

Motorist Modernization Advisory Board – Phase II Meeting
Tuesday, March 11, 2025
2:30 to 4:00 PM
VIA: Microsoft Teams

Invitees

Stephen Boley
Capt. Jason Britt
Brett Saunders
Stephanie Cabrera
TBD
Scott Lunsford
Sherri Smith
Sgt. Derek Joseph
TBD

Representing

FLHSMV
FLHSMV
FLHSMV
FLHSMV
FLHSMV
Florida Tax Collectors
Florida Tax Collectors
Law Enforcement
Law Enforcement

Agenda

- Roll Call
- Welcome
- Review and Approval of Last Meeting Minutes
- IV&V Update
- MM Phase II Program Update
 - Financial Review
 - Phase II Pilot/Implementation Readiness
- Stakeholder Outreach Update
- Q&A
- Adjourn

Motorist Modernization Advisory Board – Phase II Meeting
Tuesday, February 11, 2025
2:30 to 4:00 PM
VIA: Microsoft Teams

WELCOME AND INTRODUCTIONS

- The meeting was called to order at 2:30 p.m. Kristin Green began the meeting by welcoming members and visitors and proceeded with the roll call of board members.

Advisory Board Phase II members present included:

- Capt. Jason Britt
 - Brett Saunders
 - Dawn Gunter
 - Scott Lunsford
 - Sherri Smith
 - Stephen Boley
 - Stephanie Cabrera
- Additional FLHSMV members included – Catherine Alvarez, Michael Anderson, Elise Batchelor, Stacey Bayyari, Laura Freeman, Kristin Green, Judy Johnson, Patricia Joseph, Pavel Machado, Wendy Mechlin, Judy Moats, Ann Naiman, Aundrea Powell, Rachel Ramos, Jonathan Sanford, and Cheryl Walters.
 - Visitors included – Ed Gendusa and Joseph Weldon from Accenture, Wyatt Zalatoris with Ernst & Young, Carl Ford with J Ford Consulting, and Phil Corkrean with Sunshine State Tag Agency attended. Other visitors included Jonathan Tullis, Carina Moss, Jennifer Daniels, Leslie Alexander, and Roxanne Decker.

NEW MEMBERSHIP UPDATE

- Ms. Green welcomed new Advisory Board member Stephanie Cabrera as the FLHSMV accounting representative.

REVIEW OF MEETING MINUTES

- Rachel Ramos reviewed the meeting minutes from January 14, 2025. No corrections were identified. A motion to approve the minutes was accepted by the board members and the January 14, 2025, meeting minutes were approved.

PHASE II IV&V UPDATE

- Wyatt Zalatoris presented an overview of the IV&V report for Phase II. The overall risk state was red with one open deficiency to report involving human resource management. The project is currently tracking approximately 11.5 days behind schedule. The schedule has been adjusted to be more in line with the capacity of available resources. Ernst & Young will continue to monitor progress for the ability to adhere to the new schedule. The project continued to track on budget. Change Requests continued to follow the established change management process.

FINANCIAL REVIEW

- Judy Moats presented a Phase II financial review. The Phase II budget for the 2024 – 2025 fiscal year is approximately \$13.1 million. Approximately \$6 million was expended as of January 2025 with 0% variance and approximately \$7.1 million in remaining funds.

PHASE II PROJECT UPDATE

- Joseph Weldon presented an overview of the ORION Releases and schedule:
 - Release 1 – Motor Vehicle Issuance Inquiry – October 2023 – Completed
 - MV Customer Inquiry, Customer Summary and linkage to DLI Customer Summary
 - Release 2 – ORION Pilot – April 2024 – In Progress
 - Pilot a subset of ORION transactions and Global Admin functionality to a select group of offices
 - Release 3 – International Fuel Tax Agreement (IFTA) /International Registration Plan (IRP) – June 2024 – Completed
 - Celtic IFTA/IRP COTS Product and associated ORION updates
 - Release 4 – ORION Statewide – April – November 2025
 - All core MVI and Global functionality
 - Release 5 – Motor Vehicle MyDMV Portal – Fall 2025
 - Motor vehicle functionality additions to MyDMV Portal
 - Release 6 – Batch, Back-Office – April 2026
 - Remaining ORION back-office functionality and Phase II batch functionality
- He presented a status update for the Phase II project teams. All teams were focusing on getting Release 2e into Stage so that they can begin User Acceptance Testing (UAT).
 - Risks and issues impacting the teams included:
 - Staffing vacancies – 5 Developers, 11 SEU, 10 LDO vacancies – LDO has job postings for 3 of their open positions.
 - Titles and Registration refinement (business rule review) behind schedule (impacting having available sprint work) – The team is scheduling additional refinement sessions and working overtime.
- **Release 2e – ORION Pilot – Critical Path:**
 - Development – This was trending yellow on the traffic light report. The team has been focused on wrapping up Release 2e development.
 - UAT – This was trending yellow. The team continued to focus on regression testing until Release 2e is deployed.
 - Third Party Cashier Vendors – This was also trending yellow. The team continued to work with Tax Collector offices to test in Stage with their vendors to prepare for statewide rollout.
 - Security Testing
 - Performance Testing
 - Training – Training is yellow and has been impacted due to scope changes and reliance on other teams to complete demos.
 - User Guides

Office of Motorist Modernization

- Mr. Weldon reviewed the Phase II Implementation Transaction Summary below:

Transactions Currently Available in Production			
Title Eligibility Options	Title Transfer – Repossession (RPT)	Duplicate Regular Registration (DRR)	Restore Temporary Transfer (N/A)
Original New Title/Original Used Title (ORT/OUT)	Salvage Transactions	Sunscreen Medical Exemption (SME)	
Print Electronic Title (PET)	Certificate of Destruction (DET)	Plate Issued in Error (PIE)	Renewal Eligibility Options
Surviving Spouse Transfer (SSP)	Duplicate Certificate of Destruction (DDT)	Specialty Plate Voucher (SPV)	Renewal Regular Registration (RRR)
Transfer Title (TRT)	Correction Certificate of Destruction (CCD)	Bulk/Express Renewal (RRR)	Bulk/Express Renewal (RRR)
Mark Title Sold (SDT)	Lien Holder Response (LHR)	HOV (Original) (HOV)	Parking Permit Eligibility Options
Duplicate Title/Duplicate Title w/Lien Activity (DUT/TDL)	Derelect Vehicle Certificate (DVC)	HOV Duplicate (HVD)	Original Parking Permit (OPP)
Modify Title (TMT)	Duplicate Derelect Vehicle Certificate (DDC)	HOV Renewal (HVR)	Subsequent Parking Permit (SPP)
Title Correction (TCT)	Registration Eligibility Options	HOV Replacement (HVP)	Duplicate Parking Permit (DPP)
Title Cancellation (CAT)	Original Regular Registration (ORR)	Registration Replacement (RGR)	Parking Permit Cancellation (XPP)
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Off-Highway Decal (OHD)	Renewal Regular Registration (RRR)	Dealer Issue of Temporary Plate (DIT)	Update Authorization (UPP)
Add Wrecker Operator Lien (AWL)	Replacement License Plate/Decal (RLP/RDE)	Reserve Personalized Plate (PLP)	
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Dealer Eligibility Options	Fast Track		
Original - Dealer Registration (ODR)	Express Return Title Stop (RTS) (GHQ Only)		
Renewal Dealer Registration (RDR)	Mark Title Sold (SDT)		
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Miscellaneous			
Miscellaneous Vehicle Maintenance (MVM)			

Office of Motorist Modernization

Release 2e- Transaction Scope (24 Mar)			
Title Eligibility Options			
Miscellaneous Revenue Title (MRT)			
Registration Eligibility Options			
Miscellaneous Revenue Registration (MRR)			
Dealer Eligibility Options			
Dealer/Transporter Reg Cancellation (SLR)			
Temporary License Plate for Dealer (TTD)			
Miscellaneous			
Miscellaneous Revenue Bad Check (MRB)			
Fast Track			
Scanner Satisfy Vehicle Liens			

- He then presented an overview of the list of Pilot sites below:
 - Group 2 Pilot Sites:
 - Hillsborough – 03/20
 - Manatee – 15/15, 15/16
 - Brevard County – 19/20
 - Group 3 Pilot Sites:
 - December 3 – Escambia 09/15
 - December 10 – St. Johns 20/06
 - January 14 – Pasco 28/20
 - January 14 – Volusia 08/62
 - January 27 – Leon 13/25
 - Group 4 Pilot Sites:
 - February 4 – Sumter (44/07)
 - February 10 – Manatee (15/17)
 - February 13 – Regional Office (68/53)
 - TBD – Palm Beach (06/11, 06/19)
- **Release 4 – ORION Statewide Rollout – Critical Items:**
 - LPA Circuit Upgrades – Communication sent
 - ORION installed with devices and bins mapped appropriately – Instructions prepared
 - Users created in ORION with appropriate roles – Working on Batch program to map FRVIS roles to ORION roles for existing users
 - 3rd Party Cashier Testing complete and MOU updated – Testing with Pilot Group 3 and Group 4 vendors
 - Develop Statewide Roll-out schedule – Working through Convenience Renewal dependencies
 - The team has finalized the point-of-contact list for each county and a communication will be sent next week with the statewide rollout schedule for Tax Collector review.

ORGANIZATIONAL CHANGE MANAGEMENT UPDATE

- Elise Batchelor stated in support of Phase II, the Organizational Change Management (OCM) team will:
 - Hold Change Champion Network Connects (CCNCs) with 174 Change Champions:
 - ORION demos; Phase II schedule updates; Training and Communication updates; Q & A
 - Moving to monthly CCNCs beginning on February 19
 - Facilitate/assist with Knowledge Transfer (KT) meetings and activities:
 - ISA operational support team members completed all assigned instructor-led training
 - ISA operational support team members are working on Jira and Service Now tickets and attending ICFS stand-ups and bug meetings
 - Rescheduled in-person follow-up ICFS KT workshop due to Winter Storm: February 17
 - Assist with Phase II Tax Collector office testing
 - Assist with Phase II Pilot office installs (Pasco, Leon, Sumter)
- Ms. Batchelor overviewed the ICFS Operational Transition Status Report, which is presented at the monthly Executive Steering Committee (ESC) meetings:
 - System Stabilized – *In Progress*
 - KT – *In Progress*
 - Operational Readiness – *Not Started*
 - Transition to Operations Complete – *Not Started*

STAKEHOLDER OUTREACH

- Ms. Green stated a follow-up meeting will be held on March 19 to review the Renewal Eligibility Service specifications. Another follow-up meeting will be held on March 28 with the license plate agencies and their vendors to discuss the Motor Vehicle Bulk interface.

Q&A

- Public member Jennifer Daniels had questions concerning the Clerk of Courts System and Traffic Citation Accounting Transmission System (TCATS).
- Ms. Green stated her questions would be passed along to our Motorist Services division.
- Phil Corkrean with Sunshine State Tag Agency requested a copy of the Renewal Eligibility Service specifications.
- Ms. Green stated the team will send them after the meeting.

ADJOURNMENT

- Ms. Green adjourned the meeting at approximately 2:50 p.m.
- The next Advisory Board Phase II Meeting is scheduled for March 11, 2025.

Office of Motorist Modernization

Note: The below handouts were consolidated in a meeting packet and emailed to members:

MM Advisory Board Phase II Agenda	1 Page
MM Advisory Board Phase II Meeting Minutes (1/14/25)	4 Pages
Phase II IV&V Update	5 Pages
Financial Review	5 Pages
Phase II Project/Implementation Updates	13 Pages

Motorist Modernization Program Phase II (MMP2)

State of Florida Highway Safety and Motor
Vehicles (FLHSMV)






Independent Verification and Validation (IV&V)
Advisory Board Presentation – January MAR

11 March 2025

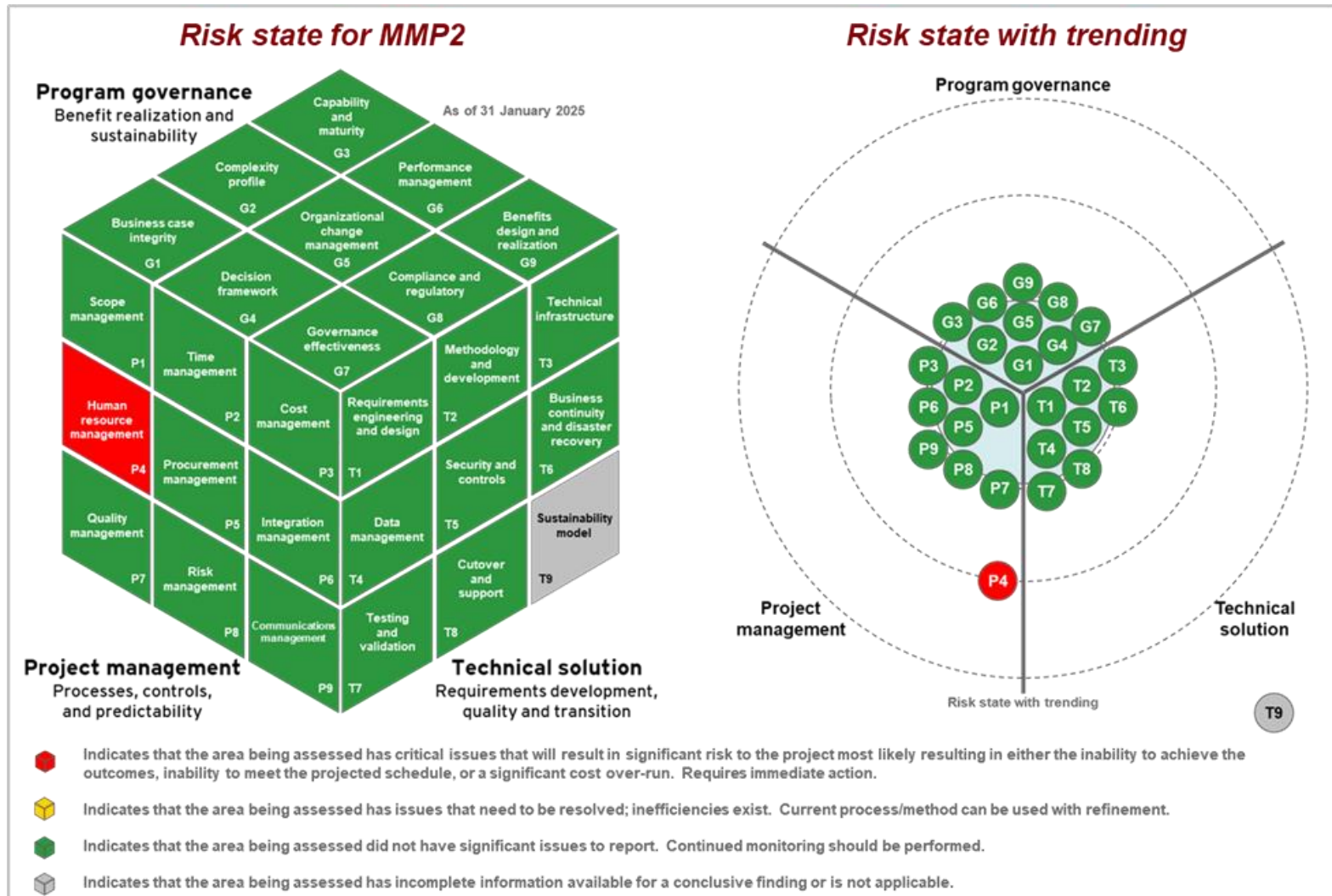
Topics for discussion

- ▶ General IV&V overview
- ▶ Overall risk state and trending

General IV&V overview

	Key Indicator	IV&V Conclusion	Supporting Points
	Is the project approach sound?	Steady →	<ul style="list-style-type: none"> Overall project risk state is red – critical issues IV&V has one open deficiency for the project
	Is the project on time?	Trending late ↘	<ul style="list-style-type: none"> Project is tracking ~11.2 days behind schedule IV&V independently assessed the schedule using industry standard measures
	Is the project on budget?	Yes →	<ul style="list-style-type: none"> Project is tracking on budget IV&V independently assessed budget based on budget and spend data provided
	Is project scope being managed?	Yes →	<ul style="list-style-type: none"> Project scope is managed; Change Requests follow the established change management process IV&V reviews the change management process
	Are risks being managed?	Steady →	<ul style="list-style-type: none"> Schedule has been adjusted to be more in line with the capacity of available resources We will continue to monitor the progress over the next few months for the ability to adhere to the new schedule

Overall risk state and trending



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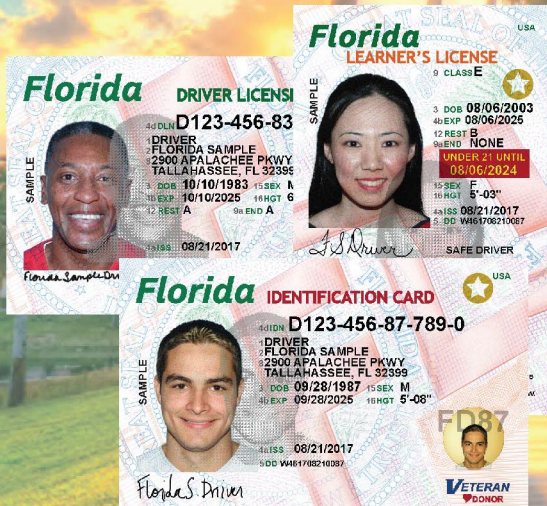
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FLHSMV
FLORIDA HIGHWAY SAFETY AND MOTOR VEHICLES



Financial Update Motorist Modernization Phase II

Phase II Fiscal Year 2024-2025

Budget vs Actual Spending

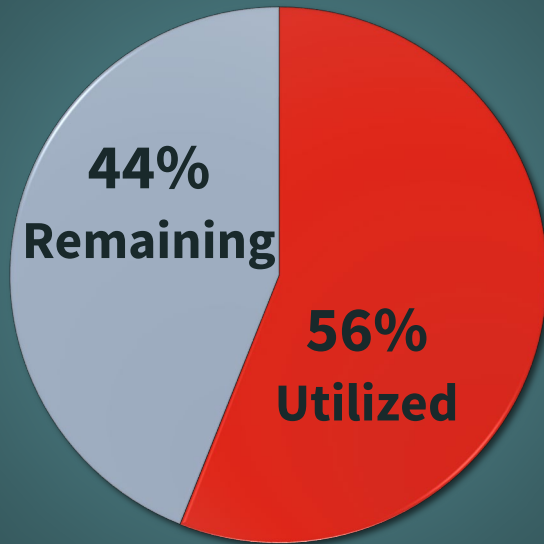
MONTHLY		BUDGET	ACTUAL SPEND	VARIANCE
February 2025 Expenditures		\$1,025,434	\$1,284,697	25%
FISCAL YEAR 2024/2025	TOTAL BUDGET	BUDGET TO DATE	ACTUALS TO DATE	VARIANCE
Fiscal Year to Date	\$13,199,608	\$7,139,853	\$7,349,143	2.93%
Remaining Funds	\$5,850,465			

Utilized vs Remaining Budget

as of

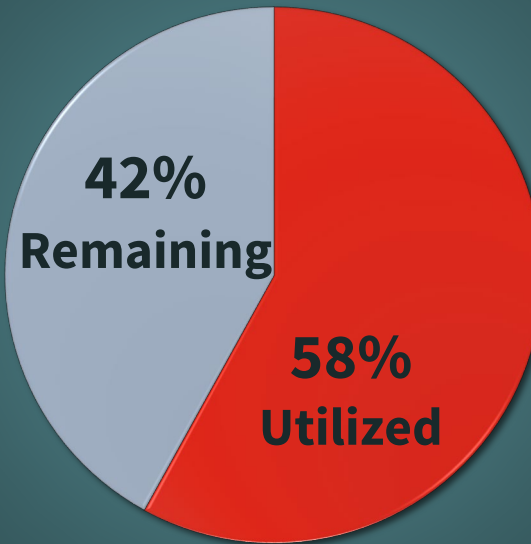
February 28, 2025

Contracted Services



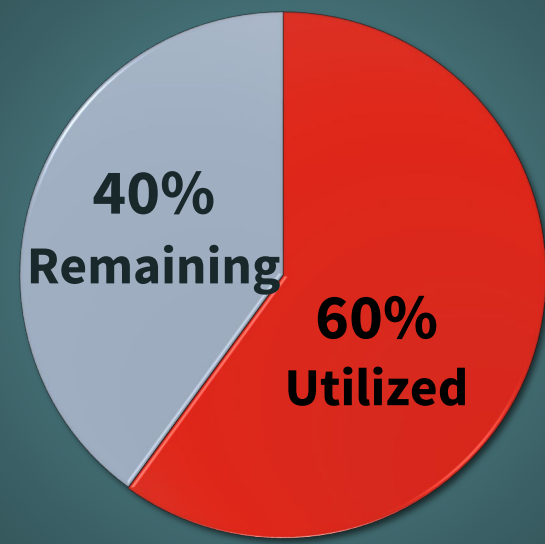
■ Utilized ■ Remaining

IV&V



■ Utilized ■ Remaining

Expense



■ Utilized ■ Remaining

Phase II LBR Requests

Fiscal Year	Total Request	Contractual Services	IV&V Services	Expenses	OCO
2017–2018	\$4,132,180	\$3,575,240	\$357,190	\$179,850	\$19,900
2018–2019	\$5,037,000	\$4,455,960	\$423,240	\$150,000	\$7,800
2019–2020	\$13,742,200	\$9,715,960	\$423,240	\$3,570,000	\$33,000
2020–2021	\$9,877,400	\$7,615,960	\$423,240	\$1,814,200	\$24,000
2021–2022	\$10,496,280	\$9,138,340	\$423,240	\$904,700	\$30,000
2022–2023	\$9,993,740	\$8,488,800	\$423,240	\$1,081,700	\$0
2023–2024	\$9,993,740	\$8,883,765	\$299,975	\$810,000	\$0
2024–2025	\$13,199,608	\$11,860,648	\$299,975	\$1,038,985	\$0
Phase II TOTAL	\$76,472,148	\$63,734,673	\$3,073,340	\$9,549,435	\$114,700

Phase II Fiscal Year 2024-2025 Spend Plan Summary

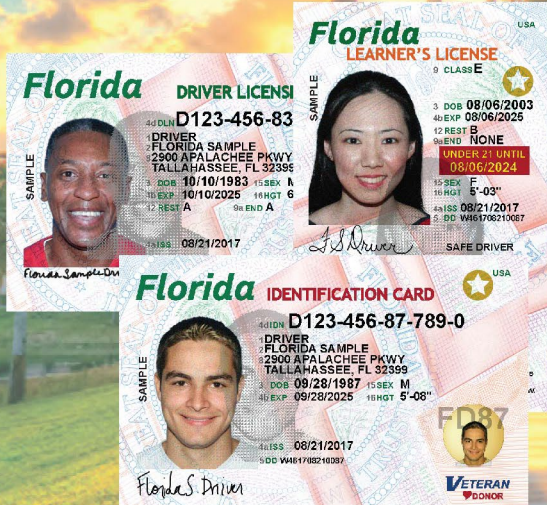
❖ Contractual Services

• Support Services (Accenture HSMV-0333-23)	\$9,450,000
• IFTA/IRP/Audit (i3 Verticals/Celtic Cross Holdings – HSMV-0286-20)	\$847,500
• Enterprise Content Management (Naviant– HSMV-0293-20)	\$522,869
• Credential Service Provider/Mobile Driver License (mDL) (Contract has not been awarded)	\$400,000
• Staff Augmentation	\$615,000
	<u>\$11,835,369</u>

❖ Independent Verification & Validation Services (Ernst & Young HSMV-0528-23) \$299,975

❖ Expense \$1,064,564

❖ Total Budget \$13,199,608



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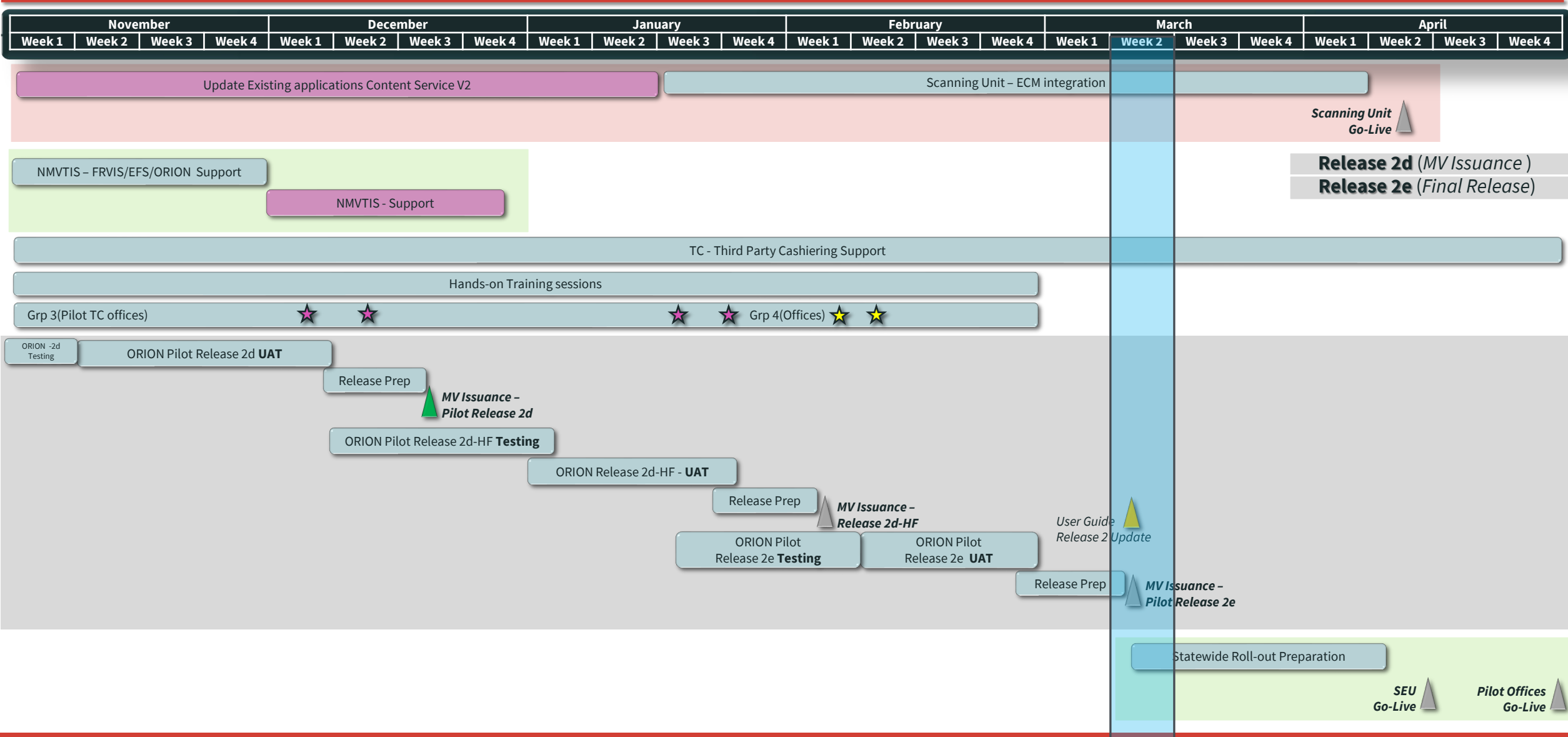
Motorist Modernization Phase II Advisory Board

MARCH 11, 2025

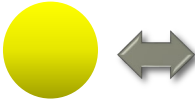
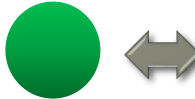
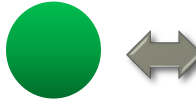
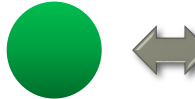
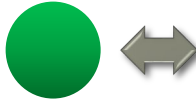
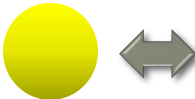
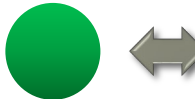

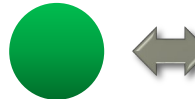

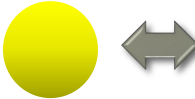
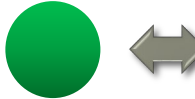

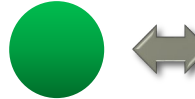
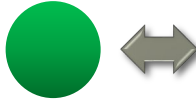
ORION Releases

- **Release 1 – Motor Vehicle Issuance Inquiry – *Oct 2023 - Completed***
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 - Pilot a subset of ORION transactions and Global Admin functionality to a select group of offices
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 - Motor vehicle functionality additions to MyDMV Portal
- **Release 6 - Batch, Back-Office – *Apr 2026***
 - Remaining ORION back-office functionality and Phase II batch functionality

Phase II Implementation – Schedule and Approach – 6 Month View



Overall Status

Team	Updates	Development	Testing	UAT	Training	User Guides
Titles & Registration	Total: 104 functional areas Build Complete: 100 Build In Progress: 2 Build Late: 2					
MV Globals	Total: 63 functional areas Build Complete: 45 Build In Progress: 5 Build Late: 16					
Portal/Fleet	Total: 43 functional areas Build Complete: 25 Build In Progress: 4 Build Late: 11					

Risks & Issues Impacting Teams & Remediation

- *Staffing Vacancies (5 Developer Vacancies, 10 SEU Vacancies, 10 LDO Vacancies) – LDO in process of filling 3 of their open positions, SEU in the process of filling 3 of their open positions*
- *Titles and Registration refinement (business rule review) behind schedule (impacting having available sprint work) – Team holding additional refinement sessions and working OT*

Release 2e – ORION Pilot – Critical Path

- **Development**
- **User Acceptance Testing**
- **Third Party Cashier Vendors**
- **Security Testing**
- **Performance Testing**
- **Training**
- **User Guides**
- **Policy & Procedures**

Phase II Implementation – Schedule – Transaction Summary

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Phase II Implementation – Schedule – Transaction Summary

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Miscellaneous			
Miscellaneous Revenue Bad Check (MRB)			
Fast Track			
Scanner Satisfy Vehicle Liens			

Phase II Implementation – Schedule – Release 2

Group 2 Pilot Sites

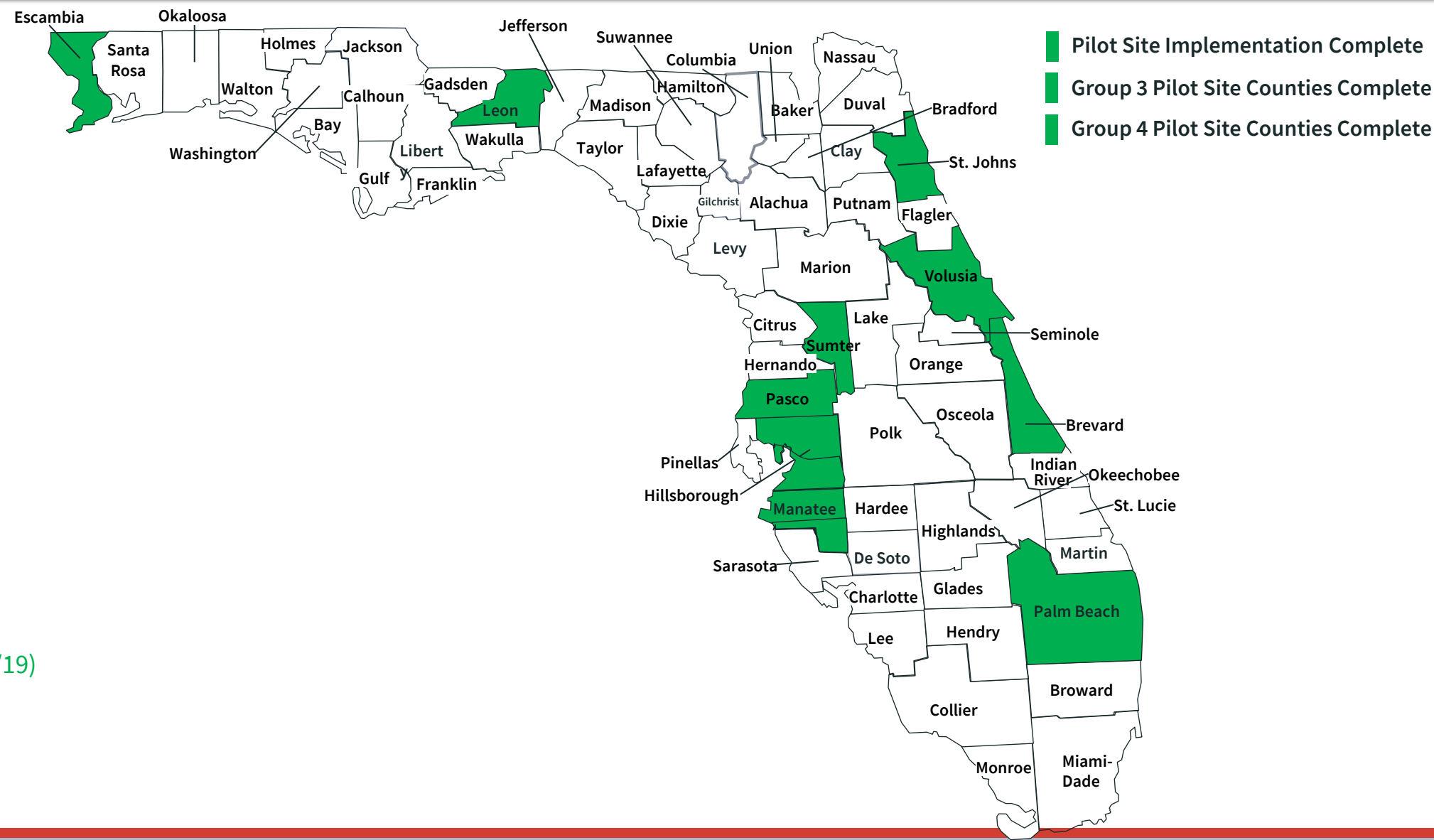
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Manatee - 15/15, 15/16
Brevard County - 19/20

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1/27 – Leon 13/25

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2/10 – Manatee (15/17)
2/13 – Regional Office (68/53)
2/18 – Palm Beach (06/11, 06/19)



Release 4 – ORION Statewide Roll-out – Critical Items

- **LPA Circuit Upgrades**
 - **Communication sent**
- **ORION Installed with Devices and Bins mapped appropriately**
 - **Instructions sent**
- **Users Created in ORION with appropriate roles**
 - **Batch program to map FRVIS roles to ORION roles for existing FRVIS users**
- **3rd Party Cashier Testing Complete and MOU Updated**
 - **Testing with vendors who are part of statewide**
- **Develop Statewide Roll-out schedule**
 - **Completing updates from Tax Collectors feedback**

ORION Phase II – Organizational Change Management (OCM)

In support of Phase II, the OCM team will:

- Hold **Change Champion Network Connects** with 175 Change Champions
 - Held CCNC February 19
 - Topics: Phase II schedule update/scheduling of offices; Preparation for Go-Live; Training update; Q & A
 - Next CCNC March 19
- Facilitate/assist **Knowledge Transfer (KT)** meetings and activities
 - In-person follow-up ICFS KT workshop held February 17
 - ISA operational support team members completed all assigned instructor-led training
 - ISA operational support team members are working Jira and Service Now tickets and attending ICFS stand-ups and bug meetings
 - Technical documentation is complete for current needs
- Assist with Phase II **Tax Collector office testing**
- Assist with Phase II **Pilot office installs** (completed 02/20/25)

ICFS Operational Transition Status Report

System Stabilized – In Progress: 95% (Due end of March/early April)

- Application is functioning as expected with no critical bugs/issues/enhancements reported
- Non-critical bugs/issues have been transitioned to the standard operational process (WRAPs) for further resolution.
- System Acceptance document has been completed and approved by the ESC

Knowledge Transfer (KT) – In Progress: 90% (Due end of March/early April)

- ISA operational support members have been identified and assigned.
- KT workshops and identified training sessions have been completed with sign-off from both the team/section manager and Bureau Chief
- Support roles for ISA operational members are clearly defined (using a RACI model or similar)

Operational Readiness – In Progress: 60% (Due end of March/early April)

- A backlog of all remaining open items (enhancements, missed requirements, defects, etc.) has been transitioned to the Product Owner and ISA operational members
- A support workflow has been established and approved by ISA and the Business Area
- Operational readiness has been confirmed by ISA/Business Bureau Chiefs

Transition to Operations Complete – In Progress: 75% (Due end of March/early April)

- Developer capacity is available to support operations
- No critical items remain unresolved
- Project Closeout report has been completed and signed off by ISA Bureau Chiefs and ESC