FLHSMV
FLORIDA HIGHWAY SAFETY AND MOTOR VEHICLES

ORION
ONLINE REGISTRATION AND
IDENTITY OPERATING NETWORK

Office of Motorist Modernization

Motorist Modernization Advisory Board – Phase II Meeting
Tuesday, June 10, 2025
2:30 to 4:00 PM
VIA: Microsoft Teams

Invitees	Representing
Stephen Boley	FLHSMV
Capt. Jason Britt	FLHSMV
Brett Saunders	FLHSMV
Stephanie Cabrera	FLHSMV
Heather Cunningham	FLHSMV
Scott Lunsford	Florida Tax Collectors
TBD	Florida Tax Collectors
Sgt. Derek Joseph	Law Enforcement
TBD	Law Enforcement

Agenda

- Roll Call

- Welcome

- Review and Approval of Last Meeting Minutes

- IV&V Update

- MM Phase II Program Update

  o Financial Review

  o Phase II Pilot/Implementation Readiness

- Stakeholder Outreach Update

- Q&A

- Adjourn

Motorist Modernization Advisory Board – Phase II Meeting
Tuesday, May 13, 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:

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

- Additional FLHSMV members included – Catherine Alvarez, Michael Anderson, Elise Batchelor, Jessica Espinoza, Laura Freeman, Kristin Green, Judy Johnson, Patricia Joseph, Wendy Mechlin, Judy Moats, Ann Naiman, Aundrea Powell, Jonathan Sanford, Corrine Taylor, and Catherine Thomas.
- Visitors included – Joseph Weldon and Ed Gendusa from Accenture, Wyatt Zalatoris with Ernst & Young, and Carl Ford with J Ford Consulting attended. Other visitors included DJ Ellerkamp, Jonathan Tullis, Leslie Alexander, Justin Jarvensivu, Roxanne Decker, and Joshua Price.

REVIEW OF MEETING MINUTES

- Review of the previous meeting's minutes was not done verbally during the meeting. A motion to approve the minutes was accepted by the board members and the April 8, 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. Ernst & Young completed their review of the sustainability model facet. After attending various meetings and reviewing associated deliverables, no issues were reported. As of April 25, 2025, the project tracked approximately 14.1 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 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 $9.3 million was expended as of April

2025 and approximately $3.8 million in remaining funds. There was a 4% variance with the monthly budget vs. actual spend. This was due to additional hours worked by staff-aug contractors and an annual invoice arriving sooner than expected.

PHASE II PROJECT UPDATE

- Joseph Weldon presented an overview of the ORION Releases and schedule:
  - <u>Release 1 – Motor Vehicle Issuance Inquiry</u> – *October 2023 – Completed*
    - MV Customer Inquiry, Customer Summary and linkage to DLI Customer Summary
  - <u>Release 2 – ORION Pilot</u> – *April 2024 – Completed*
    - Pilot a subset of ORION transactions and Global Admin functionality to a select group of offices
  - <u>Release 3 – International Fuel Tax Agreement (IFTA) /International Registration Plan (IRP)</u> – *June 2024 – Completed*
    - Celtic IFTA/IRP COTS Product and associated ORION updates
  - <u>Release 4 – ORION Statewide</u> – *April 2025 – January 2026 – In progress*
    - All core MVI and Global functionality
  - <u>Release 5 – Motor Vehicle MyDMV Portal</u> – *Fall 2025*
    - Motor vehicle functionality additions to MyDMV Portal
  - <u>Release 6 – Batch, Back-Office</u> – *April 2026 – Deferred*
    - Remaining ORION back-office functionality and Phase II batch functionality
- He presented a status update for the Phase II project teams. All teams were trending late on completing Milestone U. The Titles and Registrations (T&R) team was focused on completing change requests and production support. The MV Globals team was working on Release 5 (Portal release). The Portal/Fleet team was focused on closing out remaining stories and the MV Renewal API and Bulk API.
  - Risks and issues impacting the teams included:
    - Staffing vacancies – 5 Developers, 8 SEU, 10 LDO vacancies – LDO is in the process of filling two of their open positions. SEU is also in the process of filling five of their open positions. OMM is in the process of interviewing for three vacant developer positions.
- **Release 4 – ORION Statewide Rollout – Critical Items:**
  - ORION installed with devices and bins mapped appropriately
    - Instructions sent; will validate readiness as part of Readiness Checks
    - Running bin migration as part of readiness
  - Users Created in ORION with appropriate roles
    - Batch program to map FRVIS roles to ORION roles for existing FRVIS users running daily
  - 3rd Party Cashier Testing Complete and MOU Updated
    - Testing with vendors who are part of statewide
  - Finalize Statewide Rollout Schedule
    - Working through schedule changes based upon delay due to intermittent printing issues
  - Training
    - Launched additional Release 2e training modules on May 6
  - User Guides
    - User Guides posted to PartnerNet

- o Policy and Procedures (P&P)
  - Policy & Procedure Group focusing on legislative updates to P&P
- o MV Renewal API – included in Release 5 – Portal Release (September 2025)
  - 1st Monthly meeting held April 25
  - Testing began May 1
- o Bulk API – included in Release 5 – Portal Release (September 2025)
  - 1st Monthly meeting held for April 25
  - On schedule to begin testing July 1
- Ed Gendusa presented an overview of the statewide roll-out schedule and office migration activities below:

Migration Activities			
When	**What**	**Details**	**Who**
Beginning of Statewide Rollout period* *Can be rerun if new roles are added	Migration of **User Roles**	The batch job will get all FRVIS users that have logged in during the past 30 days. If the user exists in ORION, the ORION user will be updated with identified roles. New users AFTER the migration job is run will follow normal request process.	OMM Team Motorist Services TC Office Representative(s)
Beginning of Statewide Rollout period After End of Day prior to Migration Date	Migration of Inventory to ORION Bins **Sync Process** per office ongoing	Initial run is to support the assignment of bins to workstation by TC office. Final run is to update any differences and verify bins have the proper inventory.	OMM Team Motorist Services TC Office Representative(s)
After End of Day prior to Migration Date	**Disable FRVIS** Transactional activity	Verify FRVIS access is limited	OMM Team FRVIS Team TC Office Representative(s)
Migration Day** ** MVI Enablement is planned to be done on the night prior after FRVIS	**Enable MVI** for each office	Move the Office(s) into the Production Office Group and Remove MV Inquiry Flag TC Users verify functionality 1. User Access 2. Verify Inventory 3. Key Transactions 4. Title Printer	OMM Team Business Apps Team TC Office Representative(s)
Ongoing by all teams	Migration **Support** 7:30am – 6:00pm on Migration days	Provide support procedures and assistance 1. Migration Team (Assist in verification/Assistance routing) 2. Office Mgt. Team (Verify procedures/roles/hardware) 3. Field Support (Functional) 4. ISA – Platforms/TAC (Workstation / Printer Installs and troubleshooting) 5. MS (Users/Inventory) 6. OMM Team (Investigation support)	OMM Team Motorist Services ISA Teams TC Office Representative(s)

- Mr. Weldon then presented an overview of the GoValidate timeline for Florida Smart Wallet.

ORGANIZATIONAL CHANGE MANAGEMENT UPDATE
- Elise Batchelor stated in support of Phase II, the Organizational Change Management (OCM) team will:
  - o Hold Change Champion Network Connects (CCNCs) monthly with 186 Change Champions:
    - Held CCNC on April 23
      - Topics included: Policy & Procedures; Training; Go-Live support; Checklist; Q&A
    - Next CCNC is scheduled for May 21
      - Configuration of ORION printers will be covered
  - o Facilitate/assist with Knowledge Transfer (KT) meetings and activities:
    - ICFS KT complete

- MVI KT strategic plan/matrix in progress
  - ○ Assist with statewide Go-Live preparations
    - Readiness checklists
    - Go-Live checkpoints/readiness calls
  - ○ Assist with Phase II Tax Collector office testing
  - ○ Florida Smart Wallet/ID

Q&A

- There were no questions or concerns from members present.

ADJOURNMENT

- Ms. Green adjourned the meeting at approximately 2:45 p.m.
- The next Advisory Board Phase II Meeting is scheduled for June 10, 2025.

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 (4/8/25)	5 Pages
Phase II IV&V Update	5 Pages
Financial Review	5 Pages
Phase II Project/Implementation Updates	9 Pages
Approved Change Requests #56 – 58	10 Pages

Motorist Modernization Program Phase II (MMP2)

State of Florida Highway Safety and Motor Vehicles (FLHSMV)

Independent Verification and Validation (IV&V)

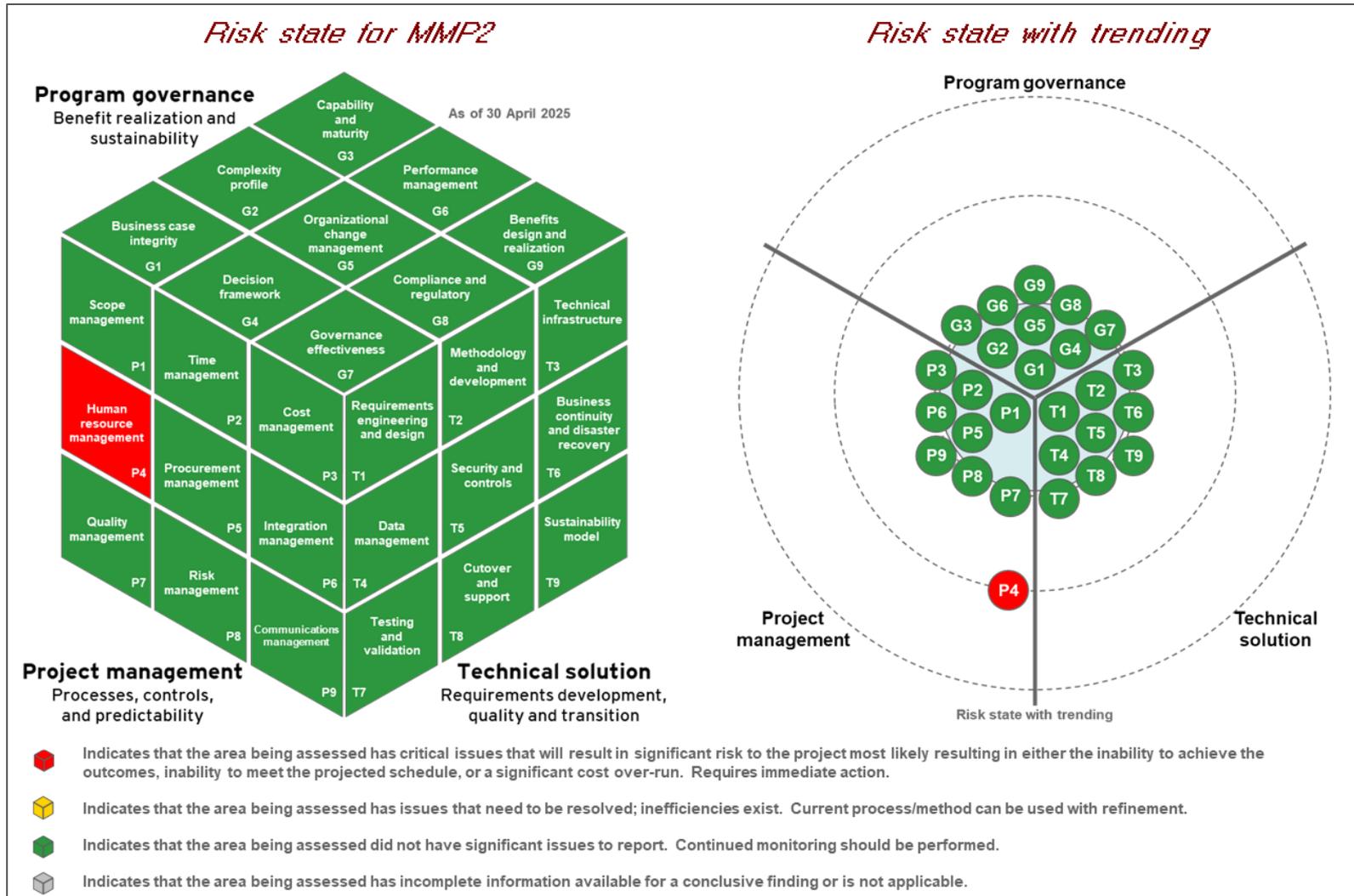Advisory Board Presentation – April MAR

10 June 2025

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Topics for discussion

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

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General IV&V overview

Key Indicator	IV&V Conclusion	Supporting Points
Is the project approach sound?	Steady ➡️	• Overall project risk state is Red (critical issues) • IV&V has one open deficiency for the project • No additional facet(s) evaluated
Is the project on time?	Trending late ➡️	• Project is tracking ~14.1 days behind schedule • IV&V independently assessed the schedule using industry standard measures
Is the project on budget?	Yes ➡️	• Project is tracking on budget • IV&V independently assessed budget based on budget and spend data provided
Is project scope being managed?	Yes ➡️	• Project scope is managed; Change Requests follow the established change management process • IV&V reviews the change management process
Are risks being managed?	Steady ➡️	• 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

(IV&V overview is reflective as of the April 2025 MAR)

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Overall risk state and trending

Indicates that the area being assessed has critical issues that will result in significant risk to the project most likely resulting in either the inability to achieve the outcomes, inability to meet the projected schedule, or a significant cost over-run. Requires immediate action.

Indicates that the area being assessed has issues that need to be resolved; inefficiencies exist. Current process/method can be used with refinement.

Indicates that the area being assessed did not have significant issues to report. Continued monitoring should be performed.

Indicates that the area being assessed has incomplete information available for a conclusive finding or is not applicable.

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Financial Update Motorist Modernization Phase II

Phase II Fiscal Year 2024-2025 Budget vs Actual Spending

MONTHLY		BUDGET	ACTUAL SPEND	VARIANCE
May 2025 Expenditures		$949,405	$938,969	-1.10%
FISCAL YEAR 2024/2025	**TOTAL BUDGET**	**BUDGET TO DATE**	**ACTUALS TO DATE**	**VARIANCE**
Fiscal Year to Date	$13,199,608	$10,163,585	$10,242,793	0%
Remaining Funds	$2,956,815			

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Utilized vs Remaining Budget
as of
May 31, 2025
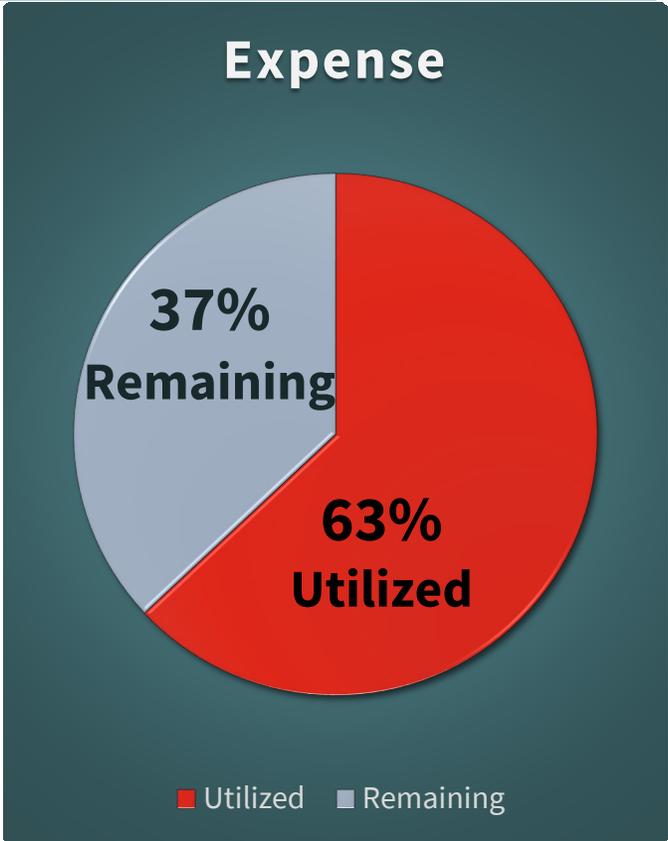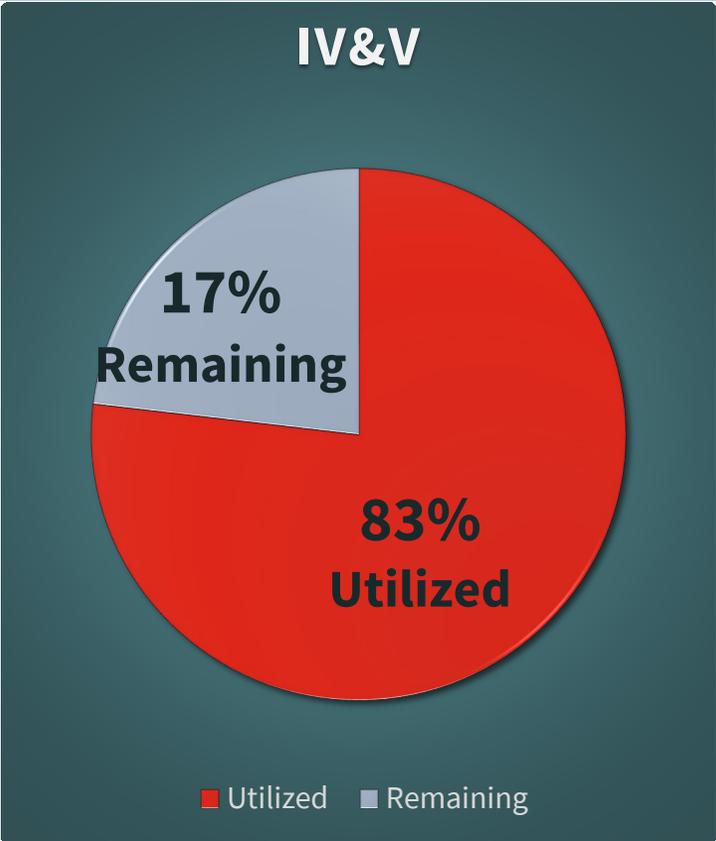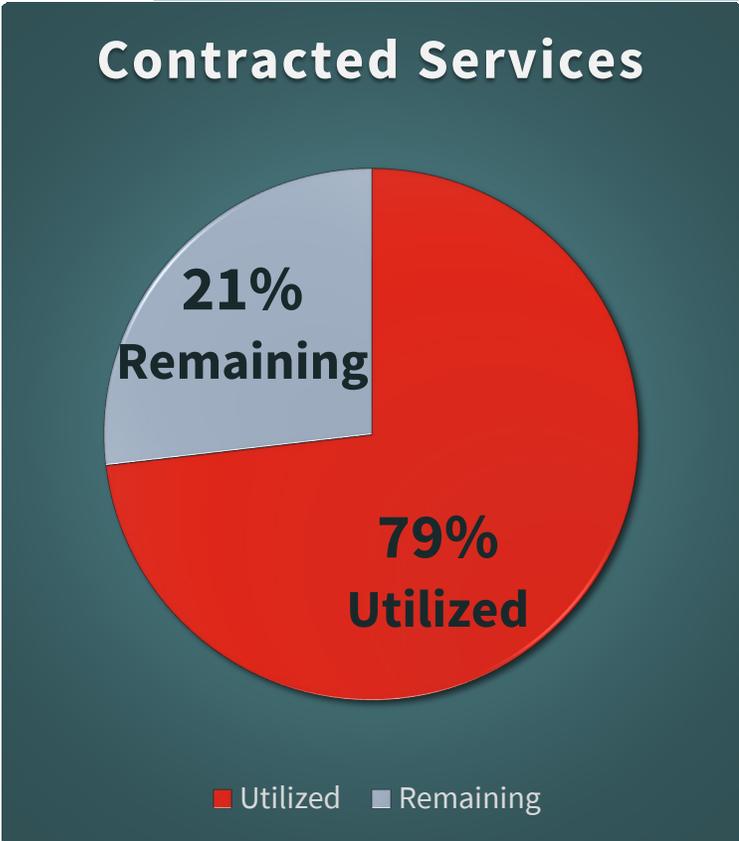
Phase II LBR Requests

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)	
(Carahsoft/GoValidate HSMV-0355-25)	$400,000
• Staff Augmentation	$615,000
	$11,835,369

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

❖ **Expense** **$1,064,564**

❖ **Total Budget** **$13,199,608**
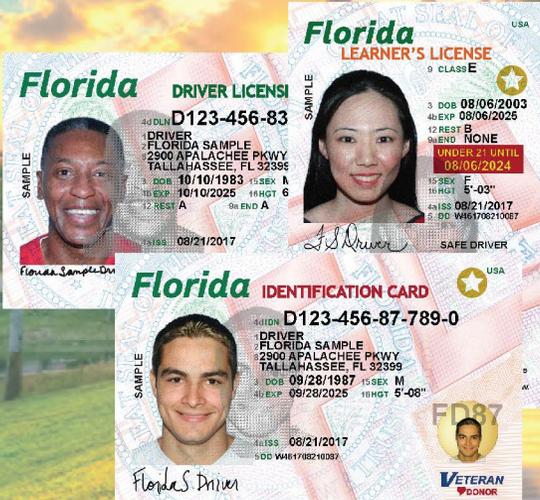
Motorist Modernization Phase II
Advisory Board

JUNE 10, 2025

ORION Releases

- **Release 1 – <u>Motor Vehicle Issuance Inquiry</u> – *Oct 2023 - Completed***
  - **MV Customer Inquiry, Customer Summary and linkage to DLI Customer Summary**
- **Release 2 - <u>ORION Pilot</u> – *Apr 2024 – Completed***
  - **Pilot a subset of ORION transactions and Global Admin functionality to a select group of offices**
- **Release 3 – <u>International Fuel Tax Agreement (IFTA) /International Registration Plan (IRP)</u> – *June 2024 - Completed***
  - **Celtic IFTA/IRP COTS Product and associated ORION updates**
- **Release 4 - <u>ORION Statewide</u> – *Apr 2025 – Jan 2026 - Paused***
  - **All core MVI and Global functionality**
- **Release 5 – <u>Motor Vehicle MyDMV Portal</u> – *Fall 2025***
  - **Motor vehicle functionality additions to MyDMV Portal**
- **Release 6 - <u>Batch, Back-Office</u> – *Apr 2026 - Deferred***
  - **Remaining ORION back-office functionality and Phase II batch functionality**

ORION Statewide Roll-out Update

- Roll-out paused while team investigates cause of key information missing from documents

- Several resolution efforts are in progress

  - Deploy updated printer firmware (in progress)

  - Update PDF library used by ORION (in testing)

  - Update ORION to have PDF documents print as images (in development, scaling issues)

- Scheduling

  - On 6/3, the team disabled FRVIS and migrated the Brevard Pilot office to ORION MVI

  - All other offices with migration dates prior to July 15 will require rescheduling

  - The team is evaluating the need to adjust post July 15 migration schedule for non-CR offices

Overall Status

Team	Updates	Development	Testing	UAT	Training	User Guides
Titles & Registration	**Total: 105 functional areas** **Build Complete: 104** **Build In Progress: 1** **Build Late: 1**	🟡 ↔	🟢 ↔	🟢 ↔	🟢 ↔	🟢 ↔
MV Globals	**Total: 61 functional areas** **Build Complete: 47** **Build In Progress: 7** **Build Late: 14**	🟡 ↔	🟢 ↔	🟢 ↔	🟢 ↔	🟢 ↔
Portal/Fleet	**Total: 43 functional areas** **Build Complete: 30** **Build In Progress: 8** **Build Late: 13**	🟡 ↔	🟢 ↔	🟢 ↔	🟢 ↔	🟢 ↔

Risks & Issues Impacting Teams & Remediation

- *Staffing Vacancies (6 Developer Vacancies, 6 SEU Vacancies, 10 LDO Vacancies) – LDO in process of filling 2 of their open positions, SEU in the process of filling 5 of their open positions, OMM in the process of filling 3 vacant developer positions*

Release 4 – ORION Statewide Roll-out – Critical Items

- 🟢 ▪ **ORION Installed with Devices and Bins mapped appropriately**
  - ▪ **Instructions sent; will validate readiness as part of Readiness Checks**
  - ▪ **OCM demoed device set-up as part of Change Champion Network Connect this month**
  - ▪ **Running bin migration as part of readiness**
- 🟢 ▪ **Users Created in ORION with appropriate roles**
  - ▪ **Batch program to map FRVIS roles to ORION roles for existing FRVIS users running daily**
- 🟡 ▪ **3rd Party Cashier Testing Complete and MOU Updated**
  - ▪ **Testing with vendors who are part of statewide**
- 🟡 ▪ **Finalize Statewide Rollout Schedule**
  - ▪ **Working through schedule changes based upon delay due to intermittent printing issues**

Release 4 – ORION Statewide Roll-out – Critical Items (Continued)

- **Training**
  - **Launched additional Release 2e training modules on 6 May**
- **User Guides**
  - **User Guides posted to PartnerNet**
- **Policy and Procedures**
  - **Policy & Procedure Group focusing on legislative updates; will provide support during Statewide rollout**
- **MV Renewal API – included in Release 5 – Portal Release (Sep 2025)**
  - **Monthly meeting held 30 May, next meeting is 17 Jun**
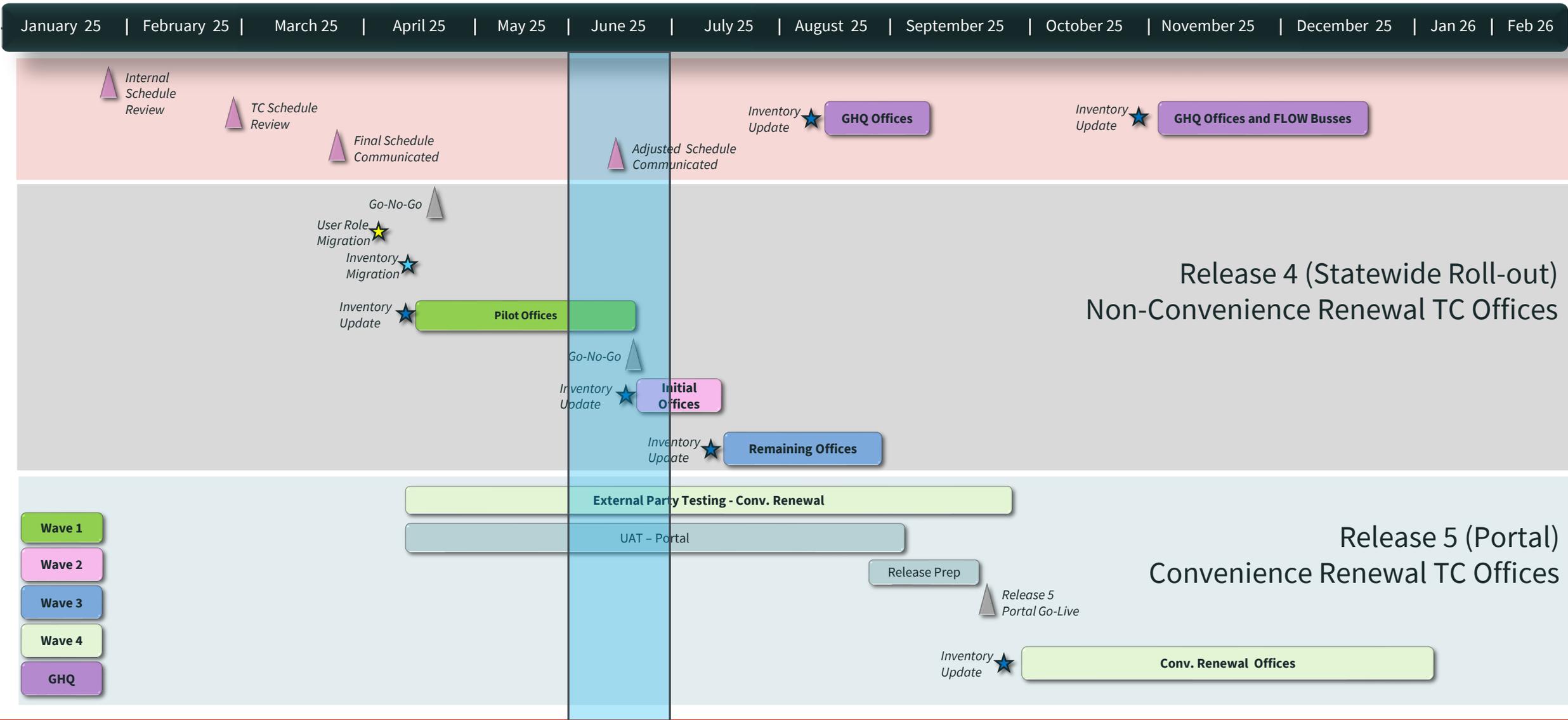 - **Testing began 1 May**
- **Bulk API – included in Release 5 – Portal Release (Sep 2025)**
  - **Monthly meeting held 30 May, next meeting is 17 Jun**
 - **On schedule to begin testing 1 July**

Phase II Implementation – Schedule – Office Migration Key Points

		Migration Activities	
When	**What**	**Details**	**Who**
Beginning of Statewide Rollout period* *Can be rerun if new roles are added	Migration of **User Roles**	The batch job will get all FRVIS users that have logged in during the past 30 days. If the user exists in ORION, the ORION user will be updated with identified roles. New users AFTER the migration job is run will follow normal request process.	OMM Team Motorist Services TC Office Representative(s)
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ORION ONLINE REGISTRATION AND IDENTITY OPERATING NETWORK

Phase II Implementation – Statewide roll-out Overview

Florida Smart Wallet – GoValidate Timeline – 6 Month View
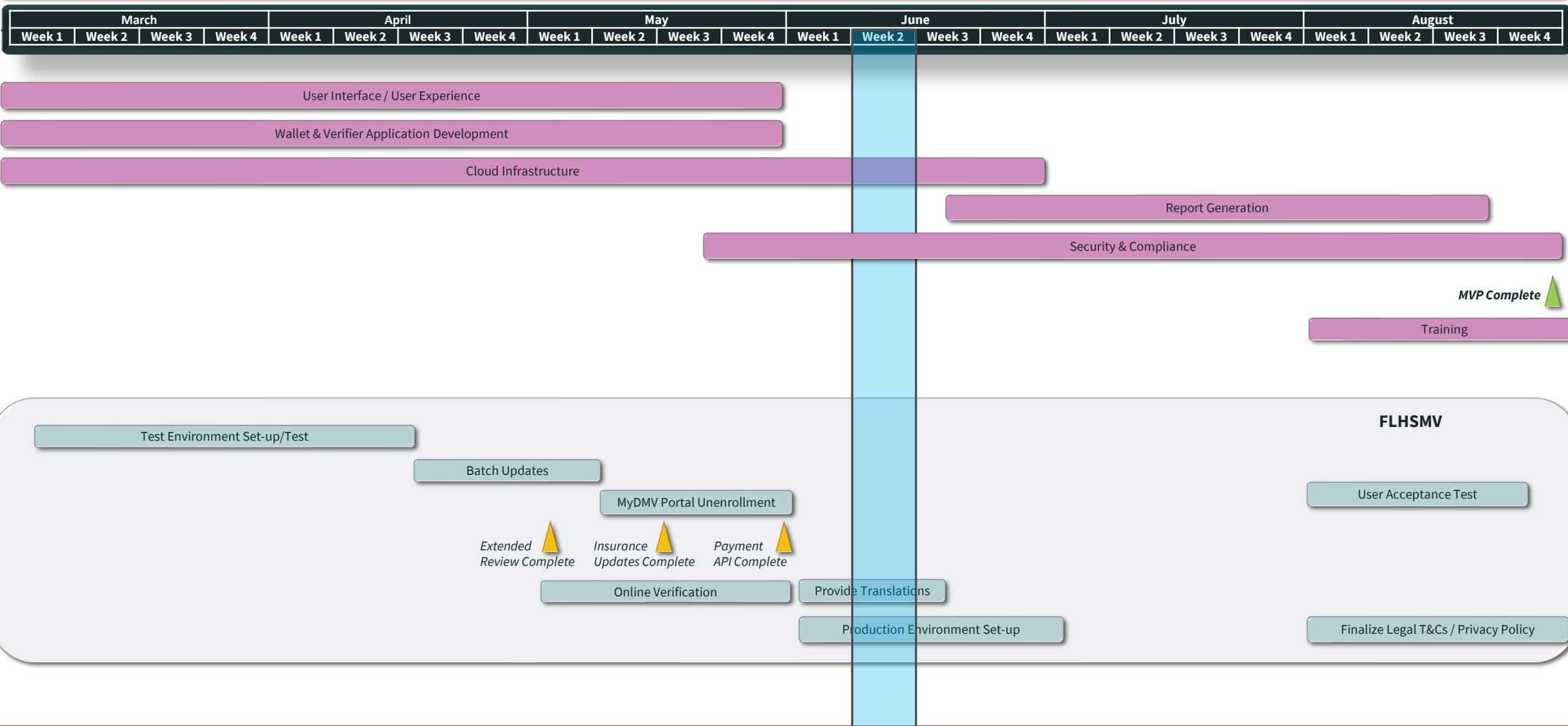
ORION Phase II – Organizational Change Management (OCM)

In support of Phase II, the OCM team will:

- Hold **Change Champion Network Connects** with 184 Change Champions
  - Next CCNC — June 18
    - ORION roles; Policy & Procedure update; Q & A
- Facilitate **Knowledge Transfer** (KT) meetings and activities
  - MVI KT strategic plan/matrix complete
  - Functional KT sessions:
    - T & R — May 22 & May 27
    - NMVTIS — May 28
    - MyDMV Portal KT — June 12
    - Third Party Cashiering KT — June 12
  - Technical KT sessions:
    - In-person KT workshop — June 10 – 11
    - KT for MV Renewal Service API & MVI Bulk API — July 15
- Assist with statewide **Go-Live preparations**
  - Go-Live checklist /readiness calls
- **Florida Smart Wallet/ID**