

Oklahoma Healthcare Authority

PeopleSoft Migration

MIPRO Consulting

Presentation No. P-049942

- Introductions
- About State of Oklahoma
- About MIPRO Consulting
- Project Background/Scope
- Timeline
- BluePrint Workshop
- Project Objectives
- Risk Mitigation
- Team
- Testing
- Dry Run
- Implementation Progress Assessments
- Project Success Factors
- Survey Feedback



SAM SISLER, MIPRO CONSULTING

- Engagement Director for the State of Oklahoma agency PeopleSoft migrations
- Sam is a Practice Director with 25+ years of Information Technology (IT) industry experience in consulting and leadership within private entities with key emphasis on implementations, upgrades, and optimization of PeopleSoft HRMS and ERP (Financials, Supply Chain, EAM/ALM) applications

AMY MILLER, STATE OF OKLAHOMA

- Director of Enterprise Applications
- Previously served as PMO Manager for agency implementations

ROB MOWID, MIPRO CONSULTING

- Director – Midwest
- 30 Years Info. Tech Experience
- 12 Years ERP experience
- 7 Years with MIPRO

- Total Annual Budget: \$27.8 billion
- 15 Cabinet Secretaries with over 200 agencies
- Number of Employees: 30,000
- State Population: 3,980,000
- Centralized PeopleSoft 9.2 FSCM
- Multiple Agencies migrated to PeopleSoft
- Run PeopleSoft on Oracle Cloud Infrastructure (OCI)
- Annual PUM updates



OKLAHOMA
Office of Management
& Enterprise Services

Our Heritage

- Founded by former PeopleSoft execs in 2005
- More than 800 engagements, 160 customers throughout North America
- Dedicated exclusively to PeopleSoft engagements

Our Passion

- Award winning culture attracting experienced talent
- Reputation for being innovative, candid and customer focused
- Integrity – taking pride in consistently doing the right thing

Our Focus

- The success of our customers, achieving their objectives
- PeopleSoft Financials/Supply Chain/Asset Lifecycle Management, Human Capital Management, Campus Solutions
- Optimizations, Upgrades, Implementations, and Managed Services



Experience and Expertise

- 100% dedicated to Oracle, top talent in the industry
- Multiple, successful PeopleSoft optimizations, upgrades and implementations
- An Oracle 9.2 PeopleSoft Beta Test partner

Commitment to Our Customers

- Consistently on time and under budget, no changes orders
- Integrity, honesty and candid, transparent conversations leading to long term relationships

Innovative Approaches and Flexibility

- Known for our ability to offer multiple approach options & have demonstrated in flight flexibility

Two Decade Relationship with Oracle

- On the team that originally created PeopleSoft's Compass implementation methodology
- Personal and professional connections within Oracle product strategy and development teams



Core Competencies



Digital Transformation
Solutions (RPA, AI, ML, etc.)



XR Applications
VR | AR | MR



Cloud Migrations
(Lift-n-shift)



Test
Automation



Cloud
Computing



ERP Consulting,
Implementations
Upgrade, and Support



IT Managed
Services



IT Staffing / Staff
Augmentation



Database
Administration



BI & Advanced
Analytics

Background/Scope

- HealthCare Authority Agency
- Move from legacy applications: Great Plains to PeopleSoft 9.2
- Run PeopleSoft on OCI
- Modules

- Project Costing
- Contracts
- Grants
- Accounts Receivable
- Billing
- Asset Management
- General Ledger
- Payables
- Purchasing/eProcurement

*" To implement a transparent, integrated financial system that aligns with state and federal standards, improves efficiencies, leverages technology, enhances data capabilities and supports continuous improvement for the **purpose of providing quality healthcare** to Oklahomans regardless of their ability to pay. "*

➤ Integrations

- Two external purchasing systems, a random moment time sampling system, Workday (HR & payroll data,) Medicaid Mgmt. Information System, BOA P-Card, Nursing Home Billing systems

➤ Reports

- Many existing reports have been developed by the state for use by the agencies
- Our project team developed queries to assist HCA in their business operations and reconciliations

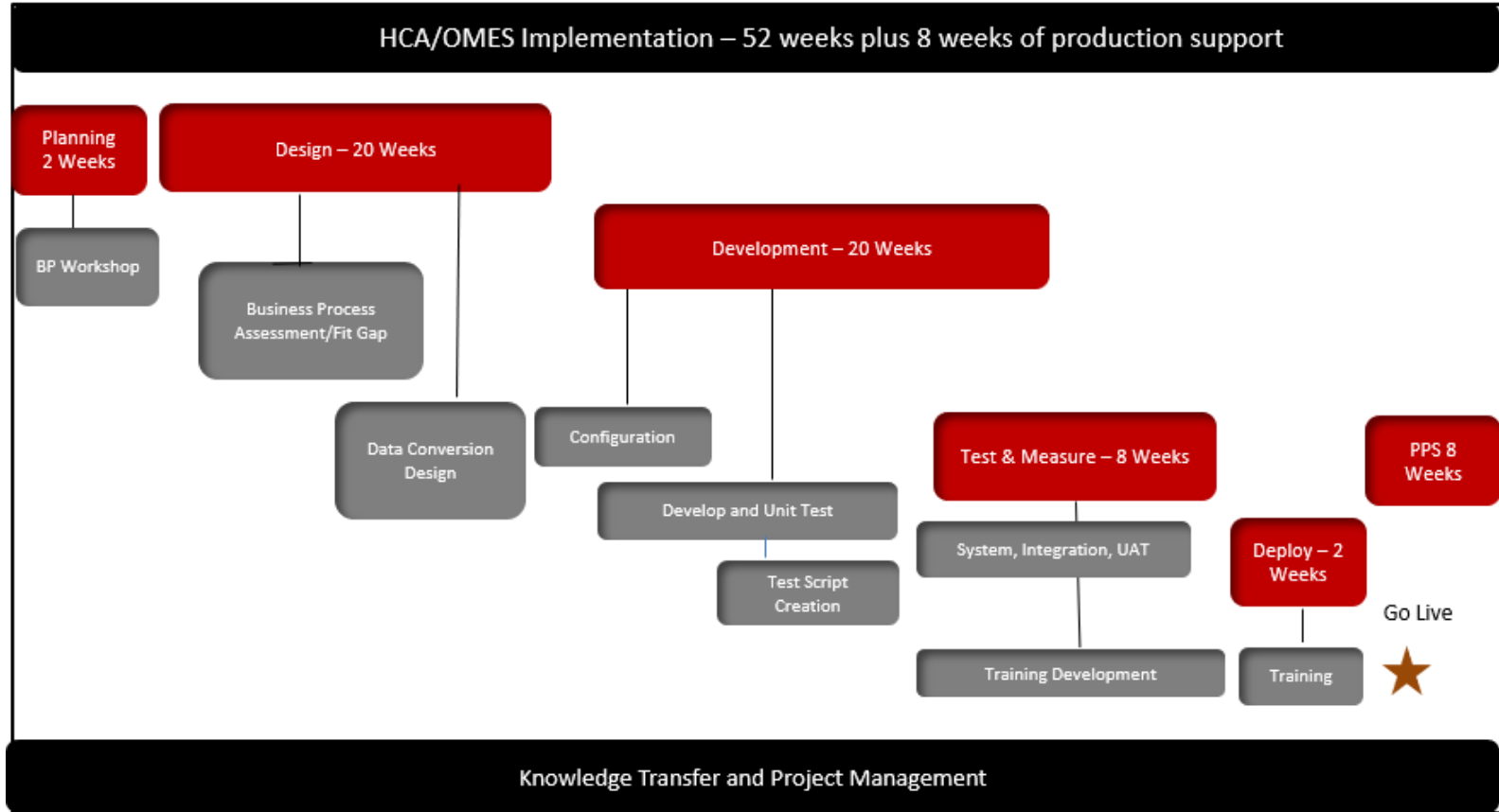
➤ Data Conversions

- Contracts, General Ledger, Grants, Projects, Accounts Receivable, Billing, Purchase Orders, Assets

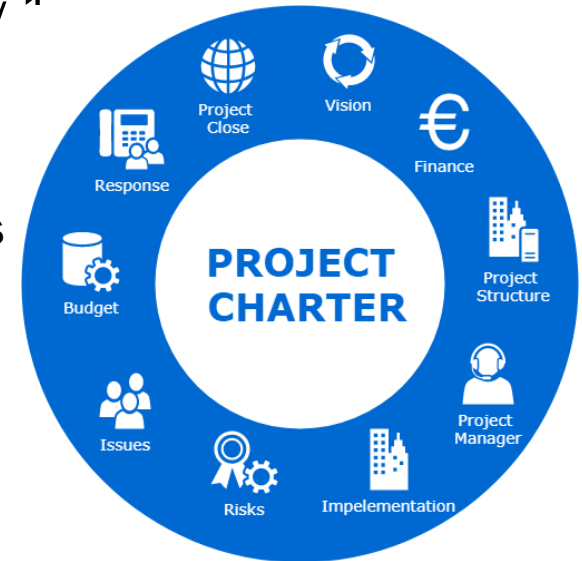
➤ Customizations

- Goal was to keep customization to the minimum
- Limited to:
 - AR/BI/GM for hospital and nursing home billing and accounting for the associated fees
 - Non-Standard Workflows

➤ ChartField Re-design



- First project activity
- Goal to get everyone on the same page from day ¹
- Two-day workshop with project leadership
 - Establish mission statement
 - Establish key project objectives/success factors
 - Identify and mitigate potential risks
 - Identify project resources required
 - Identify project constraint
 - Validate timeline
 - Validate high level scope
 - Establish project management structure



KEY PROJECT OBJECTIVES – FROM BP WORKSHOP

- Have access, in some manner, to existing/historical data for 7 years for state, and 10 years for federal requirements
- Go live with a well-trained OHCA team that is confident and self-sufficient in their use of the new system.
- Utilize PeopleSoft for the creation of monthly financial statements
- Improve user experience and satisfaction
- Utilize PeopleSoft to manage and track payments to managed care entities
- Link Grants for invoices, budgets and POs for CMS (Center for Medicaid and Medicare Services) with Advance Planning Document (APD)
- Quickly identify any OHCA requirement that impacts statewide system and take that to Governance for resolution
- Provide self service reporting to key users

Replace Great Plains functional capabilities with PeopleSoft:

- Batch invoicing
- Automated mass invoice creation
- Payment application to AR
- Journal entries and corrections
- Query and reporting functionality
- Customer (OHCA customer definition) profile management



PROJECT RISK MITIGATION – FROM BP WORKSHOP

Risk	Likelihood	Impact	Mitigation
Scope validation, expansion, and management	M/L	M	<ul style="list-style-type: none"> • Validation of fit/gap documentation with business leads • Scope management plan in place (documentation, impact analysis and approval of changes to scope)
Availability of shared resources due to multiple projects <i>IT/ MMIS would be the most unavailable due to multiple conflicting projects</i>	H	H	<ul style="list-style-type: none"> • Monitor managed care implementation – no backfills identified • Monitor MMIS Re-procurement system project • Finance team availability during critical month-end, quarter-end & year-end activities • Identify IT/ MMIS resources needed and requesting availability early
Insufficient testing	L	H/M	<ul style="list-style-type: none"> • Creation of thorough test plan • Quality assurance lead assigned to help manage the testing process • Utilize a testing tool, Azure, to track bugs identified during testing • Creation of detailed test scripts and scenarios needed for OHCA business needs

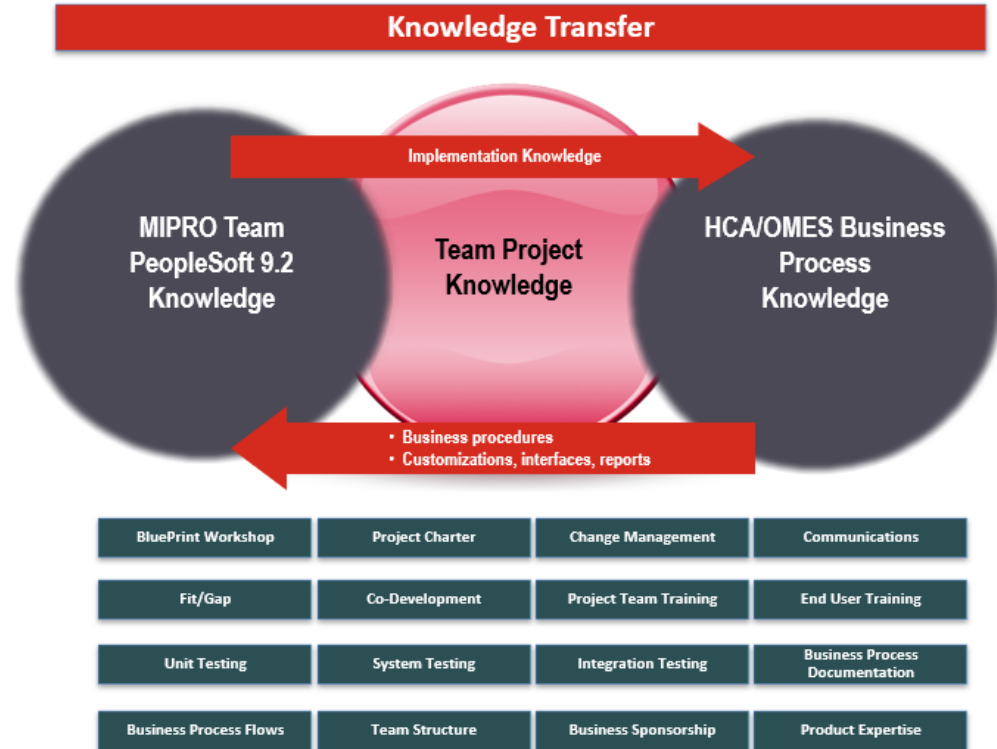
PROJECT RISK MITIGATION – FROM BP WORKSHOP

Risk	Likelihood	Impact	Mitigation
Not having fully trained and self-sufficient resources at go live	L	M	<ul style="list-style-type: none"> • 8 weeks of project team support • Project team development of training content • Develop repository for training • Track which users have received adequate training • Identify backup team members for backfill of key resources • Identify a training lead/ owner for the project and a backup
Change Management	M	M	<ul style="list-style-type: none"> • Provide leadership and guidance to teams working on multiple projects • Top down, frequent communication • Identify change management lead resource (OHCA)
Ability of the PS system to execute the business needs of OHCA (data granularity)	M/L	H	<ul style="list-style-type: none"> • Validation of fit/gap documentation with business leads • Provide sample reports to MIPRO leads for system build • Availability of “as is” process maps in order to build a “to be” processes. Identify hand-offs and process steps
Communications are ineffective and inconsistent.	L	H/M	<ul style="list-style-type: none"> • Identify communication channels most effective for messaging • Establishing a communications plan (timeline, frequency, etc.)

RESOURCES: PROJECT TEAM STRUCTURE

Enable Knowledge Transfer

- HCA Executive Sponsorship
- HCA Business Leads
- OMES Project Manager
- OMES Business/PeopleSoft Leads
- Oracle OCI resources
- MIPRO Project Management
- MIPRO Functional Leads
- MIPRO Developers



- Expected project level participation
- Actual project level participation
 - Change Mgmt.
 - Training

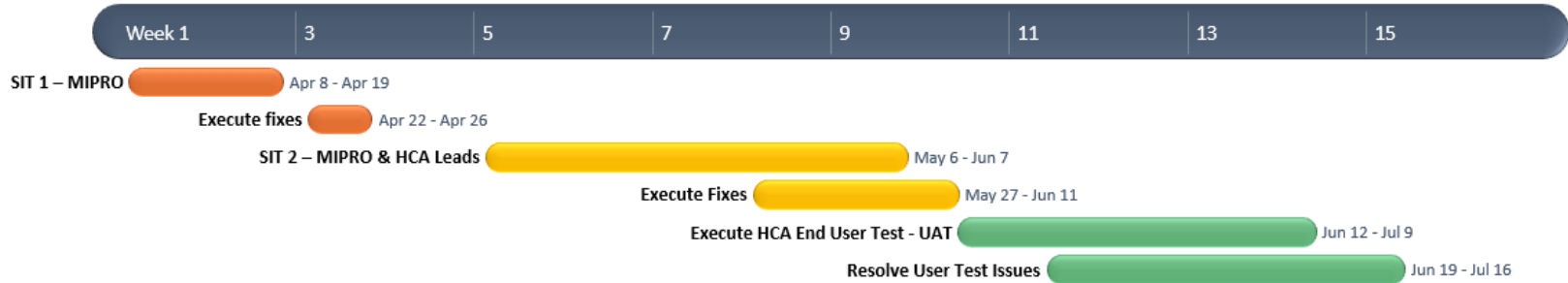
HCA/OMES Team Roles	Project Phase					
	Strategy	Design	Develop	Test	Deploy	PPS
Program Management						
Steering Committee	10%	10%	10%	10%	10%	5%
Executive Sponsor	10%	10%	10%	10%	10%	5%
Project Manager	100%	100%	100%	100%	100%	100%
Change Management						
Change Management Lead	50%	50%	50%	100%	100%	50%
Training Lead	10%	25%	75%	100%	100%	50%
Testing						
Test Lead	10%	25%	75%	100%	25%	0%
Testing Support	0%	25%	75%	100%	25%	0%
Functional Team						
Business Subject Matter Experts	10%	50%	50%	75%	50%	25%
Technical Team						
Technical Resources – Great Plains/3 rd Party apps	10%	25%	50%	50%	25%	10%
Technical Resources – PS Admins, DBA's	10%	25%	50%	50%	50%	25%
Technical Resources – PS Developers	10%	25%	25%	25%	25%	25%
Security Lead	5%	25%	50%	50%	50%	50%

RESOURCES – FROM BLUEPRINT WORKSHOP

- Every resource required identified
- Backup(s) for that resource
- Time commitment
 - Overall
 - During Fit/Gap

Role/Title	Overall Availability Percentage	Fitgap Availability Percentage
Sr. Director of General Accounting - Financial Services	25%	50%
Comptroller – Financial Services	25%	50%
Financial Manager III – Financial Services	25%	50%
Financial Manager III – Financial Services	25%	50%
Budget Controller – Financial Services	25%	50%
Division Director – Financial Services	25%	50%
Prof Services Contracts Mngr – Legal Services	25%	50%
Procurement Manager – Financial Services	25%	50%
Director of Strategic Innovation – Healthcare Quality & Performance	25%	50%
Continuous Improvement Manager	25%	50%
Continuous Improvement Manager	25%	50%
Finance COE Manager – Finance Center of Excellence	25%	50%
Office of Management and Enterprise Services	25%	50%
PeopleSoft Administrator – DCAR Accounting and Reporting	25%	50%
PeopleSoft Business Analyst – Finance Center of Excellence	25%	50%
	25%	50%
Office of Management and Enterprise Services	25%	50%
Office of Management and Enterprise Services	25%	50%
PeopleSoft Business Analyst – Finance Center of Excellence	25%	50%
State Inventory Ctrl Officer – Finance Center of Excellence	25%	50%
PeopleSoft Asset Management Business Analyst – Finance Center of Excellence	25%	50%
Procurement System Analyst III – Central Purchasing	25%	50%
Procurement System Analyst II – Central Purchasing	25%	50%
Senior Systems Analyst manager – Informational Services	25%	50%
Director – Informational Services	25%	50%
Chief of Business Operations – Informational Services	25%	50%
Senior Director of Financial Services	25%	50%
Director of Internal Audits – Financial Services	25%	50%
Drug Rebate Manager	25%	50%
HCA Oracle Transition Manager	25%	50%

- Three rounds of testing
 - SIT 1 (MIPRO teams)
 - SIT 2 (MIPRO and HCA teams)
 - UAT (HCA end users)
















- 158 Detailed, click-by-click test scripts, with many different scenarios associated with each script
- Azure DevOps utilized as the test tracking tool

- Executed a dry run replicating what will occur for cutover
- Assigned resources
- Assigned time expectations
- Executed in the correct order
- Functional and Technical tasks required
- Worked out bugs
- Lessons learned
- Applied to the production cutover process

IMPLEMENTATION PROGRESS ASSESSMENT

- Executed by a non primary project team resource
- Executed between design and development
- Identify project related processes that are working well
- Identify project related processes that need improvement
- Make recommendations for improvement
- Allows the project to stay on track
- Written detailed report (ex: 27 pages)

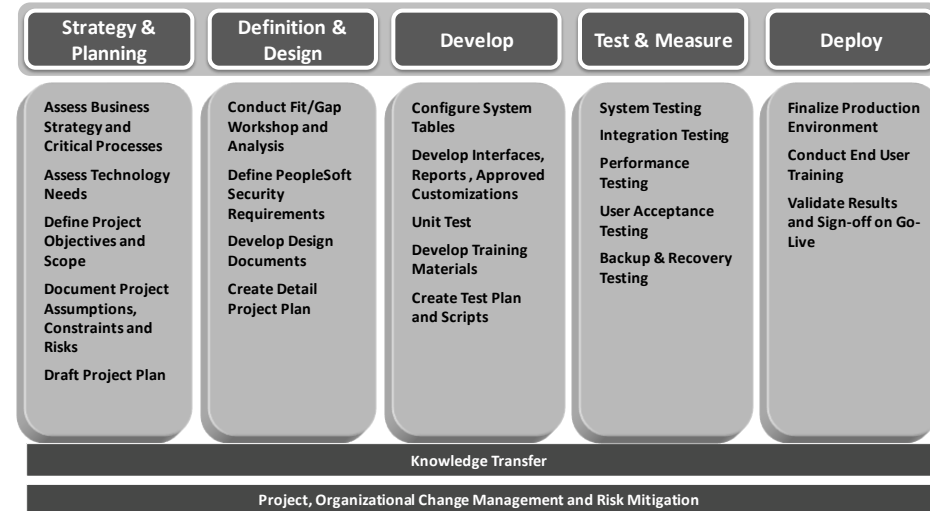
Area	Status
Overall Status	G 
Technical and Infrastructure	G 
Organizational Change Management	G 
Application Configuration and Delivery	G 
Team Structure	G 
Project Management and Structure	G 

Team Structure	Status
Overall	G 
Team Leads Identified and active	G 
Stake Holders Identified and active	G 
Executive sponsorship strong and visible	G 
Workload balance	Y 
Meetings and Project Status	G 
Turnover	G 

WHAT MADE THE PROJECT SUCCESSFUL

- Utilized a proven implementation Methodology
- Executed BluePrint Workshop at the start
- Identified all required resources with time commitment expectations
- Highly Skilled PeopleSoft Consultants
- Identified Project Objectives and measurements
- Strong Executive Sponsorship
- Strong Project Management
- Collaboration from all parties (MIPRO, OMES, HCA, Oracle)
- Strong communications
- Sufficient testing
- Risk Management and mitigation
- Implementation Progress Assessment(s)

On Time! On Budget!



LESSONS LEARNED – SURVEY FEEDBACK

- Executed a dry run replicating what will occur for cutover
- PSCw and IR to PS – Elimination of Dual entry for procurement transactions **saving 5-10 minutes per transaction.**
- MMIS to PS interface – **saves ~ 10 hours per week** in data preparation and transaction entry
- Grant reporting can now be done through the Project Costing module vs maintaining Excel Spreadsheets
- Financial reporting is now maintained in PeopleSoft vs Excel spreadsheets providing greater transparency and accessibility of financial data across the organizations
- Custom billing uploads for QCF and SHOPP to streamline billing entry.
- OHCA now meets the State of Oklahoma standards for financial reporting/ system platform.
- Streamlined business process for Budget team is available using Project Costing budgeting and can be implemented in a future project. (optional feature in PeopleSoft)

What went well?

- On-time go live/ Smooth go live
- All teams worked well together with a high level of professionalism and collaboration.
- The team felt the overall communication on the project was good.
- The survey respondents rated the PeopleSoft system at 72% for **met** or **exceeds** expectations for the project's functional requirements.
- PS system performance and reliability was rated as 30% Excellent and 53% Good.
- Post implementation support rated at 30% Excellent and 61% Good.
- Meeting state standard by retiring Great Plains

Areas For Improvement

- Timing of Go Live at the same time as year end was a strain on OHCA resources.
- More resources were needed on the Agency side to backfill roles to allow key stakeholders to have more time to devote to the project.
- Train the Trainer approach was not effective for some areas of the business. Recommendations for PeopleSoft consultants to conduct end user training.
- Allow time after fit/gap and before SIT 1 to build the system and present to users for validation.
- Additional Change Management engagement/ resources.

Questions?



Contact me:

Sam Sisler

Practice Director

MIPRO Consulting

sam.sisler@miproconsulting.com

Session ID:

P-049942



Quest
PeopleSoft
Community



LOVE THIS SESSION?

GO TO THIS SESSION'S
LISTING IN THE MOBILE APP
AND CLICK **RATE SESSION** TO
COMPLETE A BRIEF SURVEY

PeopleSoft

RECONNECT

DIVE DEEP - VIRTUAL!

At Quest, you belong.

Swap stories, ask questions, find answers, and learn from other Oracle users.

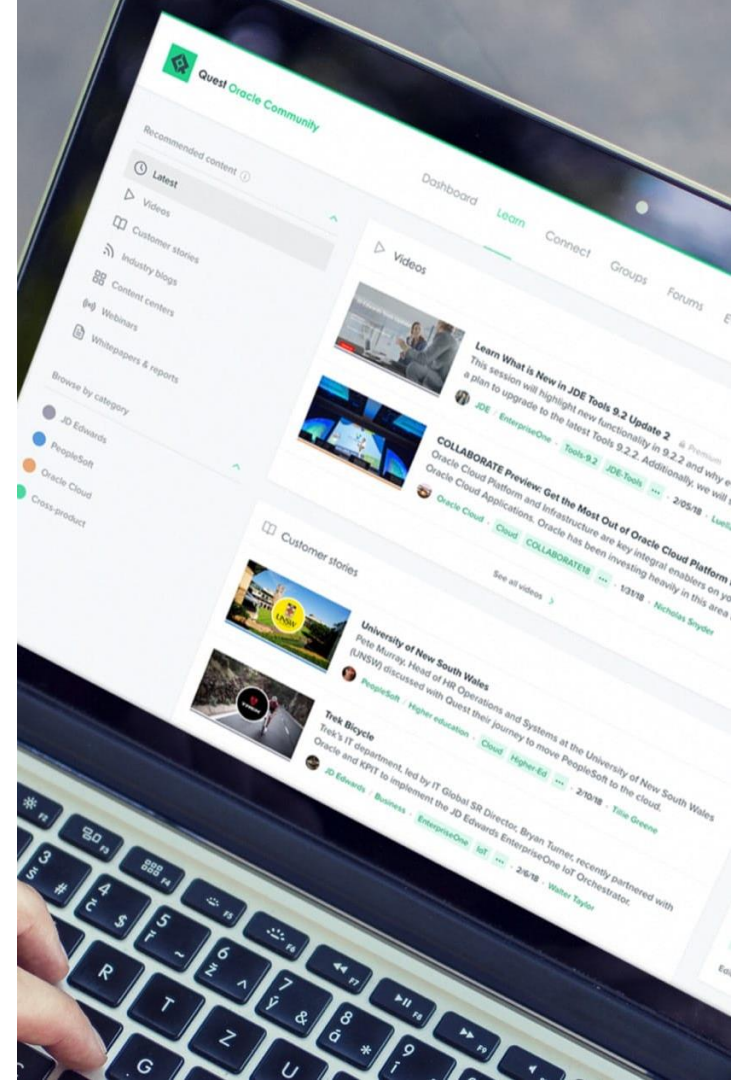
Quest Helps: Individuals

- Increase their personal knowledge, skills, and efficiency.
- Find answers and solve problems.
- Make better, informed decisions.
- Increase their sphere of professional influence and advance their careers.

Quest Helps: Companies

- Become more efficient in their use and deployment of Oracle products.
- Transform their organizations and modernize their product planning.
- Recognize opportunities for efficiency gains and cost savings.

Learn more at questoraclecommunity.org/membership



At Quest, you belong.

Swap stories, ask questions, find answers
and learn from the PeopleSoft community.

The PeopleSoft community offers:

Event Hubs

Browse 145 digital sessions from RECONNECT 23 or dig into other past conference content, organized by track or hot topic

Special Interest Groups

Take your pick of 30 informal PeopleSoft discussion groups including General Ledger, Payroll, Financials, Tech and a host of other hot topics, including dedicated industry groups.

Strategic Content Centers

Expand your PeopleSoft knowledge on Kibana, PICASO, PeopleTools, Selective Adoption and other hot topics

Learn more at questoraclecommunity.org/peoplesoft

Save the date:



RECONNECT Live! at BLUEPRINT 4D

June 10 – 13, 2025

The Venetian in Las Vegas, NV



Quest Experience Week PeopleSoft Day

December 10, 2024

SAVE THE DATE!



 **BLUEPRINT 4D**™

JUNE 10 – 13, 2025
THE VENETIAN | LAS VEGAS, NV



LEARN MORE:

questoraclecommunity.org/blueprint4d



Quest
Oracle
Community