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The Need for FMBT

VA currently uses an over-35-year-old COBOL-based legacy Financial Management System (FMS), resulting in:

– Failure to meet the federal financial regulations and mandates, including the intent of the DATA Act
– Long-standing audit findings due to inherent security vulnerabilities

VA made two previous unsuccessful attempts to replace its legacy financial system, leading to:

– System workarounds and the development of add-on systems
– A fragmented financial and procurement system environment

Implementing a modern integrated financial and acquisition system will bring VA operations into the 21st century and improve services to those who serve Veterans, allowing VA to:

– Execute its budget, pay vendors and Veterans, and produce accurate financial statements
– Access accurate and robust data in real time, improving business intelligence reporting capabilities
Current Program Status

Waves Completed

- NCA Finance go-live in November 2020
- VBA General Operating Expenses (GOE) Phase 1 go-live in February 2021
- VBA GOE Phase 2 go-live in May 2021
- Momentum 7.9 upgrade in March 2022
- NCA Enterprise Acquisition go-live in April 2022
- Office of Management Plus (OM+) go-live in October 2022
- Office of Acquisition, Logistics, and Construction (OALC), Office of Construction & Facilities Management (CFM) go-live in June 2023
- Office of Inspector General (OIG) go-live in June 2023
- Office of Information and Technology (OIT) go-live in June 2023
- Momentum 8.0 upgrade in December 2023

In Progress

- VBA Loan Guaranty (LGY)
  - Go-live: May 2025
- VHA Wave 1 (Station 134)
  - Go-Live: TBD
iFAMS by the Numbers

- 6 Implementations
- 99.76% iFAMS Availability
- 96.6% iFAMS Service Desk Satisfaction
  Case Resolution Rates: 97.5% First Call, 97.6% All Cases
- 7,308,165 Transactions Successfully Processed, Including: $18.48 billion in disbursements through Treasury
- 4,185 Active Users
- 2 Major Upgrades

*Information as of April 2, 2024*
FMBT Product Delivery Framework

Phase 0: Pre-Initiation
- Establish internal activities to prepare for wave implementation
- Develop draft timeline, prepare for customer and program engagement

Phase 1: Initiation & Planning
- Establish relationship between FMBT and the customer
- Complete detailed planning of tasks and resources for the wave
- Finalize scope and schedule

Phase 2: Product & Testing
- Conduct customer sessions to define and review user requirements for system configuration
- Perform iterative User Acceptance Testing (UAT) with the customer to configure and validate the system

Phase 3: Deployment & Transition
- Conduct final UAT and confirm readiness
- Execute deployment and cutover; begin Initial Go-Live Customer Support period
- Resolve outstanding Risks & Issues and document Lessons Learned

Wave Identification  Wave Kickoff  Checkpoint 1: Ready to begin program increments and sprints  Checkpoint 2: Product and UAT approved  Checkpoint 3: Go-Live
Guide to an iFAMS Wave

FMBT Change Management & Readiness
Focus on People and Process, not just systems

Prosci® ADKAR Model

- Awareness
- Desire
- Knowledge
- Ability
- Reinforcement

Note: This journey illustrates the ideal course of iFAMS implementation, and it is subject to changes in sequence and timing of activities based on each wave’s unique needs.

Last Updated 11/27/21
The FMBT Organizational Change Management (OCM) approach is used to deploy change management activities program-wide and within each iFAMS implementation wave and is rooted in the Prosci® Awareness-Desire-Knowledge-Ability-Reinforcement (ADKAR) model and the FMBT Product Delivery Framework.
Preparations for VHA Implementation

To achieve a successful implementation of iFAMS at VHA, FMBT is:

**CONFIGURING**
- iFAMS to process obligate and pay transactions through IPPS
- Payroll interface process to reduce legacy elements

**AUTOMATING**
- Transaction reconciliation
- Annual close processing tasks

**DEVELOPING**
- Functionality for Acquisition users to work in iFAMS during the financial system annual close process
- New dashboards and details on unreconciled transactions

**ENHANCING**
- iFAMS error handling and override processes
- Processing of intragovernmental transactions interfaced to iFAMS
- iFAMS service order accrual estimation process

**ENSURING**
- Reports will meet financial statement audit requirements
- Tools are in place to handle large data extraction needs for VHA

**ESTABLISHING**
- Full flexible posting logic for iFAMS transactions
- Processes to ensure control over split funding when VHA is partially in both FMS and iFAMS
Continuous Improvement in Production

To support continuous improvement of iFAMS and the user experience, FMBT endeavors to do the following for all user groups:

• **Frequent updates** to customer leadership

• **Ongoing assessment** of operations and end user experience

• **Site visits** for each new customer groups once 1+ year in production

• **Assess and measure** impact of improvements

• **Leverage technology** and system upgrades

• **Improve future waves** and experience of all users in production

Cycle of Feedback and Improvements

- **Wave Implementation Team**: Gathers constant feedback on wave implementation
- **Customers / End Users**: User experiences can inform future improvements
- **Momentum Product Group**: Examines long term direction of the product and its ability to meet VA’s needs
- **FSC iFAMS Service**: Receives feedback on user documentation (content and access), communications and service desk
FMBT identifies and addresses lessons learned from each completed wave and incorporates those improvements into subsequent wave operations. Key lessons include:

**TARGETED COMMUNICATIONS**
Tailoring communications to specific user groups

**USER ACCOUNT CREATION**
Simplifying the user account creation process to reduce user frustration

**USER EXPECTATIONS FOR GO-LIVE**
Clearly informing users what to expect immediately before, during, and after go-live

**iFAMS SANDBOX ACCESS**
Early access to sandbox environment improves user knowledge and eases transition

**HELP DESK CASE MANAGEMENT**
Improving workflow efficiency and grouping similar customer support cases

**INITIAL GO-LIVE CUSTOMER SUPPORT REPORTING**
Streamlining the data reporting process during initial support period following go-live
Implementation of Lessons Learned

Established standard approach and timing for **identification of customer Product Owners** and agreement of responsibilities during pre-wave activities.

Designated **Acquisition Leads** now included as part of finance waves to ensure cross-dependent connections between finance and contracting communities.

Started **technical discovery for interfaces and configuration** in pre-wave phase. Added an intake review and earlier engagement with product owners.

Updated system-focused process flows to **Business-Focused Process Flows** to improve customer understanding and increase knowledge and participation during customer validation sessions.

Added a **Pre-Wave “Phase Zero”** into the Product Delivery Framework establishing criteria for wave team organization and preparedness before wave kick-off begins.

Revamped our approach for conducting **Program Increment Planning**, including in-person events, ensuring maximum collaboration with customer stakeholders.

Established process to proactively identify **cross-dependencies** are incorporated into acceptance criteria for work to be approved.

Provided **earlier and more frequent customer engagement** in iFAMS through increased demonstrations, sandbox sessions, and power hour learning events.

**Program Management**  **Technology**  **Customer Engagement**
## Key Program Risks

<table>
<thead>
<tr>
<th>Risk</th>
<th>Impact</th>
<th>Probability/Impact</th>
<th>Mitigation Strategy</th>
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</thead>
<tbody>
<tr>
<td>Resistance to Change</td>
<td>If FMBT does not gain stakeholder engagement and buy-in, then end user adoption of iFAMS could be negatively affected</td>
<td>Medium/Very high</td>
<td>Carry out robust stakeholder engagement at varying levels across Administrations and Staff Offices; implement post go-live customer support enterprise service desk operations.</td>
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<tr>
<td>Funding</td>
<td>If there are continued funding shortfalls, then the implementation schedule for deploying iFAMS could be jeopardized.</td>
<td>Medium/High</td>
<td>Identify and communicate resource requirements by concurrent wave for FMBT, the Administrations and other support organizations as early as possible.</td>
</tr>
<tr>
<td>iFAMS Implementation</td>
<td>iFAMS implementation occurs across concurrent waves. If FMBT does not have the required funding, resources, and skillsets, then wave implementations may be delayed.</td>
<td>Medium/High</td>
<td>Identify and communicate the resource and personnel requirements for each wave to the Administrations and other support organizations as early as possible.</td>
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Questions