



The State of Oklahoma
**PROGRESS ON
UNIFICATION**

Quarterly Report



Greetings,

We begin this new fiscal year with a theme of change, great change, with two impactful projects and a new collaboration tool. With the completion of the first phase of the medical marijuana licensing application, I am proud of the work the Oklahoma State Department of Health accomplished in completing this project. The team strategically chose a technology vendor in anticipation of change not only in the technology, but in the regulations and requirements around medical marijuana licensing.

OMES and OSDH had 42 days from when voters approved State Question 788 to complete the licensing application. We pulled whatever resources we had from other projects to get the job done. The licensing application was a success, raising a total of \$1.69 million in the first seven hours and reaching \$3.7 million by the end of the second week in production.

As we face another fiscal year, projects like medical marijuana licensing showcase the importance of the time and resources of our team, and how sometimes we have to prioritize and pull resources from one project to use in another project.

On another note, Oklahoma has made large strides toward unifying its human services programs through the OK Benefits project. The ability to update our state's human services programs to an online 24/7 solution is a positive step. The architecture and security put in place will help to protect our most important asset, citizens' data. I am proud of the work the Oklahoma Department of Human Services has accomplished so far, and our ability once again to face change and come up with a resolution. Based on current planning and documentation, OKDHS chose an on-premise solution. Looking to the future, we've made sure this solution has the flexibility to become cloud-based when the need arises.

I cannot wait to see what efficiencies OKDHS employees and Oklahoma citizens will gain from the OK Benefits portal. The OMES team and OKDHS have collaborated seamlessly and will continue to work together into phases 2 and 3 of the project.

Another positive change for our customers is the latest Microsoft application, Teams, available through the Oklahoma Office 365 portal. Teams went live in September, and our agency and many others started using the new tool almost immediately. With Teams, our agencies can collaborate and share information, resources and data safely and securely.

In this new fiscal year, I expect there to be more technology changes ahead. We will work to meet the needs of our customers when faced with not only unplanned projects, but also natural disasters, outages and security risks. Whether it is a legislative change for a new program, aging technology systems that need an update, or a new service from OMES, we will be there to help navigate the changes.

Respectfully,

A handwritten signature in white ink on a red background. The signature is cursive and reads "Bo Reese".

Bo Reese
Chief Information Officer

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Teamwork makes the dream work

Microsoft Teams

“Teams has helped the OMES Service Desk be more successful in their jobs and more efficient. I am proud to see its increased level of efficiency and collaboration with other teams, especially when working on the front line, where a customer’s emergency is our emergency.”

— *Leea Mote, director of client experience, OMES*

OMES has transferred its email services into the Microsoft Office 365 enterprise platform and is over 80% complete with adding our state agency customers. With 22,000 state employees and access to a platform via mobile phone, desktop or laptop, we are moving toward a mobile government workforce.

One of the newest tools Microsoft offers is called Teams. Launched in September 2018, Teams integrates chat capability, online webinar meetings, meeting scheduling and document storage.

Chat-based workspace

Microsoft Teams is a chat-based workspace that leverages Office 365 Groups membership and Office 365 collaboration features. Teams is designed for communicating with the people you work with regularly through an instant messaging mode and is enhanced with emoticons and animated GIFs to ensure communication is casual. Team members can chime in on a topic and continue to chat and collaborate in a speedy fashion.

Here are some additional features of Teams:

- Information sharing, all in one location: Team members can collaborate and co-author via a central location where all files are stored.
- Find what you need, easily: Save time looking for files that you may have received.
- Flexible messaging and meeting setup: Team conversations are visible to all members, prompting quick responses and collaboration. It includes chat, voice or video communications with one or multiple team members through a scheduled or unscheduled meeting.
- Scheduled or unscheduled meeting capability: Launch a meeting via a single click. For instance, an idea raised in chat can be followed up with a handful of team members via voice or video calls. Or schedule a formal Teams meeting via a calendar invite.

Secure information

Before using Teams, many state employees worried their information was viewable or not secure. When you create a Teams group you can make it either public or private. When a private team is created, the content is only viewable to employees you have added to your team. This option allows for more security. (All conversations in Teams may be subject to the Oklahoma Open Records Act.)

The O365 platform and its associated applications include powerful device management capabilities, such as the option to remove a user’s access to sensitive data while a device is missing. This way, no matter where a missing device ends up, sensitive data remains secure.

Learn more

Not only do agencies have the ability to create a team for their agency, they can create a team to coordinate a project across agencies, sharing files, documents, webinar meetings, video camera sessions and more. Sharing data, processes and ideas across agencies is a new step in our path toward the digital transformation of Oklahoma state government. There are many tutorials OMES and Microsoft have available to help your agency start using Teams.

- The OMES training team has compiled many resource documents in the [O365 training SharePoint site](#). Take a look at all that is available.
- Have a specific question for us? Send a message to the [Office 365 Questions and Answers](#) Yammer group to get answers to your questions or view what other state employees are asking about.
- View the [Office Help & Training webpage](#) for guidelines on how to use all things O365, including Teams.

Customer story: OMES Service Desk uses Teams to improve case response

OMES Service Desk

The OMES Service Desk processes on average 340,000 cases a year. Before Teams, the OMES Service Desk used Skype where they had one chat for the Information Technology Operations Command Center and one chat for the OMES Service Desk. Working together in the chat room was difficult because it was an endless chat stream with no extra visibility. It was hard to keep track of what you had and had not read or responded to.

With the Teams interface, if you step away it holds your place. When you return you know which team conversations you need to catch up on. Conversations are grouped together, which allows multiple users to update in the same location.

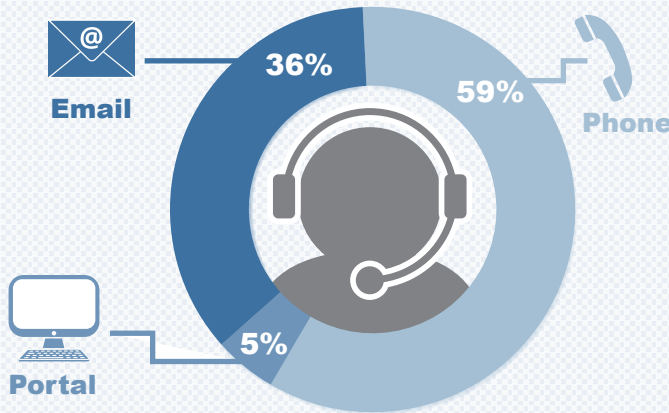
When there is a technology service disruption, such as an outage due to an electrical failure, the OMES Service Desk can post all of the reports for that outage in a Teams chat and connect them all to the parent case.

Teams also has a search feature and several of the team members can use the search option to quickly find the case data they need. Teams has improved the OMES Service Desk's capability to provide front-line services more efficiently.

THE FRONT LINE

The OMES Service Desk is central to addressing the needs of our customers — fielding incoming service requests and incidents. It plays a powerful role in providing superior customer resources.

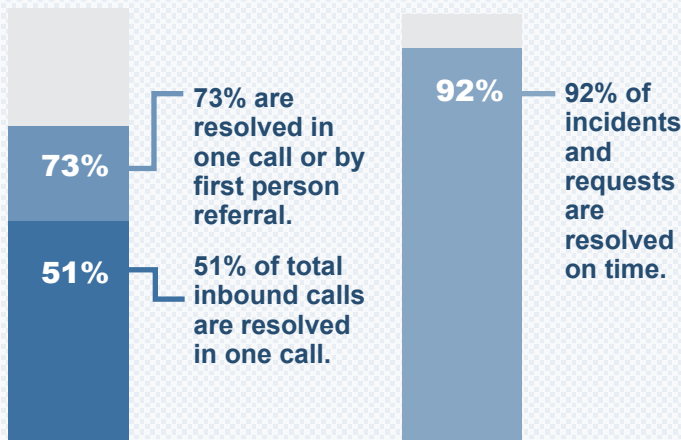
Incoming support request channels for IT service requests and incidents



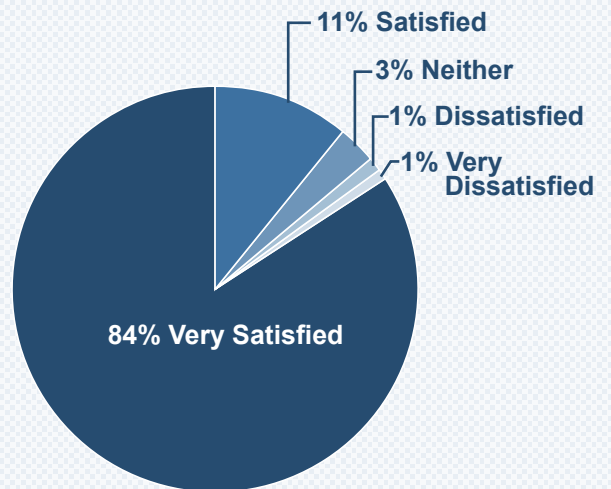
Operational metrics

- 701 state technology employees.
- 34,000 state agency employees.
- 89,002 cases processed.
- 92% of incidents and service requests resolved on time.
- 95% customer satisfaction rating.

First-level resolution rate for IT service requests and incidents



Customer Satisfaction Rating – FY 18



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Technology behind medical marijuana licensing

“I am proud of the OMES team and the Oklahoma State Department of Health for setting up the medical marijuana licensing application in such a short time frame. The licensing application was a success, raising a total of \$1.69 million in the first seven hours and reaching \$3.7 million by the end of the second week in production.”

— Bo Reese, State of Oklahoma CIO

State Question 788 was approved by popular vote in an election on June 26, 2018. It legalized medical marijuana for Oklahoma citizens. Citizens and businesses alike were ready to start their licensing applications for medical marijuana and the Oklahoma State Department of Health was charged with this task.

42 days to launch the medical marijuana licensing program

OSDH was required to implement a licensing solution by Aug. 25, 2018, 42 business days after the passage of SQ 788. This time line was more rapid than any other medical marijuana program implementation in the nation and required a cooperative effort to ensure the challenging timelines were met. OSDH determined an internal department needed to be built and created the [Oklahoma Medical Marijuana Authority](#) to run the program.

OSDH and OMES partnered to pursue the implementation of an application system beginning the morning after the vote, with OMES providing guidance and project management services. Over the course of the next seven business days, OSDH and OMES invited 14 vendors to demonstrate their potential licensing solutions, with the expectation of a testing environment by Aug. 15 and a go-live production environment no later than Aug. 25 at 10 a.m. Following vendor demonstrations, Complia, a medical marijuana licensing company with systems implemented in other states, was chosen for Oklahoma’s application system.

The requirements outlined in SQ 788 for medical marijuana are specialized, requiring OSDH to have seven different license types – three patient, one caregiver and three business. Business applicants are required to submit a background check from OSBI. Patients must obtain a recommendation from a doctor and submit it to OSDH through Complia for review. OSDH has 14 calendar days from the time the applicant submits their application to the time a license has to be approved, denied or rejected. For patients who are approved, OSDH is required to send a letter of approval and license in the mail; those who are denied will receive a physical letter of denial. Business owners get a similar approval letter with a business license or a denial letter mailed to them.

It took several steps to ensure the medical marijuana licensing application process met the requirements of the state question. The first requirement of SQ 788 was to provide citizens and businesses with information on how to apply through a webpage. A new website completely dedicated to OMMA was developed. Complia does not include printing features for letters and licenses. OSDH and OMES implemented Badgepass as an overall solution for printing licenses, providing the necessary

software and printers to print licenses. The mechanism for transferring data for printing letters and business licenses was developed by OMES using SQL Server Reporting Services.

Complia also partnered with a local payment portal company, Oklahoma Interactive, to take credit card payments. Through Oklahoma Interactive there is also a third-party relationship with Bank of America and the Oklahoma State Treasurer to ensure all of the merchant information is routed properly. OMMA launched a call center to ensure citizens with questions could get answers. The call center used a solution called InContact, a standard service offering at OMES through AT&T. Lastly, for law enforcement and retail vendors who needed to ensure the validity of patients' cards, OMES launched an online verification site.

Seven hours after launch, there were 1,687 license applications

Complia provided a test environment one week ahead of schedule and user acceptance testing was completed with minimal issues. Aug. 25, OMES and OSDH personnel gathered to watch the launch of the licensing portal and provide support where needed. The launch was a success with minimal issues.

By 5 p.m., seven hours following the launch of the portal, there were 1,054 patient and 633 business license applications submitted, raising a total of \$1.69 million and reaching \$3.7 million by the end of the second week in production.

OSDH, OMES and Complia continue with additional phases of the project to support OMMA's ability to operate the program while meeting the needs of the applicants such as linkages between the patient and caregiver applicants and a reporting database.

Requirements for OMMA will continue to change as new legislation and rules are passed and take effect. The current solutions may have more requirements or be replaced in the near future, but OMMA, OSDH and OMES have proven the ability to meet challenging timelines and implement complex and efficient solutions.

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Consolidation exemption

“Our Oklahoma Legislature knew some agencies had special needs when they created the IT Consolidation and Coordination Act and included criteria for exemptions and exceptions. ITCCA allows us the flexibility needed when a security risk or financial reason becomes an issue.”

— Matt Singleton, chief operations and accountability officer, OMES

Remember the lyrics of that old Schoolhouse Rock! song, “Conjunction Junction, what’s your function?” The rhyme provided guidelines to help us better understand the usage of and, but, and or in phrases and sentences. The Information Technology Consolidation and Coordination Act ([Title 62 O.S. § 35:1-9](#)) helps OMES navigate consolidation exemptions and exceptions in the same way.

Some agencies are unique in their missions and may be exceptions to the rule. The ITCCA exemption and exception process has been in place since the statute was written, and it provides defined rules to help with this process.

A state agency may apply for an exemption from any provisions of ITCCA if consolidation would:

- Cause it to be in violation of federal law or regulations or in violation of any provision of the Oklahoma Constitution or statutes.
- Result in a loss of federal funds to the state.
- Create an impediment to the performance of a unique agency function that is not duplicated by another state agency and is required by the Oklahoma Constitution or statutes or by federal law.

“No state agency shall expend or encumber any funds for the purchase, lease, lease-purchase, lease with option to purchase, rental or other procurement of any information technology assets without the prior written approval of the Chief Information Officer except” if the agency is following the guidelines as outlined in [Title 62 O.S. § 35.4](#).

How does an agency do this?

An agency first must write a letter to the state CIO asking for an exemption. Next, the OMES team gathers any necessary information needed from the agency. Finally, it is reviewed by the state CIO and other OMES leadership for exemption approval or denial based on the guidelines outlined in statute. Exemptions are reviewed based on what is applicable or if it has a defined timeline outlined in statute.

Below is a list of current exemptions for Oklahoma state agencies:

| Agency Number and Name | | Exemption Type | Exemption Reason |
|------------------------|---|--|--|
| 270 | Election Board, State | Full exemption from ITCCA. | Create an impediment to the performance of a unique agency function. |
| 805 | Rehabilitation Services, Oklahoma Department of | Exemption from ITCCA for IT, telecom and staffing for the Disability Determination Services division of OKDRS. | Cause it to be in violation of federal law or regulations. |
| 300 | State Auditor and Inspector | Exemption from ITCCA for IT, telecom and staffing. | Create an impediment to the performance of a unique agency function. |
| 266 | Educational Television Authority, Oklahoma | Exemption from ITCCA for IT, telecom and staffing. | Create an impediment to the performance of a unique agency function. |
| 695 | Tax Commission, Oklahoma | Exemption from ITCCA for specific IT assets and staffing. | Create an impediment to the performance of a unique agency function. |
| 220 | District Attorneys Council | Exemption from ITCCA for IT, telecom and staffing. | Create an impediment to the performance of a unique agency function. |
| 345 | Transportation, Department of | Exemption from ITCCA for IT, telecom and staffing for the Intelligent Transportation Systems division of ODOT. | Create an impediment to the performance of a unique agency function. |
| 980 | Grand River Dam Authority | Exemption from OMES PC standard for leasing and configuration. | No value added for purchasing power of workstations. |
| 290 | Employment Security Commission, Oklahoma | Exemption from OMES PC standard for leasing. | Create an impediment to the performance of a unique agency function. |
| 220 | District Attorneys Council | Exemption from OMES PC standard for leasing and configuration. | No value added for purchasing power of workstations. |
| 292 | Environmental Quality, Department of | Exemption from OMES PC standard for leasing. | Result in a loss of federal funds to the state. |
| 629 | School of Science and Mathematics, Oklahoma | Exemption from OMES PC standard for leasing. | No value added for purchasing power of workstations. |
| 300 | State Auditor and Inspector | Exemption from OMES PC standard for leasing and configuration. | Create an impediment to the performance of a unique agency function. |
| 618 | Student Loan Authority, Oklahoma | Exemption from OMES PC standard for leasing and configuration. | No value added for purchasing power of workstations. |

The exemption guidelines provide terminology for OMES to determine when to grant an exemption, but other factors considered include business value and security risk. OMES works closely with its agency customers to help them meet their missions for Oklahoma citizens. Sometimes this means giving out an exception to the rule. As long as the exemption process is available, OMES will be able to continue to help agencies with their technology decisions even if that means not using our services.

5

Many benefits through OK Benefits

“OMES helped us decide on an architecture solution that fit our needs to measure the project and keep flexibility should a cloud-based solution make more economic sense in the future.”

— Jeff Wagner, DHS Communications

Every state manages human services programs, such as child welfare, child support, Temporary Assistance for Needy Families, the federal Supplemental Nutrition Assistance Program, Medicaid and Child Care Systems, but how they offer their programs to their citizens varies from state to state. Michigan completed its MI Bridges Self-Service portal in 2017 and it integrated several legacy systems into one. The state of Georgia finished its Gateway portal in 2017 to improve its health and human services programs.¹

With OK Benefits, Oklahoma is building an integrated social services solution and joining several states in updating the technology behind its public assistance programs. Nearly one-third of all Oklahomans receive DHS services. Many are in crisis and rely on our services to get by. Today, DHS serves customers through separate programs and views customers through multiple lenses. This can result in our customers taking time off work to wait in lines and dealing with separate divisions that can seem more like separate agencies, and may leave Oklahomans feeling like transactions.

To add to that, Oklahoma faced a growing list of issues relating to the aging systems running its various public assistance programs. A lot has changed since the programs were launched, and replacing and expanding the technology framework would not be easy.

Oklahoma citizens needed an approach that addressed their varied needs, provided seamless service with 24/7 access to information, and is delivered by DHS staff who are empowered to take time to listen and help. The DHS staff needed an approach that is built on access to information and processes that place customer service at the heart of it all.

For the OK Benefits project, OMES partnered with the Oklahoma Department of Human Services and its three divisions currently participating in the OK Benefits Project – Adult and Family Services, Child Support Services and Child Welfare Services.

¹ 2018 NASCIO SIT Awards. Accessed April 26, 2019. <https://www.nascio.org/Awards/SIT/2018>.

Technology infrastructure

The solution chosen for OK Benefits meets the state’s vision for sharing information and processes of the public assistance programs to deliver integrated human services to Oklahoma citizens. A portal is being built on premise at the OMES Data Center. The portal is being installed on a flex server, with back-end architecture that maintains compliance with comprehensive privacy and security standards and certifications.

The on-premise solution uses container-based development to ensure portability should a cloud-based solution make more economic sense in the future. The flex server will help measure traffic flow to the portal. This allows for a more informed decision when the portal needs to be moved to a cloud solution. The OK Benefits project team will keep the portal on-premise for a 12-month trial period and review financial and site statistics every six months.

“The Oklahoma Department of Human Services is updating our state’s human services programs to an online 24/7 solution, which is a positive step toward modernizing these services. The architecture and security put in place will help to protect our most important asset, citizens’ data.”

— Bo Reese, State of Oklahoma CIO

Security infrastructure

The security architecture was designed in close collaboration with the OMES Security team to comply with state and federal security standards. The OMES Security team worked with the OKDHS information security administrator from the Office of Inspector General to ensure federal security standards and accessibility compliance, such as FedRAMP, HIPAA compliance, PCI DSS Level 1, ISO 27001/27018, SOC 1/SSAE 16/ISAE 3402, SOC 2, SOC 3 and Section 508, were met. The project worked in tandem with Accenture to create a risk plan, contingency planning report, incident response capability plan, risk assessment and management process.

Next steps

The next phase is to finish building the customer-facing portion of the portal, which will enable citizens to log in to a centralized location to apply for Supplemental Nutrition Assistance Program benefits, apply for child support and for foster parents, view information about children placed in their care. The portal will go live in summer 2019 and that will be followed up with additional deployments every six to nine months. The citizen portal will have identity management and full integration with the State Master Person Index.

Once live, Oklahomans meeting specific criteria will be able to apply for SNAP benefits without providing a Social Security Number, meeting a new federal requirement that the current DHS solution cannot. The citizens will also be able to view their benefits after they have created an account within the portal, which authorizes identity proofing for additional security.

The portal is a small portion of the overall scope of the OK Benefits project. Other functions such as eligibility determination, case worker functions, child welfare systems and child support will follow to complete the integrated social services solution.

Benefits

OK Benefits’ primary focus is Oklahoma citizens in need, transforming the way business is done to emphasize holistic case management rather than data entry. The system update is a tool that will support this change.

Through OK Benefits, Oklahomans will receive the right services at the right time. Customers will have 24/7, real-time access to their case information without having to go to a DHS office. Customers will no longer have to take time off work to wait in lines. They will get service from any office or can self-serve via the new OK Benefits portal.

The state continues to support the online portal for self-service for human service benefit programs such as SNAP, Medicaid and TANF through its website at <http://www.okdhslive.org/> until such time as replacement of legacy benefits management systems allows for total migration of these benefit programs to www.okbenefits.org.