

CA-PMM

Project Name: MTS

OCIO Project #: 0860-097

Department: Board of Equalization

Reporting Period: From: 10/3/16 To: 10/31/16

Executive Project Status Report

Total Percent Complete:	77.00%
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Current Status and Accomplishments:

*Describe deliverables completed and milestones met during **this reporting period**.*

Phase 5 – Direct Sellers Online Return Processing was implemented in production on October 17, 2016.

Phase 6 – Prepaid MTS Consumer Registration (79B), ACMS, Audits, Appeals, Online Relief Requests, Online Payment Plans, Outside Agency Liability Offsets, Liens, Temporary Accounts, Electronic Return Originators and Online Schedule Reporting – Scheduled implementation 06/12/17.

- Systems requirements are being finalized.

The IV&V contractor started on October 17th and completing interviews with the project team.

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Current Status Report

Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	Yes			
2. Were any key milestones or deliverables rescheduled?	No			
3. Was work done that was not	NA			
4. Were there any changes to scope?	No			
5. Were tasks added that were not originally estimated?	No			

CA-PMM

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Executive Project Status Report

6. Were any tasks or milestones removed?	No			
7. Were any scheduled tasks not started?	No			
8. Are there any new major issues?	No			
9. Are there any staffing problems?	No			

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Variations

Insert the variance value into the appropriate column for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance". **The variance must be a numeric value only.**

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	0.00%			
Milestones	0.00%			
Deliverables	0.00%			
Resources	0.00%			
OneTime Cost	0.00%			
Continuing Cost	0.00%			

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Monitoring Vital Signs Scorecard

Vital Sign	Variance	Value	Your Score	Score Justification
1. Customer Buy-In	High Degree of Buy-In	0	0	Green
	Medium Degree of Buy-In	1		
	Low Degree of Buy-In	2		
2. Technology Viability	Strong Viability	0	0	Green
	Medium Viability	1		
	Weak Viability	2		
3. Status of the Critical Path (delay)	<5%	0	0	Green
	5% to 10%	2		
	>10%	4		
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	0	Green
	5% to 10%	2		
	>10%	4		
5. High-Probability, High-Impact Risks	0 to 3	0	0	Green
	4 to 6	1		
	>6	2		
6. Unresolved Issues (on time resolution)	On time	0	0	Green
	Late with no impact	2		
	Late impacting the critical path	3		

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7. Sponsorship Commitment	Fully engaged	0	0	Green
	Partially engaged	2		
	Inadequate engagement	4		
8. Strategy Alignment	Strong alignment	0	0	Green
	Partial alignment	1		
	Weak or no alignment	2		
9. Value-to-Business	Strong	0	0	Green
	Medium	1		
	Weak	2		
10. Vendor Viability (provide rationale for the rating in the field following the scorecard) * If this is not applicable to your project, please select a score of "0".	Strong	0	0	Green
	Medium	1		
	Weak	2		
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	0	Green
	80-90% on time	1		
	<80% on time	2		
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	0	Green
	80-90% on time	1		

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planned)	<80% on time	2	
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13. Actual vs. Planned Resources	>90% assigned and available	0	0	Green	
	80-90% assigned and available	2			
	<80% assigned and available	4			
14. Overtime Utilization (% of effort that is overtime)	<15%	0	0	Green	
	15-25%	1			
	>25%	2			
15. Team Effectiveness	Highly Effective	0	0	Green	
	Moderately Effective	1			
	Ineffective	2			
		Total	0	G	

Green = 0 - 8
 Yellow = 9 - 19
 Red = 20+

Vendor Viability Rating Rationale

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Look Ahead View

Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	No		
2. Do any key milestones or deliverables need to be rescheduled?	No		
3. Is there any unplanned work that needs to be done?	No		

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4. Are there any expected or recommended changes to scope?	No		
5. Are there any tasks not originally estimated that will need to be added?	No		

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6. Are there any tasks or milestones that should be removed from the plan?	No		
7. Are there any scheduled tasks whose start will likely be delayed?	No		
8. Are any major new issues foreseeable?	No		
9. Are any staffing problems anticipated?	No		