User Acceptance Testing execution, results presentation, and remediations presentation were complete as of the end of February. Any remaining defects and enhancements have been prioritized for completion between mid-March and early-May.

- **Performance Assessment**

The program has initiated the Performance Assessment phase, which represents a period of time prior to go-live that will be used to test end-to-end process. This activity will be used to confirm overall readiness.

# Participant Communications

- **Campaign 1 Progress**

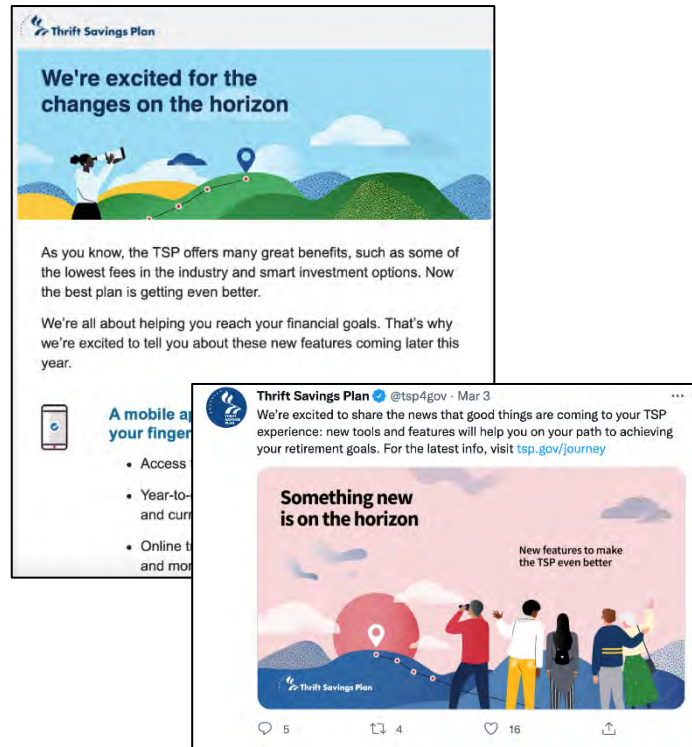
- Additional “Get Excited” messaging has been distributed including 2 additional e-mails and social media posts
  - ✓ Two additional campaigns are planned: Get Ready (mid-March) and It’s Here (upon Go-Live)
- A “Communications Toolkit” containing approved copy and visuals will be distributed to FRTIB Partner Agencies/Services (HR/payroll representatives) to use to communicate with participants and beneficiaries in their networks

- **Transition / Blackout Notice**

- A notice will be sent to all participants and beneficiaries in mid-April regarding upcoming service changes and planned downtime leading up to Go-Live

- **Go-Live Contingency Communications**






- Contingency communications scenario planning and asset development is in progress



*The second participant communications email and first tweet for Campaign 1 (Get Excited) to TSP Participants.*



# Converge Delivery Milestones

✓	<b>Program Governance Model Created</b>	12/11/20	<b>UAT Executed</b>	12/31/21	✓
	Approve and establish governance model for RKSA transition.		Execution of User Acceptance Testing, not including findings or remediations.		
✓	<b>Transition Planning Complete</b>	02/26/21	<b>Recordkeeping Data Conversion Round 3</b>	02/03/22	✓
	Finalize planning activities, including initial meetings, standup of PMO, and establishing transition governance.		Initial data conversion of non-anonymized system data in preparation for go-live.		
✓	<b>Recordkeeping Data Conversion Round 1</b>	06/30/21	<b>ATO Granted</b>	02/28/22	✓
	Initial data conversion test including partial data and additional anonymized data sets to validate functionality.		FRTIB validates compliance with H.27 and grants ATO for Accenture.		
✓	<b>Recordkeeping Data Conversion Round 2</b>	09/30/21	<b>Business Continuity Exercise</b>	04/08/22	⚙️
	Secondary data conversion test featuring anonymized data sets for the full scope of RKSA.		Validation of business continuity exercises outlining FRTIB operations including physical recovery, communications, and alternate logistics.		
✓	<b>System Test Complete</b>	11/30/21	<b>Recordkeeping Data Conversion Round 4</b>	04/15/22	⚙️
	Final validation of the data conversion round two success and technical approval for data conversion round three (Completed 2/25/22).		Final data conversion of non-anonymized system data in preparation for go-live.		
✓	<b>ATO Submitted</b>	11/30/21	<b>Performance Targets Achieved</b>	05/13/22	⚙️
	ATO submission by Accenture for FRTIB approval.		Validation final configuration of Converge meets the pre-agreed upon performance targets prior to go-live.		
<div> <div>  <b>Go-Live</b> <span>Mid-2022</span> </div> <div>             Operational go-live for Converge including delivery of all promised features.           </div> </div>					
<div> <div>  Complete           </div> <div>  On Track           </div> <div>  At Risk           </div> <div>  Missed           </div> </div>					

# Questions?