

**Attachment 2 -
Work Order 19 - Transition Services**

This transition plan will:

- Enable the transition of project functions to the New Contractor with minimal or no anticipated degradation of operational levels or service to the residents of Massachusetts.
- Provide a structure that enables the effective participation of Contractor, the New Contractor, and the Commonwealth in the transition project.
- Describe a specific, finite set of transition activities for each element.
- Detail transition elements in the form of a project plan by which CGI, the New Contractor, and the Commonwealth can tightly manage scope and schedule.
- Establish the guiding principles by which Contractor will execute the transfer of responsibilities to the New Contractor.

This plan provides an overview of Contractor's methodology for effecting the transition to the New Contractor. The attached schedule details the day-to-day transition activities during the Transition Period.

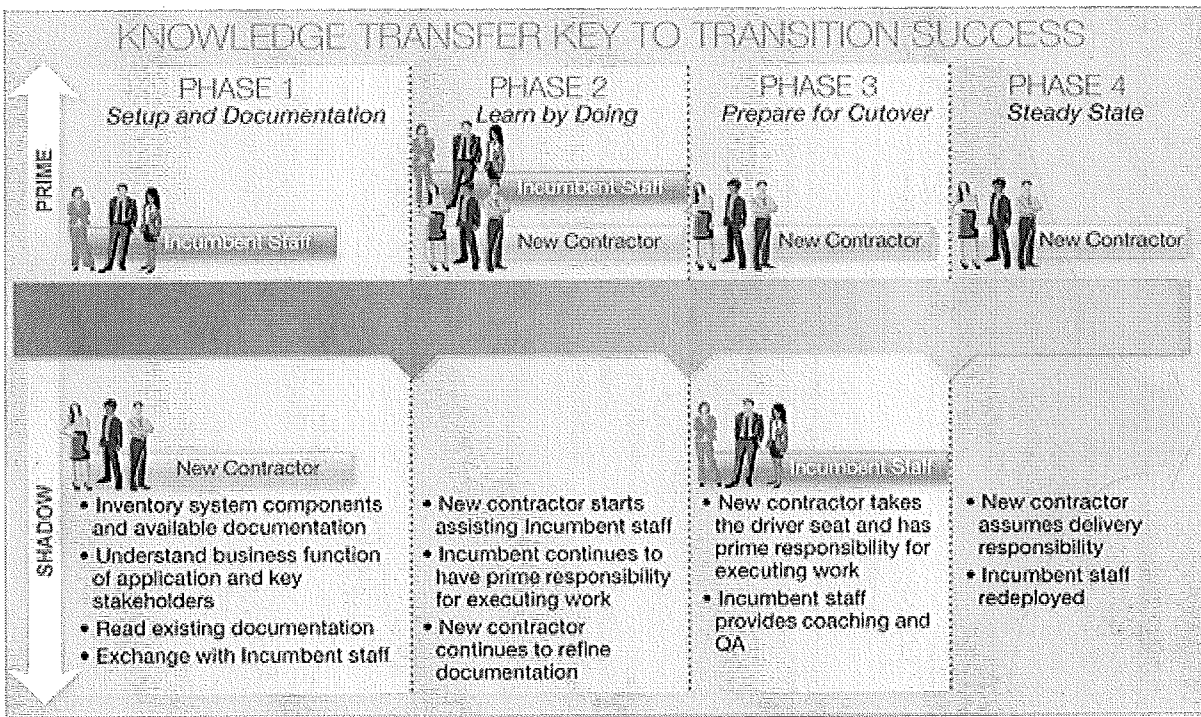
1. Transition Methodology

The following items are key components of the transition methodology:

- Contractor will maintain Jeff Bailey and Sasidhar Nayudu to manage a core team of Contractor resources identified by the Commonwealth along with other necessary Contractor resources during the transition period. This team will work with the Commonwealth and the New Contractor to transition both the operation of MA HIX/IES, and the continuing system development and integration activities related to MA HIX/IES.
- Contractor will help ITD transfer the artifacts and digital assets.
- In accordance with Contractor's contractual data security and data retention requirements and internal data retention policies, Contractor will destroy files containing Contract Data not required for transition.
- Contractor will provide training in the form of KT sessions to educate the New Contractor.
- The transition period will start with a Kick Off meeting to finalize the plan for each of the 12 core functions, attended by Commonwealth, New Contractor and Contractor to align all parties on the transition scope and process. Contractor will also work directly with the New Contractor to coordinate joint transition activities.

Contractor's methodology leverages those utilized during the successful transition of Contractor responsibilities on the Healthcare.gov project. This phased approach to transition is depicted in Figure 1 - Knowledge Transition Process below.

Figure 1 - Knowledge Transition Process



1.1 Phase 1

Phase 1 is the preparatory/planning phase of transition where Contractor inventories and transfers project assets to the Commonwealth. These assets come in multiple forms, which are categorized as either "Artifacts" or "Digital Assets." For Artifacts, the Contractor team will grant access to the Artifacts in the Contractor repositories (as described in more detail in Section 2.1.1 below) by providing credentials and access to the identified Commonwealth team. Due to the volume of Artifacts, the Commonwealth team and Contractor team will be jointly responsible for moving the Artifacts to a Commonwealth repository. The Commonwealth team will also be responsible for acknowledging that the Contractor team has provided access to the Artifacts as set forth in this Section 2.1. Contractor will provide the Commonwealth with access to the Contractor repository for a period of 2 weeks (unless mutually agreed to in writing to extend the period). For Digital Assets, the current repositories will remain in place at Logicworks and Contractor will provide the Commonwealth with access to such repositories as part of Phase 1.

1.2 Phase 2

Phase 2 can proceed in parallel with Phase 1. Phase 2 is the "Learn by Doing" phase in which the New Contractor attends KT sessions and shadows the Contractor team and actively participates in the execution of project tasks. The KT sessions are not to provide exhaustive information, but will provide enough information so that qualified professionals will know how components interact and where to find additional detail if and when needed. During this phase, the New Contractor will also update and refine project documentation as required. Once the period for shadowing the Contractor team for any given element is completed, Contractor will provide a certification as set forth in more detail in Section 4 below.

1.3 Phase 3

In Phase 3, the New Contractor assumes responsibility for task execution. The Contractor team shadows the New Contractor and provides support and guidance in completing project tasks. At the end of Phase 3, Contractor's transition activities are complete.

1.4 Phase 4

In Phase 4, the New Contractor is firmly installed in the new steady state without any shadowing or other support from Contractor.

2. MA HIX/IES Transition Plan

Because the New Contractor has been involved with the MA HIX/IES project for approximately four months, Contractor will use an adaptation of the transition methodology described above to account for activities in which the New Contractor is already engaged. In order to finalize the transition plan, Contractor has completed a set of advance activities in line with the methodology.

2.1 Project Asset Inventory

As part of preparation for transition, Contractor has created an inventory of multiple types of project assets. These assets are categorized in two groups, Artifacts and Digital Assets.

2.1.1 Artifacts

Project documentation is catalogued in both Ensemble and MassForge (document repositories for Contractor and the Commonwealth respectively). Table 1 lists the types of Artifacts that will be transferred during the transition. In total, Contractor will make available approximately 3000 project documents to the Commonwealth for transfer to Commonwealth repositories. It is the Commonwealth's responsibility to provide access to the New Contractor to the transferred documentation. It is also the Commonwealth's responsibility to catalogue and organize the transferred artifacts.

Table 1- Artifacts Types for Transition

Artifact	Access Virtual Systems	Vcloud
Artifact	Action Items	JIRA
Artifact	Change Orders	Ensemble
Artifact	Change Requests	JIRA
Artifact	Continuous Integration (CI) Framework and Associated Reports	SVN and Hudson
Artifact	DataPower Interface List	Ensemble
Artifact	Deliverable documents	Ensemble
Artifact	Deliverable Orientation Documents	Ensemble
Artifact	Deliverable Review Forms	Ensemble
Artifact	Document Templates	Ensemble
Artifact	Environment Map	Ensemble
Artifact	Graphics	Ensemble
Artifact	Impact Assessments	JIRA

Artifact	Incident Reports	JIRA
Artifact	Installation Guide	Ensemble
Artifact	Issues	JIRA
Artifact	Meeting Materials	Ensemble
Artifact	Meeting Minutes and Agendas	Ensemble
Artifact	Procedures Documents	Ensemble
Artifact	Production Promotion Tickets	JIRA
Artifact	Project Plan	Server
Artifact	Release Notes	Ensemble
Artifact	Requirements Traceability Matrix	RQM
Artifact	Risks	JIRA
Artifact	Status Reports	Ensemble
Artifact	Technical Requests	JIRA
Artifact	Test Results and Reports	Ensemble / JIRA
Artifact	Test Scenarios/Cases	Ensemble / JIRA / RQM

2.1.2 Digital Assets

Contractor will provide the Digital Assets (described in Table 2) of the project to the Commonwealth in their respective repositories. As part of transition, the Contractor team will provide access to the Digital Assets as specified in the plan. Contractor will retain control of these Digital Assets (solely from a configuration management perspective) until responsibility for configuration management is transferred to the New Contractor in Phase 3 as set forth in the attached schedule.

Table 2 – Digital Assets for Transition

Digital Asset	AIMS	Oracle
Digital Asset	Business Rules	OPA
Digital Asset	Data conversion programs	SVN
Digital Asset	Data Model and Database	Oracle
Digital Asset	Data Warehouse	Oracle / Cognos / Informatica
Digital Asset	DataPower Interfaces	DataPower
Digital Asset	Environments and deployed code	Logicworks
Digital Asset	Infrastructure Library and SVN	Ensemble and SVN
Digital Asset	Notices	xPressions
Digital Asset	Production data and backups	Oracle
Digital Asset	Reports	Cognos
Digital Asset	Shared Services	Various
Digital Asset	SQL	SVN

2.2 Transition Criticality Index (TCI) Analysis

In order to effectuate the transition, all parties should understand the comprehensive list of the elements performed by Contractor that are to be transitioned to the New Contractor. These elements are grouped into functions (e.g. Software Development, Infrastructure, Deployment, PMO). Items not included in the attached schedule will not be transitioned.

All parties must also understand the relative criticality of each transition element (within the function as well as overall criticality) as determined by the Transition Criticality Index (TCI) analysis. This determines where to concentrate time and effort.

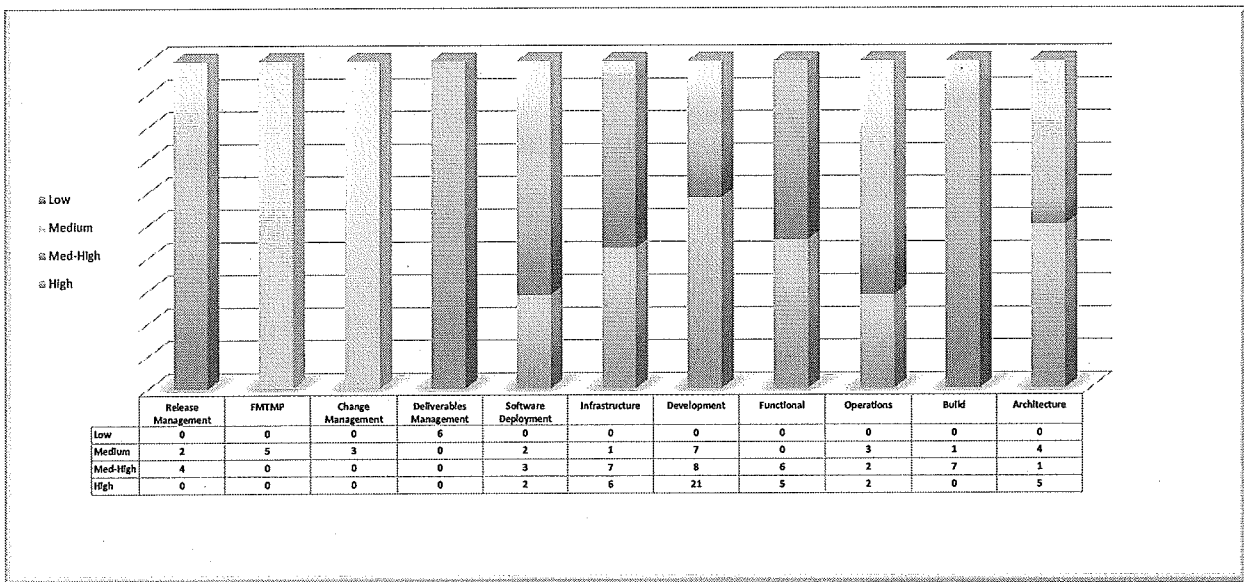
2.2.1 TCI Criteria

Contractor assessed each transition element based on the following weighted criteria:

- Technical Complexity
 - How complex is the element to understand and execute from a technical perspective?
 - Does the element involve new or leading edge technology that requires significant ramp up time for a new resource to learn?
- Multidisciplinary Resource Requirement
 - Is this element currently performed by a single type of resource (i.e., skill set) or does it require resources from multiple disciplines to execute?
- Documentation
 - How accurately does the current documentation support the transition and execution of the element?
- Impact to Operations
 - To what extent could the incorrect transition and execution of this element impact daily system and business operations?
- Maturity and Stability
 - What is the current maturity/stability of the element being transitioned?
 - What level of supplemental activity is required to bolster stability?
- Schedule
 - Are there critical business or system milestones that depend on the early (and/or timely) transition of an element that would cause it to increase in priority?

This model provides data-driven prioritization and grouping of critical transition elements. It enables the transition team to focus resources and effort on critical elements and not be distracted by elements with a lower TCI. Figure 2 shows a report from the MA HIX/IES TCI Analysis completed by Contractor. It shows the number of transition elements, by function, that fall within a specific TCI level (e.g., High, Medium-High, Medium, Low).

Figure 2 – Number of Transition Elements by Function and TCI Level



2.3 Allocation by Transition Phase

Considering that the New Contractor has been involved in the MA HIX/IES project for approximately four months, Contractor also allocated the elements into the appropriate phase of transition. This will fully leverage work that has already been done and significantly decrease the time required to complete transition, since many items are already Phase 3 candidates.

2.4 Detailed Transition Schedule

Contractor remains committed to the continued success of the MA HIX/IES project. The following addresses Contractor's approach to transitioning its responsibilities to the New Contractor as per Amendment 8. Contractor will work with the Commonwealth, the New Contractor, and other stakeholders identified in writing by the Commonwealth to support a smooth, orderly, and cooperative transition.

Contractor's transition will commence on the first day of the Transition Period (defined in Amendment 8 as the execution date for such Amendment 8). The schedule encompasses the Transition Plan with resource planning/resource turnover. The full schedule is included as Appendix A, attached hereto.

2.5 Resource Discipline Requirements for Extended Transition Period

To enable Contractor to have the correct resource disciplines available for the Extended Transition Period, ITD and Contractor shall finalize during the fifth week of the Transition Period the resource disciplines for the FTEs for the Extended Transition O&M Support, Extended Transition PD Support and Extended Case Management Support.

2.6 Roles and Responsibilities

This Section defines the responsibilities of the Commonwealth, New Contractor and Commonwealth during each phase of transition.

2.6.1 Phase 1

Contractor

- Inventory Artifacts and Digital Assets and provide information to the Commonwealth

- Work with the Commonwealth to transfer Artifacts from Ensemble to MassForge
- Provide access to Commonwealth staff to download the Artifacts (requires written approvals by the Commonwealth)
- Provide access to Commonwealth to appropriate Digital Assets (requires written approvals by the Commonwealth)
- Identify staff from the Contractor team that will be shadowed and/or performing KT sessions

Commonwealth

- Approve requests for access to support schedule
- Review all requests for access to ensure required training is in place (for example, HIPAA)
- Work with Contractor to transfer Artifacts from Ensemble to MassForge
- Move Artifacts and/or Digital Assets from Contractor repositories to the Commonwealth repositories (as determined by the Commonwealth)
- Organize and map documents within the Commonwealth repository
- Acknowledge receipt in writing of Artifacts and Digital Assets

New Contractor

- Identify and onboard staff per the transition schedule
- Complete necessary background checks and training per agreements with the Commonwealth
- Update the project artifacts (as required)
- Submit requests to the Commonwealth for access to the appropriate systems (i.e., MassForge and SVN)

2.6.2 Phase 2

Contractor

- Schedule KT sessions and publish time and location in advance of the meetings
- Deliver KT sessions as scheduled
- Provide list of staff to be shadowed for each activity in the schedule
- Monitor and report on completion of tasks per the schedule
- Communicate in writing to the Commonwealth when KT sessions or shadowing activities are not attended by the New Contractor

Commonwealth

- Assist in assuring a smooth transition and provide a single point of contact (POC) with decision making authority on behalf of the Commonwealth as to allow for effective and productive decision making and to reduce bottlenecks
- Collaboratively with New Contractor, identify and communicate priority tasks for releases and defect corrections.

New Contractor

- Identify and schedule skilled staff to attend all scheduled KT meetings
- Make skilled staff available to shadow Contractor staff at the Marina Bay location
- Identify and onboard (minimally) one team lead and one SME for each task identified in the Schedule
- Update the project Artifacts (as required)
- Collaboratively with the Commonwealth, identify and communicate priority tasks for releases and defect corrections.

2.6.3 Phase 3

Contractor

- Provide list of staff to be shadowed for each activity in the schedule
- Monitor and report on completion of tasks per the schedule

Commonwealth

- Assist in assuring a smooth transition and provide a single POC with decision making authority on behalf of the Commonwealth as to allow for effective and productive decision making and to reduce bottlenecks
- Collaboratively with New Contractor, identify and communicate priority tasks for releases and defect corrections.

New Contractor

- Be responsible for and perform the tasks that are in Phase 3 per the schedule
- Communicate schedule of activities to Contractor to enable the Contractor team to effectively shadow
- Collaboratively with the Commonwealth, identify and communicate priority tasks for releases and defect corrections.
- Update project Artifacts and Digital Assets as needed

2.7 Assumptions

Figure 3 below depicts the transition assumptions:

Figure 3 – Transition Assumptions

Assumptions
Contractor will make transition staff available for the tasks and associated duration defined in the transition plan.
The New Contractor will have obtained system accesses and login credentials in time to meet timeline in the attached schedule (i.e., Gantt chart).

Assumptions
The New Contractor project staff will be available to shadow Contractor personnel and attend all scheduled meetings related to the transition
New Contractor will assign at least 1 Lead and 1 SME to each Task as outlined in the attached schedule
The Commonwealth will assist in assuring a smooth transition and provide a single POC with decision making authority on behalf of the Commonwealth as to allow for effective and productive decision making and to reduce bottle necks.
Support for ongoing business features and functions (as requested by the Commonwealth) will be done based on the priorities. Completion of these activities will be subject to availability of resources. Resources will not be diverted from transition activities to complete directive services.
KT will be conducted using documentation in existence as of the execution date of the Transition Agreement and Amendment No. 8.
The transition will be considered complete based on the Contractor team completing the specific activities as specified in the Transition Agreement and Amendment No. 8 and the attached schedule.
Transition activities and KT will be conducted at Contractor Marina Bay Offices.
KT will be conducted by formal and informal meetings as per the attached schedule (i.e., Gantt timeline).
Project Governance and risk management are the responsibility of the Commonwealth during the transition period.
Assigning of contracts and transfer of licenses will be per the terms of Amendment 8.

2.8 Transition Team Organization

Contractor's transition team will be led by [REDACTED] who has been the project manager over the past 18 months.

3. Skill Set Profiles

The Commonwealth will be responsible for ensuring that the New Contractor requires staff skills aligned to the scope of work and technology stack that is being used in current MA HIX/IES project.

3.1 The New Contractor Staffing

The New Contractor will need to provide the people with the requisite skills. Contractor is not responsible for training the New Contractor staff on the use of specific technologies or business functions. Contractor training is limited to how those technologies and domain expertise are applied within MA HIX/IES. Each of the transition elements is listed below in Table 3 – New Contractor Staffing, along with the recommended number of staff to support the transition. The recommended staff need not be dedicated to any particular item, as long as they can attend the KT sessions, and assume responsibility in the timeframes laid out in the transition schedule.

Table 3 – New Contractor Staffing

Element	TCI	Staff
<i>Release Management</i>		
Plan Production Release(s)	0.42	1
Schedule IRs, CRs & PIMs	0.48	1
Manage Release Development	0.69	3
Oversee Release Testing	0.58	1
Schedule Deployment(work with Production Deployment)	0.60	1
Assist Deployment of Application	0.58	1
<i>FMTMP</i>		
FMTMP Nightly Execution	0.40	1
FMTMP production errors analysis	0.46	1
FMTMP QA/IST testing support	0.46	1
FMTMP Impact analysis	0.46	1
FMTMP development	0.46	1
<i>Change Management</i>		
Provide Impact Analyses for Change Requests	0.35	1
Support CCB Meetings	0.25	1
JIRA Updates/ Maintenance/Reporting	0.31	1
<i>Deliverables Management</i>		
QA Deliverables (pre-submission)	0.13	1
Submit Deliverables to CW	0.17	1
Manage Feedback and Resubmissions	0.23	1
Maintain Deliverables Repositories	0.13	1
Support Deliverables Status Meetings	0.13	1
JIRA Administration	0.21	1
<i>Software Deployment</i>		
Execute Production Deployments	0.79	3
Plan Production Deployment Staging Cutover Tests	0.56	3
Develop and issue release notes	0.35	1
Create, manage, and review change control requests in CAB	0.27	1
Monitor Production Environment Post Release / Resolve any Post Release Production Issues	0.75	1
Create daily notice "to review" file for review by operations team	0.63	2
Validate and create final daily "to be printed" notice file	0.58	1
<i>Infrastructure</i>		
Middleware support	0.81	2

Element	TCI	Staff
System administration (LINUX, Windows)	0.65	1
environment delivery - build and delivery of environments	0.63	2
database administration	0.83	1
DataPower support	0.77	1
network operations and management	0.73	1
Lower environment management	0.65	1
production operations O&M	0.90	1
environment monitoring	0.60	1
notices and batch operations	0.75	2
LogicWorks vendor management	0.67	1
Administration, user accounts, VPN, OS, hipchat etc.	0.38	1
Security administration	0.83	3
virtual infrastructure	0.71	2
Development		
Ongoing Development – UDM	0.77	1
Ongoing Development – Shopping	0.73	1
Ongoing Development - PD Redetermination	0.79	1
Ongoing Development & Testing Support - Gated Apps	0.94	1
Ongoing Development – Cognos Reports 100 and Ad-hoc Reports	0.60	4
Ongoing Development – Notices (HIX 100, WP, CRs)	0.90	4
Ongoing Environment Support - Minor&Major&Major2(DEV/IST)/UAT/Training/Stage/DR/Prod	0.75	1
Ongoing Development - HIX and WP Batch processes	0.77	4
Ongoing Data Modeling Activities	0.75	2
Ongoing OPA Rules Integration	0.94	1
Ongoing Notices Integration	0.96	4
Ongoing Performance Improvements	0.85	1
Ongoing Code Quality and Code Coverage Improvements	0.46	1
Prod support – Defect fixes Eligibility (Data integrity, verifications and PD)	0.98	1
Prod support – Gating Logic	0.98	1
Prod support – Defect fixes Notices	0.98	4
Prod support – Defect fixes UI	0.98	1
Prod Support – ADA Fixes	0.56	1
Prod Support - Content Management	0.46	1
Prod support – Shopping	0.77	4
Prod support – CSR Portal	0.44	1
Prod Support - State and Federal Hub (MMIS)	0.90	1
Prod Support - Shared Services (AIMS, AG)	0.83	3
Prod Support – FMTMP	0.56	1
Prod Support - Nightly Data Fixes	0.85	3
Prod Support - SACT Support	0.29	1
Prod Support - Backlog Processing	0.29	1
Prod Support - PIMs/Stabilization	0.90	1
Change Request Impact Analysis, Estimation and implementation	0.65	1

Element	TCI	Staff
Ongoing Development – WPL and Copy Process	0.71	4
Ongoing Development – WP MAGI & Case Management	0.73	4
Ongoing Development - WP Non-MAGI	0.71	4
Ongoing Development - MAGI MA21 Conversion	0.83	4
Ongoing Development - Non-MAGI MA21 Conversion	0.85	4
Prod Support - WPL Temp Copy Process	0.38	1
Prod Support - "AA" Coverage Data Fixes	0.38	1
Functional		
Functional designs for future releases - Report A Change (individual and CSR portals)	0.88	1
Functional designs for future releases - CSR Portal (redeterminations, etc.)	0.71	1
Functional designs for future releases - Batch Jobs	0.71	1
Functional designs for future releases – notices	0.90	1
Support for implementation of other functionality (if requested) - MH Shopping, Small Group, other)	0.71	1
Functional Support of CR Designs (meetings, update requirements, use cases, wireframes, storyboards) - this depends on how many more we will be assigned	0.50	1
Functional Support to Triage and Stability teams by confirming functionality and validating reported issues	0.56	1
Data Integrity Research, Analysis and data correction	0.90	1
Denial Notices Research, Analysis and Notice Release	0.77	1
Regular Notices Research and Analysis and Notice Release	0.81	1
Support for administrative processes: CRs input, RTM, Ensemble	0.50	1
Operations		
Operational checkouts	0.29	1
Nightly scheduled Jobs and Data fixes	0.69	1
Nightly Jobs / Data fixes (Not scheduled / <i>Ad hoc</i>)	0.75	3
Notices: nightly expression jobs to ITD	0.56	1
Incident Mgmt	0.46	1
Change Mgmt	0.48	1
Disaster Recovery	0.96	1
Configuration Management		
Create and implement continuous integration systems	0.56	2
Create and implement Hudson and Sonar logging and reporting systems	0.56	2
Maintain, monitor, manage and support SVN version control system (including user setup and access control)	0.67	1
Build OPA, OSB, BPM, BPEL, Batch jobs, Reports, Portal Web Services and other component applications/services	0.73	2
Deploy or migrate applications/services	0.73	2
Coordinate and implement regular Experian data sets updates	0.50	1
Coordinate, provide support and document timing of events for PROD releases	0.65	1

Element	TCI	Staff
Create/post documentation on B/D tasks and tools, releases, and CM processes and procedure; provide KT as needed or requested	0.40	1
Architecture		
Production Issue Resolution	0.83	1
WPL Temp Copy Process	0.38	1
WPL Requirements	0.38	1
WPL Architecture Design	0.38	1
WPL Issue Resolution	0.38	1
Ongoing Data Modeling Activities	0.94	1
Ongoing OPA Rules Integration	0.96	1
Ongoing Notices Integration	0.85	2
Ongoing Performance Improvements	0.79	1
Performance Issue Resolution	0.60	1
Testing		
Program Determination	0.73	1
Notices	0.73	2
Shopping	0.67	1
End-to-End	0.73	1
Worker Portal Lite	0.69	1
UDM	0.69	2
Worker Portal 2.0	0.77	2
HPE	0.56	1
Automation	0.60	3
Traceability	0.50	2
Defect Management	0.33	1
RQM Administration	0.33	1

4. Transition Completion

The level of knowledge transition and alternate shadowing is based on the Transition Criticality Index and should provide for adequate transition time while minimizing risk.

Transition completion is determined based on execution of the planned transition activities (i.e., when all planned KT sessions have completed, shadowing timeframe has completed, etc.).

In order to properly record the completion of activities, Contractor will prepare three certifications upon completion of each phase of the transition.

For the transfer of Artifacts and Digital Assets from Contractor to the Commonwealth, Contractor will prepare a certification, to be signed by ITD, documenting the steps taken during this phase.

For each KT session delivered by Contractor, Contractor will prepare a report that includes the session name, date and participants. ITD and the New Contractor will sign a form certifying that KT session was provided.

After the New Contractor shadow period, Contractor will prepare and the New Contractor will sign a Shadow form to signify they have shadowed Contractor performing the work. The New Contractor will then assume responsibility for the element while still receiving Contractor help.

Contractor will prepare and ITD and the New Contractor will also sign a close-out form for each element as Contractor completes its shadowing of the New Contractor.

Once all activities have been completed and documented by Contractor, transition will be complete.

**Attachment 3 -
List of Employees**

Functionality	First Initial	Last Name	Role
Config Mng			Team Lead
DW - Reporting			Developer / Architect
DW-Reporting			Team Lead
HPE			Business Analysts, SME
HPE			Team Lead
HPE			Business Analysts, SME
Infrastructure			Developer
Infrastructure			Infrastructure Config
Multi-Project			Developers/Architects
Multi-Project			Business Analyst / SME
Multi-Project			Team Lead
Notices			Developers/Architects
Notices			Developers/Architects
Notices			Team Lead
Notices			Business Analysts, SME
Notices			Business Analysts, SME
Notices			Business Analysts, SME
O & M			Developer / Architect
O & M			Developer / Architect
O&M			Developers/Architects
O&M			Developers/Architects
PD			Business Analysts, SME
PD			Developers/Architects
PD			Team Lead
PD			Team Lead
RAC			Developer/Architects
RAC			Developer/Architects
RAC			BA/SME
RAC			Team Lead
RAC			Team Lead
Stabilization			Team Lead
Stabilization			Developers/Architects
UDM			Team Lead
UDM			Developer/Architects
UDM			Developer/Architects
Worker Portal			Team Lead
Worker Portal			Developers/Architects
Worker Portal			Team Lead

Worker Portal	[REDACTED]	Business Analysts, SME
Worker Portal	[REDACTED]	Business Analysts, SME