



- a. Modification 7 for EIDM Work—CMS issued a change order via Modification 7 for CGI to develop an alternative EIDM solution. The change order assumes that CGI can prioritize current work and funding to accommodate the temporary EIDM work-around, which was not identified as part of existing set of tasks within the statement of work. In accordance with the modification, CGI has the right to submit a change order proposal within 30 days of the modification. At this time, CGI is evaluating the financial impact of the EIDM solution on current funding.

Update: 10/16: Per activity list above, CGI has been engaged in development of the temporary EIDM solution. Concurrently, CGI is evaluating the financial impact.

Meeting: 10/16: CGI and CMS clarified that Modification 7 is a change order within the general scope of work to develop a temporary alternative identity management solution for FFM, which CGI and CMS did not anticipate at the time the revised budget was developed. Diverting technical resources to the alternative EIDM solution will create delays in performing other scheduled work and may have a financial impact unless remaining scope is revised to fit within the current funding. CGI will evaluate impact and provide a response to CMS by November 3 with proposed budget and/or scope recommendations.

Update: 10/17: No change.

Update: 10/18: CGI is reviewing hours and costs incurred to date on the workaround EIDM solution and assessing costs to complete.

Meeting: 10/18: CMS requested that CGI provide a ROM estimate for the EIDM workaround by mid-week, if possible.

Update: 10/21 and 10/22 – CGI is working on the ROM estimate.

Update: 10/23 – CGI has provided ROM estimate based on current status of workaround.

Meeting: 10/23 – Paul Weiss asked about the status of the EIDM workaround. Given improvements in the current EIDM, CMS had provided direction to hold off on further development until needed. At this time, there are approximately three more days of development for two to three developers and five days of testing for a team of testers in addition to the work performed to date.

- b. Increase in Red Hat resources – CGI received direction from CMS technical staff to increase the number of resources supporting Red Hat software. The initial direction was followed up by an email notifying CGI of an impending Technical Direction Letter to support the increase in Red Hat resources. CGI is currently evaluating the financial impact of adding eight more Red Hat resources to the team.

Update: Based on CMS direction, Red Hat has identified resources. CGI is evaluating the financial impact.

Meeting: 10/16: Based on updated information, CGI indicated that Red Hat resources had reported to the FFM team over the weekend. CGI will determine the appropriate number of Red Hat resources in discussion with Red Hat and provide official authorization to the subcontractor, once the financial implications are assessed.

Update: 10/17: CGI is evaluating scope and price for an additional 8 Red Hat Resources and will provide its assessment to CMS as soon as possible.

Meeting: 10/17 - Hung Van discussed the Red Hat requirements. CGI is providing further information as follows: Red Hat will provide engineering support for the SOA-P product to help assist diagnosing technical issues and resolve setup, configuration, scalability and tuning of all Red Hat products used in the FFM ecosystem (Linux, JBoss SOA-P, BRMS, jPBM, EWS, Gluster, and HornetQ). Red Hat will provide consulting support to assist CGI Federal on technical aspects of the software – specifically on the Analysis/identification, debugging, and resolution of issues related to FFM application design with or without respect to use of Red Hat products.

Update: 10/18: In addition to the current contingent of Red Hat resources on the project, Red Hat provided 4 resources on Monday to provide immediate and targeted troubleshooting support for production issues. In order to effectively and efficiently address production issues related to Red Hat products, CGI believes it will need to increase its Red Hat resources beyond the amount contained in the extended base period proposal. Our technical team is assessing number of resources and timeframe over the weekend.

Meeting: 10/18: CMS asked if CGI needed a technical direction letter to bring on additional Red Hat resources since Red Hat was already included in the base period extension. CGI's concern is that increasing Red Hat resources, without other adjustments to planned activities, will have a financial impact, therefore, CGI suggested that it should provide a ROM estimate for the Red Hat resources and possible tradeoffs.

Update: 10/21 and 10/22 –We had received approval for certain Red Hat staff from Carolyn Robinson via email; these Red Hat are engineers which are bundled into the premium license price. Based on current FFM status, CGI is continuing to evaluate the need for additional Red Hat consultants, who are billed on a T&M basis.

Meeting: 10/22- Paul clarified that the 10/13 email from Carolyn Robinson was an acknowledgement that Henry Chao provided technical direction for Red Hat staff within the scope and current funding of the task and that a TDL would follow. CGI indicated that it may still need additional Red Hat consultants to support FFM troubleshooting and performance tuning.

Update: 10/23 – CGI is working with Red Hat to get additional information on requested support.

Update: 10/24 – Red Hat is providing three to four Technical Account Managers (TAMs) specific to this project, working both onsite and remotely, for performance tuning and product optimization at no additional charge for up to three weeks.

- c. 24 x 7 development expectations – CGI raised an issue of CMS technical staff expectations for 24 x 7 development timelines, which were not anticipated. CGI will provide additional information regarding this item.

Update: 10/16: Paul Weiss provided an excerpt from the SoW for discussion on 10/16.

Meeting: CMS clarified that it was not expecting 24 x 7 development, but rather 24 x 7 operations and maintenance support such as managing production issues, code issues, application trouble shooting and servers going down. CGI believes the language in the SoW is vague with respect to whether the requirement is

related to monitoring the applications' performance or the overall infrastructure, i.e., Terremark environment. CGI will reach out to its technical team to provide additional information to CMS on this issue.

Update: 10/17: In process

Meeting: 10/17: Paul Weiss requested that CGI provide a description of what CGI is doing to meet the requirements of the SoW related to operations and maintenance support for tomorrow's meeting.

Update: 10/18: CGI is monitoring the FFM system in production while addressing system issues and continued development.

Meeting 10/18: CGI and CMS discussed O&M responsibilities since the system is essentially in both the development and production phase. CGI is providing O&M support for the functionality in production but will provide further clarification.

Update: 10/21 and 10/22: Gathering additional info for CMS.

Meeting: 10/22: Lyandra Emmanuel asked for documentation of the 24 x 7 operations and maintenance support by close of business.

Update: 10/23: Briefing of operational support provided to CMS, which is under review by CMS.

- d. Production Monitoring support – Per the 10/16 discussion, CMS clarified its expectations regarding production monitoring support, which was described as 24 x 7 monitoring and support of the actual production environment. CGI and CMS agreed to review the FFM statement of work as it relates to production environment support.

Update: 10/16: Paul Weiss provided an excerpt from the SoW for discussion on 10/16.

Meeting: 10/16: Hung Van provided clarification to CMS' expectations as noted in the revised issue statement above, which will be used going forward. From CGI's perspective, it appears that there may be an overlap between the XOC's functions and CGI's scope with respect to monitoring as noted in item e above. Typically, operations and maintenance includes application monitoring only. CGI will review the SoW and XOC charter with its technical team.

Update: 10/17: CGI is evaluating the SoW with its technical team and will provide further feedback to CMS.

Meeting: 10/17: Paul Weiss requested that CGI provide a description of what CGI is doing to meet the requirements of the SoW related to production monitoring for tomorrow's meeting.

Update: 10/18: CGI uses automated monitoring tools including JON and Tivoli to monitor the production environment. We monitor various indicators to measure system stability, responsiveness and availability. Email alerts are generated for system unavailable incidents. We have an on call schedule to respond to incidents in during off business hours. CGI does not monitor the supporting infrastructure provided by Terremark.

Meeting: 10/18: CGI provided additional description of its current monitoring process and on-call service functions.

- e. Additional work for Strategi –On 10/16, CGI notified CMS that its subcontractor, Strategi identified additional work that it had been requested to provide by CMS. CGI met with Strategi this morning to determine scope and price before providing any authorization to proceed.

Meeting: 10/17: CMS reiterated the need to obtain either CO or COR approval for new and/or expanded tasks based on CMS technical direction. CGI provided information on Strategi's role on the project.

Update: 10/18: CGI is working with Strategi to refine the scope of work related to issuer onboarding metrics and development of a production data cleanup strategy to determine impact on price and/or planned activities.

Meeting: 10/18: CGI will finalize Strategi scope and review any financial impact in the context of other tasks as identified in the list above.

Update: 10/21 and 10/22: CGI is finalizing the Strategi scope and estimated price with respect to other work activities and requirements.

Update: 10/24 - Strategi's work on Issuer Onboarding & Reporting has been reduced post 10/1; they have been asked to assist in production data clean-up but CGI is reviewing current funding allocated to Strategi prior to authorization.

- f. Use of Mixpanel and New Relic tools to monitor user access:

Meeting: 10/21 – CGI has been directed to implement mixpanel, a monitoring tool for the User Interface.

Update: 10/23 – CMS has a license for mixpanel through 10/31/13, which is being leveraged for the FFM. CGI is obtaining quotes to extend the license. Mixpanel pricing is based on the number of data points tracked per month. For example, the cost to track 2M data points is \$2K/month; however, the exchange will be much higher than that going forward.

Update: 10/25- CGI is also using New Relic to monitor the application and assist in identifying performance improvements. CMS has an existing license which is being leveraged for FFM.

- g. Industry Experts- CGI has been directed by bring on industry experts to assist in performance issues and troubleshooting the solutions. At this time, a minimum of five experts have been identified to provide assistance. High level ROM is provided below.

Meeting: CGI and CMS discussed the financial impact of the industry experts, which is estimate at \$1.2M (ROM). Paul asked whether those resources are replacing current staff, therefore mitigating the impact. In fact, the industry experts are providing solution and architecture reviews around stabilization and performance tuning while CGI is performing issue analysis, bug fixes, and other production related support in addition to code development and deployment. The Red Hat resources are focused on fine-tuning and optimizing the products used in the system.

Meeting: 10/24 – CMS inquired as to cost and status of the industry experts who were characterized as White House Fellows or otherwise covered by government funding elsewhere. CGI clarified that the recommended industry experts are in the private industry, although some may have involved in government fellowship

programs in the past. Therefore, CGI is working through consulting agreements, scope and price with them.

Update: 10/25: CGI has negotiated price reductions with the industry experts but is still working on schedule and timeline, at which time CGI can refine the ROM. The price reductions are worth approximately \$200k.

- h. Repurposing of VMs and environments -CMS provided direction late yesterday regarding VM allocation, which will impact the schedule to establish the various environments (TEST0, IMP0, Test1 and Imp 1A) outlined in the TDL response. In order to accommodate the call center, CGI is repurposing a VM specifically for the call center (instead of sharing) which requires CGI to redeploy three to five staff members to configure the VM appropriately. This will have an impact on CGI's ability to establish the environments identified in the TDL.

**Scope and/or Price Impact**

Issue	Impact on Scope	Impact on Price and ROM estimate
Temporary EIDM solution	Not included in activities planned for the base period	ROM estimate is between \$250k and \$300k based on current status of the workaround.
ROMS for software	Received TDL dated 10/23/13 - Cost for increase in Terracotta and MarkLogic software is not included in current funding	MarkLogic licenses (20) \$2,942,161.61 Terracotta licenses \$2,417,399.98 Total impact - \$5,359,561.59
Red Hat Resources	Increase in level of effort related to need for troubleshooting system	Resources provided over the weekend of 10/4 do not have a material impact. Red Hat is currently providing Technical Account Managers at no additional cost for up to three weeks.
Strategi	Potential increase in level of effort for Strategi based on development of processes for tracking manual issuer testing processes and issuer attestation of Direct Enrollment testing completion. Also assistance with development of production data cleanup.	Reviewing current funding to determine redirection of resources.
Use of Mixpanel	Implement Mixpanel , a monitoring tool for the UI to help collect metrics on user events within the application.	Leveraging a license that CMS already has on hand through 10/31. CGI will provide further information for extended license if needed.
Additional technical experts	Per direction from the administration, CGI will engage additional industry experts with experience in large scale, complex systems using multiple tools.	Current ROM estimate is approximately \$1M to \$1.2M.
Direction on VM allocation and environments	Allocation and reconfiguration of the VM specifically for the call center will impact CGI's schedule to establish the environments identified in the TDL since it requires redeploying	N/A

Issue	Impact on Scope	Impact on Price and ROM estimate
	resources. The schedule will need to be evaluated	

Paul Weiss expressed concern that the list of items with financial impacts has grown without any corresponding tradeoffs identified. We discussed the fact that CGI and CMS would need to evaluate tradeoffs collaboratively once the financial impacts were determined, given the project dynamics and high level involvement.

### 3. Financial Notification

The CMS contracting officer asked that CGI provide notification of funds expended earlier than the 75% notification required by the task order. Accordingly, CGI will provide notification of percent of expended funds as well as planned expenditures for the next 60 days so that both parties can plan accordingly. Given the current set of TDLs, CGI is re-evaluating the planned costs for the next 60 days and will provide an update.

#### Funding Notification

	Funded/Expended	Percent of Funds Expended
Current Funding as of Modification 7	\$196,037,115.85.	
Cumulative Amount to be invoiced through 9/20	\$118,130,622.92	60.26%
Estimated cost for next 60 days (including Adobe) *	\$47,000,000	
Estimated Amount to be Expended	\$152,130,622.92	77.86%

\*currently re-assessing estimated costs given increase in resources related to the go-live and associated activities.

4. **Risks** – Given multiple technical directions related to additional staff, expanded infrastructure and other items, there is a potential financial impact on the project. It is imperative to discuss trade-offs in order to stay within budget.

### 5. Walk-ons

CGI discussed the fact that the FFM team is large and includes CGI and subcontractor staff working side by side with CMS staff in the same office and at a fast pace. In order to clarify lines of communication, CGI has reminded its subcontractors that they can take direction that changes their scope, schedule or price only from authorized CGI staff so that CGI can more effectively manage funding and planned activities. CGI and CMS staff will work collaboratively so that CGI can provide appropriate direction.

10/22- There are a number of CMS staff on CGI site who occupy approximately three conference rooms and two offices. Due to the increased size of the FFM project staff, CGI will need to obtain additional space, which may impact CMS seating.

1.2 Action Items Summary

No.	Action Item	Responsible	Date Due
1	CGI and CMS to review SoW for production support as it relates to the production environment	Paul Weiss, Hung Van, CMS Betsy Burton, Monica Winthrop, CGI technical staff	10/18/13
2	Financial impact of EIDM solution	CGI	11/3/13
3	Financial impact of additional Red Hat resources	CGI	ASAP
4	Financial impact of additional Strategi resources	CGI	ASAP

1.3 Completed Action Items

No.	Action Item	Responsible	Date Due
	CGI to check on status of ROMS for Terracotta and MarkLogic	Betsy Burton	10/16
	Akamai modification	CMS	10/18
	Terracotta and MarkLogic licenses authorized through TDL issued 10/23.	CMS	10/24