



*“We Help
Put
America
Through
School”*

Federal Student Aid Integration Partner

Bi-Weekly Task Order Status Report
Period Ending: December 13, 2002

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MODERNIZATION PARTNER PROGRAM SUMMARY

	IAP		CRM4FSA	Common Services for Borrowers		Financial Integrity				eCommerce/Web Services		Workforce Alignment	
	TO 77 WO 2 - Common Origination & Disbursement	TO 102 - CPS Support	TO 77 WO 5 - CRM4FSA (Consistent Answers)	TO 77 WO 3 - Direct Loan eServicing	TO 99 - Common Services for Borrowers	TO 73 - FFEL Lender Payment Process Redesign	TO 88 - FMS Operations	TO 94, WO 2 - NSLDS Reengineering Definition Phase	TO 116 - Electronic Audited Financial Statements	TO 122 - ERM Phase 2	TO 77 WO 1 - SAIG (FSA to the Internet)	TO 79 - Portal Rollout	TO 95 - FSA University Mod Support
Task Order	Green ↔	Green ↔		Green ↔	Green ↔	Red ↔	Green ↔	Yellow ↔	Yellow ↓	Green ↔	Green ↔	Green ↔	Green ↔
Scope	Yellow ↔	Green ↔		Green ↔	Green ↔	Green ↔	Green ↔	Yellow ↔	Green ↔	Green ↔	Green ↔	Green ↔	Green ↔
Schedule	Yellow ↔	Green ↔		Yellow ↔	Green ↑	Yellow ↓	Green ↔	Yellow ↔	Green ↔	Green ↔	Green ↔	Yellow ↓	Green ↔
Cost	Yellow ↔	Green ↔		Green ↔	Green ↔	Green ↔	Green ↔	Yellow ↔	Green ↔	Green ↔	Green ↔	Green ↔	Green ↔
Additional Task Order Metrics													

Key	
Green	Low Risk - on schedule, no significant issues
Yellow	Moderate Risk - minor schedule slippage and/or manageable issues
Red	High Risk - significantly impacts project schedule
↑	Better since last report
↓	Worse since last report
↔	Same since last report

	Data Marts & Data Arch		Technical Architecture & Inf. Services						
	TO 110 - FP Data Mart Operations	TO 113 - CM Data Mart Ops	TO 51 - Rational Support	TO 81 - Program Mgmt. & Leadership	TO 87 - SLC Deployment	TO 108 - SAIG System Security	TO 109 - eSignature	TO 117 - EAI Release 3	TO 118 - ITA Release 3
Task Order	Green ↔	Green ↔	Green ↔	Yellow ↔	Green ↔	Green ↔	Green ↔	Red ↔	Yellow ↔
Scope	Green ↔	Green ↔	Green ↔	Green ↔	Green ↓	Green ↔	Green ↔	Red ↔	Green ↔
Schedule	Green ↔	Yellow ↔	Green ↔	Yellow ↔	Yellow ↓	Green ↔	Green ↔	Green ↔	Green ↔
Cost	Green ↔	Green ↔	Green ↔	Green ↔	Green ↔	Green ↔	Green ↔	Green ↔	Green ↔
Additional Task Order Metrics									

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Green	Low Risk - on schedule, no significant issues
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↔	Same since last report



TO 77 WO 2: Common Origination & Disbursement

ITR: Katie Crowley

FSA Project Sponsor: Kay Jacks

FSA Project Lead: Rosemary Beavers

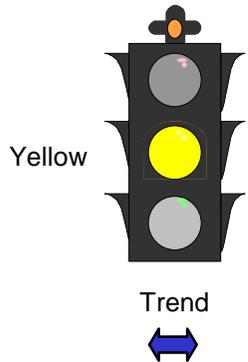
Modernization Partner Project Lead: Chris Merrill

December 13, 2002

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- Project Scorecard
- Integrated Timeline
- Major Risks
- Government & Project Dependencies
- Key Issues & Decisions

Overall Status



COD completed the thirty third week of production. Additional 2002-2003 functionality was implemented and remaining functionality for 2002-2003 will be released through January 2003. Requirement and design documents for school year 2003-2004 functionality (Release 2.0) delivered to FSA for sign off. Started working on requirements for release 2.1. RFMS data conversion requirements to be reviewed by FSA.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	Share-in-Savings
Total \$\$ on Initial Contract	Share-in-Savings
Contract Mod Amount(s)	Share-in-Savings
Total \$\$ on Current Contract	Share-in-Savings

<i>Major Accomplishments Since Last Meeting</i>	<i>Upcoming Activities / Target Dates</i>
<ul style="list-style-type: none"> ■ Completed thirty third week of production. ■ Post implementation Verification is 91% complete for release 1.0, 61% complete for release 1.1. 71% complete for release 1.7 , 71% complete for release 1.8 and 11% for Release 1.9. ■ Submitted preliminary Requirements and Design Document delivery schedule for release 2.1 ■ Started working on Functional Design Documents for release 2.1 ■ Started preliminary Technical Design documents for release 2.0 ■ Attended COD EAC in Las Vegas ■ First draft of UAT deliverables were submitted to FSA for review 	<ul style="list-style-type: none"> ■ Continue to work on outstanding production issues ■ Remaining 2002-2003 functionality will be implemented through January 2003. Remaining releases are 1.12 (12/13) and 1.13 (01/27). ■ Continue working on design documents for release 2.1. ■ Complete data mapping walkthrough with FSA for RFMS data conversion ■ Review sessions of UAT scripts for release 2.0 with FSA

Project Scorecard



Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> The contract will be modified to add incentives and penalties for missing implementation dates and meeting service level agreements. to
Scope			<ul style="list-style-type: none"> All the functional design documents have been created for the 2.0 release functionality to be implemented next year.
Schedule			<ul style="list-style-type: none"> Monthly releases of remaining 1.x functionality were identified and published in a new release plan. The delay in implementing 1.X functionality will soon impact the implementation of Release 2.0, scheduled for 3/24.
Cost			<ul style="list-style-type: none"> The team continues to have more resources than expected on the team and some team members are working overtime. This is expected to continue to occur until the remaining 1.x items are implemented.



High Risk – Significantly impacts Project schedule/cost
 ex) 4+ weeks over schedule
 10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
 ex) 2-4 weeks over schedule
 5-10% over cost



Low Risk – On schedule, on budget and no significant issues
 ex) 0-2 weeks over schedule
 0-5% over cost



Better



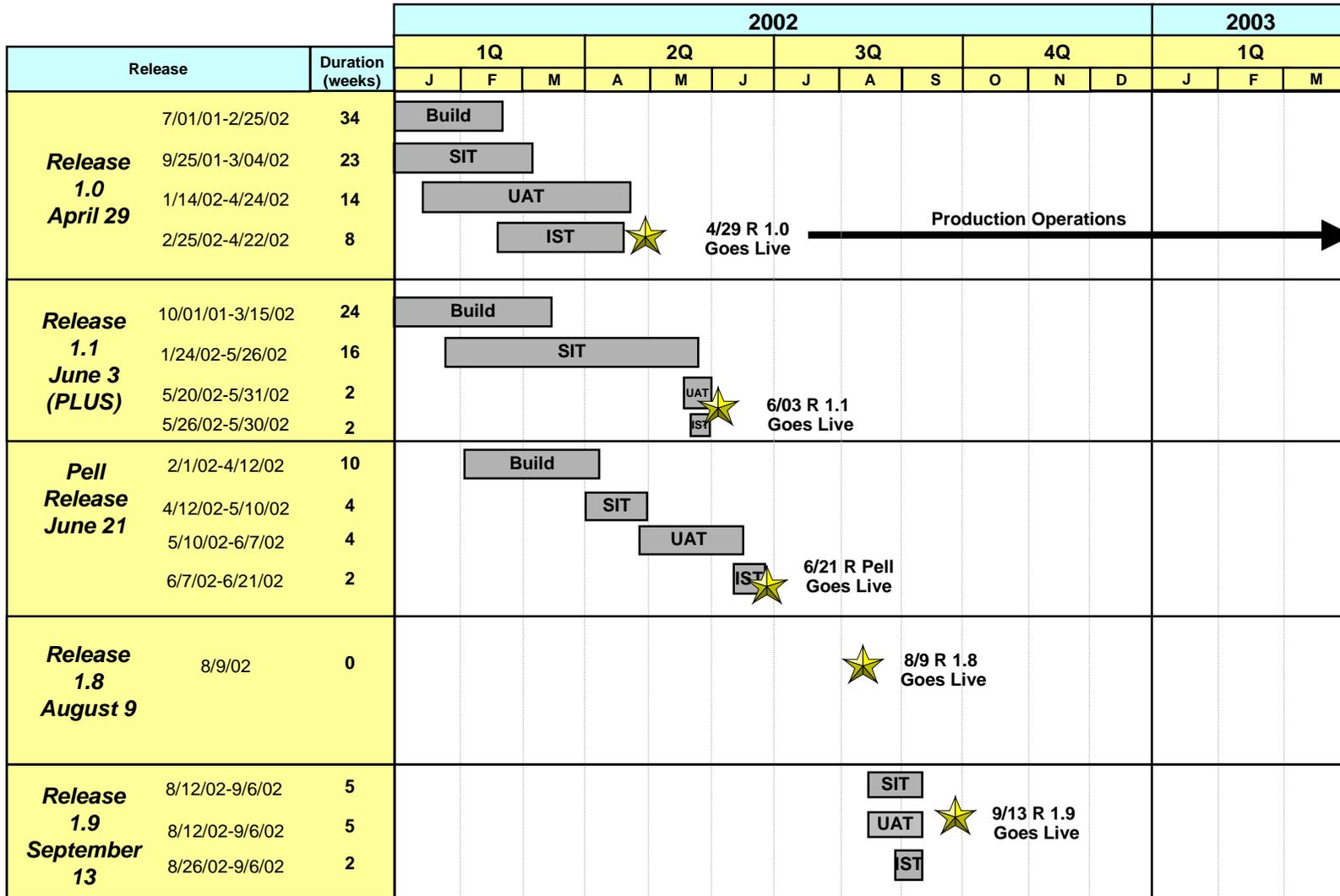
Worse



Same

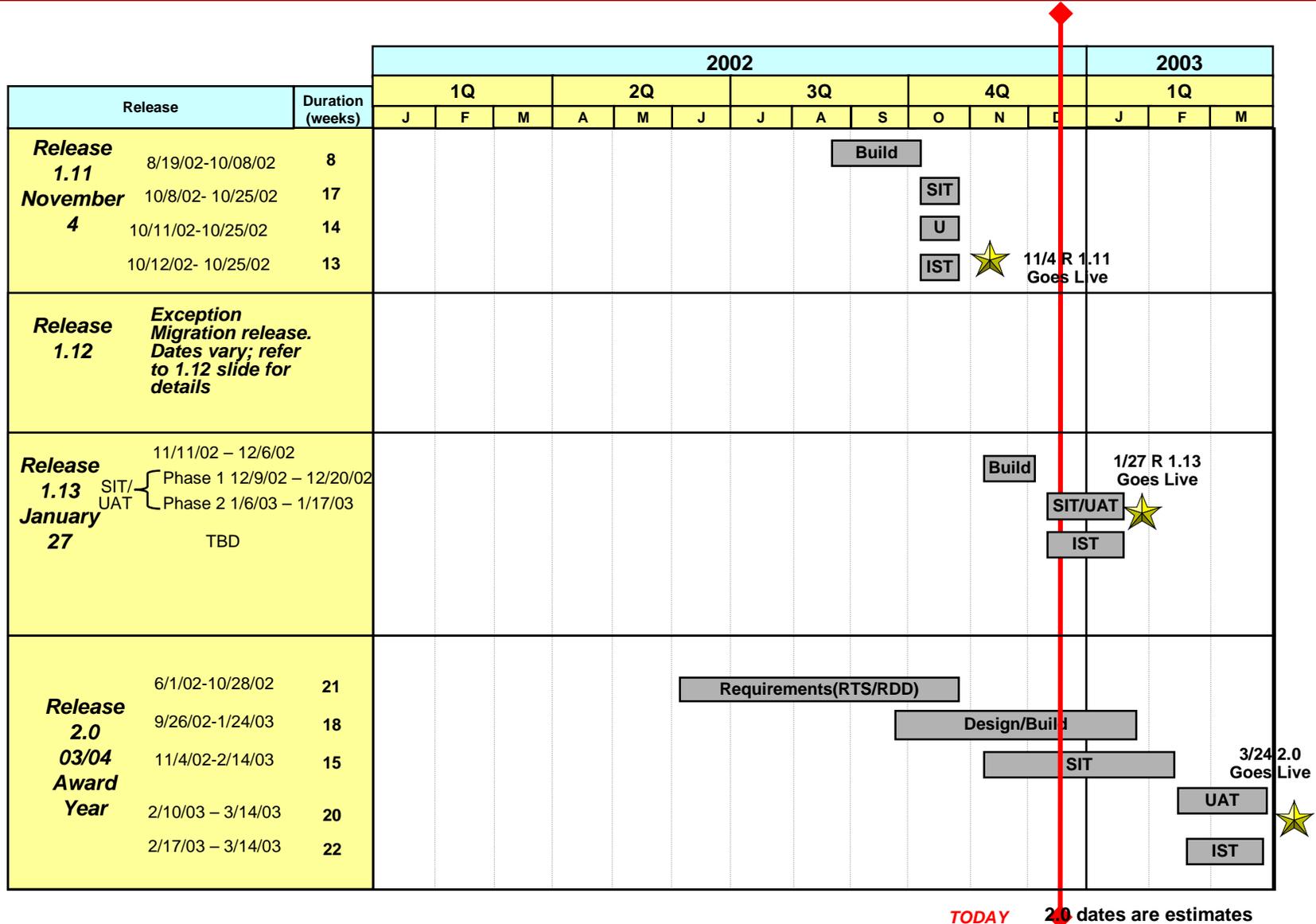
* Per current plan

Integrated Timeline – One Year Horizon

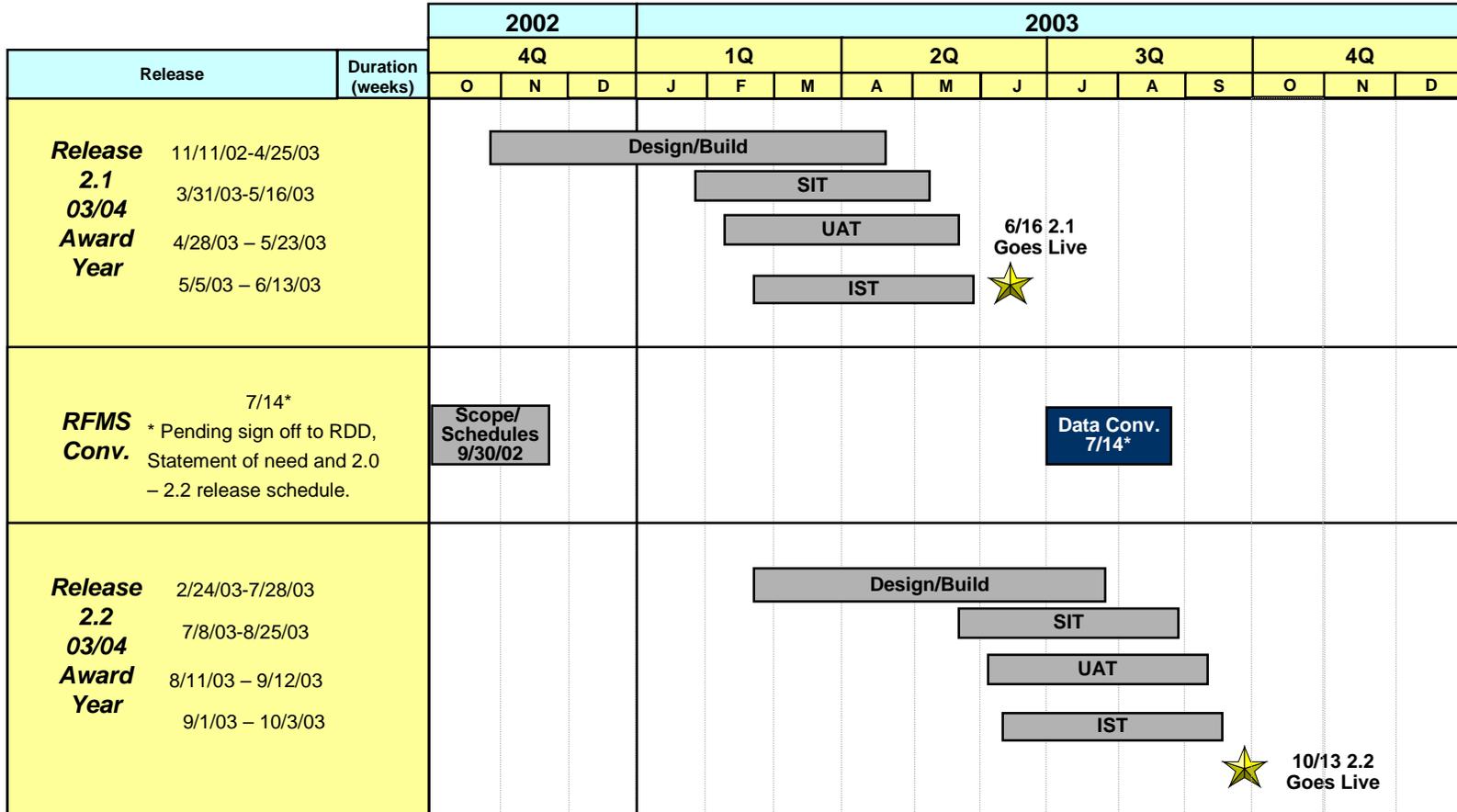


2.0 dates are estimates

Integrated Timeline – One Year Horizon



Integrated Timeline – One Year Horizon



2.1 and 2.2 dates are estimates

Major Risks

Risk Description	Impacts	Dependent Parties	Risk Category	Open Date	Status	Mitigating Actions	Severity	Probability	Level Of Control
Production Issues - The number of production issues could get above a manageable level	Impacts Schools ability to process records. Increases Customer Service call volume. Pulls development resources which impacts ability to make 1.x, 1.x and 2.x release dates.	Schools, Customer Service, FSA Staff, Development Staff	Operational	10-22-2002	In-Progress (The number of open production issues has been reduced.)	-Action Teams formed with members from TSYS, Mod Partner and FSA to resolve issues. - NETMAN Reduction plan has been implemented	High	Likely	Moderate
Concurrent Development Effort – significant overlap between 1.x, 2.0, 2.1, 2.2 releases	Impacts schools, customer service and FSA users of COD	Trading Partners,	Operational	10/1/2002	In-Progress (1.x release items have been delivered late.)	-Additional resources are being added to the team -Resource planning is being done to	High	Likely	Moderate
FSA Resources - may not have enough resources to review all deliverables by their due dates	Impacts design, coding, test planning and test execution	Development Staff	Operational	11/18/2002	In-Progress	- Meetings will be held to prioritize items to be reviewed by FSA	High	Likely	Moderate

Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
Development Schedule Overlap – 2.0 development schedule is compressed and phases overlap which makes phase containment not possible	This will impact the teams responsible for each phase of development.	Development Staff	Operational	10-22-2002	In-Progress	Management is closely monitoring the status of each phase. Additional resources are being identified to help stay on schedule	High	Likely	Moderate
Data Conversion RFMS data conversion will not be completed prior to ending of contract with RFMS. Also ACS development staff gone 9/30.	Development Staff	Development Staff, ACS (trading partner), Schools	Operational	10-15-2002	In- Progress	Discussions in progress with ACS to extent the support for RFMS Customer Service and Technical	High	Likely	Moderate

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
2.0 RDD not signed off by FSA	Impacts 2.0 Design which impacts overall 2.0 release date. Also impacts 2.1	2.0 Design, 2.0 Coding and SIT Testing Teams	Operational	11/11/2002		In-Progress	Urgent	Get FSA Sign-off/
2.0 FDDs not signed off by FSA	Impacts 2.0 Tech Design which impacts overall 2.0 release date. Also impacts 2.1	2.0 Coding and SIT Testing Teams and 2.1 Design team	Operational	11/18/2002		In-Progress	Urgent	Get FSA Sign-off/
1.x reviews by FSA have not stayed on schedule	Impacts 1.x release date and 2.0 release date.	1.x Coding and SIT/UAT Testing team. Also impacts 2.0 Release	Operational	11/11/2002		In-Progress	Urgent	Get FSA Sign-off and precede with next phase/

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
TSYS Development team does not have sufficient functional knowledge of business	Impacts 2.0 Design which impacts overall 2.0 release date. Also impacts 2.1	2.0 Design Team, Coding and SIT Testing teams,	Operational	11/11/2002		In-Progress	Urgent	Continue to add new staff to team and conduct training sessions



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TO 102 - Central Processing System (CPS) Support

ITR: Martin Renwick

FSA Project Sponsor: Jeanne Saunders

FSA Project Lead: Jeanne Saunders / Nina Colón

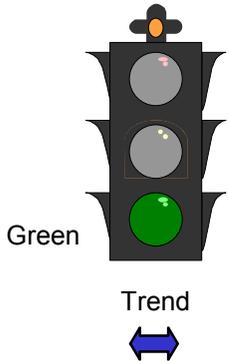
Modernization Partner Project Lead: Yateesh Katyal / Nate Baker

December 13, 2002

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- Major Risks
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Overall Status



The FSA Modernization Partner team is supporting the FSA Students channel – Application Processing – a CPS Upgrade Analysis has been completed; performance testing for FAFSA 7.0/ED PIN is underway. As of 12/13/02, the Upgrade Analysis revised deliverable has been submitted and is being reviewed with FSA and 16 of 23 planned performance test cycles covering all 12 business cycles have been executed.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$1,500,000
Total \$\$ on Initial Contract	\$500,000
Contract Mod Amount(s)	\$999,674.47 – Mod 1
Total \$\$ on Current Contract	\$1,499,674.47

Major Accomplishments Since Last Report

Week Ending 12/13/2002

- EAC Conference – attended EAC conference
- Submitted, reviewed, and incorporated comments from FSA into draft FY 03 business cases for CPS Upgrade and ED PIN Re-Engineering Analysis
- FAFSA on the Web 7.0/ED PIN Performance Testing
 - Completed cycles 15-16
 - Resolved four outstanding issue
 - Eight open issues remain
 - Determine peak hardware requirements based on test of two “N” class servers deployed to performance test environment
- XML ISIR – began reviewing data model with XML ISIR working group

Upcoming Activities / Target Dates

- FY 03 Business Case Justification
 - Working with FSA, other Modernization Partner teams and Pearson Government Solutions to review business case justifications
- Continue FAFSA 7.0/EDPIN performance testing
 - Cycle 17 scheduled for 12/17
 - Cycle 18 scheduled for 12/19
- Continue reviewing and revising XML ISIR data model with ISIR working group

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order has been awarded. Period of performance is August 15, 2002 to January 31, 2003.
Scope			<ul style="list-style-type: none"> Scope is defined for the task order. <ul style="list-style-type: none"> CPS Upgrade Analysis FAFSA 7.0 / PIN Performance Test
Schedule			<ul style="list-style-type: none"> Deliverables: <ul style="list-style-type: none"> 102.1.1 CPS Integration Support Status, 09/20/2002 (Accepted) 102.1.2 CPS Upgrade Analysis, 11/01/2002 (Revised Deliverable Submitted) 102.1.3 FAFSA 7.0 / PIN Performance Test Planning, Scripts & Environment, 09/30/2002 (Accepted) 102.1.4 FAFSA 7.0 / PIN Performance Test Report, 12/31/2002 102.1.5 FAFSA .0 / PIN ITA Support Report, 01/31/2003
Cost			<ul style="list-style-type: none"> Tracking to approved budget.



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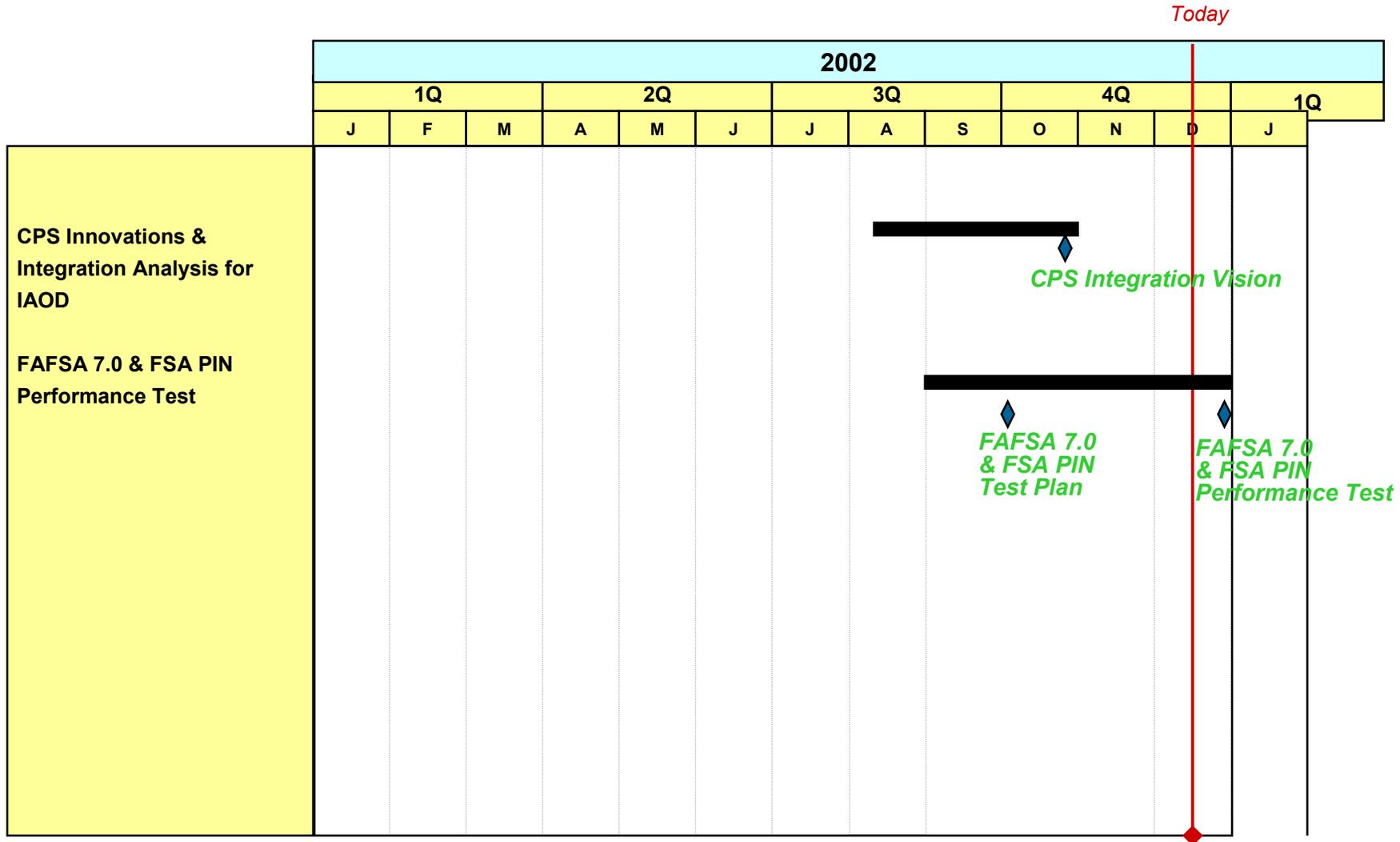
Worse



Same

* Per current plan

Integrated Timeline



Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
XML ISIR Funding under TO 102 will be expended by 12/15/02. Will need additional funding to continue XML ISIR activities scheduled through February 2003 and beyond	Completion of XML ISIR schema	ISIR Working Group/ Schools and States	Financial	11/1/2002	In Progress	FY 03 business case for XML Framework including XML ISIR implementation activities is pending approval from the Department of Education	Medium	Very Likely	None

Deliverable Schedule for TO 102 Mod 1-CPS Reengineering Support

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
102.1.1	CPS Integration Support Status	9/20/2002		9/20/2002
102.1.2	CPS Upgrade Analysis	11/1/2002		11/1/2002
102.1.3	FAFSA 7.0/PIN Performance Test Planning, Scripts & Environment	9/30/2002		9/30/2002
102.1.4	FAFSA 7.0/PIN Performance Test Report	12/23/2002		
102.1.5	FAFSA 7.0/PIN ITA Support Report	1/31/2003		



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TO 77 WO 5 – CRM4FSA

ITR: Martin Renwick/Katie Crowley

FSA Project Sponsor: Jennifer Douglas / Kay Jacks

FSA Project Lead: Dena Bates / Jane Holman

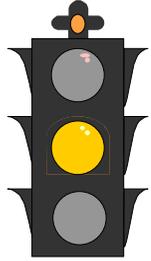
Modernization Partner Project Lead: Kelly Tate

December 13, 2002

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Overall Status



The CRM4FSA team has received approval from FSA to keep a small core team in place in order to support FSA leadership and other modernization efforts while the project is in a “holding” period. The areas that the team will be focusing on include: supporting the Release 1 Pilot, maintaining the development environment along with the related software application products, ensuring that work progresses on certain enterprise assets that are also needed for current modernization efforts. These include: Common School ID, Common Student ID, Portals, Common Record and Consistent Data.

In addition, the CRM4FSA team has been asked to support FSA with its re-scoping and re-sequencing efforts for the CRM4FSA project.

Project Funding	Dollar Amount
IRB Approved Funding	\$8.2 Million
Total \$\$ on Initial Contract	\$3,199,879
Contract Mod Amount(s)	\$4,999,385
Total \$\$ on Current Contract	\$8,199,264

Major Accomplishments Since Last Report

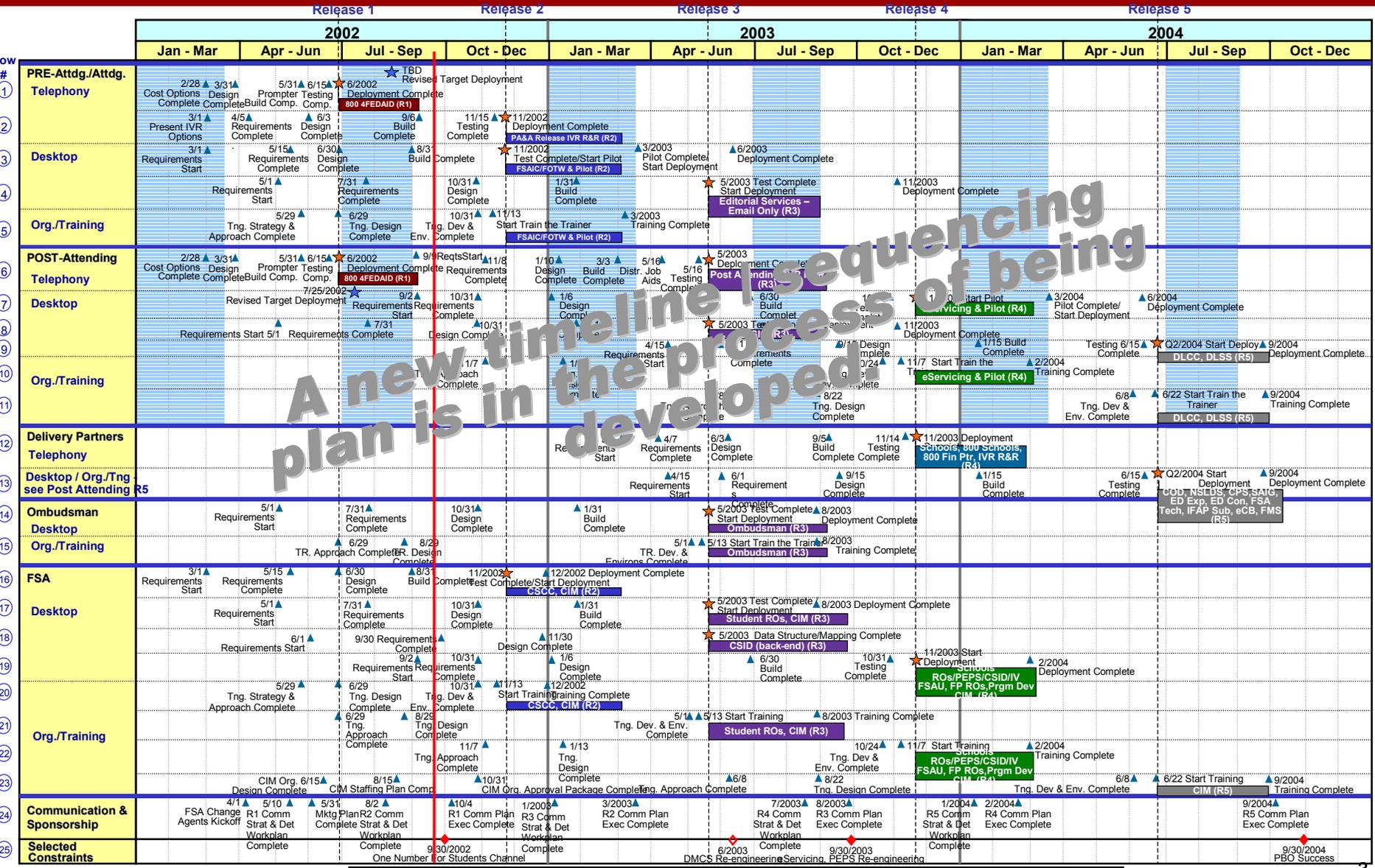
- Continued monitoring and gathering statistics on the Release 1 Pilot (10% call volume) in production.
- Upgrading Siebel development environment interface prototype. Continued maintenance of development environment.
- Continued with Routing ID data extracts and requirements definition. Built data synchronization tool to analyze Routing ID data discrepancies across legacy and modernized systems. Began data analysis.
- Continued requirements gathering for institution change of affiliation.
- Documented current state analysis for student/borrower identifiers. Presented findings to date to Jeanne Saunders and her staff.
- Met with FSA and agreed to approach and pilot initiative for Product/Service Improvement Process, with initial focus on eServicing product improvement process.
- Continued reviewing portal strategy draft internally within Modernization Partner (Project teams and ITRs).
- Continued detailing and documenting Consistent Answers XML requirements.
- Continued documenting data flow for customer demographic information across the FSA student/borrower lifecycle.
- Continued working group sessions to re-scope and re-sequence CRM4FSA.
- Began analyzing contract options for CRM4FSA.

Upcoming Activities / Target Dates

- Continue to monitor and assess the Release 1 Pilot (weekly).
- Roll Out Release 1.0 capabilities to remaining 90% of callers (TBD).
- Continue development of Siebel-MQSeries integration prototype (12/13).
- Continue Routing ID (RID) requirements and data analysis (12/13).
- Finalize “As-Is” state documentation for student identifiers across FSA systems.
- Continue to analyze Common Student ID requirements with FSA system owners and Mod Partner representatives (11/29).
- Develop Common Student ID solution options and present to FSA Integration Group (12/19).
- Conduct kickoff meeting to develop team charter for the Performance Measures Working Group.
- Gain approval on the Product/Service Improvement Process as well as the pilot initiative and schedule the first working sessions.
- Finalize Portal Strategy review with ITR and ensure FSA Business Objectives are reflected in Portal Strategy.
- Review Consistent Answers XML strategy with ITA team and revise as necessary.
- Finalize scope and sequence decisions for CRM4FSA.
- Finalize contract approach for CRM4FSA.



Integrated Timeline – Detailed Milestones



Government & Program Dependencies

Dependency	On Point	Target Date	Impact on Cost and/or Schedule	Status Comments
DMCS Replacement: <ul style="list-style-type: none"> CRM4FSA Release 3 is dependent on the DMCS replacement application (Interface for Consistent Answers) 	<ul style="list-style-type: none"> Bone 	<ul style="list-style-type: none"> On Hold 	<ul style="list-style-type: none"> DMCS Replacement schedule delays could impact the Release 3 implementation. 	<ul style="list-style-type: none"> On Hold
FSA Portal initiatives: <ul style="list-style-type: none"> R2 – limited overlap with Student and FP Portal R3 – Some functional overlap with All Portals R4 – Limited overlap with Schools Portal 	<ul style="list-style-type: none"> Mahoney 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> Involvement across initiatives is required to clearly define scope and maintain schedule 	<ul style="list-style-type: none"> Have developed plan that outlines what will be done with Portals over the next few months.
CPS Integration: <ul style="list-style-type: none"> CPS changes will impact Consistent Answers solution approach Changes to web portions of CPS (FOTW, FAA, Student Access) will affect approach for Portals 	<ul style="list-style-type: none"> Katyal (CPS) Mahoney (Portals) Ruff (ConAns) 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> Involvement across initiatives is required to develop enterprise approach, clearly define scope and maintain scheduled 	<ul style="list-style-type: none"> In Progress: Mod Partner is involved in plans for CPS Integration (redesign).
Common Student ID: <ul style="list-style-type: none"> CSID recommendations will affect how legacy and modernized systems identify and match student/borrower data, including CPS, NSLDS, DMCS, DLCS, DLSS, and COD 	<ul style="list-style-type: none"> Hartmuller (CSID) Katyal (CPS) Ruff (ConAns) 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> Involvement across initiatives is required to develop enterprise approach, clearly define scope and maintain scheduled 	<ul style="list-style-type: none"> In Progress: Representatives from each system are included in working group.

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
Release 1 Pilot Hang-ups in the IVR – currently 8 – 9%	Customer satisfaction	FSA, Mod Partner, Operating Partners, Customers	Operational	8/1/02	TBD	In-progress	Medium	Review results of analysis to determine course of action.
DCSIC Release 1 Pilot Impact - Misdirected Pilot callers account for 40-50% of DCSIC's daily average of 500 calls	Customer satisfaction, DCSIC resources	FSA, Mod Partner, Operating Partners, Customers	Operational	8/1/02	TBD	In-progress	Medium	Changes to DCSIS menu pending decision regarding R1 rollout.
Full Pilot Implementation - Decision needed on how/when to proceed.	Customer satisfaction, cost to implement	FSA, Mod Partner, Operating Partners, Customers	Operational	10/15/02	TBD	In-progress	Medium	Decision pending review and approval by Terri Shaw
Rescoping CRM4FSA ▪Decision pending recommendations from Management Council	Scope and Sequence of CRM4FSA	FSA, Mod Partner	Strategic	10/22/02	1/21/03	In-progress	High	Agreement expected by end of January.



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77 WO3 – Direct Loan eServicing

ITR: Martin Renwick

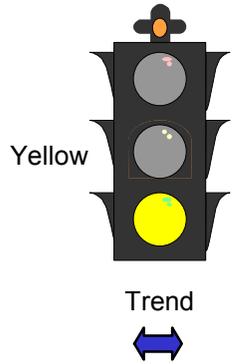
FSA Project Sponsor: Sybil Phillips

FSA Project Lead: Dan Hayward

Modernization Partner Project Lead: Kerry Trahan

December 13, 2002

Overall Status



Continued to resolve First Live Batch issues encountered by eCRM users, and with the EBPP/EC, Self-Service, and CSR Web Access functionality.

eCRM and EBPP/EC performance and uptime has stabilized.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	SIS
Total \$\$ on Initial Contract	SIS
Contract Mod Amount(s)	SIS
Total \$\$ on Current Contract	SIS

<i>Major Accomplishments Since Last Meeting</i>
<p>EBPP/EC</p> <ul style="list-style-type: none"> Configuration changes to eDocs software have stabilized eDocs application. Reviewed estimate for upgrade estimate submitted by eDocs. Estimate was deemed to high to commit before end of FY02. <p>eCRM</p> <ul style="list-style-type: none"> Successfully implemented Release 1 code for Late Charges and TPD. Completed development for all Pass 2 Data Elements. Continue roll-out to 20 CSR's.

<i>Upcoming Activities / Target Dates</i>
<p>EBPP/EC</p> <ul style="list-style-type: none"> Continue to monitor stability of EBPP/EC solution. Review estimate received by eDocs for 3.x upgrade and make decision on how to proceed. Meet to prioritize all outstanding EBBP/EC issues. <p>eCRM</p> <ul style="list-style-type: none"> Continue to reconcile data between DLSS and eCRM.. Clean comments that were truncated during Oracle database maintenance. Continue Roll-out to 20 additional users prior to year end.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order was awarded on November 1, 2001.
Scope			<ul style="list-style-type: none"> EBPP/EC: Aggregator began production operations on 7/29. CRM: Marketing efforts continuing: <ul style="list-style-type: none"> •Stuffers being mailed •Mass emailing up to date •Beginning use of oversprayed envelopes
Schedule			<ul style="list-style-type: none"> CRM: ePhone delays interrupting planned savings stream for General Forbearances. eCRM Pilot delays being addressed. Working against a plan to expand pilot in August.
Schedule			<ul style="list-style-type: none"> No Cost Issues at this time.



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Better



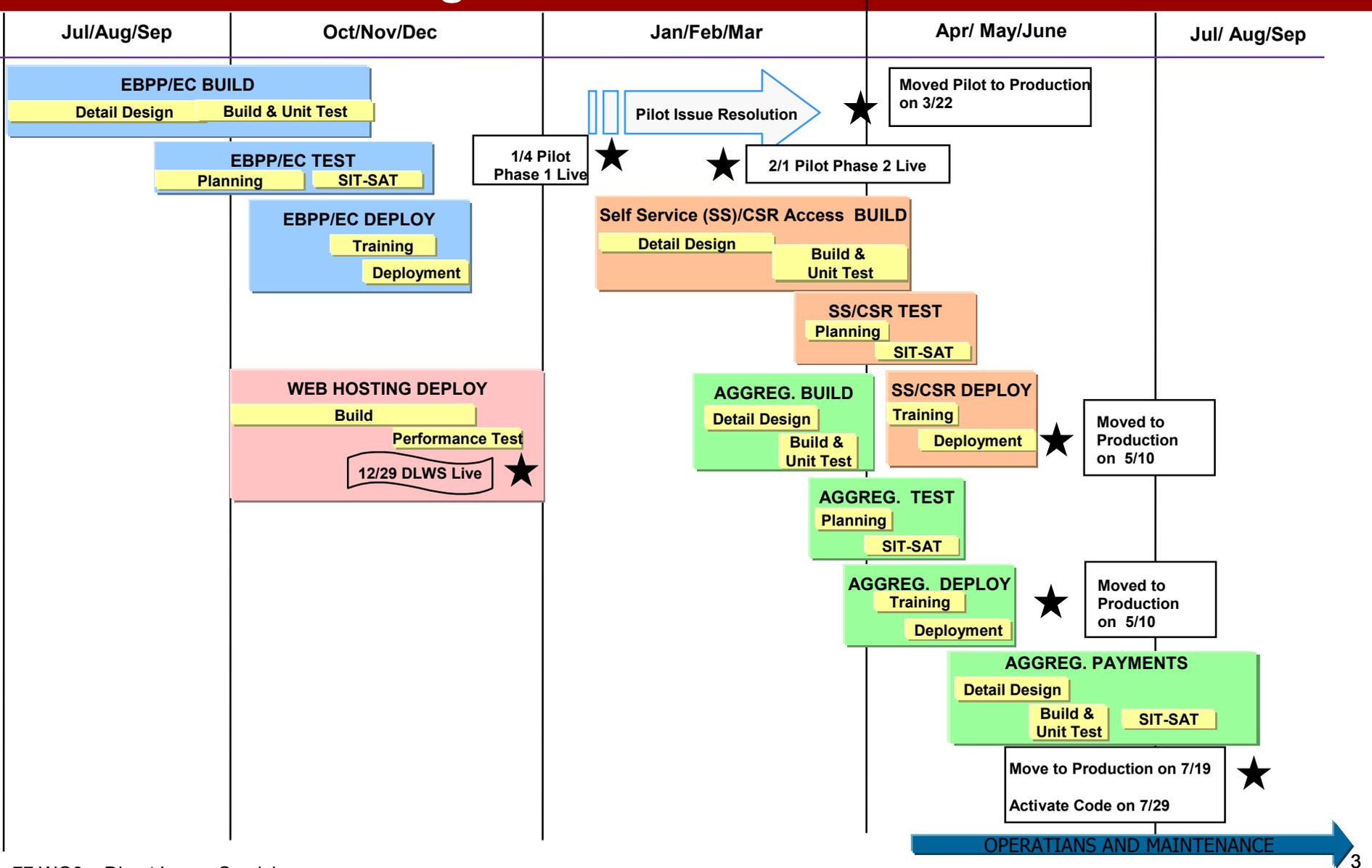
Worse



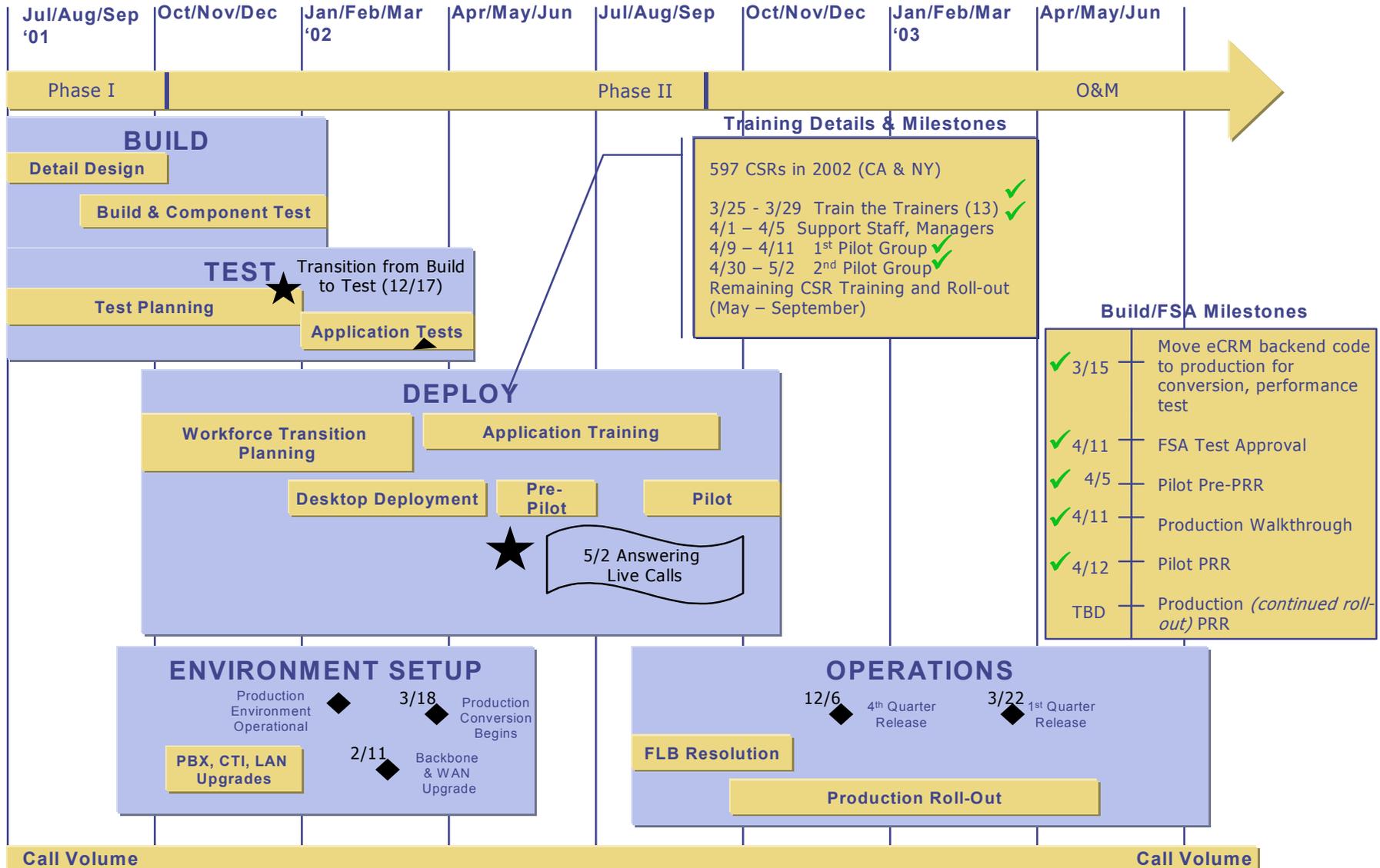
Same

* Per current plan

EBPP/EC - Integrated Timeline



eCRM - Integrated Timeline



Operations & Maintenance Transition Status

Technical Component	Task	Target Date	Actual Comp. Date	Status Comments
Batch Interfaces	<input type="checkbox"/> Documentation/Training on code/programs/scripts for Batch interfaces (Updated Design/DataMap)	<input type="checkbox"/> 6/6/2002	✓ 10/24/2002	Training and Documentation In-Progress
	<input type="checkbox"/> AutoSys Job Run Instructions	<input type="checkbox"/> 5/24/2002	✓ 5/24/2002	Sat with Prod Ctrl for training and monitoring of AutoSys schedulers (5/29)
	<input type="checkbox"/> Data Integrator Transition	<input type="checkbox"/> 6/19/2002	✓ 09/02/02	Env configured and brought back online for testing and development. Autosys and DI configuration remain outstanding. Document draft completed Pilot and FLB Identification end dates TBD
	<input type="checkbox"/> O&M environment configuration (AutoSys, MQ Series, Data Integrator)	<input type="checkbox"/> 6/29/2002		
	<input type="checkbox"/> Code Migration Procedures	<input type="checkbox"/> 6/15/2002	✓ 9/03/02	
<input type="checkbox"/> Resolution of Pilot FLB Issues	<input type="checkbox"/> Ongoing through Pilot			
Online Interfaces	<input type="checkbox"/> Updated Design/DataMap	<input type="checkbox"/> 5/31/2002	✓ 5/31/2002	
	<input type="checkbox"/> NT Server Stop/Restart Procedures	<input type="checkbox"/> 5/31/2002	✓ 5/31/2002	
Tech Arch	<input type="checkbox"/> Siebel Technical Architecture Guide	<input type="checkbox"/> 6/15/2002	✓ 6/15/2002	Online Interface portion complete. This will be a living document
	<input type="checkbox"/> Returned leased/AGC equipment	<input type="checkbox"/> 6/24/2002	✓ 7/03/2002	
MQ Series	<input type="checkbox"/> Borrower Contacts/COM Adapter Documentation (Updated Design/Data Map)	<input type="checkbox"/> 6/14/2002	✓ 6/14/2002	Received outline for TOC. Draft document due 6/10.
	<input type="checkbox"/> Implement Failover on Production Boxes	<input type="checkbox"/> Date TBD	✓ 8/23/2002	Additional IBM resource required
	<input type="checkbox"/> O&M environment configuration (migrate MQ/MQSI code)	<input type="checkbox"/> 6/29/2002	✓ 6/18/2002	Completed MW configuration of Dev and Test environments.
	<input type="checkbox"/> Code Migration Procedures	<input type="checkbox"/> 6/14/2002	✓ 6/14/2002	
	<input type="checkbox"/> Enhanced Error Handling	<input type="checkbox"/> 6/7/2002	✓ 8/23/2002	
	<input type="checkbox"/> Dynamic Memory Allocation	<input type="checkbox"/> 6/21/2002		
CTI/VRU	<input type="checkbox"/> Updated Design/Troubleshooting Tips	<input type="checkbox"/> 5/17/2002	✓ 5/31/2002	
Siebel Configuration	<input type="checkbox"/> Training of Siebel Config/Online O&M resource	<input type="checkbox"/> 5/31/2002	✓ 5/31/2002	Received updated Design and Troubleshooting tips 6/3
	<input type="checkbox"/> Updated Design/DataMap/Troubleshooting Tips	<input type="checkbox"/> 5/31/2002	✓ 5/31/2002	
	<input type="checkbox"/> Training on Siebel Test Procedures	<input type="checkbox"/> 6/7/2002	✓ 9/27/02	Add'l working sessions to be scheduled
	<input type="checkbox"/> Siebel Anywhere Approach Plan	<input type="checkbox"/> 5/31/2002	✓ 5/31/2002	
Project Management	<input type="checkbox"/> Security Plan	<input type="checkbox"/> 6/28/02	✓ 7/19/02	Meetings ongoing with S. Piper (FSA) and J. Norris; Date to be changed as a result of postponed meetings

Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
All Borrowers Tab needs to be modified to show less information	Resulting costs will be addressed through the maintenance/enhancement process.	Dan Hayward Tony Taylor	Operational	07/01/02	In-Progress	All Borrowers View has been removed.	Medium	Unlikely	Moderate

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
Need to target a pilot end date.		Bob Castle Mike Brady Dan Hayward	Strategic	11/01/02	12/20/02	In-Progress	High	Performance needs to be stabilized prior to exiting pilot.
eDocs Out of Memory error.	As more borrowers continue to use the DLSS Web for online payments/correspondence, system performance may be affected.	Maylon Hayes Tony Taylor	Operational	09/01/02	12/20/02	In-Progress	Medium	Continuing to work with eDocs to resolve issue. The eDocs web servers are being rebooted daily to prevent borrower impact.



TO 99 – Common Services for Borrowers

ITR: Martin Renwick

FSA Project Sponsor: Jennifer Douglas

FSA Project Lead: Sybil Phillips

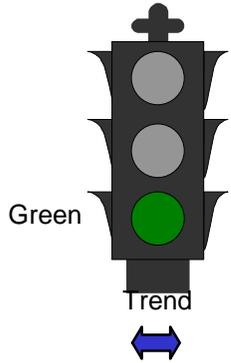
Integration Partner Project Lead: Kerry Trahan

December 13, 2002

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- Deliverables Schedule

Overall Status



First draft of Deliverable 99.1.5 – Preliminary Business Case delivered to Sybil Phillips for review on 12/4/02

- Integration discussion with representatives from CRM4FSA/Portals was held on 12/11/02

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$3,751,000.00
Total \$\$ on Initial Contract	\$3,154,436.94
Contract Mod Amount(s)	
Total \$\$ on Current Contract	\$3,154,436.94

Major Accomplishments Since Last Meeting

- A first draft of Deliverable 99.1.5 – Preliminary Business Case was delivered to Sybil Phillips on 12/4/02.
- An integration discussion with Dennis Mahoney and Beth Dublin of CRM4FSA/Portals was held on 12/11/02.

Upcoming Activities / Target Dates

- Core Team Meeting scheduled for 12/16/2002 from 2:00pm to 4:00pm.
- Schedule and hold individual CSB Deliverable Review working sessions with each of the Core Team members to familiarize them with the three deliverables that will be turned over on 12/23/02 including Deliverable 99.1.4 – Business Architecture Blueprint, Deliverable 99.1.5 – Preliminary Business Case, and Deliverable 99.1.6 – Conceptual Design.
- Schedule and hold peer reviews with CSB Management for each of the three deliverables including Deliverable 99.1.4 – Business Architecture Blueprint, Deliverable 99.1.5 – Preliminary Business Case, and Deliverable 99.1.6 – Conceptual Design.
- Complete Deliverables 99.1.4 – Business Architecture Blueprint, 99.1.5 – Preliminary Business Case and 99.1.6 – Conceptual Design by 12/23/02.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order was awarded on August 21, 2002.
Scope			<ul style="list-style-type: none"> An integration discussion with Dennis Mahoney and Beth Dublin of CRM4FSA/Portals was held on 12/11/02.
Schedule			<ul style="list-style-type: none"> A first draft of Deliverable 99.1.5 – Preliminary Business Case was delivered to Sybil Phillips on 12/4/02.
Cost			



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



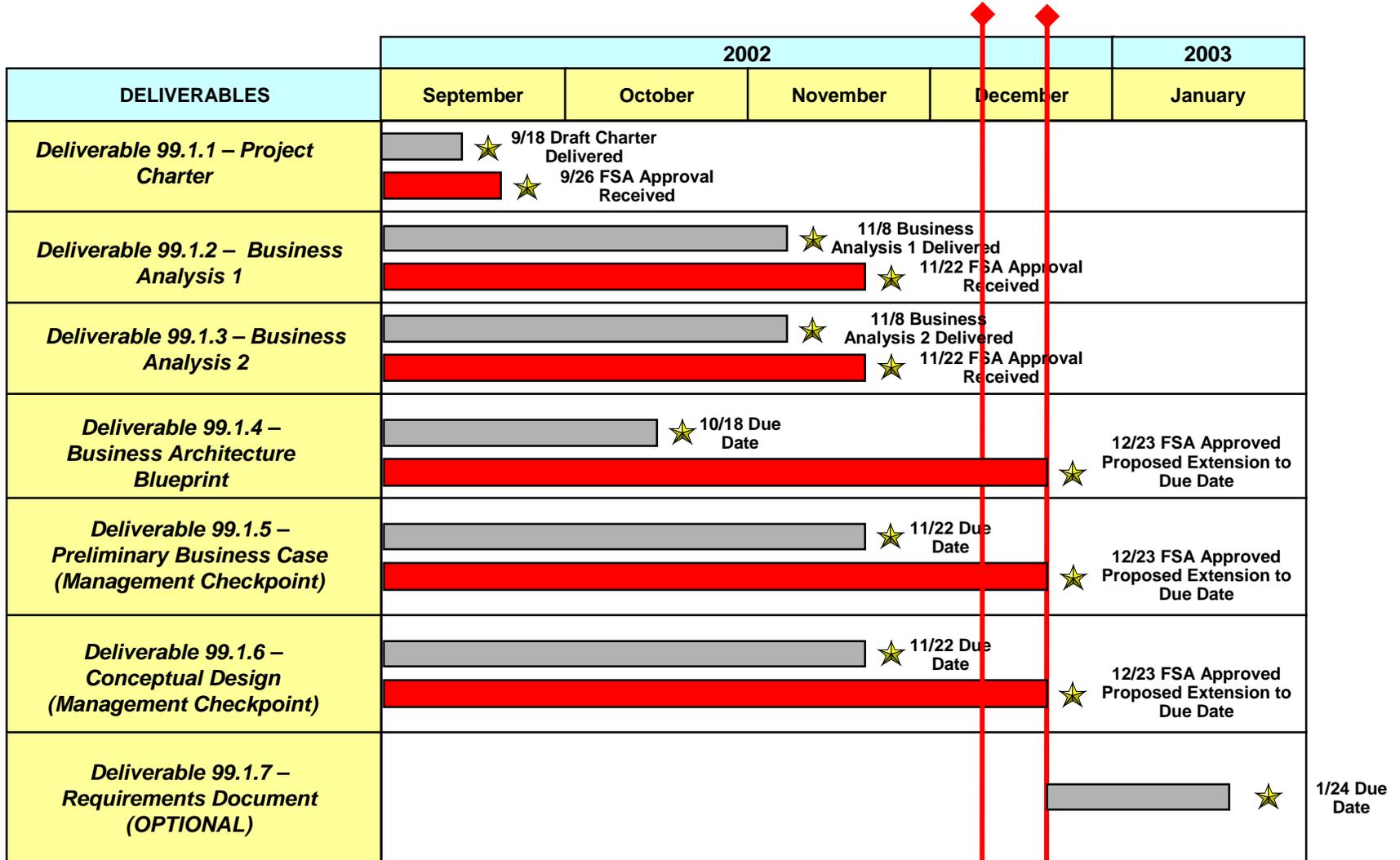
Worse



Same

* Per current plan

Integrated Timeline



Today
(as of 12/13/2002)

Phase 1 Complete

Deliverable Schedule for TO 99 WO 1-Common Services for Borrowers Visioning & Planning

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
99.1.1	Common Services Project Charter	8/30/2002	9/13/2002	9/18/2002
99.1.2	Common Services Strategy	9/20/2002	11/8/2002	11/8/2002
99.1.3	Business Analysis	10/18/2002	11/8/2002	11/8/2002
99.1.4	Common Services Business Architecture Blueprint	10/18/2002	12/23/2002	
99.1.5	Preliminary Business Case for Common Services	11/22/2002	12/23/2002	
99.1.6	Conceptual Design for Common Services	11/22/2002	12/23/2002	



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TO 73 Lender Payment Process Redesign

ITR: Nicole Shaffer

FSA Project Sponsor: Johan Bos-Beijer

FSA Project Lead: Frank Ramos

Modernization Partner Project Lead: Todd Elliott

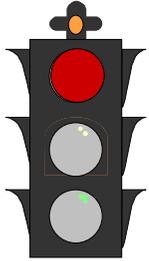
December 13, 2002

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- Key Issues & Decisions
- Deliverables Schedule

Overall Status

Red



Trend



Funding issues have caused the Stabilization Release II to be delayed. No User Acceptance Testing can occur until the contract extension is approved.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$ 2,372,000
Total \$\$ on Initial Contract	\$2,171,996.15
Contract Mod Amount(s)	\$839,089.88 Mod 1 \$511,139.50 Mod 2
Total \$\$ on Current Contract	\$3,522,225.53

Major Accomplishments Since Last Meeting

- 3385 LAP applications have been submitted, and 3256 were converted to LaRS.
- Completed development of the LaRS Stabilization Release II

Upcoming Activities / Target Dates

- Complete the testing of the LaRS Stabilization Release II – December 13
- Implement LaRS Stabilization Release II – tbd

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task order Mod 2 has been partially awarded by FSA. The remainder of 2002 funding was awarded on 9/25. One deliverable due in FY2003, Deployment Acceptance (73.1.5), has not yet been awarded. Project is currently at risk.
Scope			<ul style="list-style-type: none"> Project has entered post-production phase; two stabilization releases have been scoped and scheduled. One was implemented on 11/17.
Schedule			<ul style="list-style-type: none"> The Stabilization Release II has been delayed due to funding issues.
Cost			<ul style="list-style-type: none"> The award of the Deployment Acceptance deliverable will cover the costs for the effort through 10/31/2002. Additional deliverables are included in Mod 3 to cover activities through Jan 7, 2003



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



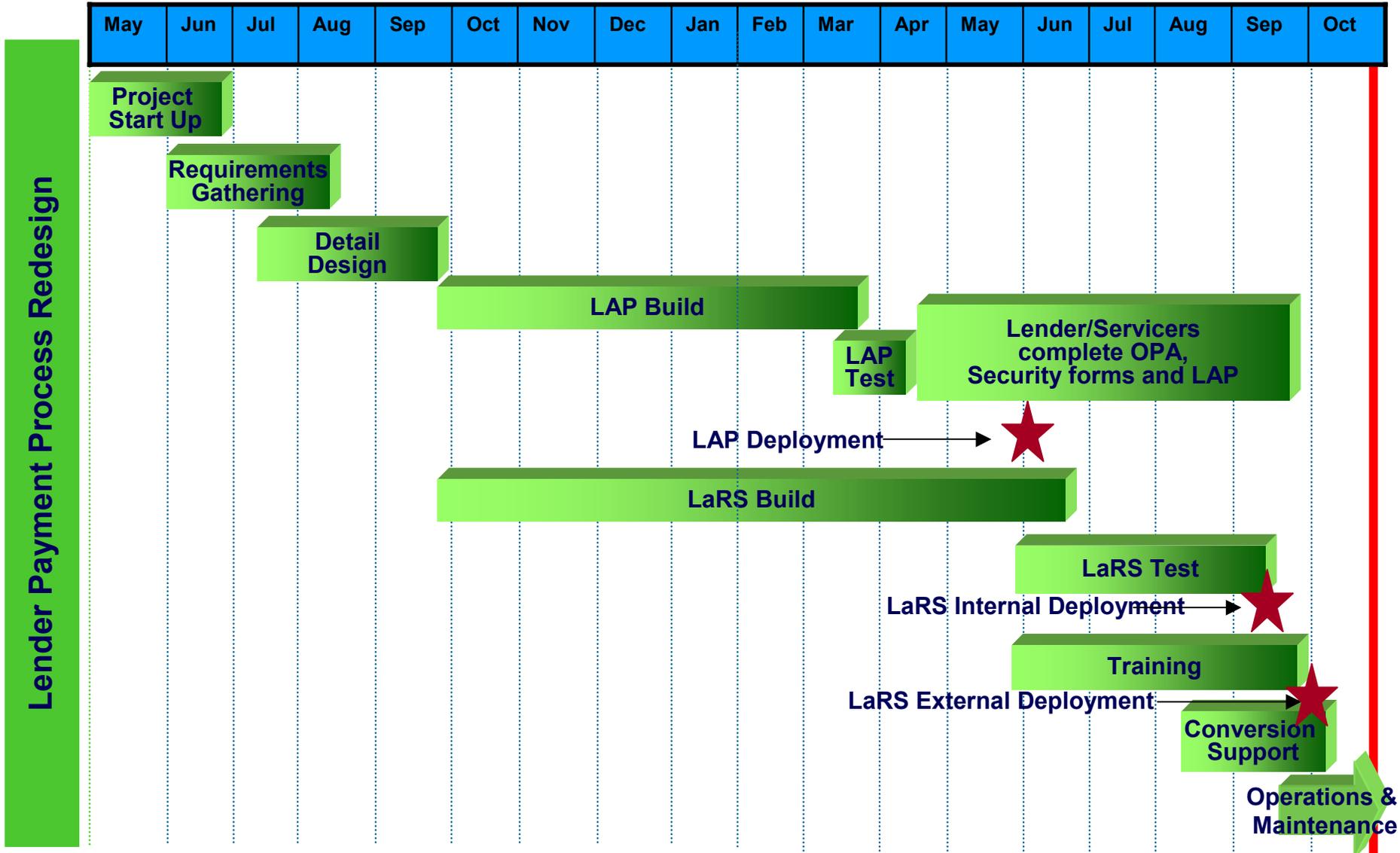
Worse



Same

* Per current plan

Integrated Timeline



Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
ED-FSA may receive a high number of paper-based submissions initially, due to the need for Servicers to alter their systems and possibly re-negotiate their contracts with the Lenders	Operations is not staffed to handle large quantities of paper-based submissions	Financial Partners, FP Lender Community	Operational	06/02/2002	In-Progress	Work through FP and the various lender/servicer organizations to emphasize the benefits of electronic submission, and to track how many are planning to use paper-based initially and how many will move to electronic submission as soon as they are able to resolve any technical and contractual issues.	Medium	Unlikely at this point; 80% of the submissions have been submitted electronically	Moderate

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
Funding for TO73 Mod 3 has not been approved	The deployment of LaRS as well as the two stabilization releases are unfunded	Financial Partners	Financial	11/27/2002	12/13/2002	IPC approved the funding; contract award pending	Urgent	The LAP/LaRS business case was approved by the IPC on December 10.

Deliverable Schedule for TO 73-R1 Lender Payment Process Redesign (TO 73)

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
73.1.1	Lender Payment Process Design	8/3/2001		8/3/2001
73.1.2	Lender Payment Process Development Sign-Off	6/14/2002	6/27/2002	6/27/2002
73.1.3	Lender Payment Process Testing Acceptance	9/30/2002		8/30/2002
73.1.4	Lender Payment Process Production Readiness Review	9/30/2002		8/30/2002
73.2.1	Lender Payment Process Community Road Map	6/21/2002		6/20/2002
73.2.2	Lender Application Process Production Readiness Review	6/21/2002		6/21/2002
73.3.1	Lender Reporting Sys Tech Designs	6/21/2002		6/21/2002



We Help Put America Through School

TO 88 – FMS Application Maintenance

ITR: Bill Walsleben

FSA Project Sponsor: Vicki Bateman

FSA Project Lead: Shirley Singleton

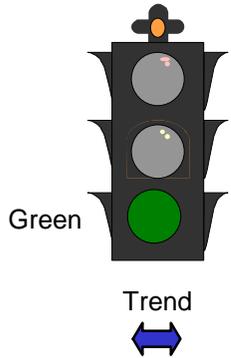
Modernization Partner Project Lead: Todd Elliott

December 13, 2002

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Overall Status



Upgrade to 8i database proceeding on schedule for 12/29 release. Continued to maintain the normal operations schedule.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$3,687,843.58
Contract Mod Amount(s)	\$996,272.06 – Mod 1 \$409,356.84 – Mod 2
Total \$\$ on Current Contract	\$ 5,093,472.48

Major Accomplishments Since Last Meeting
<ul style="list-style-type: none"> ■ Closed November and distributed all files to FMSS ■ Conducted CDDTS training for ACS and Students Channel ■ Investigated new approaches to the splitter process ■ Maintained normal operations schedule for all programs

Upcoming Activities / Target Dates
<ul style="list-style-type: none"> ■ Implement 8i database upgrade – 12/29 ■ Close December and distribute all files to FMSS – 1/7 ■ Continue to process daily files into FMS - Ongoing ■ Provide ongoing DBA, development and functional support - Ongoing.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order continues to meet goals and objectives.
Scope			<ul style="list-style-type: none"> No changes in scope
Schedule			<ul style="list-style-type: none"> All project metrics targets have been achieved or exceeded
Cost			<ul style="list-style-type: none"> Project financials are in line with expectations.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



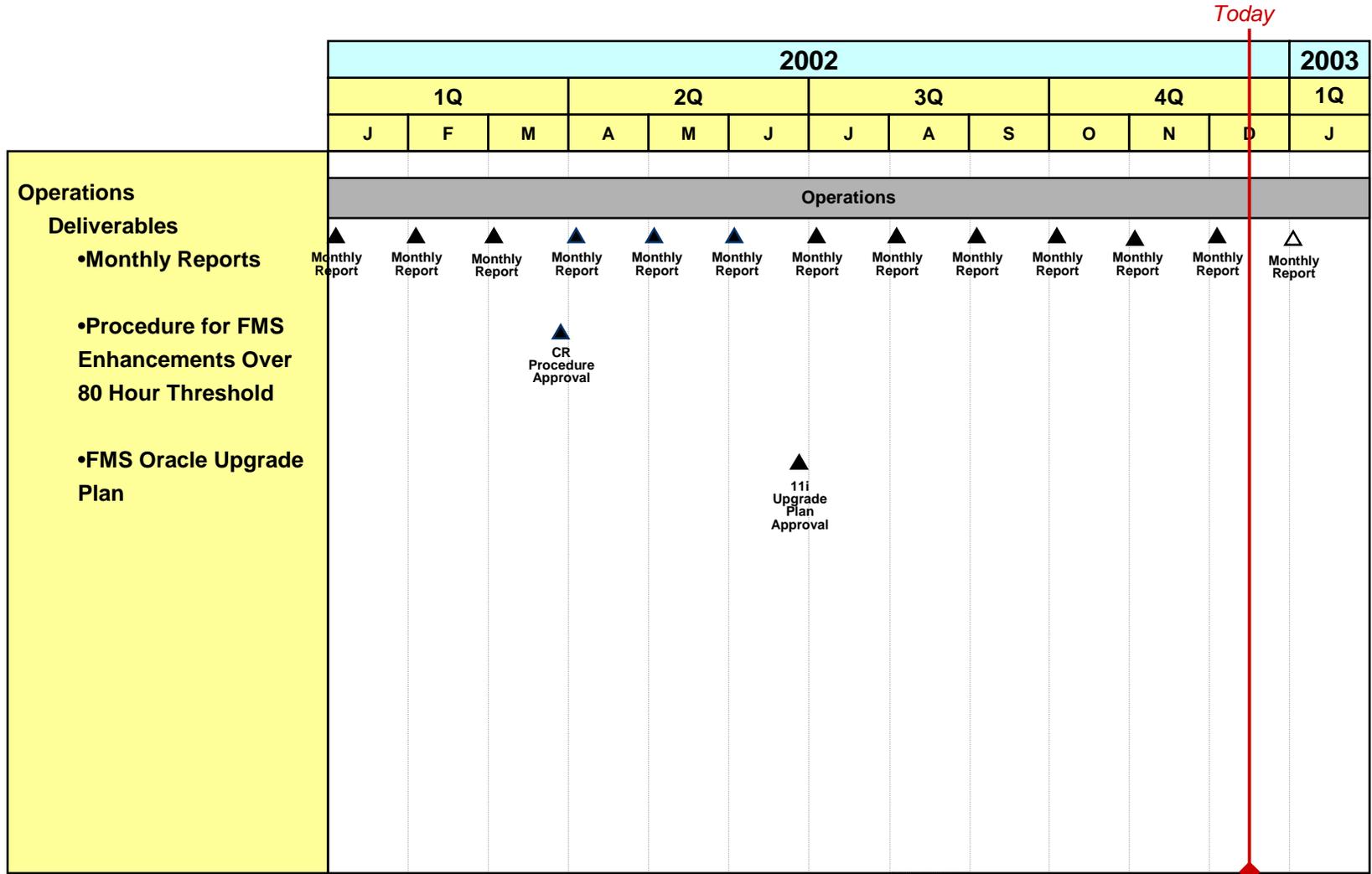
Worse



Same

* Per current plan

Integrated Timeline



Status Legend									
▲	High Risk – Major impact to schedule	▲	Moderate Risk – Manageable impact to schedule	▲	On Schedule	▲	Not Started	▲	Complete

Deliverable Schedule for TO 88- FMS Operations

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
88.1.1a	FMS Application Operations Monthly-Dec 2001	3/11/2002		3/12/2002
88.1.1b	FMA Application Operations Monthly-Jan 2002	3/11/2002		3/12/2002
88.1.1c	FMS Application Operations Monthly-Feb 2002	3/11/2002		3/12/2002
88.1.1d	FMS Application Operations Monthly-Mar 2002	4/7/2002		4/7/2002
88.1.1e	FMS Application Operations Monthly-Apr 2002	5/7/2002		5/7/2002
88.1.1f	FMS Application Operations Monthly-May 2002	6/7/2002		6/7/2002
88.1.1g	FMS Application Operations Monthly-June 2002	7/7/2002		7/7/2002
88.1.1h	FMS Application Operations Monthly-July 2002	8/7/2002		8/7/2002
88.1.1i	FMS Application Operations Monthly-Aug 2002	9/7/2020		9/7/2002
88.1.1j	FMS Application Operations Monthly-Sep 2002	10/7/2002		10/7/2002
88.1.1k	FMS Application Operations Monthly-Oct 2002	11/7/2002		11/7/2002
88.1.1l	FMS Application Operations Monthly-Nov2002	12/7/2002		12/7/2002
88.1.2	FMS Enhancement Procedures	3/11/2002	3/29/2002	4/11/2002
88.1.3	FMS Oracle Upgrade Plan	6/30/2002		6/28/2002
88.2.2	FMS FY03 Release 1.1 (Oracle 8i Upgrade) Production Readiness Review	12/31/2002		



TO 94 - NSLDS II Reengineering

ITR: Elisabeth Schmidt

FSA Project Sponsor: Harry Feely

FSA Project Lead: Mike Fillinich

Modernization Partner Project Lead: Eric Stackman

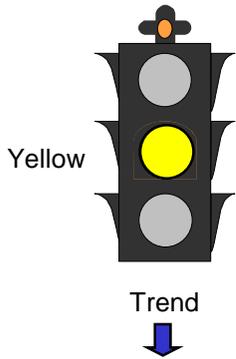
December 13, 2002

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- Deliverables Schedule

Overall Status

- WO4 Mainframe assessment completed



<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$3,100,000
Total \$\$ on Initial Contract	\$249,891.69
Contract Mod Amount(s)	\$1,099,323.67 – Mod 1 \$1,749,951.00 – Mod 2 \$ 49,736.98 - Mod 3
Total \$\$ on Current Contract	\$3,148,902.98

<i>Major Accomplishments Since Last Meeting</i>
<ul style="list-style-type: none"> Completed and submitted mainframe assessment

<i>Upcoming Activities / Target Dates</i>
<ul style="list-style-type: none"> Discuss assessment once Operations costs are known

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> WO 4 mainframe assessment was delivered to the government on 12/10/02.
Scope			<ul style="list-style-type: none"> NSLDS II will undergo a replanning phase which will examine a Mainframe alternative. Changes to legacy NSLDS outside of modernization continue and will need to be reconciled with NSLDS II designs prior to the restart of the design/build phase.
Schedule			<ul style="list-style-type: none"> NSLDS II go-live schedule of 9/30/03 is no longer the target. A new schedule can be developed once additional questions regarding technology alternatives questions are answered in WO/4 and a determination is made by the Government about what functions are to be included in NSLDS II.
Cost			<ul style="list-style-type: none"> Although additional costs for replanning will be required, the net cost impact on NSLDS II is based on replanning decisions as indicated above. (see scope above)



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



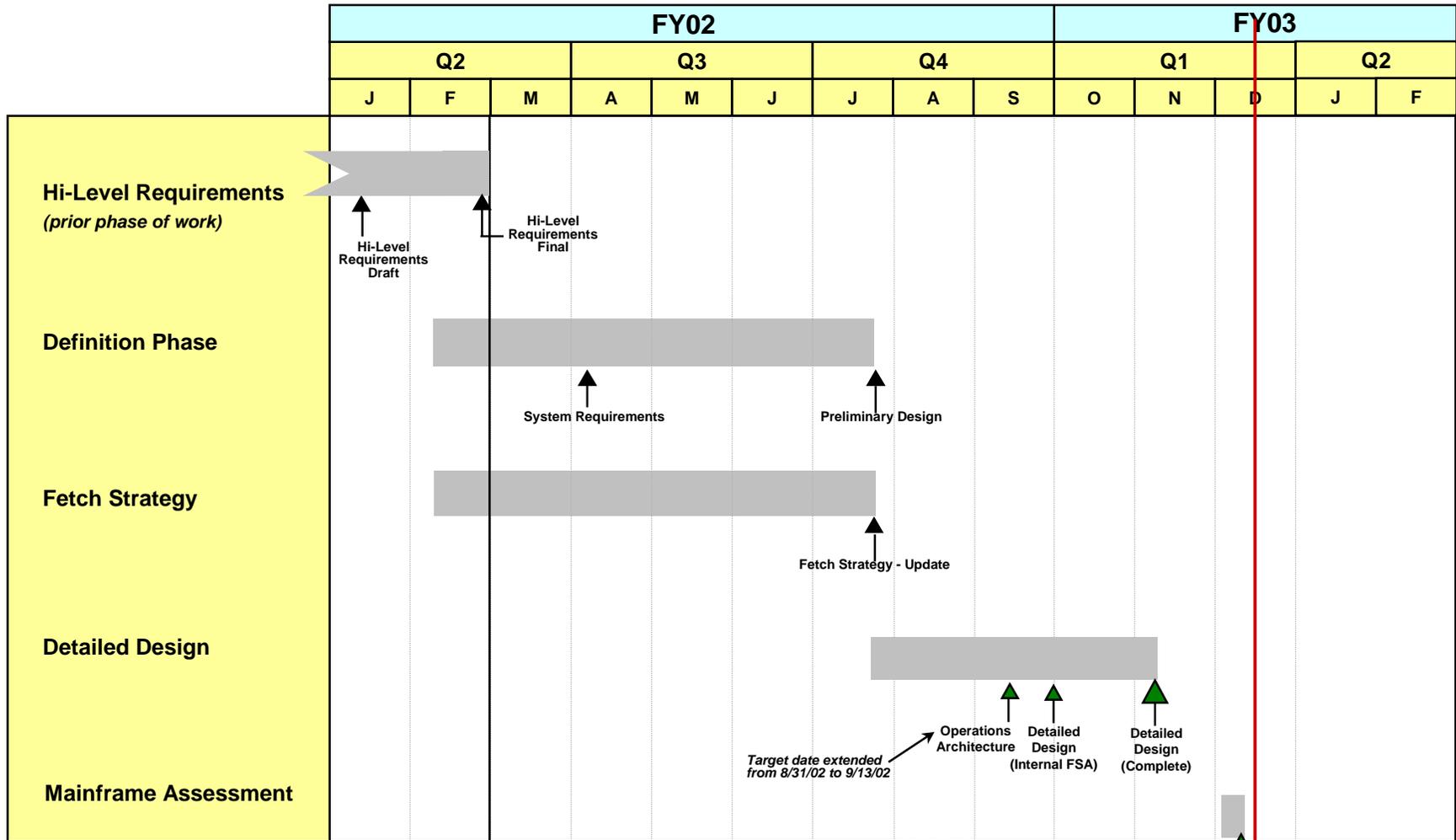
Worse



Same

Integrated Timeline

Today



Status Legend									
	High Risk – Major impact to schedule		Moderate Risk – Manageable impact to schedule		On Schedule		Not Started		Complete

Key Issues & Decisions

<i>Issue / Decision Required</i>	<i>On Point</i>	<i>Target Date</i>	<i>Impact on Cost and/or Schedule</i>	<i>Status Comments</i>
<p>Mainframe Assessment requires Operations costs to draw conclusions – an estimate of VDC operations costs are required to make an overall assessment of the mainframe vs. mid-tier alternatives</p>	<p>M. Fillinich H. Feely</p>	TBD	<ul style="list-style-type: none"> Conclusions cannot be drawn until database software and ops costs are combined. 	<p>Waiting for FSA to obtain VDC ops costs.</p>
<p>NSLDS II steering Committee - Engaging Executives and NSLDS Users Outside of FSA – There has been a 6+ week delay in meeting with external users and executives due to scheduling conflicts</p>	<p>M. Fillinich</p>	TBD	<ul style="list-style-type: none"> Further delays may impact ability to gain sufficient community momentum / acceptance of NSLDS II FY03 plans 	<p>On Hold. FSA is waiting for the funding approval for development, prior to engaging the NSLDS users outside of FSA. Once FY03 direction is set and funding has been approved, meetings with many of these individuals –specifically, FPs and schools should be scheduled.</p>

Deliverable Schedule for TO 94WO1 - NSLDS II Reengineering High-Level Req Definition

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
94.1.1a	Hihg-Level Business Requirements - Draft	4/15/2002		4/5/2002
94.1.1b	High-Level Business Requirements-Final	4/22/2002		4/5/2002
94.2.1	System Requirements - Drafts	4/5/2002		4/8/2002
94.2.2	Preliminary Design	6/30/2002	7/19/2002	7/19/2002
94.2.3	Fetch Strategy Review - Update	6/30/2002	7/19/2002	7/19/2002
94.3.1	Operations Architecture - Draft	8/31/2002	9/13/2002	9/13/2002
94.3.2	Detailed Design - Internal FSA	9/30/2002		9/30/2002
94.3.3	NSLDS II Detailed Design	11/8/2002		11/8/2002
94.4.1	Review of NSLDS II Mid-Tier vs Mainframe Arch Alternatives	11/26/2002		12/10/2002



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TO 116 – Electronic Audited Financial Statements

ITR: Katie Crowley

FSA Project Sponsor: Kay Jacks

FSA Project Lead: Randy Wolff / Ti Baker

Modernization Partner Project Lead: Gene Murphy

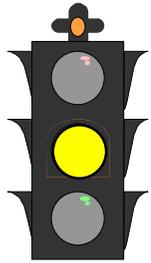
December 13, 2002

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- Government & Project Dependencies
- Deliverables Schedule

Overall Status

Yellow



Trend



- Funding for work beyond 12/20 required for continuity of effort.
- eZ-Audit Software Development Completed on Schedule
- PEPS integration planning/execution underway – albeit at a slower pace than desired.
- System Test scripts prepared; required data identified.
- UAT Test Plan completed; in client review.

Project Funding	Dollar Amount
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$1,058,620.35
Contract Mod Amount(s)	\$0
Total \$\$ on Current Contract	\$1,058,620.35

Major Accomplishments Since Last Meeting
<ul style="list-style-type: none"> ▪ Contract / Funding <ul style="list-style-type: none"> ▪ System Test (Deliverable 116.1.3) , Communication & Training Support (116.2.2) require funding prior to 12/20 for continuity of effort ▪ Deliverable – 116.1.2 <ul style="list-style-type: none"> ▪ On track for completion of software development and delivery to system test on 12/20. Demonstration of unit tested software planned. ▪ Scope <ul style="list-style-type: none"> ▪ Clearly defined – per strict adherence to CCB process and direction. ▪ Development <ul style="list-style-type: none"> ▪ Client demonstration of capabilities (#3 of 4) completed on 12/10. ▪ Report development (using Microstrategy enterprise tool) completed; validation in progress. ▪ Test scripts completed; required data and expected results being integrated into approved scripts. ▪ Outreach <ul style="list-style-type: none"> ▪ Las Vegas EAC presentations and lab support provided. ▪ Workforce alignment needs identified and action plan identified and in progress. ▪ Training staff (from FSAU) engaged and draft of user materials in progress. ▪ School Registration posting for IFAP prepared; awaiting Regs decision for posting.

Upcoming Activities / Target Dates
<ul style="list-style-type: none"> ▪ Secure funding for post 12/20 efforts. ▪ Reach decision on Negotiated Rulemaking / Deployment strategy; Kay working directly with Jeff Baker. <ul style="list-style-type: none"> ▪ Meeting with decision makers scheduled for Tuesday 11/19. ▪ OGC / OIG / OPE Briefing held 11/25. ▪ Continue to work closely with PEPS to confirm data model and interface transactions/mechanics. <ul style="list-style-type: none"> ▪ Initiate a second data mapping matrix identifying PEPS needed data from eZ-Audit. Provide this to PEPS tech team for validation and additions. ▪ System Test Readiness – environments, data and script reviews. ▪ Delivery of Deliverable 116.1.2 – Application (Code) Delivery <ul style="list-style-type: none"> ▪ Includes test scripts, UAT plan and Full Requirements Matrix mapping (Test Script / Design (Use Case) / Requirements Matrix) ▪ FSA Business Process definition for eZ-Audit use at FSA (due 12/31/02).

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order (#116) partial funding - provides for work through Application (Code) Delivery – 12/20/02. Deliverables 116.1.1 and 116.1.2 funded (Application and System Test Script Development) Deliverables 116.1.3 – 116.1.5 (System Test, Deployment Readiness and Communications & Training require awarding prior to 12/20 for continuity of effort and a scheduled April 1, 2003 eZ-audit deployment).
Scope			<ul style="list-style-type: none"> <u>New Task Order (#116)</u> provides for application (code) and test script development. Application test execution and test results, application deployment and communication and training support are optional tasks – dependent upon FSA decision to fund and execute.
Schedule			<ul style="list-style-type: none"> Deliverable 116.1.1 – Application (Code) Checkpoint – November 12, 2002 Deliverable 116.1.2 – Application Code Delivery – December 20, 2002 Deliverable 116.1.3 – Application Test Results (Optional) – February 28, 2003 Deliverable 116.1.4 – Application Deployment (Optional) – March 28, 2003 Deliverable 116.2.1 – Communications, Training and Workforce Realignment Support (Optional) Deliverable 116.1.6 – Production and Transition Support (Optional)
Cost			<ul style="list-style-type: none"> Task Order 116- Work being performed within informally funded budget allowance.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



Worse



Same

* Per current plan

eZ-Audit End-to-End Timeline

10/1/2002

2002												2003		
1Q			2Q			3Q			4Q			1Q		
J	F	M	A	M	J	J	A	S	O	N	D	J	F	M

Planning – Project Initiation <u>Requirements Definition</u> Baseline Requirements <u>Application Design Phases</u> Preliminary Design Functional Design Detailed Technical - HTML Prototype Test Approach & Plan <u>Application Development</u> Build – Unit and Assembly tested Test – System Test Performance Test User Acceptance Test <u>Application Delivery</u> Deployment & Stabilization Support	★ ✓ Kickoff 1/16													
				★ <i>Requirements Definition</i> ✓ Requirements 3/20										
				★ ✓ Reqs Baselined 4/16										
					★ <i>Application Design</i> ✓ Preliminary Design 5/15									
						★ ✓ Functional Design 7/15								
							★ ✓ Tech Arch Design & HTML Prototype 8/19							
								★ ✓ Master Test Plan 9/30						
									Application Build (Code) 9/4 – 12/20 ★					
										Test 1/1 – 2/28 ★				
											Application Delivery 4/1/03 ★			

✓ - Indicates on schedule task completion
Red italics – NOT currently funded

Stabilization Support - Through 6/20/03

Major Risks

Risk Description	Impacts	Dependent Parties	Risk Category	Open Date	Status	Mitigating Actions	Severity	Probability	Level Of Control
Ability to Secure Required Regulatory Changes	Impact to Operations Costs (No impact to system build & deploy schedule)	FSA – Jeff Baker & Randy Wolff	Operational & Financial	2/1/02	In Progress	(1) Jeff Baker coordinating discussions with OPE / IG and OGC to resolve any remaining concerns. (2) eZ-Audit team providing system demos.	Medium – build & deploy is not impacted, however costs of operation support for both an electronic & paper based submission process would be greater than planned.	Likely	Moderate
Delayed Delivery or lack of Required Build & Deploy Funding	Break in continuity of system development – schedule & costs adjustments would result.	FSA (Randy Wolff) Mod Partner (Gene Murphy)	Financial	12/1/02	In progress	Proposal submitted and priced for task order options – system test, deployment preparation and communications & training provided to FSA in November.	Critical – cannot proceed without funding authority.	Likely	Total – FSA can authorize funding.

Major Risks

Risk Description	Impacts	Dependent Parties	Risk Category	Open Date	Status	Mitigating Actions	Severity	Probability	Level Of Control
FSA Adoption of new business processes to fully exploit the electronic submission advantages of eZ-Audit	Impact to Operations Costs (No impact to system build & deploy schedule)	FSA – Randy Wolff & Ti Baker	Operational & Financial	10/1/02	In Progress	Revised business procedures to be completed by 12/31. Staffing to complete task identified and assigned.	Medium – build & deploy is not impacted, however costs of operation support could be greater than required if new business procedures are not deployed.	Unlikely	Total
PEPS Integration – data exchange to/from PEPS	Risk to (1) accurate eZ-Audit system setup data and (2) accuracy of PEPS display of eZ-Audit owned data, and (3) potential risk to PEPS system stability.	PEPS – Chris Hill Mod Partner – Frank Southfield	Operational	11/1/02	In Progress Twice weekly technical meetings begun the week of November 18.	Validation of Data Mapping Matrices in process with PEPS staff. Requires PEPS recognition of tasking as a priority.	Critical – impacts to operational capabilities & integrity of both systems.	Likely – at this reporting	Total – FSA can authorize PEPS priorities. eZ-Audit has well identified plan for resolution.

Government & Program Dependencies

Dependency	On Point	Target Date	Impact on Cost and/or Schedule	Status Comments
<u>Decision on Negotiated Rulemaking</u>	Randy Wolff	10/15 Overdue Revised Date: 12/1	Overall costs Cost and Schedule Impacts for Build should be negligible.	<ul style="list-style-type: none"> Impact to FSA business processes could be significant if requirement for Negotiated Rulemaking decision is now reached. This would impact electronic submission requirement for schools. Costs to FSA could be considerable – if running 2 parallel processes.
Communication Plan – Execution	Laura Harcum & Ti Baker	On-going	Minimal impact to implementation schedule – although a key contributor to school compliance and ability to meet financial objectives	<ul style="list-style-type: none"> Plan provided by Mod Partner Tailoring and execution the responsibility of FSA; Mod Partner to assist in implementation of plan. Communication execution started 9/1/02. Optional deliverable for Mod Partner support in the areas of Communication, Workforce Transformation and Training provided in Task Order 116 proposal.
<u>Funding Authorization to Proceed</u>	Randy Wolff	12/20/02	Funding and resulting work interruption will severely impact both cost and schedule.	<ul style="list-style-type: none"> Funding through 12/20 received. Post 12/20 efforts remain unfunded. Mod Partner revision to Task Order 116 ready for FSA review; includes pricing for Communications, Outreach & Training support.
FY '03 Stabilization Support & Operations Funding	FSA	2/1/03	Does not impact Build and Deployment Prep Activities as identified in pending Task Order 116	<ul style="list-style-type: none"> Optional deliverable for Mod Partner stabilization support provided in Task Order 116 proposal. Stabilization support activities required upon release of application to production environment – scheduled for 4/1/03. Use of DRCC savings to self-fund this effort.

Deliverable Schedule for TO 116-Electronic Audited Financial Statements & Compliance Reports

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
116.1.1	Application (Code) Progress Checkpoint & Demonstration	11/12/2002		11/12/2002
116.1.2	Application (Code) Delivery	12/20/2002		



TO 122– ERM Operational Support

ITR: Bill Walsleben

FSA Project Sponsor: Kay Jacks

FSA Project Lead: Denise Merchant

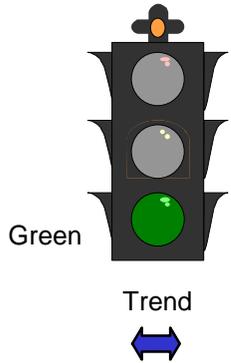
Modernization Partner Project Lead: Jiji Alex

December 13th, 2002

Table of Contents

- Overall Status
- Project Scorecard
- Integrated Timeline
- Deliverables Schedule

Overall Status



- This task order proposal is currently being prepared for submission to FSA.
- An ATP has been issued to avoid any break in operational support services.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	N/A
Total \$\$ on Initial Contract	N/A
Contract Mod Amount(s)	N/A
Total \$\$ on Current Contract	\$50,000 under ATP.

Major Accomplishments Since Last Meeting

- Draft Technical proposal outlining all key activities and deliverables submitted to FSA.
- Price proposal is being prepared.
- Negotiations with sub-contractor underway to finalize sub-contract agreements.
- Scanning and conversion of paper documents received within Schools channel resumed on 12/3/02.

Upcoming Activities / Target Dates

- Submit TO 122 Tech and Price proposals to FSA.
- Finalize sub-contractor agreements.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			ATP awarded. Final submissions from sub-contractor expected by 12/18.
Scope			No changes expected.
Schedule			No changes. Period of performance for TO runs from 12/1/02 thru 11/30/03.
Cost			Being worked.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



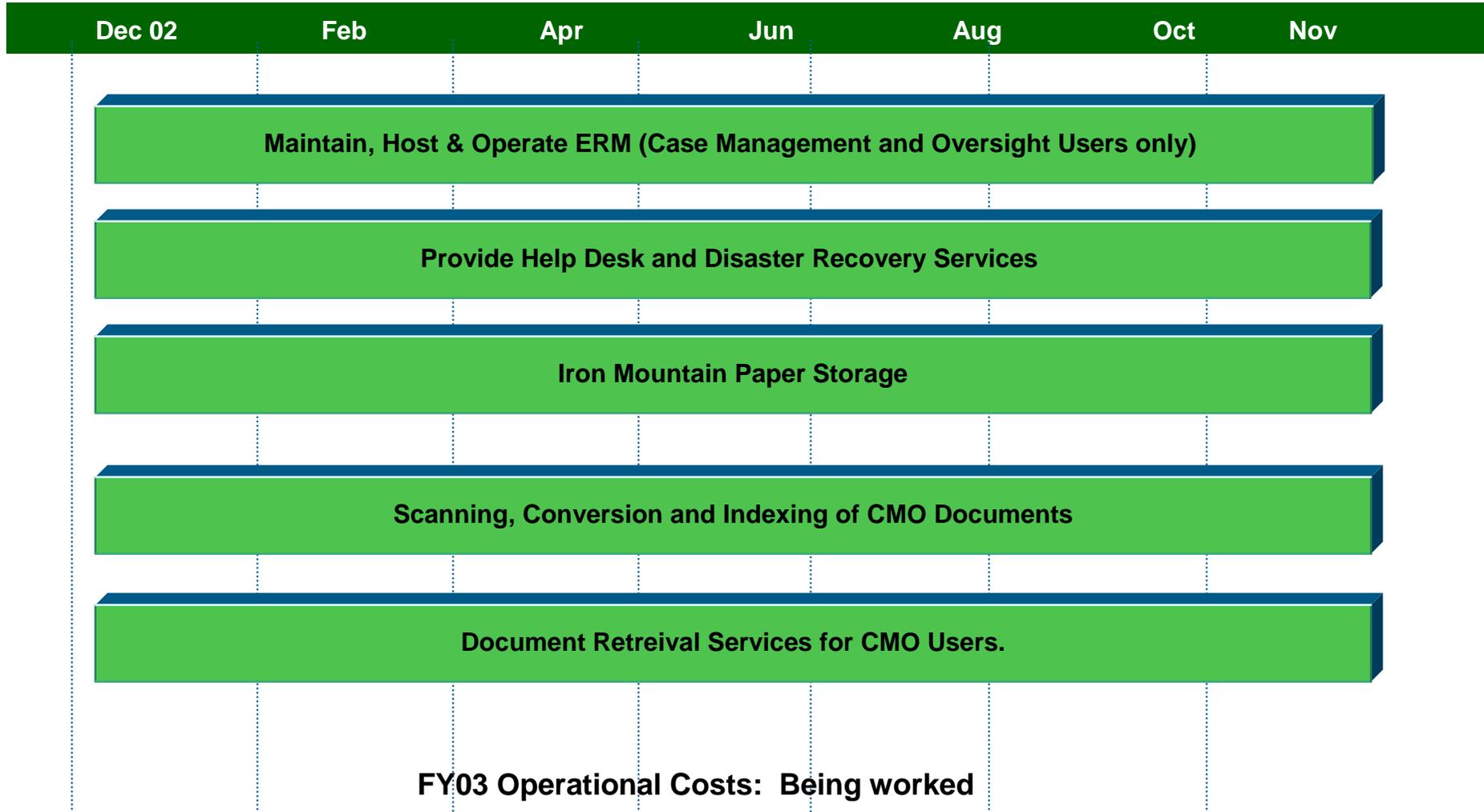
Worse



Same

* Per current plan

Integrated Timeline





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77 WO 1 – SAIG (FSA to the Internet)

ITR: Katie Crowley

FSA Project Sponsor: Kay Jacks

FSA Project Lead: Lydia Morales

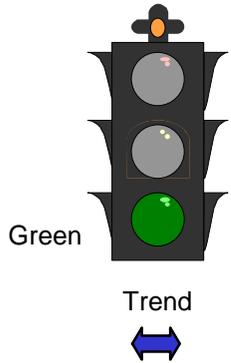
Modernization Partner Project Lead: Colleen Ward

December 13, 2002

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- Overall Status
- Project Scorecard
- Integrated Timeline

Overall Status



- Conducting performance testing to verify SAIG will process February-March peak.
- Conducting SAIG Satisfaction Survey
- Defining requirements for next release of SAIG.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	N/A Shared In Saving Contract
Total \$\$ on Initial Contract	N/A
Contract Mod Amount(s)	N/A
Total \$\$ on Current Contract	N/A

Major Accomplishments Since Last Meeting
<ul style="list-style-type: none"> ■ No major disruptions in service. ■ Began SAIG Satisfaction Survey ■ SAIG Application Meeting conducted December 11. ■ Defined eCDR requirements for deployment in February ■ Added peak server to development environment. ■ Began Peak Processing performance testing. ■ Conducted ServiceGuard Failover testing. Need to repeat test.

Upcoming Activities / Target Dates
<ul style="list-style-type: none"> ■ Complete SAIG Satisfaction Survey for this quarter ■ Final VDC Disaster Recovery Meeting – December 16 ■ Testing – comparing XML versus legacy format ■ Repeat ServiceGard Failover testing ■ Peak Load Hardware configuration in production – January 1

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> • Umbrella SIS task order has been approved. • SFA to the Internet (Work Order 1) has also been approved.
Scope			<ul style="list-style-type: none"> • Baseline scope successfully executed. • Operations now in place; savings being generated. • New applications added to SAIG beyond baseline: <ul style="list-style-type: none"> • Lender Redesign (LaRS) – added 10/01/02 • eCDR to be added 2/15/03
Schedule			<ul style="list-style-type: none"> • Full migration of all SFA Applications and TIVWAN mailboxes completed 12/19/01. • GEIS February 1, 2002 retirement achieved. • Successfully processed August-September peak with no major system issues
Cost			Shared in Savings – Savings being generated according to forecast.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



Worse



Same

* Per current plan



We Help Put America Through School

TO 79 – Portal Rollout Plan

ITR: Martin Renwick

FSA Project Sponsor: Jennifer Douglas / Kristie Hansen

FSA Project Lead: Mary K Muncie / Johan Bos-Beijer

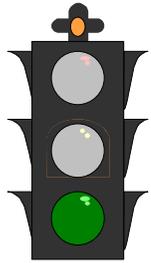
Modernization Partner Project Lead: Chris Paladino

December 13, 2002

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- Overall Status
- Project Scorecard
- Integrated Timeline
- Major Risks
- Government & Project Dependencies
- Deliverables Schedule

Overall Status



Green

Trend



- Release 2 of the FP Portal and Release 1.1 of the Students Portal are live in Production.
- The Privacy Act/System of Record packet is on hold with ED/OGC. Discussion with OGC are in progress to get packet submitted to OMB.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$3,604,000
Total \$\$ on Initial Contract	\$3,146,635.08
Contract Mod Amount(s)	\$249,956.73 – Mod 1 \$499,170.45 – Mod 2
Total \$\$ on Current Contract	\$3,895,762.26

Major Accomplishments Since Last Meeting
<ul style="list-style-type: none"> • Provided session (Focus Group) at the Las Vegas EAC for the Students Portal • Provided Focus Group for HS students at MLK Jr. Memorial Library in Washington, DC • Resolved various production and TeamSite issues • Continued with stabilization of the Portals (on-going) • Continued with System of Record (SoR) and Information Collection Clearance (ICC) processes (on-going) <ul style="list-style-type: none"> • The clock has started for ICC, but not SoR • Continued requirements collection for Release 3 of the Students Portal • Received acceptance of Deliverable 79.1.7 • Provided updates to Deliverable 79.3.2b

Upcoming Activities / Target Dates
<ul style="list-style-type: none"> • Submit Deliverable 79.3.2c (12/31/2002) • Provide production support (as needed) • Perform EFC estimator comparison/testing (TBD) • Schedule FAFSA pre-population testing (TBD) • Continue with stabilization of the Portals (on-going) • Continue with System of Record and ICC processes (on-going) • Continue with Students Portal Release 3 requirements (on-going) • Begin preparing Business Justification for Students Portal Release 3 design and development

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order Modification approved by FSA
Scope			<ul style="list-style-type: none"> Scope has been defined for the task order
Schedule			<ul style="list-style-type: none"> Release 2 of Students Portal delayed until Mar/Apr 03. Due to delays with the OGC, Release 2 deployment might not occur before the end of the existing TO (3/31/2003).
Cost			<ul style="list-style-type: none"> Deliverable 79.1.7 was split into two deliverables so that partial payment can be made now



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



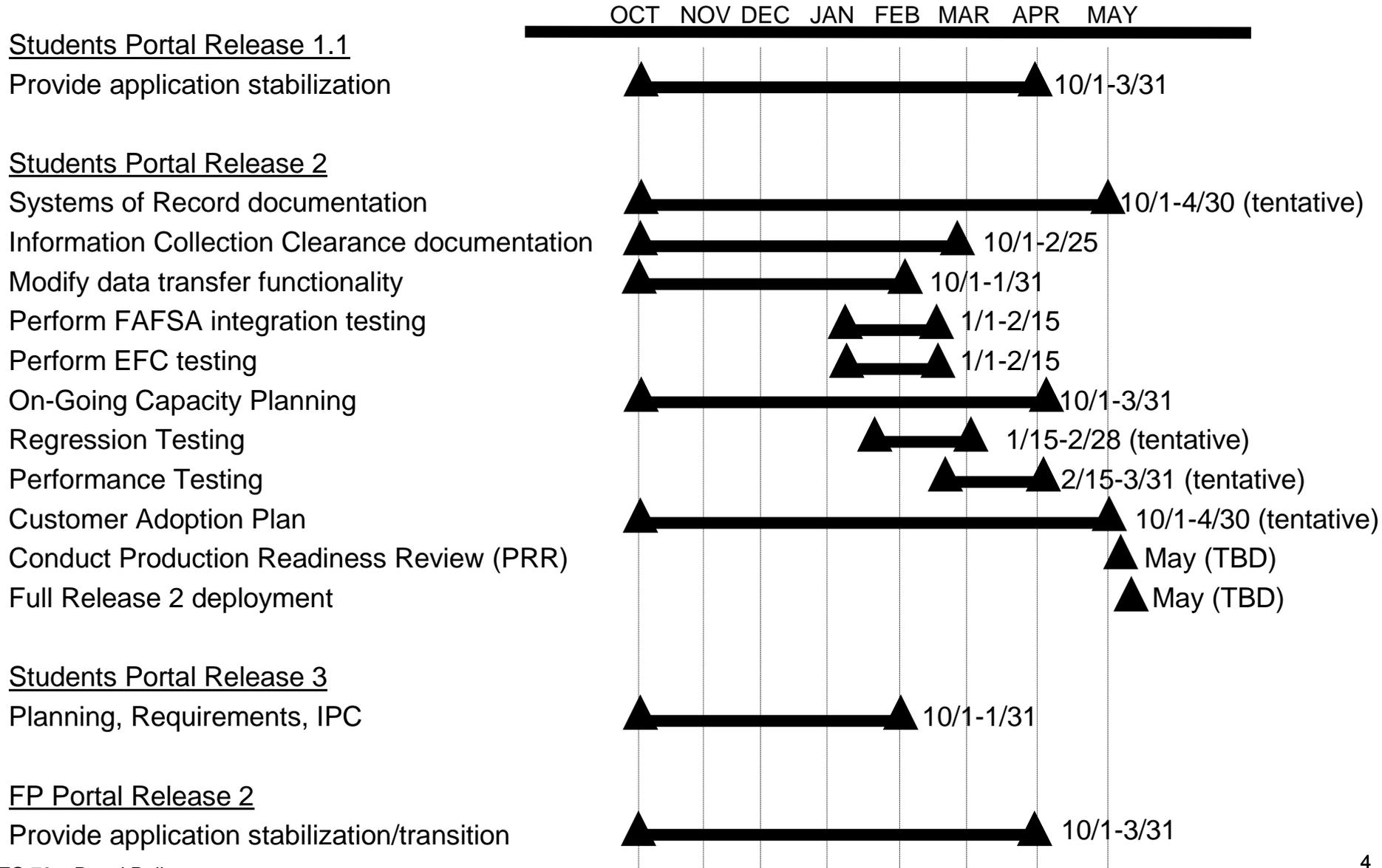
Worse



Same

* Per current plan

Integrated Timeline



Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
The System of Record packet has not been submitted to OMB by the OGC	There is a day-for-day schedule delay of the implementation of Release 2 of the Students Portal	Students, Students Channel, ED/OGC, OMB	Operational	10/01/2002	In-Progress	Meeting with ED/OGC and OMB to address potential issues and speed up the process	Critical	Likely	Moderate

Government & Program Dependencies

<i>Dependency</i>	<i>On Point</i>	<i>Target Date</i>	<i>Impact on Cost and/or Schedule</i>	<i>Status Comments</i>
Need an agreement in place for Xap, as a FAFSA Pre-population client (Students Portal Release 2)	Nina Colon / Chris Paladino	December 2002		Jeanne Saunders is currently reviewing.
Need to have testing support from NCSP in place for Xap functionality (Students Portal Release 2)	Nina Colon / Adam Essex	December 2002		Nina is scheduling the testing

Deliverable Schedule for T079-Portal Rollout Strategy

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
79.1.1	Project Schedule and Resource Assignment Release 1	2/4/2002		2/5/2002
79.1.2	Requirements Definition Release 1	2/4/2002		2/5/2002
79.1.3	Detailed Document Design-Release 1	2/11/2002	2/22/2002	2/18/2002
79.1.4	Test Plan and Test Scripts for Portal- Release 1	3/11/2002	3/21/2002	3/21/2002
79.1.5	Developed, Tested, and Accepted Solution-Release 1	4/15/2002	4/30/2002	5/1/2002
79.1.6	Project Schedule, Xap Conceptual Design-Release 2	8/16/2002	8/22/2002	8/22/2002
79.1.7	Developed, Tested, & Accepted Solution-Release 2	9/30/2002		10/1/2002
79.2.1	Requirements Definition - Release 2	8/16/2002	8/22/2002	8/22/2002
79.2.2	Detailed Design Document-Release 2	8/16/2002	8/22/2002	8/22/2002
79.2.3	Test Plan and Test Scripts-Release 2	8/30/2002		8/30/2002
79.3.1	Developed, Tested and Accepted Solution-Students Portal Release 2	1/31/2003		
79.3.2a	Stabilization & Tranformation Support-October Status-Release 2	10/31/2002		10/31/2002
79.3.2b	Stabilization & Transformation Support November Status-Release 2	11/30/2002		11/27/2002
79.3.2c	Stabilization & Transformation Support December Status-Release 2	12/31/2002		
79.3.2d	Stabilization & Transformation Support January Status-Release 2	1/31/2003		
79.3.2e	Stabilization & Transformation Support February Status-Release 2	2/28/2003		
79.3.2f	Stabilization & Transformation Support March Status-Release 2	3/31/2003		



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TO 95 – FSA University Modernization Support

ITR: Linh C. Nguyen

FSA Project Sponsor: Anne Teresa

FSA Project Lead: Anne Teresa

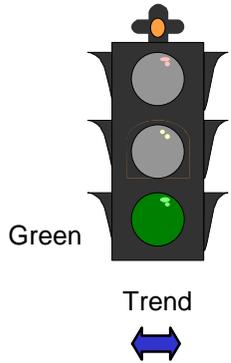
Modernization Partner Project Lead: Howard M. Weitzner

December 13, 2002

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- Overall Status
- Project Scorecard
- Integrated Timeline
- Deliverables Schedule

Overall Status



The task order is proceeding on schedule. Values delivered include:

- Enable FSA to develop and deliver training with efficiency, quality and consistency.
- Defined metrics and tool for identifying and reducing training costs.
- Processes and templates to support FSAU's partnership with other FSA channels and Enterprise Units.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$273,756.52
*Contract Mod Amount(s)	\$230,787.39 – Mod 1 \$256,473.33 – Mod 2 \$107,858.16 – Mod 3
*Total \$\$ on Current Contract	\$868,875.40

<i>Major Accomplishments Since Last Meeting</i>
<ul style="list-style-type: none"> ▪ Continue to advise FSAU on FY03 strategic planning. ▪ Continued support for cost analysis team, including phase 2 planning and ad hoc support. ▪ Continued deployment of performance consulting process, which creates a standard approach for responding to customer requests for service. Continued transition to new FSAU team lead. ▪ Continued support for development of external partner training curriculum and schedule. ▪ Conducted all but one Performance Planning working session with FSAU teams. ▪ Conducted initial meetings with multiple FSAU teams to develop an effective process for coordinating training logistics.

<i>Upcoming Activities / Target Dates</i>
<ul style="list-style-type: none"> ▪ Continue to advise FSAU on FY03 strategic planning. ▪ Support cost analysis team, including One-ED ad hoc support and phase 2 planning. ▪ Continue deployment of performance consultant process. Determine appropriate process for informing managers about potential upcoming proposals. ▪ Continue deployment of training development process through coaching of individual training teams. ▪ Design updates to DL/FFEL training program materials. ▪ Support development of external partner training curriculum and schedule. ▪ Complete remaining Performance Planning working session for FSAU teams in the regional offices. ▪ Continue to develop an effective process for coordinating training logistics.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task order proceeding on schedule. Modification accepted to extend current scope of work through January, 2003.
Scope			<ul style="list-style-type: none"> Scope is well defined and regularly reviewed with FSA.
Schedule			<ul style="list-style-type: none"> Milestones and deliverables on schedule
Cost			



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



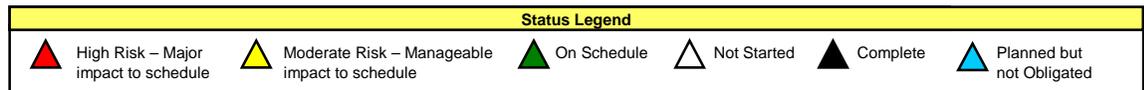
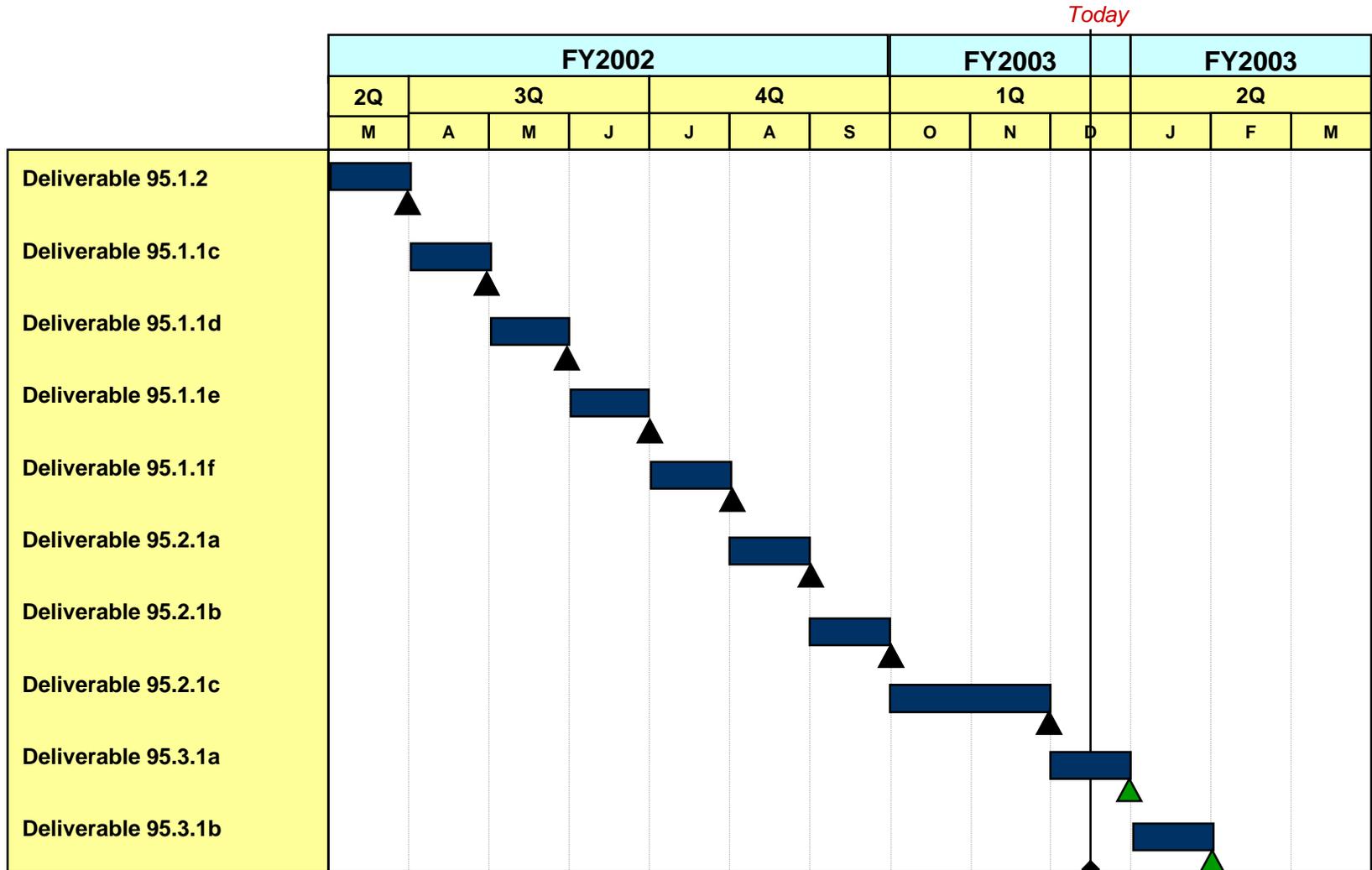
Worse



Same

* Per current plan

Integrated Timeline



Deliverable Schedule for TO 95-SFA University Modernization Support

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
95.1.1a	Training Services Summary-February	2/28/2002		2/28/2002
95.1.1b	Training Services Summary-March	3/31/2002		3/29/2002
95.1.1c	Training Services Summary-April	4/30/2002		4/30/2002
95.1.1d	Training Services Summary-May	5/31/2002		5/31/2002
95.1.1e	Training Services Summary-June	6/30/2002		6/30/2002
95.1.1f	Training Services Summary-July	7/31/2002		7/31/2002
95.1.2	Facilitative Leadership Conference	3/31/2002		3/22/2002
95.2.1a	Training Services Summary - August	8/31/2002		8/31/2002
95.2.1b	Training Services Summary - September	9/30/2002		9/30/2002
95.2.1c	Training Services Summary - October	10/31/2002	11/29/2002	11/26/2002
95.3.1a	Training & Organizational Services Summary-Dec'02	12/31/2002		
95.3.1b	Training & Organizational Services Summary-Jan'02	1/31/2003		



We Help Put America Through School

TO 110 – FP Data Mart Operations

ITR: Nicole Shaffer

FSA Project Sponsor: Anna Allen

FSA Project Lead: James Greene

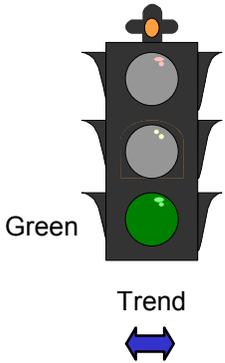
Modernization Partner Project Lead: Scott A. McConaghie

December 13, 2002

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- Overall Status
- Project Scorecard
- Integrated Timeline
- Key Issues & Decisions
- Deliverables Schedule

Overall Status



FP Data Mart Operations Team is achieving its major milestones on schedule.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$172,649.40
Contract Mod Amount(s)	\$54,087.60
Total \$\$ on Current Contract	\$226,737.00

Major Accomplishments Since Last Meeting

- Received 4 new FP DM SIRs, 3 were resolved (existing SIRs and new SIRs), 10 requests are outstanding.
- Completed loads from NSLDS, PEPS, and FMS.
- Submitted Deliverable 110.1.1f on 12/6/2002 as scheduled.

Upcoming Activities / Target Dates

- Support all on-going FP Data Mart Operations.
- Upgrade MicroStrategy to v7i. Currently coordinating with FP, CMDM, eCBS, and VDC to install on DEV/TEST server for testing.
- Submitted Deliverable 110.1.1f on 12/6/2002 as scheduled.
- Continue to work with FSA to determine how many Optional periods should be picked up. TO113 (Credit Management Data Mart Operations) has picked up options for January, February, March, & April. We need to work with FP to keep these two task orders in synch.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order deliverable has been accepted on time per the contract. Task Order period is from 6/1/02 thru 12/31/02, with follow on optional periods. Need to work with FSA to determine how many Optional periods should be picked up. TO113 (Credit Management Data Mart Operations) has picked up options for January, February, March, & April. We need to work with FP to keep these two task orders in synch.
Scope			<ul style="list-style-type: none"> No changes in scope.
Schedule			<ul style="list-style-type: none"> No schedule issues.
Cost			<ul style="list-style-type: none"> No cost issues.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
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5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



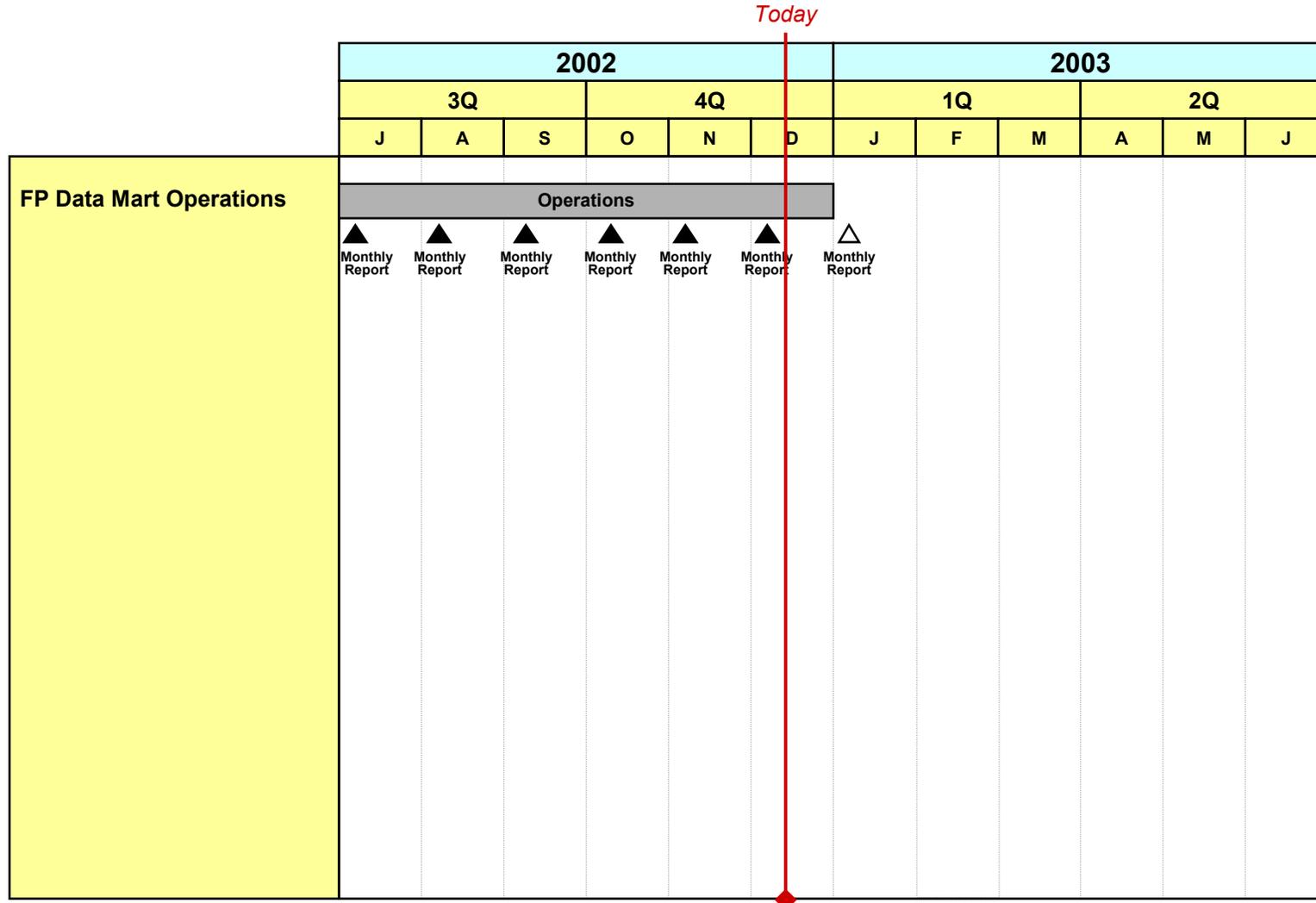
Worse



Same

* Per current plan

Integrated Timeline



Status Legend									
▲	High Risk – Major impact to schedule	▲	Moderate Risk – Manageable impact to schedule	▲	On Schedule	△	Not Started	▲	Complete

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
Security Issue with MicroStrategy filters.	GA users could potentially see data for all GAs, not just their own.	-FPDM -ITA -VDC -GAs	-Strategic -Financial	10/16/2002	1/15/2003	In Progress	Urgent	Need to upgrade to MicroStrategy 7.2.1 (a.k.a. 7i) Issue currently being worked by Paul Peck

Deliverable Schedule for TO 110-Data Mart Operations, Release 2

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
110.1.1a	Data Mart Operations Monthly SLA Metrics Rpt.- June	7/22/2002		7/22/2002
110.1.1b	Data Mart Operations Monthly SLA Metrics Rpt.- July	8/7/2002		8/23/2002
110.1.1c	Data Mart Operations Monthly SLA Metrics Rpt.- August	9/7/2002		9/6/2002
110.1.1d	Data Mart Operations Monthly SLA Metrics Rpt.- September	10/7/2002		10/4/2002
110.1.1e	Data Mart Operations Monthly SLA Metrics Rpt.- October	11/7/2002	11/21/2002	11/7/2002
110.1.1f	Data Mart Operations Monthly SLA Metrics Rpt.- November	12/7/2002		12/6/2002
110.1.1g	Data Mart Operations Monthly SLA Metrics Rpt.- December	1/7/2003		



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TO 113 – CM Data Mart Operations

ITR: Martin Renwick

FSA Project Sponsor: Catherine Power

FSA Project Lead: James Greene

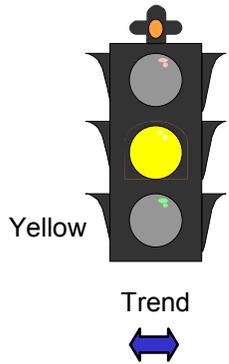
Modernization Partner Project Lead: Scott A. McConaghie

December 13, 2002

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- Key Issues & Decisions
- Deliverables Schedule

Overall Status



The CMDM Operations Team is successfully supporting the current functionality in the CMDM. In parallel, we continue to work through CMDM Phase III. CMDM Phase III was contingent on the FMS and CFO schedule of processing DLSS IF010 data. Our status remains yellow as the schedule slipped due to the delay in the full implementation of DLSS Accounting in FMS, as well as the delay caused by the recent Audit Requests which required special processing to occur to meet the deadlines.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$241,994.55
Contract Mod Amount(s)	\$96,797.82 – Mod 1
Total \$\$ on Current Contract	\$338,792.37

Major Accomplishments Since Last Meeting

- Awarded March & April options on Task Order.
- Received 4 new CM DM SIRs, 4 were resolved (existing SIRs and new SIRs), 9 requests are outstanding.
- Continued interfacing with FMS Operations to process August and September financial data.
- Continuing to generate Feb-Sep monthly aggregate data to move into Production.
- Submitted Deliverable 113.1.1b on 12/6/2002 as scheduled.

Upcoming Activities / Target Dates

- Support all on-going CM Data Mart Operations.
- Continue tasks for CMDM Phase III deployment.
- Upgrade MicroStrategy to v7i. Currently coordinating with FP, CMDM, eCBS, and VDC to install on DEV/TEST server for testing.
- Submit Deliverable 113.1.1c on 1/7/2003 as scheduled.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task Order deliverable has been accepted on time per the contract. Task Order period is from 10/1/02 thru 12/31/02, with follow on optional periods. To date, optional periods for 1/1/03 thru 4/30/03 have been awarded.
Scope			<ul style="list-style-type: none"> No changes in scope.
Schedule			<ul style="list-style-type: none"> CMDM Phase III not complete. The schedule slipped for delivery of CMDM Phase III catch-up due to the delay in the full implementation of DLSS Accounting in FMS, as well as the delay caused by the recent Audit Requests.
Cost			<ul style="list-style-type: none"> No cost issues.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



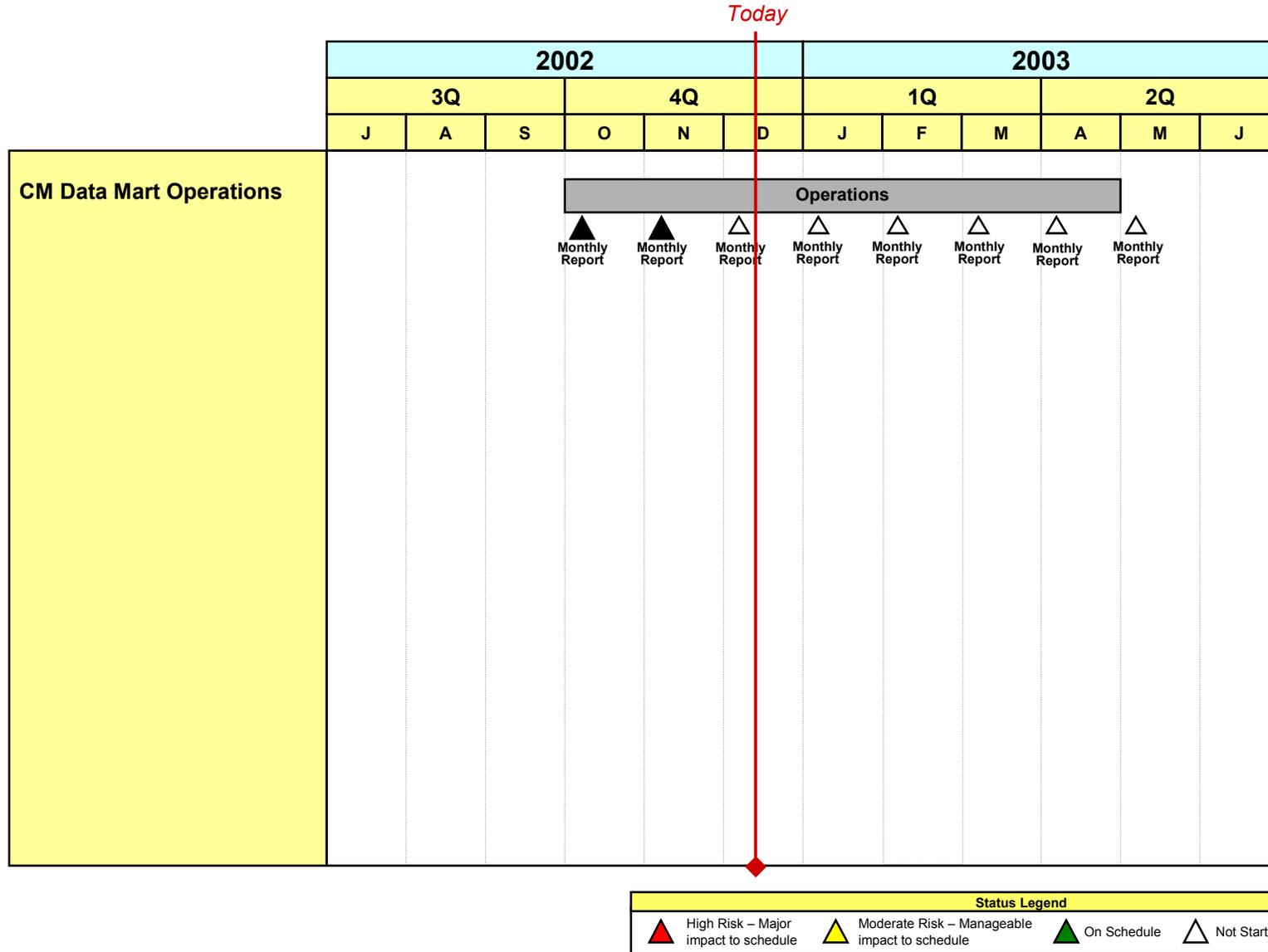
Worse



Same

* Per current plan

Integrated Timeline



Deliverable Schedule for TO 113-Credit Management Data Mart

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
113.1.1a	Data Mart Operations Monthly SLA Metric Rpt-October	11/7/2002		11/11/2002
113.1.1b	Data Mart Operations Monthly SLA Metrics Rpt-November	12/6/2002		12/6/2002
113.1.1c	Data Mart Operations Monthly SLA Metrics Rpt-December	1/7/2003		
113.1.1d	Data Mart Operations Monthly SLA Metric Rpt-January	2/7/2003		
113.1.1e	Data Mart Operations Monthly SLA Metrics Rpt-February	3/7/2003		
113.1.1f	Data Mart Operations Monthly SLA Metrics Rpt-March	4/7/2003		
113.1.1g	Data Mart Operations Monthly SLA Metrics Rpt-April	5/7/2003		



We Help Put America Through School

TO 51 – Rational Tool Implementation Support

ITR: Elisabeth Schmidt

FSA Project Sponsor: Charlie Coleman

FSA Project Lead: Frank Kidd

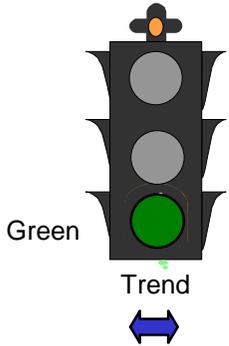
Modernization Partner Project Lead: Ron Langkamp

December 13, 2002

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- Project Updates
- Integrated Timeline
- Major Risks
- Deliverables Schedule

Overall Status



Rational tool deployment efforts continue on various projects. Team will focus on long term capacity planning and infrastructure needs.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$649,957.44
Contract Mod Amount(s)	\$173,196.09 – Mod 1 \$338,103.40 – Mod 2
Total \$\$ on Current Contract	\$1,161,256.93

<i>Major Accomplishments Since Last Meeting</i>	<i>Upcoming Activities / Target Dates</i>
<ul style="list-style-type: none"> ■ Completed the installation of ClearQuest, ClearQuest Web, and Oracle 8.1.7 Client on SFANT042, the new ClearQuest web server. Configuration is also complete on the box. Initial alpha tests on the box (to simulate normal functionality and error conditions) were successful. ■ ECM (ClearQuest): <ul style="list-style-type: none"> ■ Helped produce a post-Release 2 document that details all changes made to ECM. ■ Setup a test environment to replicate the production ECM environment. This will be used to test the email rules that will be triggered when ECM and GCARS are integrated. The script will run on SFANT040, a test box, to simulate the record activity and trigger the email rules. ■ eZ-Audit (ClearQuest): Completed the initial implementation of ClearQuest for eZ-Audit. Developed their SIR schema. Have held several review meetings. Changes are being made to the schema based on feedback from the eZ-Audit team in these meetings. Reports are being developed for the initial release. ■ Developed the PRR (Production Readiness Review) for SFANT042. It is currently being reviewed by FSA. ■ Supported CSC in development of the ORR. 	<ul style="list-style-type: none"> ■ ECM (ClearQuest): Complete ECM/GCARS integration. This includes supporting the email load test in the test environment, supporting efforts to get the integration setup on SFANT042, and supporting ECM user acceptance tests of the integration on SFANT042. (12/18) ■ eZ-Audit (ClearQuest): Complete the SIR schema, add all approved eZ-Audit users to the appropriate groups, and complete the initial reports. (12/18) ■ Begin planning for a new ClearCase web server. This new web server will replace the existing ClearCase web server. (TBD) ■ Continue user administration work on all ClearQuest projects. (ongoing) ■ NOTE: Most of the team will be out the whole week of 12/23 to 12/27. Arrangements will be made with FSA to support any possible issues that come up during this week.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Deliverable 51.2.1c – ‘Monthly Tool Support Activity Report – November’ was delivered early to FSA and Lorenzo Moore on December 4th (it was due by December 7th). A Mod the Task order has extended the TO until May 31st, 2003.
Scope			<ul style="list-style-type: none"> The Scope of the project has not changed from the Task Order
Schedule			<ul style="list-style-type: none"> Deliverable 51.2.1c – ‘Monthly Tool Support Activity Report – November’ is due to be accepted by FSA on or before December 21st.
Cost			<ul style="list-style-type: none"> Overall delivering as planned and within budget.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



Worse



Same

* Per current plan

Project Updates

▪ ClearQuest

- **New ClearQuest Web Server** – The installation of ClearQuest, ClearQuest Web, and Oracle 8.1.7 Client was completed on SFANT042. Configuration of the web server is also complete. SFANT042 will become the ClearQuest production web server in the production environment. Alpha testing was run on the web server on December 4th to simulate normal ClearQuest web functionality. Some error test conditions were run to try and bring down the box, but all tests were successful. SFANT042 entered Beta testing on December 5th. Beta testing opened the box to the internet and intranet and all ClearQuest users will have to use the new web server. Beta testing is scheduled to last for 30 days, after which point the box will officially be designated as a production server. If any problems occur, users can be directed back to SFANT018 for ClearQuest Web. The ECM/GCARS integration components will be loaded onto this machine once testing of ECM/GCARS has been completed and approved on SFANT040, a development box.
- **ECM (In-Production)** – Jay, the ECM technical lead, helped support the creation of a document to detail all the changes made to the ECM tool since Release 2 was put into production in mid-September. He also helped configure a test environment on HPV1 to be used for ECM/GCARS integration testing. A test will be run against this environment to make sure that all email rules will be triggered correctly on GCARS initiated records. The email load will also be observed to make sure the initial creation of emails doesn't bring down ClearQuest, ClearQuest Web, or the email server (approximately 500 emails will be triggered in the initial run).
- **eZ-Audit (Planned)** – The Rational team created the SIR schema for eZ-Audit and 3 initial reports. A couple of review meetings have been held since and the Rational team is making modifications to the schema and reports based on those meetings. The schema will be production ready by December 18th.

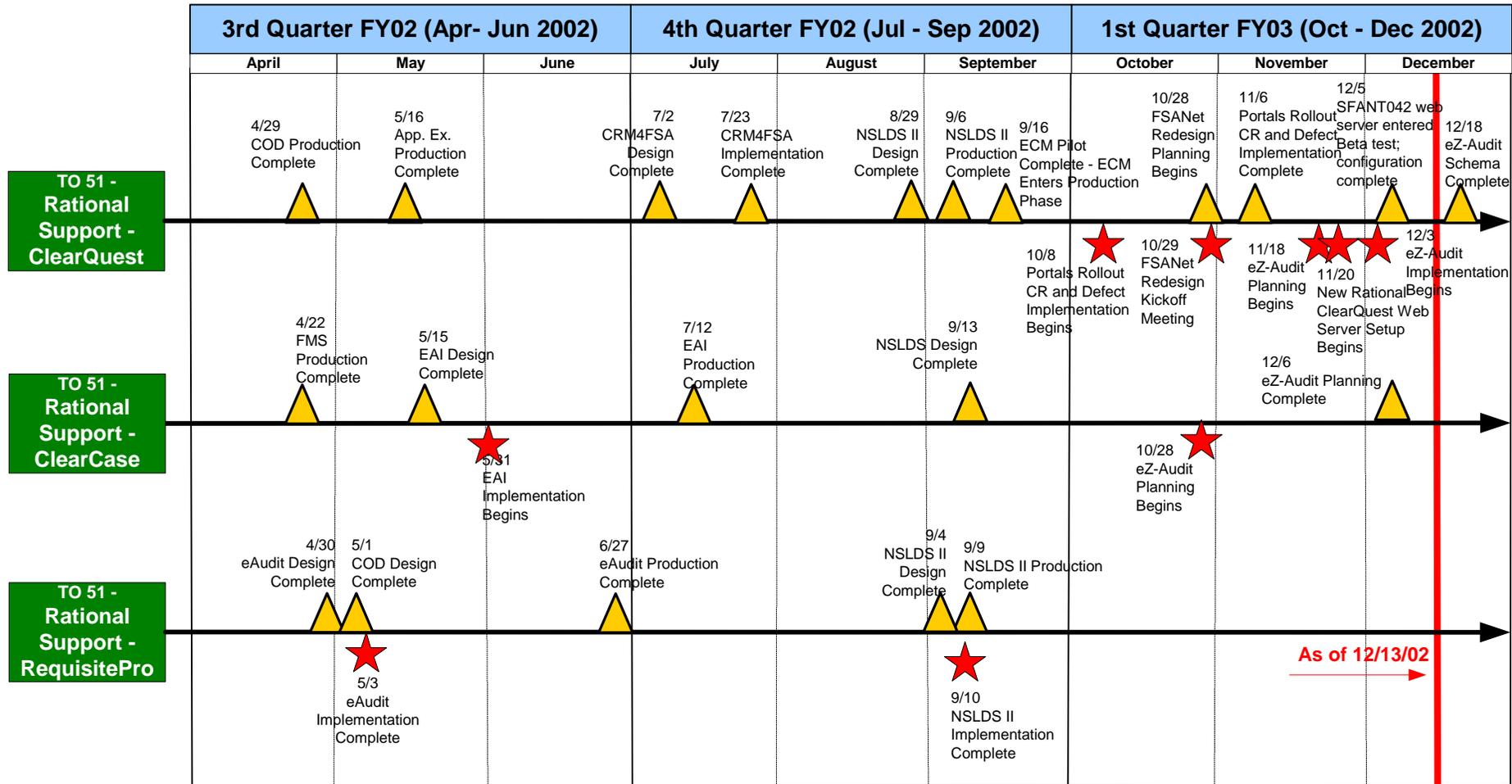
▪ ClearCase

- **No new work this period.**

▪ RequisitePro

- **No new work this period.**

Integrated Timeline



Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
Oracle 8.1.7 Client configuration on SFANT042 is not working properly. We are unable to connect to HPV1 or HPV2 from SFANT042	This could delay ECM/GCARS integration in production which was schedule to be setup beginning 12/8.	ECM/GCARS integration	Operational	11/25/2002	CLOSED	Jay was able to reconfigure the Oracle settings on SFANT042 on 11/27 and make a connection to HPV1 and HPV2.	High	Unlikely – Risk has been resolved.	Moderate – also dependent on CSC for support (SFANT042 is at the VDC but we have remote access)

Deliverable Schedule for TO 51-Rational Tool Implementation

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
51.1.1	Prepare and Rollout Tool Support Program	10/16/2001	11/16/2001	11/16/2001
51.1.2	Implementation Guide-Tool Rollout to Pilot Project(s)	1/15/2002	1/31/2002	1/31/2002
51.1.3a	Monthly Tool Support Activity Report-February	2/7/2002		2/7/2002
51.1.3b	Monthly Tool Support Activity Report-March	3/7/2002		3/7/2002
51.1.3c	Monthly Tool Support Activity Report-April	4/7/2002		4/8/2002
51.1.3d	Monthly Tool Support Activity Report-May	5/7/2002		5/7/2002
51.1.3e	Monthly Tool Support Activity Report-June	6/7/2002		6/7/2002
51.1.3f	Monthly Tool Support Activity Report-July	7/7/2002		7/8/2002
51.1.3g	Monthly Tool Support Activity Report-August	8/7/2002		8/7/2002
51.1.3h	Monthly Tool Support Activity Report-September	9/7/2002		9/9/2002
51.2.1a	Monthly Tool Support Activity Report-October	10/7/2002		10/7/2002
51.2.1b	Monthly Tool Support Activity Report-November	11/7/2002		11/7/2002
51.2.1c	Monthly Tool Support Activity Report-December	12/7/2002		12/7/2002
51.3.1a	Monthly Tool Support Activity Rpt-January	1/7/2003		
51.3.1b	Monthly Tool Support Activity Rpt-February	2/7/2003		
51.3.1c	Monthly Tool Support Activity Rpt-March	3/7/2003		
51.3.1d	Monthly Tool Support Activity Rpt-April	4/7/2003		
51.3.1e	Monthly Tool Support Activity Rpt-May	5/7/2003		



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TO 81 – Program Management & Leadership

ITR: Elisabeth Schmidt

FSA Project Sponsor: Steve Hawald

FSA Project Lead: Carol Seifert

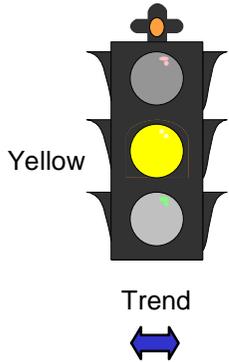
Integration Partner Project Lead: Eric Stackman

December 13, 2002

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- Project Scorecard
- Integrated Timeline
- Government & Project Dependencies
- Deliverables Schedule

Overall Status



Waiting on SOO from Jane Sisco – FSA Program Management Director to determine future task order. In need of task order extension to enable development of future scope for Integration Partner program management. Received notification of program nomenclature change from “Modernization Partner” to “Integration Partner”.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$9,000,000.00
Total \$\$ on Initial Contract	\$8,999,851.04
Contract Mod Amount(s)	\$750,000.00
Total \$\$ on Current Contract	\$9,749,851.04

Major Accomplishments Since Last Meeting
<ul style="list-style-type: none"> ■ Submitted the Schedule and the Nov 27 Bi-Weekly Report ■ Met with Jane Sisco to transition Mod Partner Reporting capabilities. ■ Submitted 3 Task Order proposals: TO51 Mod 3 R1 – Rational Spt, TO101 Mod 1 – ERM, and TO117 R2 – EAI Release 4. ■ Continued staff security effort – 357 of 357 complete. ■ Continued subcontractor negotiation efforts – 42 signed and active, 5 in progress, and 38 inactive.

Upcoming Activities / Target Dates
<ul style="list-style-type: none"> ■ Develop the next Schedule ■ Develop the December 2002 Monthly Report ■ Consolidate the Bi-Weekly Status Report ■ Provide Integration Support ■ Continue effort for each Modernization Partner staff member to have a basic Security Clearance (Level 5C). ■ Continue negotiation efforts with multiple subcontractors. ■ Continue to work and submit outstanding Task Order proposals: TO84 Mod 1 – LMS Phase II, TO118 R1 – ITA Release 4, TO119 R1 – FMS Releases, TO120 – Security and Privacy Support, TO121 – BTA Support (On Hold), TO122 – ERM Ops, TO123 – XML Framework, and TO125 – PMO.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Waiting on potential task order 81 extension through January 2003 to enable scoping of new task order.
Scope			<ul style="list-style-type: none"> PM&L scope is stable based off of existing task order.
Schedule			<ul style="list-style-type: none"> Current task order expires December 31, 2002 with final deliverable due January 10, 2003. In need of extension through either January 20 or 31 to enable scoping of future task order.
Cost			<ul style="list-style-type: none"> PM&L cost is stable.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



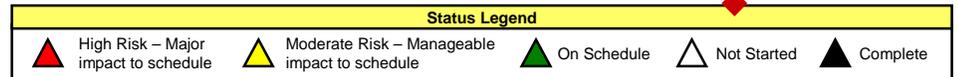
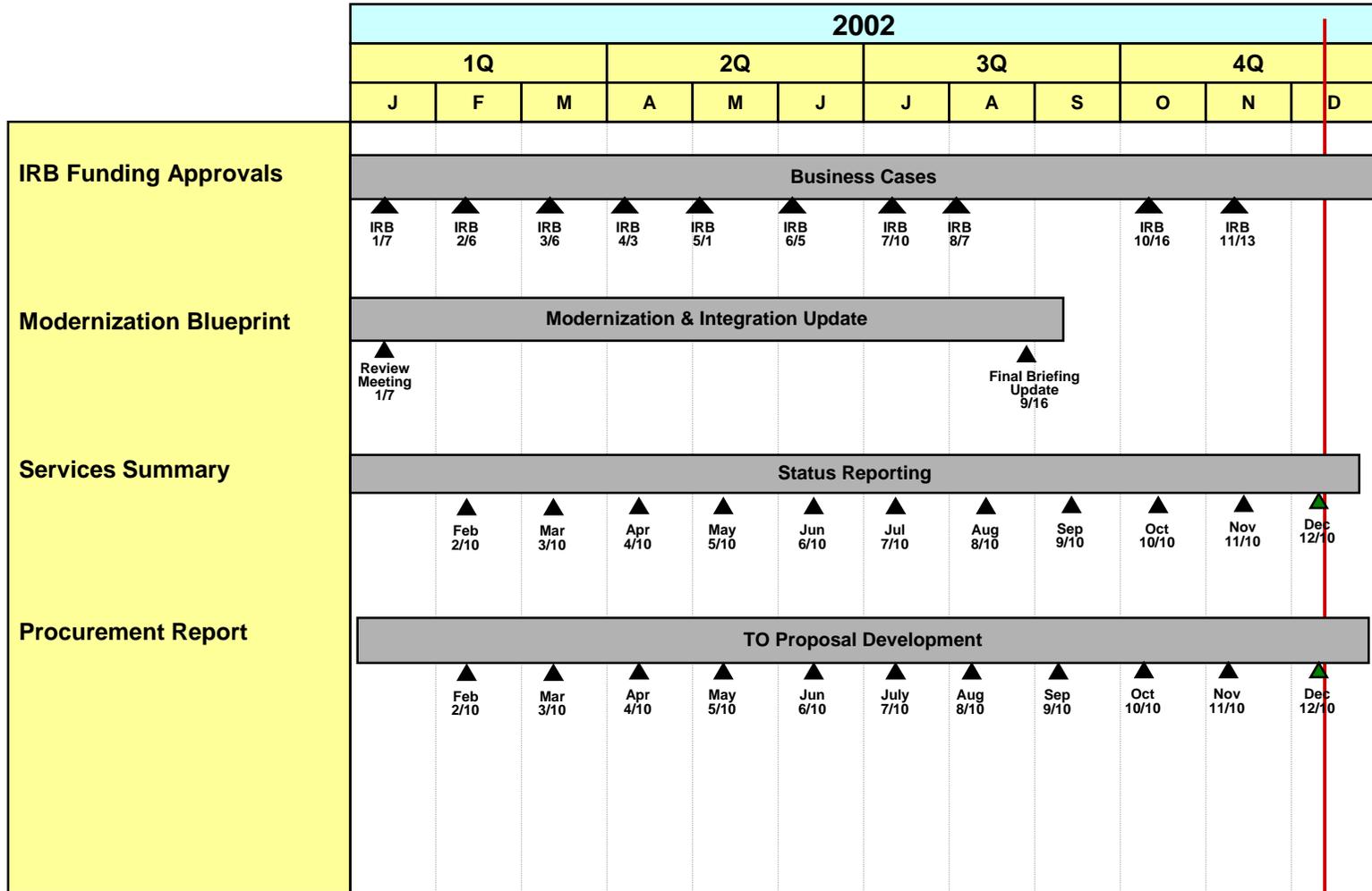
Worse



Same

* Per current plan

Integrated Timeline



Government & Program Dependencies

<i>Dependency</i>	<i>On Point</i>	<i>Target Date</i>	<i>Impact on Cost and/or Schedule</i>	<i>Status Comments</i>
Waiting for SOO from FSA for future task order from Jane Sisco.	Integration Partner PM	<ul style="list-style-type: none"> 12/20/02 	<ul style="list-style-type: none"> N/A 	

Deliverable Schedule for TO 81-Program Management & Leadership

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
81.1.1a	FY02 Modernization Blueprint Update-Incorporation of Final Comments	2/15/2002	11/11/2011	
81.1.1b	FY02 Modernization Blueprint Update-Production	2/28/2002	11/11/2011	
81.1.2a	FY02 Modernization Blueprint Update-Initial Draft	10/15/2002		
81.1.2b	FY03 Modernization Blueprint Update-Initial Draft	11/30/2002		
81.1.3a	Program Management Services Summary-December 01	1/10/2002		1/10/2002
81.1.3b	Program Management Services Summary-January 02	2/10/2002		2/10/2002
81.1.3c	Program Management Services Summary-February 02	3/10/2002		3/10/2002
81.1.3d	Program Management Services Summary-March 02	4/10/2002		4/10/2002
81.1.3e	Program Management Services Summary-April 02	5/10/2002		5/10/2002
81.1.3f	Program Management Services Summary-May 02	6/10/2002		6/10/2002
81.1.3g	Program Management Services Summary-June 02	7/10/2002		7/10/2002
81.1.3h	Program Management Services Summary-July 02	8/10/2002		8/10/2002
81.1.3i	Program Management Services Summary-August 02	9/10/2002		9/10/2002
81.1.3j	Program Management Services Summary-September 02	10/10/2002		10/10/2002
81.1.3k	Program Management Services Summary-October 02	11/10/2002		11/10/2002
81.1.3l	Program Management Services Summary-November 02	12/10/2002		12/10/2002
81.1.4a	Program Services Summary-December 01	1/10/2002		1/10/2002
81.1.4b	Program Services Summary-January 02	2/10/2002		2/10/2002
81.1.4c	Program Services Summary-February 02	3/10/2002		3/10/2002
81.1.4d	Program Services Summary-March 02	4/10/2002		4/10/2002

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
81.1.4e	Program Services Summary-April 02	5/10/2002		5/10/2002
81.1.4f	Program Services Summary-May 02	6/10/2002		6/10/2002
81.1.4g	Program Services Summary-June 02	7/10/2002		7/10/2002
81.1.4h	Program Services Summary-July 02	8/10/2002		8/9/2002
81.1.4i	Program Services Summary-August 02	9/10/2002		9/10/2002
81.1.4j	Program Services Summary-September 02	10/10/2002		10/10/2002
81.1.4k	Program Services Summary-October 02	11/10/2002		11/10/2002
81.1.4l	Program Services Summary-November 02	12/10/2002		12/10/2002
81.2.1	Modernization Update Briefing	9/15/2002		9/16/2002
81.2.1a	Program Management Services Summary-December '02	1/10/2003		
81.2.2a	Modernization Partner Procurement Services-December '02	1/10/2003		



TO 87 – Solution Life Cycle Deployment

ITR: Elisabeth Schmidt

FSA Project Sponsor: Charlie Coleman

FSA Project Lead: Lana Gourdine

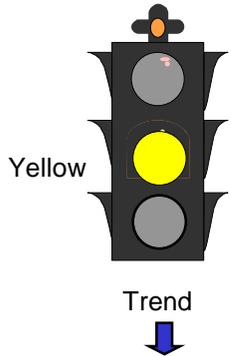
Modernization Partner Project Lead: Ron Langkamp

December 13, 2002

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Overall Status



SLC Deployment has begun defining and developing the approach and materials to support the coaching effort.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	N/A Operations TO
Total \$\$ on Initial Contract	\$250,000.00
Contract Mod Amount(s)	\$155,887.86 – Mod 1 \$199,533.40 – Mod 2
Total \$\$ on Current Contract	\$605,421.26

<i>Major Accomplishments Since Last Meeting</i>	<i>Upcoming Activities / Target Dates</i>
<ul style="list-style-type: none"> ■ Completed Informal feedback sessions with Coaches (12/11/02) ■ Deliverable 87.2.1a accepted (12/11/02) ■ Integrated Process Measurement into coaches Toolkit – so Integration enables coaches to easily align process compliance reviews and awareness of those reviews with projects they support.... 	<ul style="list-style-type: none"> ■ Identify Projects begin deployment activity ■ Assign SLC coaches to projects ■ Conduct? Communication Planning meeting – what is the outcome? ■ Begin Pilot projects – support coaches in the introduction and awareness phase of the SLC coaching effort ■ Conduct coach “de-brief” sessions and lessons learned on initial deployment effort ■ Approval of the SLC compliance review process and measurement job -aid

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Request was made to modify delivery dates from initial task order due to changes required to align multiple efforts and stemming from resource availability problems at project kick-off.
Scope			<ul style="list-style-type: none"> No additions or changes relative to Scope Delays in FSA coaching activity, will likely require review of current scope and reduce delivery commitments, in order to stay with in current budget.
Schedule			<ul style="list-style-type: none"> Deliverable 87.2.1a has been accepted Deliverable 87.3.2 was delivered Deployment engagement with specific projects is behind plan. This will impact Modernization's ability to complete the deployment effort to agreed timeline. Additional funding may be required to provide extended support.
Cost			<ul style="list-style-type: none"> Overall delivering as planned. Schedule delays are putting deployment funds at risk of funds running short for stated outcomes.



High Risk – Significantly impacts Project schedule/cost
 ex) 4+ weeks over schedule
 10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
 ex) 2-4 weeks over schedule
 5-10% over cost



Low Risk – On schedule, on budget and no significant issues
 ex) 0-2 weeks over schedule
 0-5% over cost



Better



Worse



Same

* Per current plan

Integrated Timeline

Deliverables	Delivery Date	Status	Comments
87.2.1a – SLC Coaching Deployment Support Bi-Monthly Report – September - October	11/12/2002 (Proposed)	September/ October Report on Schedule	Deliverable accepted
87.3.1 – Additional Support for the Coaching Enablement Process	2/24/2002	Mod Accepted	The Mod was submitted and accepted on September 9, 2002
87.3.2-Performance Measures	11/26/02	Delivered	Awaiting acceptance

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
Some SLC Coaches are external contractors to the organization. Their contracts expires January 2003 – with a loss of 1/3 of the coaches the success of the deployment effort is questionable.	Institutional knowledge loss & need for replacement affecting FSA success and MP's ability to transition the knowledge	<ul style="list-style-type: none"> ▪SLC team ▪Current SLC coaches 	Operational	11/15/02	Unknown	In-Progress/Un-Resolved	Medium	Dependent on FSA decisions
Client needs to determine criteria for aligning specific coaches to projects. This is hindering pilot project from beginning and affecting completion of knowledge transfer.	The TO expires mid January and time is running short for pilot project duration.	<ul style="list-style-type: none"> ▪ Current SLC coaches 	Operational	11/15/02	Unknown	In-progress/Un-Resolved	HIGH	Work with CIO leadership to make this happen
Scope may need to be modified due to delays in coach involvement,	Completion of knowledge transfer.	<ul style="list-style-type: none"> ▪SLC team ▪Current SLC coaches 	Operational	11/15/02	Unknown	In-progress/Un-Resolved	HIGH	Dependent on FSA decisions

Deliverable Schedule for TO 87 Solution Life Cycle Deployment and Maintenance

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
87.1.1	SLC Deployment Approach and Plan	2/15/2002		1/30/2002
87.1.2	SLC Awareness and Marketing	3/15/2002		3/15/2002
87.1.5b	SLC Process Guide release 2.0-Final	9/30/2002		
87.2.1a	SLC Coaching Deployment Support-Bi Monthly Rpt.-Aug-Sept.	10/7/2002	11/8/2002	11/12/2002
87.2.1b	SLC Coaching Deployment Support-BI-Monthly Oct.-Nov.	12/7/2002	1/10/2003	
87.2.2	SLC Change Control Process Implementation	10/7/2002	1/3/2003	
87.2.3	Configuration Management Coaching Deployment Status Rpt.	8/1/2002	8/23/2002	8/23/2002
87.3.1	Additonal Support for Coaching Enablement Process	1/24/2003		
87.3.2	Formalized Performance Measures	11/15/2002	11/25/2002	11/25/2002
87.3.3	Pulbication of SLC Process Guide Release 2.0	1/3/2003		



We Help Put America Through School

TO 108 – SAIG System Security

ITR: Paul Peck

FSA Project Sponsor: Steve Hawald

FSA Project Lead: Lydia Morales

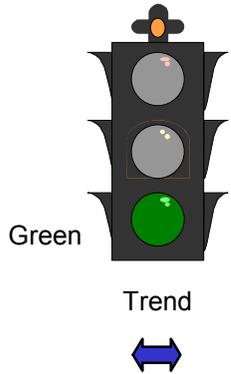
Modernization Partner Project Lead: Colleen Ward

December 13, 2002

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- Project Scorecard
- Integrated Timeline
- Deliverables Schedule

Overall Status



- Security Plan accepted by FSA.
- Continuity of Operations / Disaster Recovery Plan submitted to client.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$123,937.84
Contract Mod Amount(s)	\$0
Total \$\$ on Current Contract	\$123,937.84

<i>Major Accomplishments Since Last Meeting</i>
<ul style="list-style-type: none"> ■ FSA accepted Security Plan ■ Delivered Continuity of Support/Disaster Recovery Plan – December 10,2002

<i>Upcoming Activities / Target Dates</i>
<ul style="list-style-type: none"> ■ Review Continuity of Support/Disaster Recovery Plan with FSA – December 17.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			Task Order deliverable has been accepted on time per the contract (Green)
Scope			<ul style="list-style-type: none"> Scope defined. FSA decided Continuity of Operations and Disaster Recovery should be combined into one document to make future maintenance simpler. FSA determined SAIG Enrollment not to be included in SAIG Security Plan. SAIG Enrollment will be covered as part of the CPS Security Plan.
Schedule			<ul style="list-style-type: none"> On schedule; delivered Security Plan with all available information included.
Cost			<ul style="list-style-type: none"> On budget



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



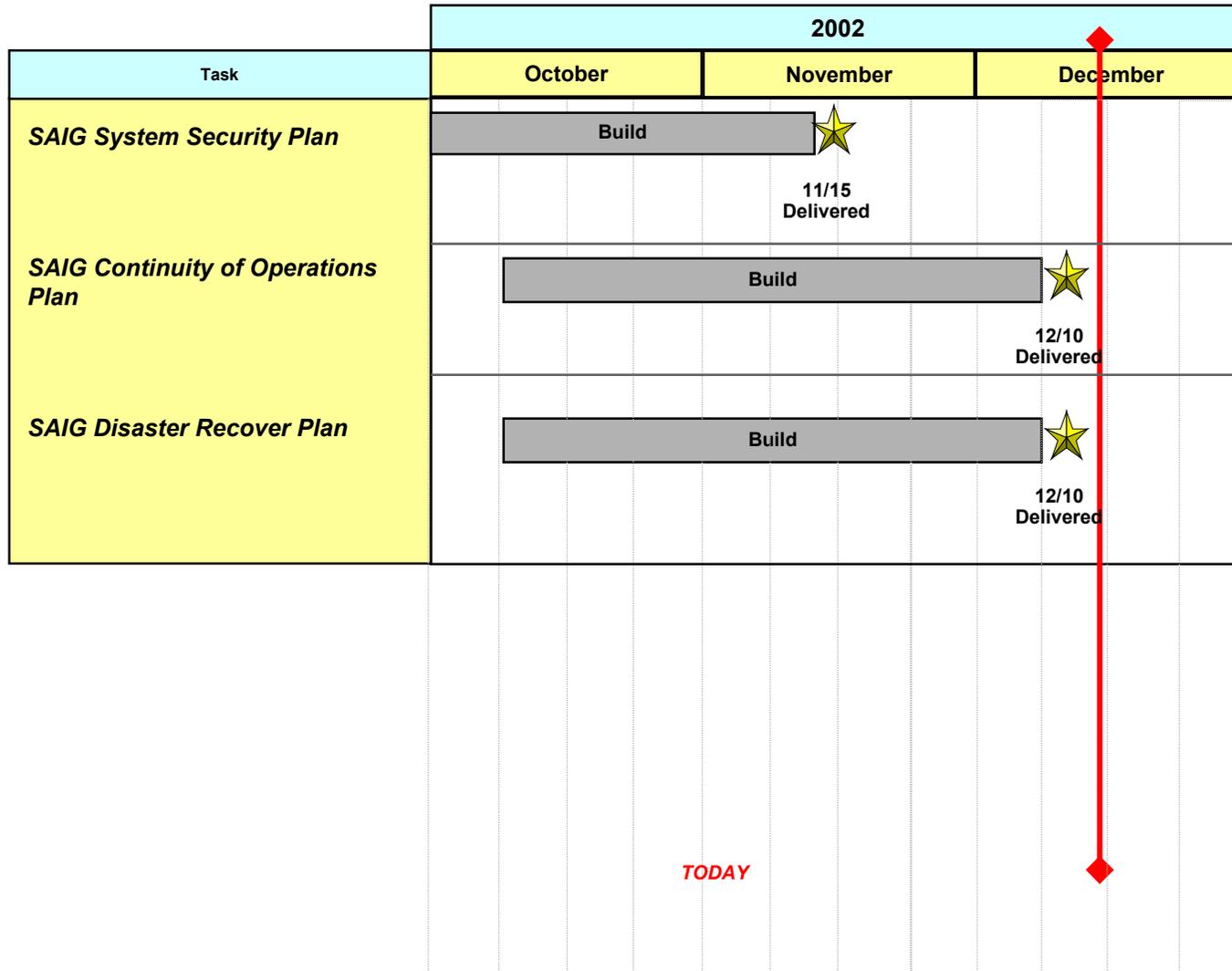
Worse



Same

* Per current plan

Integrated Timeline



Deliverable Schedule for TO 108-Student Aid Internet Gateway (SAIG) System Security

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
108.1.1	SAIG SystemSecurity Plan	11/15/2002		11/15/2002
108.1.2	SAIG Disaster Recovery Plan	12/20/2002		
108.1.3	SAIG Continuity of Support Plan	12/20/2002		



TO 109 – E-Signature & E-Authentication Support

ITR: Paul Peck

FSA Project Sponsor: Stephen Hawald

FSA Project Lead: Neil Sattler

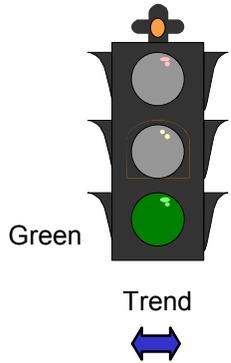
Modernization Partner Project Lead: Yateesh Katyal

December 13, 2002

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- Project Scorecard
- Integrated Timeline
- Government & Project Dependencies
- Deliverables Schedule

Overall Status



Technical and project management activities supplementing FSA support to Department of Education and E-Gov initiatives for aligning the FSA Electronic Signature initiatives with the President's Management Agenda.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$49,975.60
Total \$\$ on Initial Contract	\$49,975.60
Contract Mod Amount(s)	N/A
Total \$\$ on Current Contract	\$49,975.60

<i>Major Accomplishments Since Last Meeting</i>
<ul style="list-style-type: none"> Assisted in the development of an alternate ED proposal to the E-Gov e-Authentication initiative. The alternate ED proposal is based on leveraging ED e-Signature and e-Authentication experience, ED infrastructure and ED vision.

<i>Upcoming Activities / Target Dates</i>
<ul style="list-style-type: none"> Review of ED e-Authentication proposal.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> Task order has been awarded.
Scope			<ul style="list-style-type: none"> Scope is defined and includes evaluating potential for additional e-Sign opportunities at FSA and alignment of FSA e-Sign initiatives with the President's Management Agenda e-Gov E-Authentication and E-Loans objectives.
Schedule			<ul style="list-style-type: none"> On Schedule. Deliverable 109.1.1, Project Management & Integration Support Report, (11/22/2002), revised at customer request to 01/07/2003. Deliverable 109.1.2, E-Signature and E-Authentication Innovations Report, 01/31/2003.
Cost			<ul style="list-style-type: none"> Tracking to budget.



High Risk – Significantly impacts Project schedule/cost
 ex) 4+ weeks over schedule
 10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
 ex) 2-4 weeks over schedule
 5-10% over cost



Low Risk – On schedule, on budget and no significant issues
 ex) 0-2 weeks over schedule
 0-5% over cost



Better



Worse



Same

* Per current plan

Government & Program Dependencies

Dependency	On Point	Target Date	Impact on Cost and/or Schedule	Status Comments
E-Gov E-Authentication direction	Neil Sattler / Charlie Coleman	January 2003	N/A	FSA is preparing a proposal for the E-Gov E-Authentication team that leverages ED experience with authentication.

Deliverable Schedule for TO 109 E-Signature & E-Authentication Support

<i>Deliverable Number</i>	<i>Deliverable Name</i>	<i>Original Contract Date</i>	<i>Updated Current Contract Date</i>	<i>Actual Delivery Date</i>
109.1.1	Project Management & Integration Support Rpt	11/22/2002	1/7/2003	
109.1.2	E-Signature & E-Authentication Innovations Rpt	1/31/2003		



We Help Put America Through School

TO 117 - EAI Core Architecture Release 4.0

ITR: Paul Peck

FSA Project Sponsor: Steve Hawald

FSA Project Lead: Ganesh Reddy

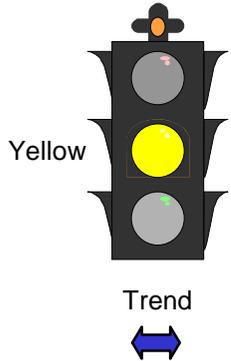
Modernization Partner Project Lead: Bruce Kingsley

December 13, 2002

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- Overall Status
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- Major Risks
- Key Issues & Decisions
- Deliverables Schedule

Overall Status



The EAI team continues operations and support of ongoing EAI capabilities.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$ 3,500,000
Total \$\$ on Initial Contract	\$599,991.15
Contract Mod Amount(s)	\$0
Total \$\$ on Current Contract	\$599,991.15

Major Accomplishments Since Last Meeting

- Continued to support the FAFSA Performance Testing effort. Maintenance was successfully applied to CPS to address performance related issues.
- Created Interface Control Documents (ICD's) for the new NSLDS to CPS Data Integrator interfaces. These documents outline design information for the functionality that will be built by the EAI Team.
- EAI reviewed alternatives and cost estimates with COD for the purpose of handling bad input data from schools.
- Performed DB2 upgrade to the EAI development and test environments. This is a prerequisite for the upcoming MQSI product upgrade.
- Completed first four out of ten planned SAIG Performance Test cycles. This tested the capacity of SAIG to handle estimated load of school data.
- Completed eZAudit interface design on 12/5.
- Relocated EAI log files on the FMS production server to better support volume of data logging necessary for EAI.

Upcoming Activities / Target Dates

- Continue to support FAFSA performance testing.
- Continue to analyze options/approach for bad schools input data for COD.
- Perform upgrade to MQSI product.
- Finalize EAI infrastructure for FAFSA 7.0.
- Submit EAI Operations Services Performance Report I (deliverable 117.1.1a) for review on 12/20.
- Complete SAIG performance testing.
- Close-out open PMRs (problem tickets) related to FAFSA with IBM.
- Complete FAFSA performance testing on 12/30.
- Complete the development of eZAudit on 12/17.

Project Scorecard

Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> EAI Release 4.0 Task Order has received authority to proceed with a budget of \$600,000. Technical and Cost proposals are in final PMO review.
Scope			<ul style="list-style-type: none"> EAI Release 4.0 has not yet been awarded.
Schedule			<ul style="list-style-type: none"> On schedule.
Cost			<ul style="list-style-type: none"> Overall cost on track.



High Risk – Significantly impacts Project schedule/cost
ex) 4+ weeks over schedule
10% over cost



Moderate Risk – Minor schedule/cost slippage and/or manageable issues
ex) 2-4 weeks over schedule
5-10% over cost



Low Risk – On schedule, on budget and no significant issues
ex) 0-2 weeks over schedule
0-5% over cost



Better



Worse



Same

* Per current plan

Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
Task Order 117 has not been awarded yet.	Without EAI funding, FSA's applications would no longer receive EAI operations support.	EAI, FAFSA, COD, CMDM, FPDM, OCTS	Financial	10/01/2002	In-Progress	TO 117 proposal has been submitted.	High	Unlikely	None

Key Issues & Decisions

<i>Issue Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Issue Category</i>	<i>Open Date</i>	<i>Target Resolution Date</i>	<i>Status</i>	<i>Priority</i>	<i>Proposed/ Actual Resolution</i>
For FAFSA interface, CKB5 Abend (error) messages appear in the logs.	No data is lost, but it impacts performance by causing extra processing.	EAI, FAFSA	Operational	12/11/02	12/18/02	In-Progress	Medium	An IBM upgrade to latest maintenance did not resolve the problem, so EAI will continue to work with IBM to find a solution.
For FAFSA, the DLP Bridge/CICS must be recycled whenever it receives bad data (i.e., inconsistent with the header).	This impact is minimal as it is unlikely to happen again since all the data will be coming from the tested FAFSA application, which will provide consistent data.	EAI, FAFSA	Operational	12/08/02	12/18/02	In-progress	Low	IBM recommended removing Xpeditord and Abendaid, but this did not solve the problem. EAI will continue to work with IBM to resolve this issue.
Monitoring and paging issues: EAI is not always getting timely notification of production issues.	This impacts the EAI response time in dealing with production issues.	EAI	Operational	12/05/02	12/30/02	In-progress	Medium	EAI is working with the CSC availability managers on this issue.
MQ Semaphore: Queue managers on Sun EAI servers must be restarted whenever the software locks on a semaphore.	Minimal: No messages are lost, and interactive messages roll over to the other clustered server.	EAI	Operational	11/22/02	12/15/02	In-Progress	Medium	IBM has provided suggested parameter changes to correct the problem. These will be installed during the maintenance window on 12/15.



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TO 118– ITA Release 4.0

ITR: Paul Peck

FSA Project Sponsor: Ganesh Reddy

FSA Project Lead: Ganesh Reddy

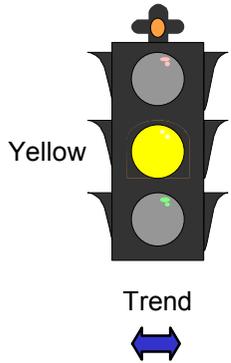
Modernization Partner Project Lead: Alex LeFur

December 13, 2002

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Overall Status



Task order 69 was completed.
Began work on TO 118.

<i>Project Funding</i>	<i>Dollar Amount</i>
IRB Approved Funding	\$0
Total \$\$ on Initial Contract	\$674,948.99
Contract Mod Amount(s)	\$0
Total \$\$ on Current Contract	\$674,948.99

Major Accomplishments Since Last Meeting

- Continued to provide Autonomy and Interwoven support to Students and Financial Partners Portals applications.
- Resolved production issues for Students' Interwoven TeamSite.
- Created startup script for the OpenDeploy process on FAFSA HP web servers. This will resolve production issues upon implementation on 12/19.
- Completed FAFSA Performance Test Cycles 15, 16,17, and 18 on time and on budget.
- Summarized and published test results for FAFSA Performance Test Cycles 15 and 16 to <http://4.20.18.87:8080/FAFSA70.htm>, the ITA Performance Test web site.
- Continued to support the FAFSA application in production.
- Continued performance testing for SAIG.
- Provided FAFSA capacity planning numbers to CSC.

Upcoming Activities / Target Dates

- Complete FAFSA Performance Test Cycles 19 through 23.
- Release of FAFSA 7.0 PIN scheduled for 12/27.
- Continue to provide Interwoven and Autonomy support to Students and Financial Partners.
- FAFSA go-live on 1/1/03.
- Preparing for Students and Financial Partners Portals in January.

Project Scorecard

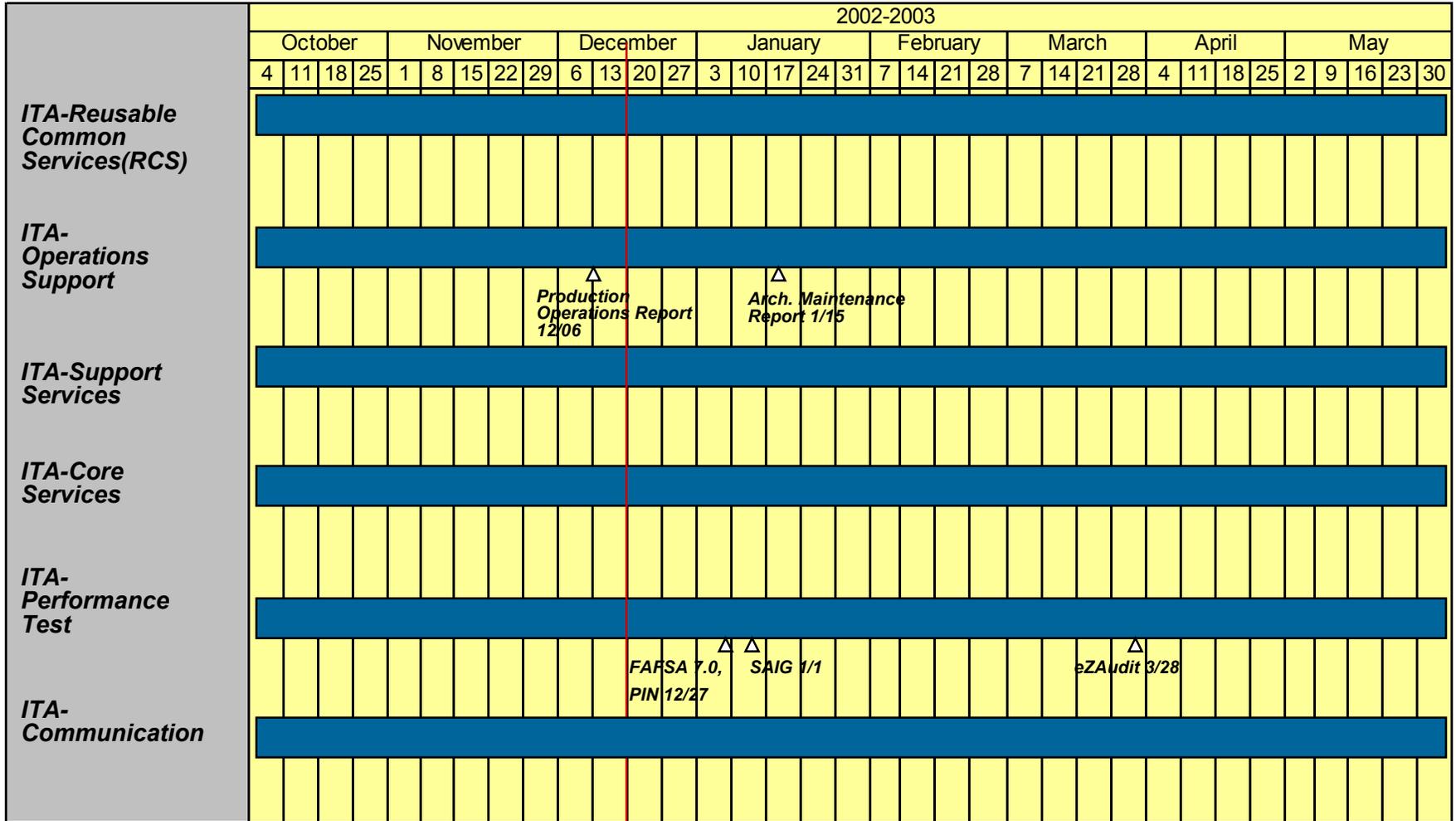
Category	Status	Trend	Status Comments
Task Order			<ul style="list-style-type: none"> •ITA R4.0 has not been awarded. •ITA R4.0 proposal has been submitted. •Authority to proceed through 12/31.
Scope			<ul style="list-style-type: none"> •ITA R4.0 proposed scope approved by the IRB.
Schedule			<ul style="list-style-type: none"> •All tasks are on schedule.
Cost			<ul style="list-style-type: none"> •Contract costs are on target.

 High Risk – Significantly impacts Project schedule/cost ex) 4+ weeks over schedule 10% over cost	 Moderate Risk – Minor schedule/cost slippage and/or manageable issues ex) 2-4 weeks over schedule 5-10% over cost	 Low Risk – On schedule, on budget and no significant issues ex) 0-2 weeks over schedule 0-5% over cost
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 Better	 Worse	 Same
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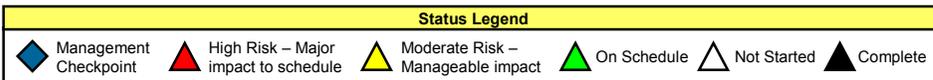
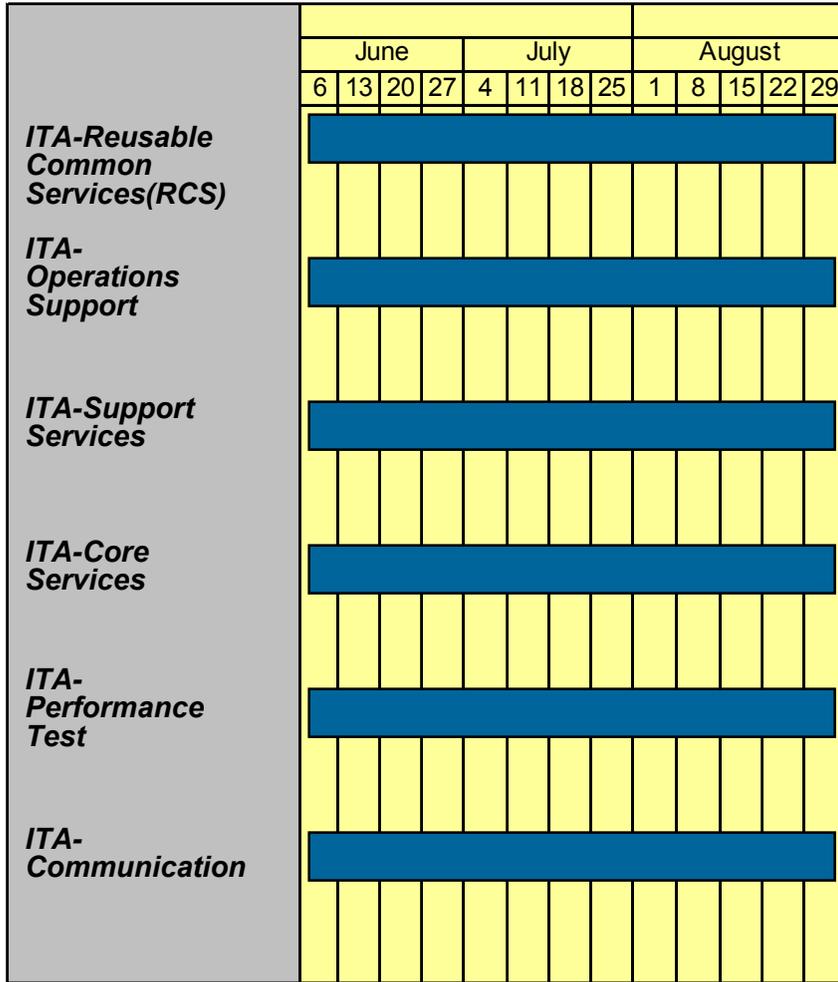
* Per current plan

Integrated Timeline



Status Legend											
	Management Checkpoint		High Risk – Major impact to schedule		Moderate Risk – Manageable impact		On Schedule		Not Started		Complete

Integrated Timeline



Major Risks

<i>Risk Description</i>	<i>Impacts</i>	<i>Dependent Parties</i>	<i>Risk Category</i>	<i>Open Date</i>	<i>Status</i>	<i>Mitigating Actions</i>	<i>Severity</i>	<i>Probability</i>	<i>Level Of Control</i>
Task Order 118 has not been awarded yet.	Without ITA funding, FSA's applications would no longer receive ITA product support.	ITA Team, FAFSA	Financial	10/01/2002	In-Progress	TO 118 proposal has been submitted.	High	Unlikely	Moderate