



USIMS

Utah Schools Information Management System

Program Management Review

January 24, 2023

Katrina Brinkley

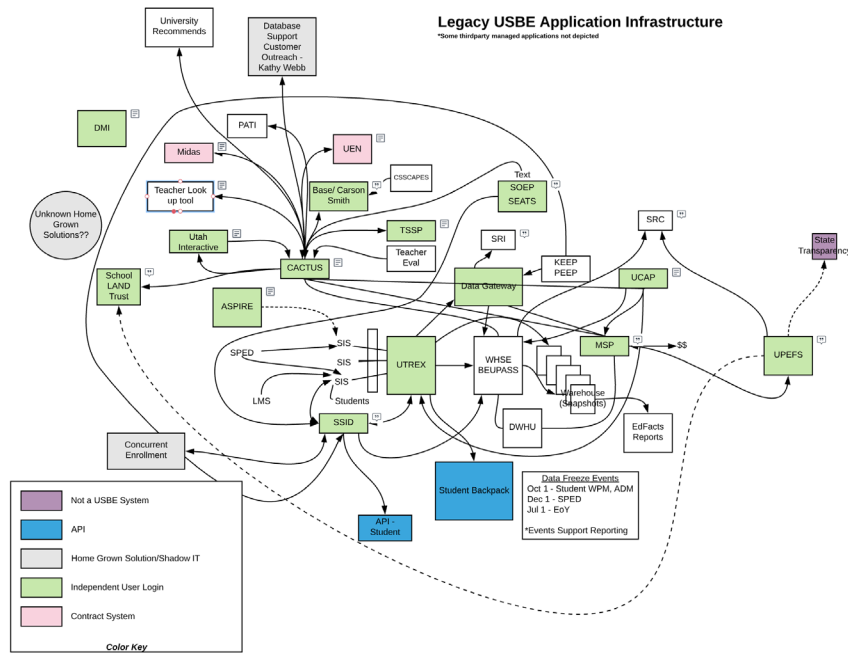
Chief Product Owner and USIMS Program Manager

TOPICS

- Why USIMS?
- USIMS Initiative
- Ensuring Usability
- Roadmap
- USIMS Update
- USIMS Dashboard
- Financials
- Upcoming Events

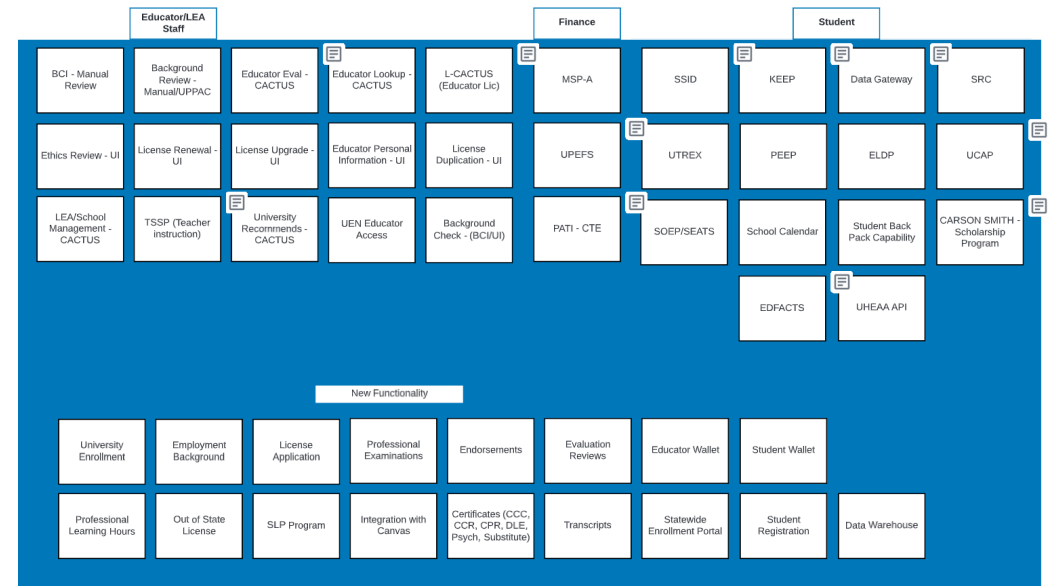


Why USIMS?

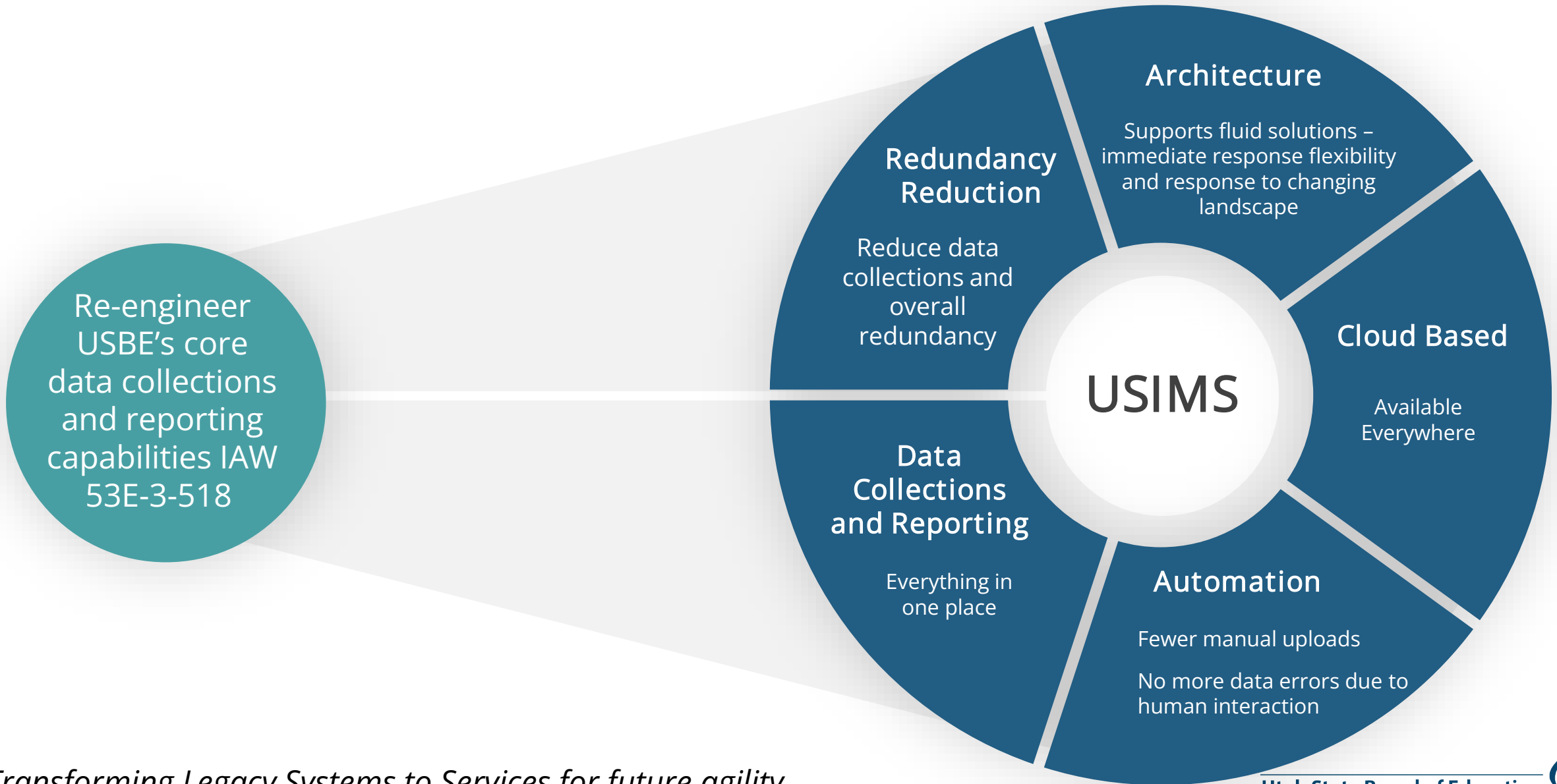


USIMS

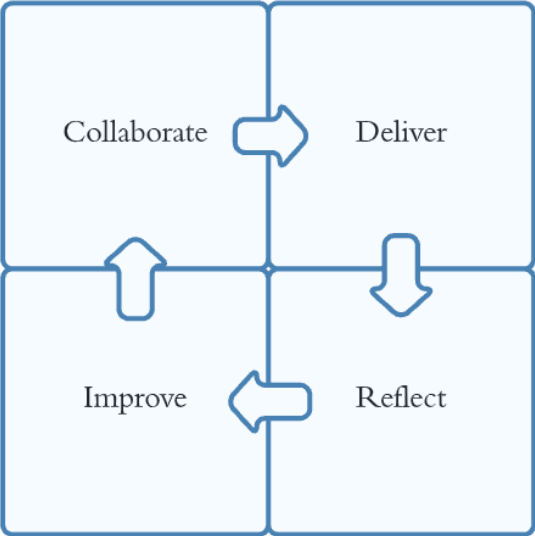
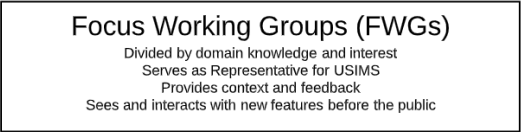
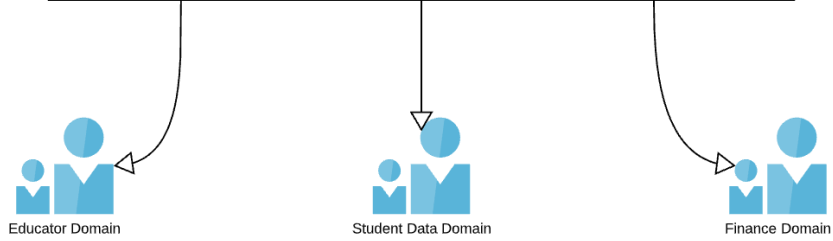
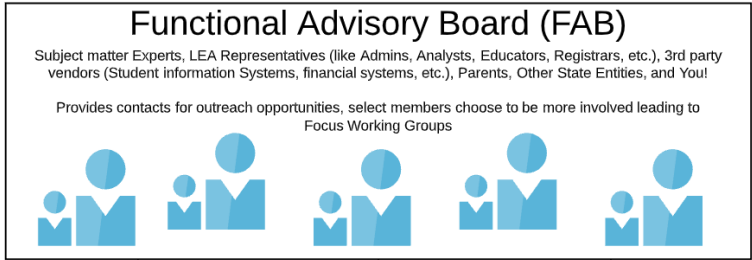
Utah Schools Information Management System



USIMS Initiative



Ensuring Usability



Roadmap

USIMS Roadmap

January 23, 2023

	Educator Team (Skywalkers)	Student Team (Wizards)	Finance Team (Illusionists)
Current Work	<ul style="list-style-type: none"> Production fixes Utah Interactive Subsumption: Professional License Expiration dates 	<ul style="list-style-type: none"> Core Assessments: Rostering Basic Infrastructure for Assessment Rostering Core Assessments: RISE Assessment Data in USIMS 	<ul style="list-style-type: none"> USBE Chart of Accounts API Data Sharing from LEAs
Future Work (in order of current priority)	<ul style="list-style-type: none"> Associate License Renewal CACTUS Background check with BCI Subsumption CACTUS Subsumption: TBD UPPAC Subsumption: TBD . 	<ul style="list-style-type: none"> Core Assessments: Data Ingestion Basic Infrastructure for Post Assessment Data Ingestion Core Assessments: Aspire Plus Assessment Data in USIMS Core Assessments: Acadience Math & Reading Assessment Data in USIMS Core Assessments: Acadience Math & Reading Assessment Data in USIMS Core Assessments: PEEP & KEEP Assessment Data in USIMS 	<ul style="list-style-type: none"> Mapping between USBE and LEA Chart of Accounts Data Validation Checks and Account Rules Implement Indirect Cost Calculations and Sign-Off Funding Allocation

Recently Completed Work

- Utah Interactive Subsumption: University Recommends
- Utah Interactive Subsumption: License Renewal & Expired License Renewal
- Utah Interactive Subsumption: Educator Ethics Review
- Production Break Fix Work
- Style Guide enhancements
- Educator Licensing Checklist
- USIMS Home Page Elements Accessing Functionality & Reporting
- Student Personas
- Azure B2C setup for reuse in any environment
- Event Storming
- Context Mapping (Domain Mapping and Roadmap Creation)
- Process workflows & Infrastructure Provisioning

- **Student Team**
 - Launched USIMS Home Page feature foundation for dashboard (currently hidden waiting on other team functionality)
 - Building out rostering foundation for RISE Assessment
 - Consuming Assessment Data Results discovery work with Student FWG
 - New hire joined in Dec, working to spin up 2nd team to speed up delivery
- **Educator team**
 - Working on Professional License - License Areas Expiration Date, Production Fixes and Associate License Renewal
 - Moving forward towards CACTUS Subsumption
 - Introduced Helpdesk Email Support
 - Assessing legislative requirements with focus working group
- **Finance Team**
 - Completed multiple demos for USBE Chart of Account functionality to FWG
 - Started discussions with LEA vendors to build APIs for LEAs to automate submissions to USIMS
- **Next Steps – High level**
 - Complete current teams' final hiring needs.
 - Create a second student team.
 - Data pipeline and standards discussions underway. Leaning toward Ed-Fi and CEDS standards for our APIs at start. Communications to LEAs and vendors to follow.
 - Continue roadmap development and releases.

Issues/Risks

- **Timelines**
 - The student team's legislative requirements assessment indicates we have too much left in the backpack and not enough time.
 - Current assessment vendors do not have API capabilities – we have one vendor on oneroster. The rest are manually uploading.
 - The Finance team is attempting to meet a requirement for API handling of data and having trouble finding a capable system.
 - The Educator Team is assessing the amount of work remaining with their focus working group. The FWG expressed concerns on definitions of completion and are working with the educator team in assessing needs.

Position Count: 26/38 positions filled.

Mitigation

- **Hiring additional staff**
 - Hiring is #1 priority
 - Building out a second student data team
 - Considering requirements for a second educator team
- **Working on Definition of Done per domain to level expectations (USIMS will fix it!)**
- **We are assisting with implementation of financial systems which can support USIMS.**
- **Working with Assessments & Accountability section to explore Assessment vendor options**

USIMS Dashboard

[USIMS Dashboard Link](#)

Up to date (minute by minute!) information on USIMS progress

Wizards

Assessments Foundations and RISE

Summary: Build the USIMS foundation to rostering students for assessments - beginning with RISE.

Target Completion: TBD

A subset of user stories from the following features:

- Assessment Foundation | Build Rostering Foundation
- RISE | Roster Students

USIMS Home Page and Student Demographic Record Foundations

Summary: Build the structure for the USIMS Home Page so users have 1 location to access future educator, finance and student domain related functionality and

Assessment Foundations and RISE

21

Legend: New (Orange), Closed (Blue), Active (Grey)

Assessments Foundations and RISE (2)

ID	Work Item Type	Title	State	Tags
6252	Feature	Assessment Foundation Build Rostering	Active	FS2
8935	Feature	RISE Roster Students For RISE Assessment	Active	FS2

View query

Skywalkers

We are currently working on Print Professional License Expiration Dates and Production Fixes.

- All items marked Closed are in production

We completed the following:

- Utah Interactive (UI) Consumption Piece removing the UI Licensing integration
- University Recommends

Print Professional License Expiration Date...

11

Legend: Closed (Blue)

Print Professional License Expiration Dates and Production Fixes (2)

ID	Work Item T...	Title	State	Target Date	Parent
756	Feature	Remove Utah Interactive Licensing Int...	Closed	6/30/2022, 1...	3rd Party...
5450	User Story	Provide License Renewal form for Ren...	Closed		

View query

Print Professional License Expiration Date...

2

Legend: Closed (Blue), New (Orange), Active (Grey)

Print Professional License Expiration Dates and Production Fixes (4)

ID	Work Item Type	Title	State	Target Date
7029	Feature	Production Fixes	Active	

Illusionists

Chart of Accounts

The USBE Chart of Accounts is used to standardize the mapping of LEA budget to both Utah and federal standards.

Target completion: TBD

API Compatibility

The team continues to build out User Stories for this Feature in preparation for the incoming Developers

Target completion: TBD

Chart of Accounts by State

76

Legend: Closed (Blue), New (Orange), Active (Grey)

Chart of Accounts Details (1)

ID	Work Item Type	Title	State	Tags
7912	Feature	Manage USBE Chart of Accounts	Active	
7433	User Story	Export USBE Chart of Accounts	Closed	
7913	User Story	Chart of Accounts - Import USBE mapping	Closed	
7918	User Story	Chart of Accounts - Update an Existing Acc...	New	
7921	User Story	Chart of Accounts - Retire an Account Code	New	
7922	User Story	Chart of Accounts - Add a New Account C...	New	
7980	Spoke	Confirm USBE Chart of Accounts info	Closed	

View query

API Compatibility by State

21

Legend: Closed (Blue), New (Orange), Active (Grey)

API Compatibility Details (1)

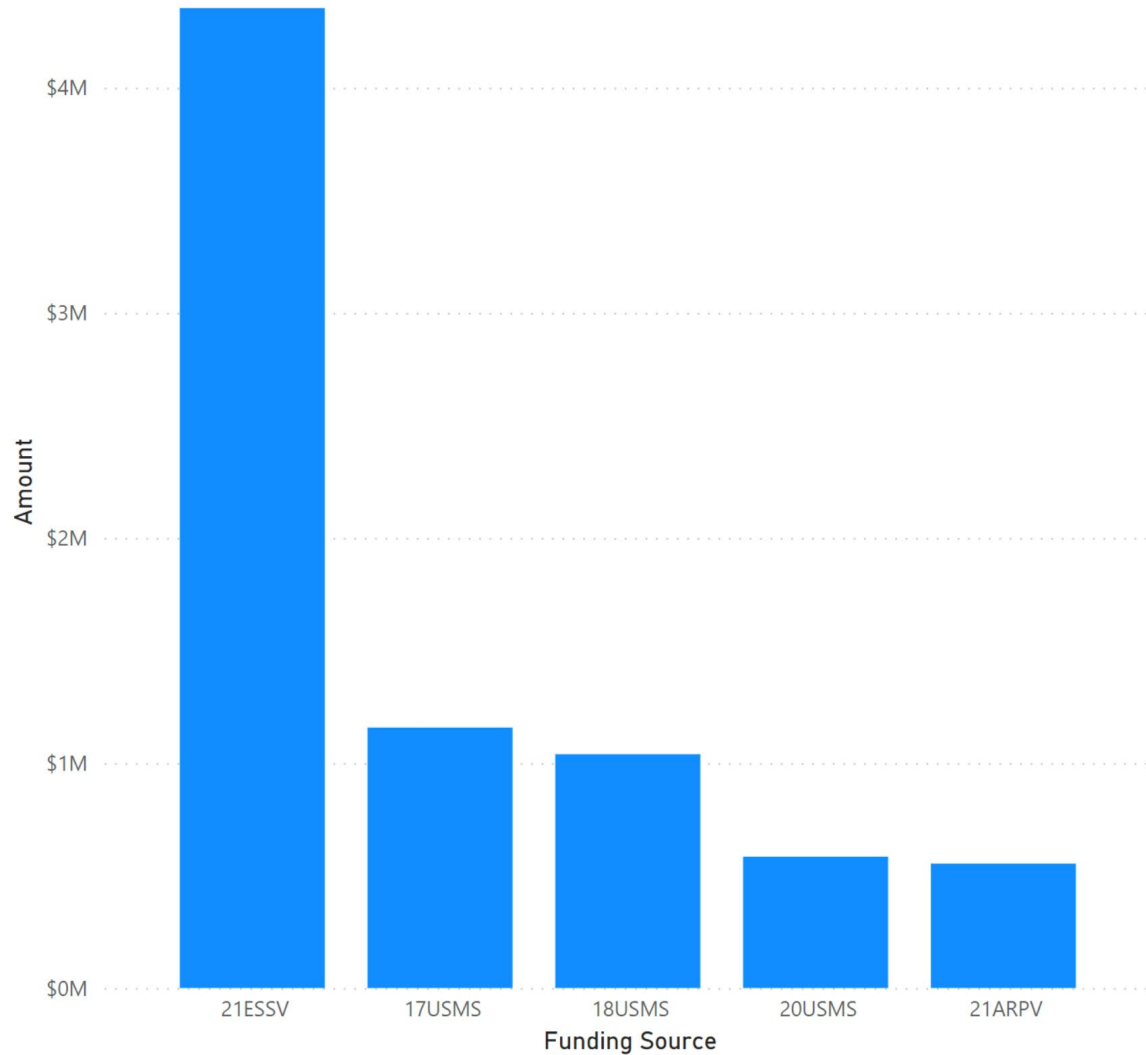
ID	Work Item Type	Title	State	Tags
7491	Feature	API Compatibility	Active	API
7441	User Story	Update list of existing LEA financial platfor...	New	API
7492	Spike	Research API compatibility within USIMS	Active	API Blocked
7504	User Story	API Checks source system (LEA or other Ut...	New	API
7518	User Story	Schedule API to check an LEA for financial i...	Closed	API
7519	User Story	Manually run API to check for updated fina...	Closed	API
7520	Spoke	Which Azure Resources will be utilized for I...	Closed	API

View query

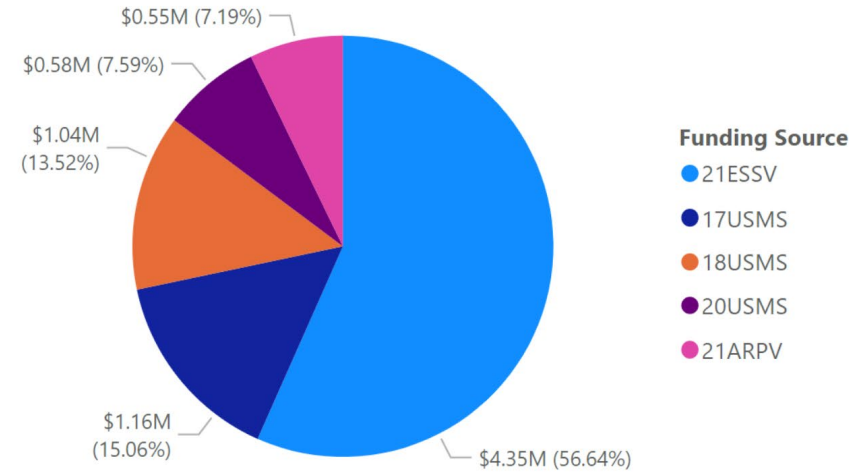


Financials

Amount by Funding Source



Amount by Funding Source

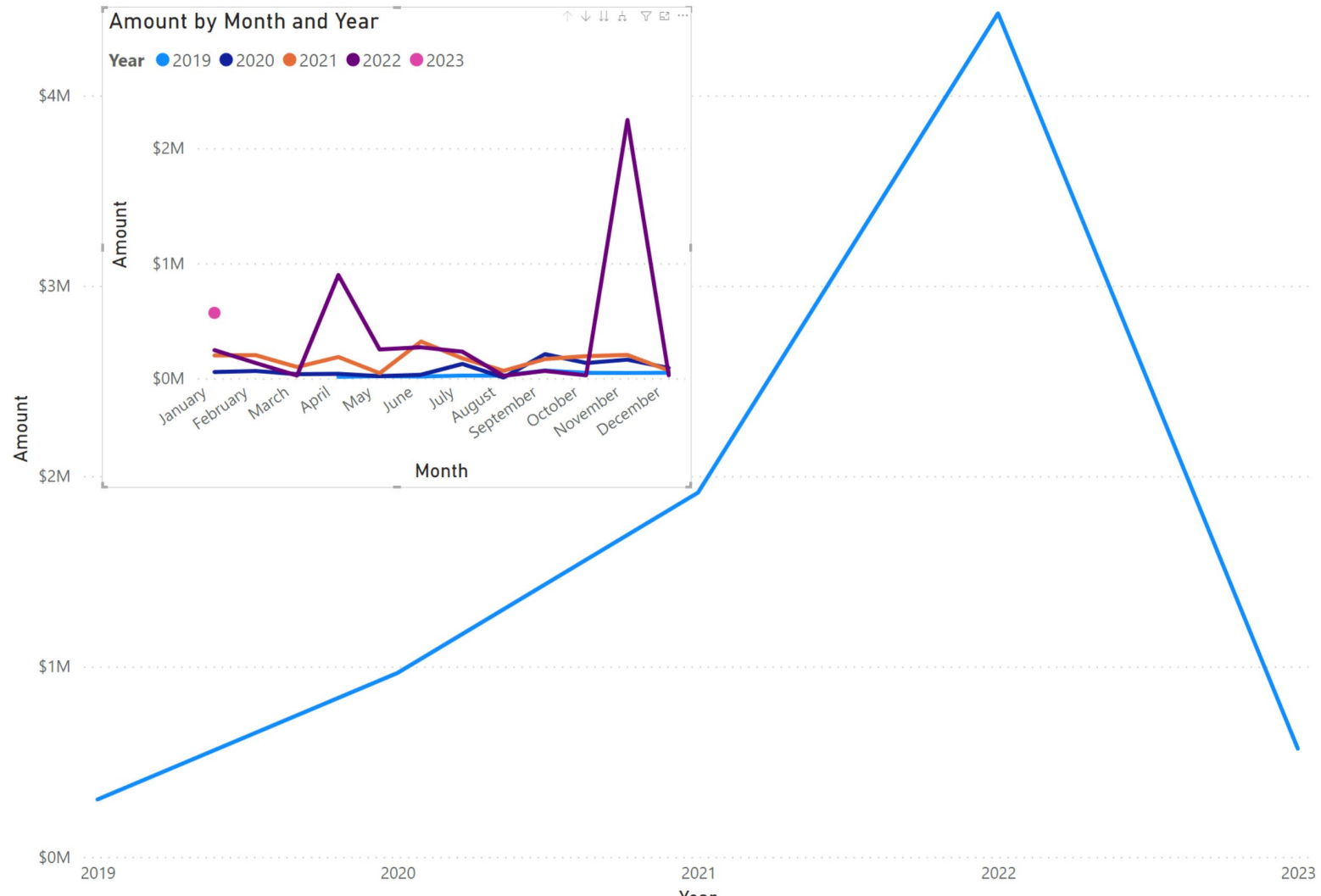


Funding Source	Spent	Encumbered	Funded
21ESSV	\$4,354,596.74	\$7,799,323.68	\$8,098,039.00
21ARPV	\$552,877.62	\$1,577,948.6	\$8,201,961.00
20USMS	\$583,766.60	\$0	\$17,200,000.00
18USMS	\$1,039,138.08	\$0	\$1,039,138.00
17USMS	\$1,157,500.87	\$16,638.5	\$3,467,473.00
Total	\$7,687,879.91	\$9,393,910.78	\$38,006,611.00

Financials

Year	Month	Amount
2020	May	\$18,705.33
2020	June	\$30,142.34
2020	July	\$125,298.57
2020	August	\$6,476.49
2020	September	\$209,533.42
2020	October	\$132,744.37
2020	November	\$161,931.67
2020	December	\$89,188.56
2021	January	\$198,313.00
2021	February	\$200,720.84
2021	March	\$97,363.65
2021	April	\$185,064.40
2021	May	\$43,685.42
2021	June	\$319,429.34
2021	July	\$174,051.89
2021	August	\$64,571.80
2021	September	\$166,843.57
2021	October	\$192,739.92
2021	November	\$202,932.36
2021	December	\$68,185.99
2022	January	\$244,763.67
2022	February	\$132,658.05
2022	March	\$23,446.57
2022	April	\$897,665.37
2022	May	\$250,804.14
2022	June	\$268,968.09
2022	July	\$231,681.62
2022	August	\$20,830.79
2022	September	\$64,273.73
2022	October	\$25,208.84
2022	November	\$2,245,832.38
2022	December	\$24,945.53
2023	January	\$568,499.32
Total		\$8,181,268.91

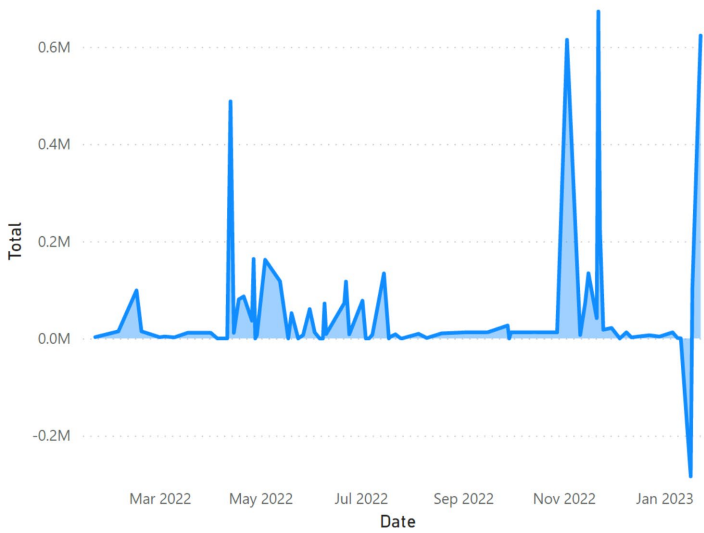
Amount by Year



Financials

21ESSV

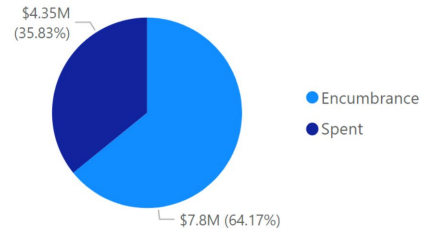
Total by Date



Total	Date
623,193.96	23 January, 2023
103,649.82	18 January, 2023
-283,807.37	17 January, 2023
301.60	11 January, 2023
835.57	9 January, 2023
12,514.17	6 January, 2023
3,704.43	29 December, 2022
6,592.20	23 December, 2022
2,160.00	12 December, 2022
12,488.90	9 December, 2022
0.00	5 December, 2022
21,577.98	30 November, 2022
17,875.24	25 November, 2022
222,665.09	23 November, 2022
4,354,596.74	

Encumbrance	Total Budget
\$7,799,323.68	\$8,098,039.00

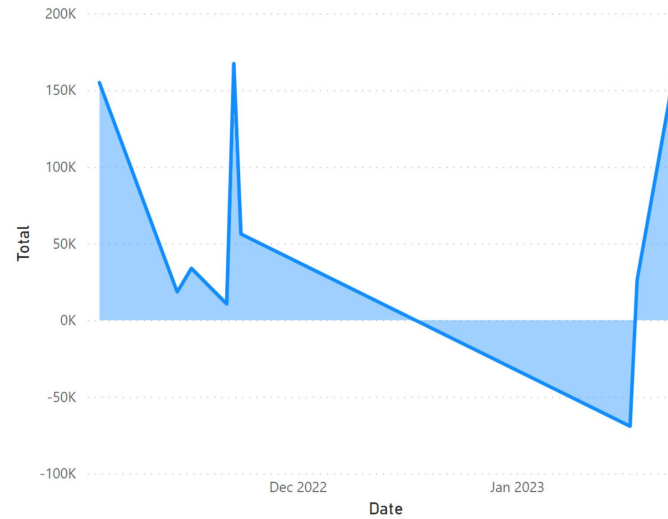
Encumbrance and Spent



*Note: Salary and contractor pay had not been updated for 3 months as the state USIMS PO was closed. This was updated throughout November and accounts for a large spike.

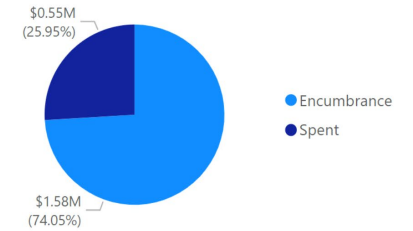
21ARPV

Total by Date



Total	Date
154,913.10	23 January, 2023
26,177.74	18 January, 2023
-69,279.27	17 January, 2023
56,136.87	23 November, 2022
167,375.66	22 November, 2022
10,515.04	21 November, 2022
33,789.94	16 November, 2022
18,335.44	14 November, 2022
154,913.10	3 November, 2022
552,877.62	
Encumbrance	Total Budget
\$1,577,948.6	\$8,201,961.00

Encumbrance and Spent



Upcoming Events

Planned Date	Event / Meeting	Purpose
Every other Tuesday	Educator Focus Working Group	Continued iterative detail capture and incremental development for future sprint work
Every other Tuesday	Educator Focus Working Group Sprint Review	Inspect the outcome of the Sprint and determine future adaptations
Every other Monday	Student Focus Working Group	Continued iterative detail capture and incremental development for future sprint work
Every FWG	Student Focus Working Group Sprint Review	Inspect the outcome of the Sprint and determine future adaptations
Every other Wednesday	Finance Focus Working Group	Continued iterative detail capture and incremental development for future sprint work
Jan 25, 2023	Functional Advisory Board	High Level Status / Feedback / Support – All are welcome! In person aspect Jan and April.