# UFMS Connection

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## CDC Goes Live with Grants Module

"We're excited to reach another critical milestone," says Barbara Harris, CDC's Chief Financial Officer, speaking for all the associates within the Financial Management Office (FMO) involved in the deployment of UFMS. Harris oversees the entire UFMS project at CDC. CDC achieved a "go-live" of the Grants Solution component this week, representing the second of three phases involved in the overall UFMS system implementation at CDC. "I think that everyone across the Agency can relate to the feeling of accomplishment that comes with incremental success along a path to an ultimate goal," says Harris. Full deployment of the new Department-wide financial system is currently scheduled for April 2007. "Turning on" the new Grants Solution at CDC is a critical step toward that full deployment.

Another, unrelated, team at CDC (Accelerated CDC Extramural Awards Solution, or ACES) is charged with analyzing, redesigning, and implementing new processes and management systems surrounding CDC's procurement and grants. The UFMS Grants Solution involves the financial system for accounting for grants. Activities such as commitments, obligations, advances, expenditures, and accruals are handled by the newly launched system. According to Dave Moore, CDC's UFMS project manager, who is responsible for day-to-day imple-

## UFMS PMO Director Tom Doherty Retires

After 34 years of federal government service, Tom Doherty, UFMS Program Director, retired December 3rd. He has been involved with the UFMS project in some capacity since its beginning, first at OS, then at the PSC, and most recently as the UFMS PMO Director.

Tom accepted the position as PMO Director in June 2003. Upon arriving at Twinbrook and overcoming the personal challenge of "getting up to speed," he and his team were faced with the challenge of completing the gap-closure analysis. This analysis was completed and recommendations were made to the PDC in September 2003. Since then, Tom has seen many significant milestones accomplished, including the October "Go-Lives" at both CDC and FDA. According to Tom, the

project's ability to effectively and timely overcome large hurdles and achieve these significant milestones is due to "a highly qualified and dedicated staff." He adds,
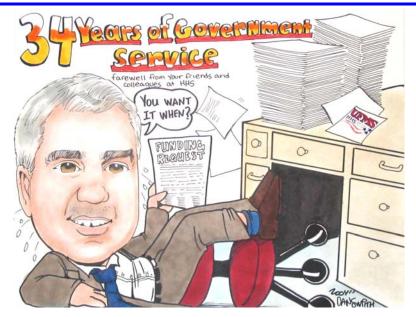
## Grants Go-Live
*(Continued from page 1)*

mentation activities, the launch of the UFMS Grants Solution does not affect the work activities of field personnel at CDC. "As we've said many times before, full implementation of UFMS at CDC next spring (phase 3) will mean business process changes for many CDC organizations. The phase 2 implementation, while a major milestone, affects only FMO activities related to how we handle accounting for grants. It allows us to process the Agency's grants more efficiently, which is a good thing for the entire organization."

Moore emphasizes the significance of the Grants Solution deployment to CDC in terms of dollars and number of transactions. Adding the Grants Solution to the Accounting For Pay System (deployed this past October), CDC now processes two critical business functions in UFMS, representing almost 60% of its dollars and transactions. "That's a metric to take note of," he says.

What comes next with UFMS? Full implementation of the remaining modules at CDC will occur next spring. Just as with the phase 2 launch, teamwork is taking place every day to make sure that CDC and other HHS Operating Divisions are ready. ∎



## Tom Doherty Retires *(Continued from page 1)*

"That was something that impressed me from day one; the quality of the people on the team, the dedication, the long hours people were putting in, and their knowledge of the project. That was and still is a definite strength."

Tom undoubtedly contributed to the strength of the UFMS team. According to Kathy Heuer, Deputy Assistant Secretary for Performance and Planning, "Tom's experience in systems implementations, financial management, his knowledge of HHS, and his steadfast leadership has brought tremendous value to the UFMS Project, and has allowed the Project to attain a state of maturity that translates into sus-

tainability and future success."

Tom's advice for the next PMO Director is to "listen to the people around here and keep communications with the sites open," because the site teams are most likely to be the first to know "when things start going wrong or when things are going right."

> "UFMS continues on the road toward implementation and will miss Tom's leadership as the Department converts to full implementation."
>
> **George Strader**
> Deputy Assistant Secretary for Finance

As he moves on to his next adventure, Tom would like to leave us with this thought, "Keep up the good work. You have a large challenge in front of you and I know you can do it."

In retirement, Tom will visit his son in Tennessee, his daughter in Orlando, and then spend a week in Mexico during January. Beyond that he will be doing chores around the house. He says with a smile on his face, "A lot of things have been piling up since I've been on this project."

*John Gentile, who has been serving as the PMO Deputy Director, will be acting PMO Director until a permanent Director is named.* ∎



**Tom (L) celebrates with Kathy Heuer and George Strader.**

## NIH Kicks Off Preparations to Merge with UFMS

A National Institute of Health (NIH) Migration Assessment Kickoff meeting was held November 3 at the NIH to discuss the 9-month effort to analyze the complexities of merging the NIH Business and Research Support System (NBRSS) with UFMS. The scope of the assessment is an end-to-end approach, from initial assessment through the development of a business case and transition plan, and includes the strategy and approach for integrating NBRSS with UFMS. The five goals of the assessment are to ascertain the business needs and objectives sought from integration, assess NBS and UFMS system scope and configuration differences,

identify options or alternatives of transition models, recommend the best cost/benefit/risk transition model, and develop a business case and implementation plan. The business case methodology is executed in these phases: mobilize, confirm scope and scenarios, baseline current state, analyze future state scenarios, and build business case.

Assessments have started for business requirements under the functional area and under the technical area (including tools, system architecture, hardware, software and security). The NBRSS PMO has scheduled monthly meetings to review the status of the migration assessment.

Upcoming planned activities include:

- Complete Accounts Receivables Assessment workshop material and coordination

- Schedule initial Accounts Receivables Assessment workshop

- Continue Tools Assessment (60% complete)

- Continue NIH and UFMS Business Requirements review

- Review NBS and UFMS network architecture and perform gap analysis

- Review NBS System Security Plan and Risk, to include implications of consolidating accounting functionality under UFMS. ∎

## FDA Holds iProcurement Conference Room Pilot in Dec.



**The iProcurement CRP Team**
Front:  Karl Kamman, Sam Wahdan, Scott Cunningham
Back:  Anjana Ghosh, Mandar Kukarni, Paula Searle, Mirek Kalousek, Donna Gray, Dorothy Horvat

HHS, in addition to delivering functionality with UFMS, has elected to use the implementation of UFMS to automate its procurement process (i.e., the manner in which the Agency purchases goods and services). FDA was selected to pilot iProcurement, an internet-based application similar to Amazon.com, which is intuitive and user-

friendly.  iProcurement will automate and simplify the procurement process for all employees. In order to demonstrate the software and business processes - using FDA-specific business scenarios, the iProcurement project team conducted a Conference Room Pilot (CRP) from December 7 - 10, 2004.  Over those four days there were two

CRP sessions lasting two days each. Approximately 80 FDA representatives from the centers and field offices attended the sessions. In addition, select observers were invited to participate in the CRP for informational purposes.

During the CRP the iProcurement team ran eight script scenarios highlighting iProcurement functionality. The script scenarios included:

- Non-Catalog Requests Relating to Training
- CAN-BACS and iProcurement
- Catalog Requests
- Approvals
- Creating a MOD
- Modifying a Requisition
- IMPAC Request
- Receiving

FDA employees demonstrated the scripts and CRP attendees were given "hands-on" time to use the application during the two-day sessions. ∎

# UFMS Teams Recognized By HHS Leadership



Kerry Weems, acting Assistant Secretary for Budget, Technology and Finance (pictured above) held an award celebration on October 20 to recognize HHS improvements in Financial Management. Weems emphasized that "HHS considers the ongoing development of the Unified Financial Management System (UFMS) to be the foundation for continued improvement in our financial management and reporting capabilities." Because of the impact UFMS has on the Department's financial management and because of the significant milestones reached in the last year (including newly operational modules at CDC and FDA), UFMS teams from NIH, CDC, FDA and the UFMS Project Management Office were presented with plaques signed by Secretary Tommy Thompson. BearingPoint, Inc. and Oracle Corporation were also presented with certificates of appreciation.

Mark Carney, CFO, Department of Education, shared his perspective of the big picture of Financial Management in federal organizations. "There are a lot of risks, a lot to be aware of. The end of the line is ultimately about the stewardship of public assets, the strengthening of public trust and belief, and reinforcing our systems of government."

Keynote speaker, Linda Springer, Controller, OMB, described the challenge in government financial management as having just a few short years to come as far as the private sector had come in decades. She described the implementation in an agency as



large as HHS as a tremendous accomplishment and applauded the end goal of getting the right information at the right time to our leaders. She also suggested that "HHS is positioning itself to be a Center of Excellence" fulfilling the vision of financial management systems going forward.

> "The only problem [with UFMS] is that batteries are not included, some assembly required."
>
> **Mark Carney**
> CFO US Department of Education

Mark Johnson of Oracle Corporation, Bob Sullivan of BearingPoint, and Tom Romeo of IBM spoke on the theme of partnership between HHS and contractors. Bob Sullivan specifically noted that "key executive support and leaders who are very committed and supportive of the team" have been important to the success of the project. Tom Romeo echoed Sullivan's assertion that "passionate leadership and frequent communications" are two key components to successful change. Romeo also said in reference to transformation efforts, "Taking systems and integrating them is difficult. Taking business processes and people and changing the way that business is done is extremely difficult. So we realized that focusing on the change was one of the important tasks in itself."

In his closing remarks, Kerry Weems encouraged the teams to continue helping HHS to "make strides relative to the President's Management Agenda." HHS accomplishments to date include unqualified opinions for six years in a row, successful measuring and reporting of erroneous payments, and proving that the largest, most complex agency can close its books in 45 days. Weems specifically thanked the UFMS teams for their efforts and encouraged them to maintain their momentum toward success. ■

## PSC: UFMS at the Program Support Center

Since CRP1 in August, business process flows and module configurations have been updated to reflect PSC-specific accounting activities. Activities focusing on data conversion from feeder systems to UFMS have begun. A workshop is planned for the end of January 2005 to present progress to date on interfaces, extensions and conversions.

UFMS training activities kicked off with six Training Implementation Workshops presented in early December, with two more planned for mid-December. A network of Super Users and Master Users is being established and will be trained in February through April 2005. End user training is scheduled to begin in May 2005.

To enhance visibility and awareness of the UFMS implementation at the PSC and its customer agencies, a series of posters, brochures, fact sheets and other communications media is being developed and will be rolled out throughout the life cycle of this project. Look for the first poster to be displayed in January 2005 in buildings housing the PSC and its customer agencies.

*Looking for more information on what is happening at the PSC and its customer agencies?* Read **The PSC Pages** at www.hhs.gov/ufms/thelatest.html.