The PSC Pages

Post Go-Live 2006

This informal publication has been created to bring you UFMS implementation information from the perspective of the PSC and Its Customer Agencies. The PSC Pages is published on a quarterly basis. We welcome your suggestions and contributions! Please direct them to the following e-mail address: Mailbox.UFMS@hhs.gov

Bringing Clarity to Financial Management for PSC and Its Customer Agencies

UFMS Goes Live for PSC and Its Customer Agencies!

Ready, Set, Go! October 16 has come and gone, and we made it; the PSC and Its Customer Agencies' Implementation has seen success with the transition from the CORE financial management system to the new Unified Financial Management System (UFMS).

"Leadership was engaged; communication continued throughout; the workforce was prepared; training was complete and security issues were handled, all thanks to a committed, dedicated and hard working team!" These were just a few words expressed by Kerry Weems, HHS Deputy Chief of Staff and Joe Ellis, Assistant Secretary for Administration and Management as they visited and thanked the UFMS-PSC Project Team on the afternoon of Monday, October 16. Others on hand to thank the team included Terry Hurst, Director, UFMS Program Management Office, and UFMS Program Sponsors Larry Bedker, Director, Financial Management Service, Program Support Center (PSC), and Maria Joyce, Director, Division of Financial Operations, PSC. Similar events took place throughout the OPDIVs and STAFFDIVs with various Chief Financial Officer's expressing their gratitude and multitude of thanks to respective staff members.

As part of the Department's response to the President's Management Agenda, seven more agencies within HHS are up and running on the new financial management system. With this release, UFMS has delivered 100% of its baseline requirements and is scheduled to complete its final release with the Indian Health Service in October 2007. When complete, the entire program will support over 22,000 HHS employees and provide sound financial controls for HHS.

Go-Live Clock at 38 minutes prior to the switch to the new System for PSC and Its Customer Agencies!

PSC Customer Agencies

- Administration for Children and Families (ACF)
- Administration on Aging (AoA)
- Agency for Healthcare Research and Quality (AHRQ)
- Health Resources and Services Administration (HRSA)
- Indian Health Service (IHS)
- Office of the Secretary (OS)
- Substance Abuse and Mental Health Services Administration (SAMHSA)

Post Go-Live Training

The UFMS-PSC Training Team commenced Post Go-Live Training on October 18, 2006. This training is intended for users who were unable to attend UFMS Instructor-Led Training prior to Go-Live. Post Go-Live Training has been offered for Budget Execution (BE) Federal Administrator, Purchasing (PO) Contract Officer, Account Receivable (AR) Billing Accountant, Project Accounting (PA) Manager Reimbursable, and Receiving. The Receiving Workshops are being scheduled at the Parklawn Building, SAMHSA Headquarters, Aerospace Building, and the Cohen Building. Additional targeted training classes are also being held for Travel, IPAC, and BE Open Interface. A series of AP refreshers are also being conducted for Super Users/Master Users to strengthen support to their staff.

Training required for new UFMS users must be requested through the Help Desk and/or User Provisioning Process. Once receiving the request through the User Provisioning Process, the UFMS-PSC Training Lead will develop a training curriculum for, and alert the user of specific training requirements. After the online training is complete and necessary Instructor-Led Training is scheduled, the UFMS-PSC Training Lead will then confirm training completion and send the request to Operations and Maintenance to issue user names and passwords. The User Provisioning Form can be found on the UFMS-PSC Intranet site: http://intranet.hhs.gov/ufms/psc.html.

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Customer Advisory Group

In order to continue the information that was disseminated via the UFMS User Group monthly teleconference calls, the PSC Customer Advisory Group (teleconference call) has been established. The bi-weekly calls commenced on October 23, and as of December 5 they will become a weekly call. The purpose of the Customer Advisory Group is to provide a forum to ensure that the Division of Financial Operations (DFO) is providing the level of support users require to seamlessly perform their daily functional operations. In addition, the group will also focus on the status of UFMS operations, updates from the UFMS Stabilization Team, and address issues that users have experienced. It is clear that an implementation of this magnitude and complexity presents a great deal of functional changes and challenges, therefore it is necessary to discuss and resolve issues as they arise.

The PSC Customer Advisory Group teleconference call will take place every Tuesday from 1:30 p.m.– 2:30 p.m. If you wish to attend in person, please contact Matt Zakielarz at 301-443-4378 or you may dial in at: **1-877-700-6574, Passcode: 834237.** Attendance from each of the Operating and Staff Divisions is highly encouraged and is critical to your continued success with UFMS.

Stabilization

The UFMS project for PSC and Its Customer Agencies underwent a major transition following the successful Go-Live on October 16. As the UFMS program moves from developing and implementing the new System to maintaining it, the team members involved are also being reorganized to serve a new role.

A number of members of the implementation team have transitioned to become a part of the newly established Stabilization Team. The Team, consisting of functional experts (most of who were intimately involved in the development and implementation of UFMS), will work with Operations and Maintenance (O&M) and the UFMS Help Desk to gather and respond to user issues concerning the new System. Any user issues that cannot be resolved by the first or second tiers of support will be addressed by the Stabilization Team. The Team will also coordinate with feeder system owners to ensure that all necessary information is available in UFMS. Overall, the Stabilization Team is responsible for monitoring the health of UFMS for PSC and Its Customer Agencies.

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Month-End Close

During the last week of October, the UFMS system was successfully guided through its first big challenge: Month-End close.

A Month-End close involves reconciling the system accounts and posting transactions to the General Ledger in accordance with accounting rules. Information was gathered from all Modules in the UFMS system and from the various feeder systems linked to UFMS. What's critical about the closing process is that it needs to take place in a specific order: Purchasing, Payables, Receivables, and then General Ledger.

Functional experts from each accounting area of PSC and its serviced clientele worked throughout the week to complete the process, which finished on the evening of November 3. Closes take place at the end of each fiscal period (month, quarter, and year). The success of the October Month-End close was significant for many reasons: it was the first close in UFMS for PSC and Its Customer Agencies, the close was successfully completed in a timely manner, and the completion highlighted the functionality and capabilities of the UFMS system.

Go-Live Highlights

Pictured from left to right: Philip VanLandingham, Director, Program Support Center (PSC); Linda Garvin, Principal Deputy Assistant Secretary for Administration and Management; Joe Ellis, Assistant Secretary for Administration and Management; Kerry Weems, Deputy Chief of Staff, HHS; Maria Joyce, Director, Division of Financial Operations, PSC; Larry Bedker, Director, Financial Management Service, PSC.

Jeff Hubler (left), UFMS-PSC Implementation Lead, BearingPoint and Mike Fullem (right), UFMS-PSC Implementation Lead, Federal during a post Go-Live Project Team celebration.

Mike Peckham, UFMS-PSC Project Accounting Lead and Susan Eakins of the PSC General Accounting Branch count down the clock as the System goes live!

PSC users gathered to listen to words of appreciation from the PSC Leadership on October 16, 2006, minutes before the System goes live.

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Go-Live Highlights

Joe Ellis, Assistant Secretary for Administration and Management and Kerry Weems, Deputy Chief of Staff, HHS, visiting with members of the UFMS-PSC Project Team on October 16 to thank them for a job well done.

Preparations prior to Go-Live — informational bags were prepared and distributed to each end user as a token of appreciation for their hard work and support towards the implementation of the new System.

Members of the UFMS-PSC Project Team posing for a picture at a celebratory team breakfast.

UFMS-PSC Project Team members enjoying food and conversation at the team breakfast.

Terry Shiflett-Moats and Lydia Peele discussing last minute details of the System implementation.

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UFMS – PSC Poster Series Number Seven Unveiled

We did it; we've come full circle! With the implementation of the Unified Management System for the PSC and Its Customer Agencies on October 16, 2006, the total system and business transformation has come full circle and is being seen and felt by one and all throughout the HHS financial management arena. The final UFMS poster – "Believe – Nurture – Succeed" – depicts the final stage of the implementation and the launch of your new system. As noted in the header, the time has come for us to take ownership – to "Believe" in the system we have now implemented, to "Nurture" it as we go forward, and in doing so, we will "Succeed"!

Poster 7

The Transformation is Complete!

Also featured is the UFMS poster series in its entirety. As you see each Eagle Origami image take shape from one stage to the next, you will realize how the UFMS-PSC Business Transformation Team has worked in tandem with the Chief Financial Officers; Financial Management Supervisors; Business Points-of-Contact; Super Users and Master Users and most important, the financial management end user community in order to truly transform the way we do business at HHS.

Poster 1

Poster 2

Poster 3

Poster 4

Poster 5

Poster 6

Post Go-Live Tips!

☑ Celebrate your successes, both large and small, as you use UFMS

☑ Talk to your users – don't assume they know how to use the System

☑ Troubleshooting is a team approach – collaborate with members from Budget and Accounting, etc.

☑ Address errors early – they are harder to correct the longer they are in the System

☑ Use focus group input to enhance training efforts

☑ Ongoing communications post Go-Live is critical

☑ Post Go-Live training is very important

☑ Expect great changes in your business processes with UFMS – you'll see them become more streamlined and practical

☑ Be familiar with the User Provisioning Process to request user additions, deletions, or modifications. The Request, along with the User Roles and Responsibilities Descriptions and Definitions, may be found on the UFMS-PSC Intranet at: http://intranet.hhs.gov/ufms/access.html

☑ Attend the PSC Customer Advisory Group meetings

☑ Partner with other Operating/Staff Divisions and share lessons learned and key successes

☑ Address UFMS issues with the Help Desk at: 1-888-ONE-DHHS

☑ Visit the PSC-UFMS Intranet site at: http://intranet.hhs.gov/ufms/psc.html

Word Search

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ADAPT
BELIEVE
EMBRACE
EXPERIENCE
HELPDESK
JOB AID
MICHELLE MOTEN
NURTURE
ONE DHHS
OPERATION AND
   MAINTENANCE
PRODUCTION
RECONCILIATION
ROSE BROWN
SUCCEED
TRANSFORM