Vendor Startup Checklist

Alabama Medicaid Enterprise Systems (MES) Modernization Program (AMMP)

PMO-2-o-02

Prepared for:

Alabama Medicaid Agency

Version 4.0

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REVISION HISTORY

Version	Effective Date	Revision Owner	Description of Change
4.0	03/20/2024	Latoya Byas	Approved and published
3.2	2/29/2024	Amber Brown	Iteration updates, no changes made
3.1	09/14/2023	Bob Grafals	Revised table to include cells for adding links to artifacts and comments.
3.0	03/22/2023	Latoya Byas	Approved and published
2.2	03/15/2023	Sandy Plotzker	Updates based on Agency comments
2.1	02/28/2023	David Skillman	Iteration updates
2.0	07/31/2021	Latoya Byas	Approved. Removed resolved comments and published
1.1	4/2/2021	April Daniels	Updates based on review of items during the 1st module of AMMP
1.0	03/01/2021	Latoya Byas	Approved. Removed resolved comments and published
0.2	11/12/2020	April Daniels	Updates based on review comments
0.1	10/14/2020	April Daniels	Initial Creation

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1 Vendor Startup Checklist

	#	Action	Guidance	When	Who	Artifacts	Status
**MES PMO Program Vendor Startup Checklist – For the Onboarding Coordinator**						
☐	1	SharePoint Implementation	Stand-up the Vendor SharePoint.	6 months prior to contract start date.	PMO PM		
☐	2	Executive Dashboard	Ensure an Executive Dashboard is created for the Vendor.	3 months prior to contract start date.	PMO PM		
☐	3	Report Card	Ensure a Report Card is created for the Vendor.	3 months prior to contract start date.	PMO PM		
☐	4	Internal Review (Gap Analysis) of RFB/RFP and Vendor's Proposal	Document internal Gap Analysis of the Review Request for Bid (RFB) /Request for Proposal (RFP) and Vendor's proposal.	2 months prior to contract start date.	PMO		
☐	5	Invoicing Tracker	Develop a project specific invoice tracker, following the process defined within PMO-2-n-04 Invoice Protocols Reference Guide.	1 month prior to contract start date.	PMO		
☐	6	Load/Review Requirements	Ensure Vendor requirements are loaded and verified within the Requirements Management Tool (currently Orbus iServer).	1 month prior to contract start date.	RBPM PM		
☐	7	Start Reporting on Vendor Start-up	In the Program Management Office (PMO) Vendor Status Meeting and Program Meeting, start reporting the status of the Vendor Start-up.	1 month prior to contract start date.	PMO PM		

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☐	8	Initial Meet/Greet 1 – Determine Contacts	Work with the Alabama Medicaid Agency (AMA) to establish the main vendor contact and determine if the Vendor is willing to meet earlier than contract start. If the vendor cannot meet earlier, the timeline from this point forward has to be adjusted starting with contract start date.	At least 3 weeks prior to contract start date	PMO PM		

☐	9	Initial Meet/Greet 2 – Welcome Email	Send Welcome email and/or call the contact person to welcome the new vendor. Within this welcome email,
			- Give them a brief summary of the vendor startup process and what they should expect in the upcoming days
			- Determine if some of the following pre-startup items can be captured during the initial meet and greet
			  o Pre-startup items are listed in #10 through #17 below.
			  o Provide PMO-2-o Vendor Start Up Guide and PMO-2-o-02 Vendor Start Up Checklist
				At least 3 weeks prior to contract start date	PMO PM		

☐	10	Initial Meet/Greet – Follow-up	If Vendor does not have the information available, perform follow-up and determine tentative dates to learn each of the pre-startup items. Follow-up on action items from Meet & Greet 1, Meet & Greet 2 to this entry	At least 3 weeks prior to contract start date	PMO PM		

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☐	11	Request office space information	During RFB/RFP Review in Vendor Start-up Checklist Item #1, determine if Vendor is allotted office space at the Alabama Medicaid Agency (AMA) facility or will have its own office location. If own location, please provide the address.	At least 3 weeks prior to contract start date	PMO PM		
☐	12	Parking Responsibility	Inform Vendor that it is their responsibility to secure parking for their employees.	At least 3 weeks prior to contract start date	PMO PM		
☐	13	Request building access information	Determine the Vendor employees who will need building access to the Alabama Medicaid Agency office.	At least 3 weeks prior to contract start date	PMO PM		

☐	14	Request staffing information	Request a Vendor organization chart and a list of Vendor employees supporting the project. The list should include the following information:
			
			- Name
			- Email address
			- Phone Number
			- Indicator to determine if a Medicaid account is needed
			- Role and Responsibilities to assist in the following:
			  1. Requesting access addressed in #16 – Access Information.
			  2. Provide Stakeholder Registry to Vendor, they will update and be included within the AMMP COM-6-A: Project Registry (RASCI)
				At least 3 weeks prior to contract start date	PMO PM/Vendor		

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☐	15	Scheduling Meetings	During the initial meet and greet, schedule the meetings identified in the checklist item **#18** several weeks before the contract start – to ensure the calendars are free.	At least 3 weeks prior to contract start date	PMO PM/Vendor		
☐	16	Meeting Attendees	Coordinate with the Vendor PM to determine the vendor staff who should attend the following meetings: determination. - Program Meeting - PMO Services meeting - Issue and Risk meeting - Change Control Board meeting - Enterprise Architecture Board Meeting - Business Review Board meeting - Phasing Plan Meeting - Centers for Medicare and Medicaid Services (CMS) Status meeting	At least 3 weeks prior to contract start date	Vendor		

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☐	17	Access Information	Determine who will need access and training/processes related to any of the tools below: - SharePoint(s) per library - AMMP – Program Wide – Site - AMMP - <Module> - Project Site – This site has a Restricted Confidential library, which houses invoicing and pricing information. Determine the team member who will need access to this restricted library - IST Governance site if created - Microsoft Project - DMT Tool (Office 365 E3 or higher is needed) - Information Security Office Tool VPN Access (requires a Medicaid ID) - Web conferencing tool (Webex) – (requires a Medicaid ID; review internally to establish the max # of Webex license for Vendor) - Requirements Tool (Orbus iServer) - Executive Dashboard **Note:** Before requesting Medicaid IDs, collaborate with the vendor to determine when the team member can begin the required Medicaid Compliance training and request access on an agreed upon date. For Medicaid IDs to remain active, the team member has to complete the training within 30 days of the request. Pass information to the Onboarding Coordinator.	At least 3 weeks prior to contract start date	PMO PM		

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☐	18	Coordinate Demo	If the Vendor has a Commercial Off the Shelf (COTS) product, determine if the Vendor will perform a demo. If so, coordinate a date for the demo.	At least 2 weeks prior to contract start date	PMO PM		

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☐	19	Send Upcoming Event Calendar	Send Upcoming Event Calendar to the identified primary contact person for the Vendor. - On-board individuals and/or vendors – Medicaid Training required for newly established Medicaid Accounts - Project Kick-off - Start reviewing AMMP plans and templates - Work plan/Review Invoice Tracker - Project Quality Assurance (PQA) Kick-off - Gap Analysis Sessions - Solution Demo - Project Management Office (PMO) Services Kick-off - Information Security Office (ISO) Kick-off - Data Governance Office (DGO) Kick-off - Deliverable Management Tool (DMT) Training - Organizational Change Management (OCM) Kick-off - OCM Assessment - Testing Kick-off - Discovery Sessions - Start Vendor's Recurring Project Status Touchpoint Meetings - Start Vendor's Monthly Project Status Meeting - Join the Monthly Program Status Meeting, Issue and Risk Meeting, - Change Control Board (CCB) and Business Review Board (BRB) meetings.	At least 1 week prior to contract start date	PMO PM		

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☐	20	Send MES Newsletters	Send link to MES Newsletters to the vendor staff identified in Item #13.	1 Day Prior to contract start date	OCM Lead		
☐	21	Send PMO-2-b Onboarding Plan and Checklist	Email PMO-2-b Onboarding Plan and Checklist and Buddy Assignment Contact List. The Onboarding Buddy should have a back-up identified. Also send COM-6-A: Responsibility Assignment Matrix which has all the contact information. **Note:** Do not request Medicaid Accounts until review with Vendor to determine the start of required Medicaid Compliance training.	1 Day Prior to contract start date	Onboarding Coordinator		
☐	22	Update/Review Meeting Protocol	Update COM-8 with Fund Code for new project. Communicate COM-8 updates to Agency Merit staff. Review Meeting Protocol with the identified QC Vendor Contact within the "Request staffing information".	Within 7 days after contract start date	QA/QC Manager		

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☐	23	Review AMMP/PPMO Plans and Templates	AMMP Plans/Template Review (Vendor deliverables identified in the Vendor version of PMO-2-o-01: Vendor Templates). Request Vendor to send a signed copy of PMO-2-o-01 which has a statement of the Vendor agreeing to adhering to the PMO plans and if they plan on creating their own plans. **Note:** Deadlines for the Vendor to review the AMMP Plans and Templates is before each associated Kick-off. Explain that late deliverables are not a reason for a Project Change Request. Late deliverables will be tracked as late.	Within 14 days after contract start date	PMO PM		
☐	24	SharePoint Review	SharePoint Review (Overall Set-up/File Structure and Toolkit (Risks, Action Items, Issues, Decisions, Change Control/Requests and Lessons Learned))	Within 14 days after contract start date	PMO Manager		
☐	25	Assign Specific Vendor Employees to Committees	Executive Oversite Committee (No Vendor Members), Change Control Board (CCB), Business Review Board (BRB) and Enterprise Architecture Board (EAB)	Within 7 days after contract start date	PMO PM		
☐	26	AMMP/Project/Vendor Kick-off	PMO presents the AMMP overview and Vendor presents the Project Kick-off Meeting. Vendor will work closely with OCM and the PMO to determine the appropriate meeting content	Within 14 days after contract start date	Vendor		
☐	27	Invoice Protocols and Invoice tracker review	Review the PMO-2-n-04 Invoice Protocols Reference Guide and the associated vendor specific Invoice Tracker.	Within 14 days after contract start date	PMO		

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☐	28	Gap Analysis Review	Vendor to perform Gap Analysis between RFB/RFP and Proposal, will then review any PMO/Agency identified gaps between the RFB/RFP and Vendor Proposal Response.	Within 14 days after contract start date	PMO		
☐	29	Vendor Demo	If applicable, Vendor COTS Demo.	Within 14 days after contract start date	Vendor		
☐	30	PQA Kick-off	PQA Kick-off meeting	Within 30 days after contract start date	PQA Lead		
☐	31	PMO Services Kick-off	PMO Services Kick-off which includes review of the AMMP Plans and Templates. This kick-off will provide the Contract Monitoring and Executive Dashboard review.	Within 30 days after contract start date	PMO Services Lead		
☐	32	ISO Kick-off	ISO Kick-off – Provide ISO Guidance Documents to Vendor before Kick-off. Documents are available through IST Governance Site or provide via the AMMP - <Module> - Project Site.	Within 30 days after contract start date	ISO Lead		
☐	33	DGO Kick-off	DGO Kick-off – Provide DGO Guidance Documents to Vendor before Kick-off. Documents are available through IST Governance Site or provide via the AMMP - <Module> - Project Site.	Within 30 days after contract start date	DGO Lead		
☐	34	OCM / Vendor Kick-off	OCM Kick-off	Within 30 days after contract start date	OCM Lead		

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☐	35	OCM Assessment	OCM Assessment	Within 30 days after contract start date	OCM Lead		
☐	36	EQP/TCOE Kick-off	EQP/TCOE Kick-off – Perform after OCM Kick-off	Within 30 days after contract start date	Testing Lead		
☐	37	DMT Training	DMT Training – Perform after PMO Services Kick-off	Within 30 days after contract start date	Tool Lead		
☐	38	ISO Tool Training	ISO Tool Training (Xacta) – Perform after ISO Kick-off	Within 30 days after contract start date.	ISO		
☐	39	SharePoint Training	SharePoint Training	Within 30 days after contract start date	Tool Lead		
☐	40	iServer Engagement/Training	Meeting between AMMP iServer Admins/RBPM and the Vendors tool capability leaders, with the focus on transfer of I/O files for a full RTM	Within 30 days after contract start date	Tool Lead		
☐	41	Program Status Report/Meeting	Coordinate with the vendor to ensure the Vendor Status is incorporated into the Program Status Report.	Within 30 days after contract start date.	PMO PM		
☐	42	Review the Vendor Schedule	Review the schedule for Contract Monitoring, Schedule Updates/uploads, Executive Dashboard Updates, OCM Effectiveness Evaluations, Lessons Learned, etc.	Within 30 days after contract start date.	PMO PM		

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☐	43	Discovery Sessions	Discovery Sessions – Vendor leads the discovery sessions	Within 30 days after contract start date	Vendor		
☐	44	Vendor Status Meetings	Vendor leads the Project Status Meeting and the Project Touchpoint meeting	Within 30-60 days after contract start date	Vendor		
☐	45	Vendor's Recurring Touchpoint Project Status Meeting	Start Vendor's Recurring Touchpoint Project Status Meetings.	Within 30-60 days after contract start date	Vendor		
☐	46	Add Vendor employees to meetings for the following month	Meeting Invites (Program, PMO Services, Issue and Risk Meeting, Change Control and Business Review Board). Note: Requirement, Discovery and Communication Sessions will be coordinated within the OCM and RBPM teams.	Within 30-60 days after contract start date	PMO PM will coordinate		
☐	47	Submit Invoice	Submit an actual Invoice to ensure the process has been fully established for the new vendor.	Within 60-90 days after contract start date	PMO PM		
☐	48	OCM Communication and Training Session	OCM Communication and Training Session.	Within 60-90 days after contract start date	OCM Lead		
☐	49	Vendor's Monthly Project Status Meeting	Start Vendor's Monthly Project Status Meeting.	Within 60-90 days after contract start date	Vendor		

Appendix A. Acronyms/Glossary|

For a complete list of Acronyms and Glossary of Terms, please reference the [AMMP Acronyms and Glossary](#).