UFMS

HHS UNIFIED FINANCIAL MANAGEMENT SYSTEM

The PSC Pages

Summer 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

PROGRAM SUPPORT CENTER
PSC
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
Office of the Assistant Secretary for Administration and Management

Bringing Clarity to Financial Management for PSC and Its Customer Agencies

UFMS-PSC Online Role-Based Training Released!

On May 15, 2006, the UFMS Online Role-Based Training was released to PSC and its Customer Agencies. Approximately 1150 users received their specific roles and responsibilities for UFMS which provided a tailored training plan within the Online Role-Based Training. The Online Learning Tool allows users to perform transactions in a simulated environment of the System. It will also provide end users with the skills necessary to complete tasks in UFMS relevant to their roles/responsibilities.

As of January 2006, the UFMS-PSC Online Training Team began working closely with Federal Subject Matter Experts (SMEs) and the Business Analysis Team (BAT) to develop 115 training topics using the Online Learning Tool. The topics correspond to various UFMS tasks within the System, based on the areas below:

- ✦ Accounts Payable (AP)
- ✦ Accounts Receivable (AR)
- ✦ Budget Execution (BE)
- ✦ General Ledger (GL)
- ✦ Purchasing (PO)
- ✦ Project Accounting (PA)
- ✦ Grants
- ✦ CAN-BACS
- ✦ CAN-BACS Realignment

To prepare end users for the release of the Online Role-Based Training, the UFMS-PSC Training Team hosted information sessions at various locations throughout the Washington, DC metropolitan area, as well as a video and teleconference to the Regional users.

Each session included a review of the training approach, a demonstration of the online training material (including how to access roles and responsibilities within the Online Learning Tool), and tips on troubleshooting. These sessions were conducted from May 8–16. Seventeen sessions were held in five different locations spanning over Rockville, MD, Gaithersburg, MD, and Washington, DC. To access the Online Role-Based Training, end users will need to select the following link: https://tla01.ufms.hhs.gov:31130/ufms/global_training/PSC.html.

For more information concerning the online training, please e-mail the UFMS-PSC Training Team at Mailbox.UFMS@hhs.gov.

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)

Functional Team Meetings Underway

The UFMS Business Transformation Team (BTT) began kick-off sessions for Functional Team Meetings (FTMs) at the beginning of May 2006 and will continue through October 2006. Divided by Branch within the Division of Financial Operations (DFO) and specific Customer Agencies, FTMs are forums for selected end users to discuss the impacts UFMS will have on their business processes, procedures, and policies. After developing a common under-standing of these impacts, the FTM participants will identify operational changes and readiness issues based on the new System.

The FTMs are a critical component of BTT's workforce readiness strategy which is comprised of workforce transi-tion, training, communications, and leadership engagement activities. Training prepares end users to operate the Sys-tem and understand specific functionality, such as entering transactions in UFMS. The FTMs build on training, and outline the role UFMS will play on a day-to-day basis. The outcomes from the FTMs are also utilized by the Stan-dard Operating Procedures (SOP) Team who are developing detailed operating procedures for DFO.

The FTMs for the DFO are organized by Branch and Section. The BTT took this organization-based approach to address the unique process needs of each group. For the PSC (excluding DFO) and the Customer Agencies, the BTT is conducting FTMs for users who are responsible for entering allowances, allotments, and apportionments as well as those users who are responsible for transactions in Reimbursable Agreements within UFMS. Both of these types of users will enter and modify data in UFMS and will need to identify and integrate impacts of UFMS into their daily operations. For more information on FTMs, please contact Marianne Linger, UFMS Workforce Transition Lead, at 301-443-0561 or at mlinger@psc.gov.

Instructor-Led Training Begins Late July

UFMS Instructor-Led Training (ILT) will begin in late July for PSC and Its Customer Agencies' end users. In keeping with the role-based training approach, ILT courses will also be based on end user roles and responsibilities. This training will focus on the UFMS business processes, "the why", and reinforce completing tasks, "the how", within the System. It is strongly encouraged that all end users complete the UFMS Prerequisite Training and the Online Role-Based Training prior to attending the Instructor-Led Training classes. End users who need to attend ILT classes will receive a notification via e-mail with their specific course information at the beginning of July.

Stay tuned for upcoming ILT news!

Workshop 3 Complete!

Workshop 3 demonstrated the functionality of UFMS for PSC and Its Customer Agencies in its final capacity before the System is fully imple-mented in October 2006. The UFMS-PSC Project Team hosted a one-day workshop on April 27 for the Customer Agencies in the areas of Grants and Operational Reports. Shortly following those sessions, a series of week-long workshops were held for the Division of Financial Operations (DFO) from May 22-26, covering the areas of Service and Supply Fund (SSF), IPAC, CAN Realignment, Federally Mandated Reports, and Error Handling. All sessions were held at the SAMHSA headquarters, with a single session, Error Handling, being held in the Parklawn Building.

This series of workshops allowed users to view the functionality added to the System since the second Conference Room Pilot.

"Code Freeze" Reached for PSC and Its Customer Agencies!

On Friday, May 12, the UFMS Implementation for the PSC and Its Customer Agencies reached its "Code Freeze" milestone, an important transition point in the life of the project.

Code Freeze marks the end of system design and a complete freeze on future programming work for the UFMS system as it impacts PSC and Its Customer Agencies. Prior to the Code Freeze, the UFMS Business Analysis Team (BAT) worked with Federal Subject Matter Experts (SMEs) to develop the functionality needed in UFMS. The Technical Analysis Team (TAT) brought these functional designs to life by building and programming the actual system. Both teams worked hard to complete this phase of the project on time, which will allow for a smooth transition into the testing and deployment phase of the UFMS implementation.

Following Code Freeze, teams of Federal UFMS users along with participants from the System Integrator (SI), BearingPoint, began testing the System to ensure proper functionality. Maintaining a strict freeze on any further changes to the system design ensures that testing will take place in a stable environment and that defects can be identified and resolved sooner.

The UFMS training program will also benefit from this stable environment. Following Code Freeze, all training materials will be modeled on the finalized system design. This means that the lessons disseminated to end users will be a near match of the System that will Go-Live in October 2006.

As the UFMS Implementation moves past the Code Freeze point, the UFMS-PSC Project Team will be working together to fine-tune the System and prepare end users for Go-Live!

UFMS Learning Labs

UFMS Learning Labs for PSC and Its Customer Agencies opened to all end users on May 15, 2006 and will remain open through October 2006. The Learning Labs are an additional tool created to assist users with their UFMS training plan. Supported by staff (Super Users/Master Users (SU/MUs)), the Labs will allow all end users the opportunity to access UFMS Online Role-Based Training and practice UFMS exercises in a simulated environment. From the months of May to October, UFMS Online Training will be available in the labs to include the UFMS Prerequisites and Online Role-Based Training. Starting in August, a UFMS Sandbox environment will also be available to end users to practice UFMS exercises that will be covered during the Instructor-Led Training courses. The Learning Labs are located in Rockville, MD, Gaithersburg, MD, and Washington DC. Refer to the Learning Labs calendar for each specific location and hours of operation at: http://intranet.hhs.gov/ufms/psc.html.

New UFMS Training Lead Onboard!

In April 2006, the UFMS-PSC Project Team welcomed the new Federal UFMS Training Lead, Michael Dewey, for PSC and Its Customer Agencies. Mike has returned to the Washington, DC area from New Mexico, where he was contributing his expertise to the Department of Homeland Security. We are excited to have Mike as part of the team and we look forward to utilizing his extended training experience!

Leadership Update

Visible and active executive leadership is critical to effectively transition employees from their current business processes and system to a new way of doing business. When we stand together in "Unified" leadership, only then can we fully support the magnitude of an implementation such as UFMS.

Therefore, several activities are in full-force to continuously increase awareness of the Project implementation and identify major workforce transition challenges. The prominent activities include: One-on-One Meetings, the PSC Leadership Coalition, and the PSC Customer Leadership Coalition. The goal of these meetings are to provide well-defined, actionable steps for leaders and their staff to carryout in support of the UFMS implementation.

- **One-on-One Meetings (conducted with DFO Branch Chiefs and CFOs of Customer Agencies) - March, April, June, and July**
  - » **Gain clarity regarding concerns**
  - » **Understand organizational impacts**
  - » **Develop action plans for Go-Live and beyond**

- **DFO Leadership Coalition - Conducted Weekly**
  - » **Project Status**
  - » **Hot Topics Log**
  - » **Action Planning**

- **Customer Leadership Coalition - Conducted Monthly**
  - » **12 Week View**
  - » **"Things CFOs Need to Know"**
  - » **Key Impacts - "How is my life going to change"**

The items mentioned above ensure the specific needs and concerns of every Agency are met in a timely manner, thereby providing for a successful UFMS implementation.

Testing Underway

In order to launch the beginning of Integration and User Acceptance Testing (UAT) for UFMS, the UFMS-PSC Project Team hosted kick-off sessions on May 2 and June 6 for each of the respective testing cycles. Integration Testing and UAT are necessary to validate functionality as well as identify and correct any defects within UFMS. Integration Testing began on May 30 and UAT is scheduled to begin on August 16.

SU/MU Individual and Group Coaching Sessions Held

Super Users/Master Users (SU/MUs) from PSC and Its Customer Agencies attended one of three available SU/MU Individual and Group Coaching Sessions in April. Two sessions were held in the new UFMS-PSC training facility in the Parklawn Building in Rockville, MD while the remaining session was held at the Cohen Building in Washington, DC. Approximately 53 SU/MUs attended across the three sessions.

The SU/MU Individual and Group Coaching Sessions showcased soft-skill training to prepare the participants to assist individuals in one-on-one and group situations with UFMS. The SU/MUs were instructed on individual coaching pertaining to the Online Learning Tool, group coaching for various adult learning styles, and interacting with individuals with various characteristics and personalities. Attendees also participated in a exercise to identify their own learning and working styles, followed by instruction on how to communicate with individuals with differing styles.

The SU/MUs are key players in assisting end users navigate through UFMS on a daily basis; they are receiving all stages of training prior to others in order to prepare them for their role as On-site Support.

Find UFMS on the Intranet!

Please visit us on the Intranet to get up-to-date UFMS information at:

http://intranet.hhs.gov/ufms/psc.html

The Intranet will provide you with comprehensive information regarding the implementation for PSC and Its Customer Agencies. Recently added information to include:

- Description of Roles and Responsibilities for DFO and Customer Agencies
- Learning Labs Calendars
- User Group Presentations
- Calendar of Events (June-August)
- Functional Team Meetings Information

UFMS Townhall Gatherings for
PSC and Its Customer Agencies

In an effort to provide end users with greater awareness and the latest information surrounding the UFMS implementation for PSC and Its Customer Agencies, the UFMS-PSC Project Team hosted Townhall Gatherings throughout March, April and June of this year. The presentations were kicked off by the Chief Financial Officers of each of the various Operating Divisions and key management from the Office of the Secretary. The implementation's executive sponsors, Larry Bedker, Director, Financial Management Service (FMS), PSC, and Maria Joyce, Director, Division of Financial Operations (DFO), FMS, PSC, participated in the presentations along with members of the UFMS-PSC Project Team and numerous Business Points-of-Contacts (BPOCs) from the each of the Customer Agencies.

The sessions provided a detailed overview of key UFMS information including System background, specific Module functionality, detailed impacts and benefits to end users and the activities being utilized to prepare end users prior to and post Go-Live. The Townhall Gatherings were a resounding success; some sessions included over 100 users in attendance.
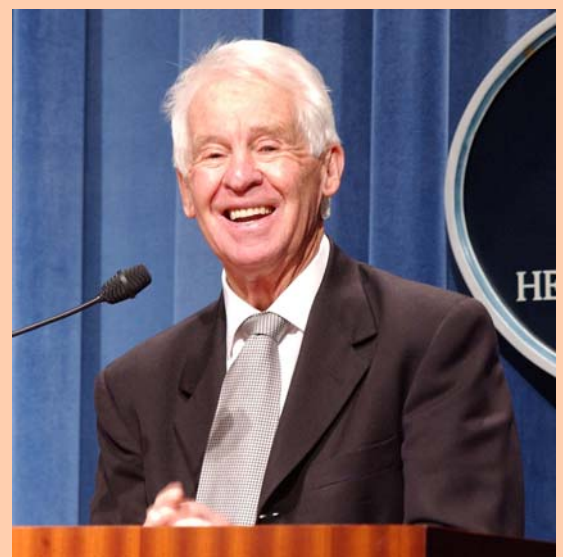
Joe Ellis, Assistant Secretary for Administration and Management, Office of the Secretary, addressing UFMS OS and STAFFDIVs users at the Townhall Gathering for the Office of the Secretary. Additional presenters (on stage) included, Charlie Johnson, Assistant Secretary for Resources and Technology; Terry Hurst, Director, Program Management Office, UFMS and Larry Bedker, Director, Financial Management Service, PSC.

Charlie Johnson, Assistant Secretary for Resources and Technology, offering opening remarks at the OS/StaffDiv Townhall Gathering on June 12, 2006.

Curt Coy, Chief Financial Officer, Administration for Children and Families, welcoming his staff to the ACF Townhall Gathering on April 25, 2006.

UFMS Townhall Gatherings for PSC and Its Customer Agencies (cont'd)

Maria Nelson, UFMS Super User/Master User and ACF Business Point-of-Contact, addressing ACF staff on the impacts of UFMS at the Agency's Townhall Gathering.

DFO staff listening to presenters at the UFMS Townhall Gathering.

Matt Zakielarz, Chief, Systems Accounting Branch, DFO, addressing ACF users on the various Modules within UFMS.

Kim Darling, Chief, Audit Liaison Staff, DFO, and Leon Jackson, UFMS Accounts Payable/Purchasing Lead, explaining the various impacts and benefits of the System during the UFMS DFO Townhall Gathering.

CALENDAR OF EVENTS– JUNE TO AUGUST

SPECIFIC ACTIVITY	ACTIVITY DATES
Customer Coalition Meeting - June	6.21.06
PSC Pages — Summer	6.22.06
UFMS User Group Call - June	6.27.06
Completion Date for UFMS Online Role-Based Training	6.30.06
Security Paperwork Deadline	6.30.06
Customer Coalition Meeting - July	7.19.06
Poster 5 - Training Released	7.20.06
UFMS User Group Call - July	7.25.06
Instructor-Led Training Begins	7.31.06
Training via "Sandbox" Environment Available	7.31.06
User Acceptance Testing Begins	8.16.06
Customer Coalition Meeting - August	8.16.06
UFMS User Group Call - August	8.29.06

June 2006

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July 2006

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August 2006

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EVENT	Communications	Training	Security	User Group	Leadership	Testing

UFMS Training - Poster Series Number Four Unveiled!

Learn, Lead, Coach…. that's what training is all about, at least for our Super Users/Master Users (SU/MUs)! As the UFMS-PSC Project Team continues down the road to implementation, the Business Transformation Team has been focusing their efforts on training our SU/MUs in the different UFMS Modules so they can provide On-site Support to end users.

Take a moment to view poster series four of seven, which symbolizes the transformation of yet another step towards our goal of implementing the largest financial system worldwide. With only a few months remaining to Go-Live, keep your eyes peeled for how you can "embrace your tomorrow…today"!

Word Search

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