

Bureau of the Fiscal Service

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Volume 1, Issue 2

# AS FISCAL SERVICE PIVOTs...



## Video Launched on Fiscal Service PPMI Website

The Post Payment Modernization Initiative (PPMI) team worked with the Fiscal Service Graphics Department to create a video to be used on the Fiscal Service website to highlight the mission, vision and guiding principles. The feedback received has been very positive. The video was presented at our most recent virtual summit so participants could validate the ability to see the shared screen and adjust their volume appropriately.

*“The art of life lies in a constant readjustment to our surroundings.” - Kakuzo Okakura*

## PIVOT Epic 7 Work Completed

The development work for Epic 7 took place between September 2, 2020 and December 1, 2020. The system began branding with the Payment Information & View of Transactions (PIVOT) logo.

- 100% of the development for cancellation processing was completed.
- Online user interfaces were completed for upload of scanned return check files, manual cancellations for mutilated checks and upload return check correspondence.
- 90% of the Treasury Offset Program (TOP) Reversal process was completed.
- The Authorization to Operate (ATO) was received with an effective date of December 15, 2020.
- Began conversion of legacy data for migration to populate Production for internal parallel processing.
- An online user interface was created for claims submission after providing proof of concept user screens at the November Benefit Agency Summit for feedback.

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## Terminology

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**Agile:** Is a development methodology based on iterative, incremental and transparent approach.

**EPIC:** Work to be completed based on a set of features. PPMI started using three-month timeframes for each Epic. It is a helpful way to organize and prioritize work.

**Sprint:** An iteration that lasts two weeks. A sprint is a single cycle in the iterative development process used by SCRUM.

**SCRUM:** A framework for team collaborating using an interactive process referred to as sprints.

## Virtual Benefit Agency Summit

The Post Payment Modernization Initiative (PPMI) team hosted a virtual benefit agency summit on November 19, 2020. There were seven federal benefit agencies that participated in the summit and 90 participants who attended this collaborative and interactive event. The benefit agencies represented were the Office of Personnel Management, Veterans Administration, Railroad Retirement Board, Department of Labor, Social Security Administration / Social Security Insurance and Internal Revenue Service.

The summit is one way that PPMI engages with Fiscal Service's agency partners in order to obtain feedback, along with creating open dialogue regarding progress on development. The demonstrations of PIVOT showed the built-in intelligence being used. A simulation of the Check Forgery Claim provided users the ability to provide input on the on-line claims interface.

Agencies asked questions via audio and chat which engaged all participants and provided pivotal feedback to the PPMI team.

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*“A wise man adapts himself to circumstances, as water shapes itself to the vessel that contains it.” - Chinese Proverb*

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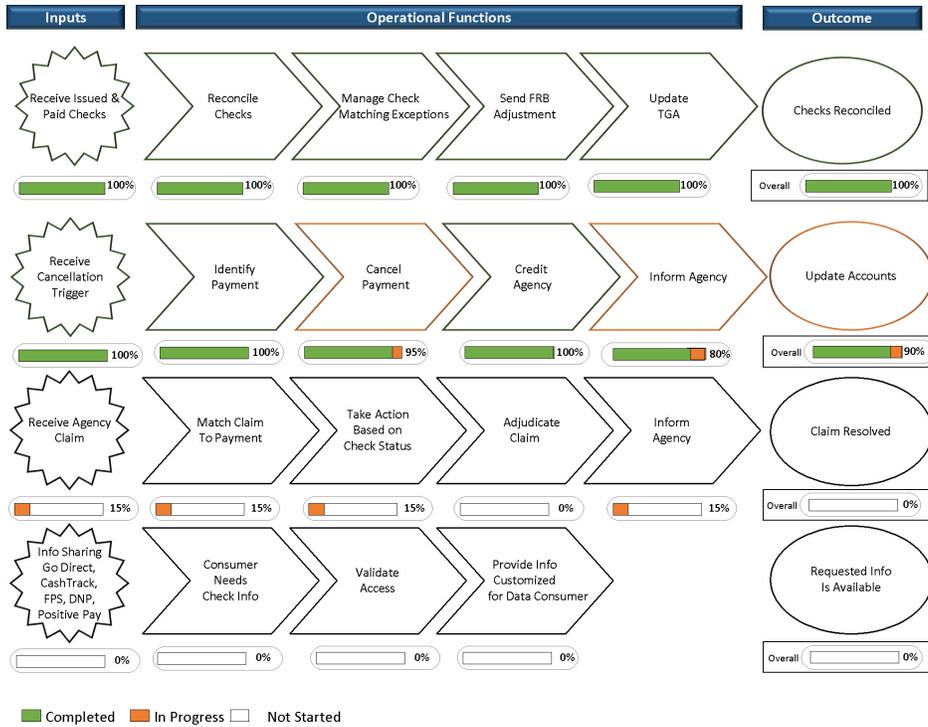
## PIVOT Epic Demos

The PPMI team brought us back on schedule with the Epic demos which was impacted due to migration issues from the move to the Fiscal Agent Production Cloud environment. Our Epic goal, business re-engineering and accomplishments, are shared with the participants at each demo and the functionality is displayed by the PPMI staff.

The Epic 5 demo was held on October 27, 2020, led by Kathy Gave, Investment Project Manager and Diane Poeggel, Financial Systems Analyst. Our demo included showing the updated user interface to view cancellations, which gives the ability for the user to export via PDF or Excel, and the Public Money Symbol (PMS) report for PMS 8011.

The Epic 6 demo was held on November 24, 2020, led by Jimmy Jouthe, IT Analyst and Juanita Stokes, Outreach Analyst. Our demo included showing the new internal mailroom user interface for Fiscal Service initiated cancellations (i.e., return checks) and associating correspondence.

# PIVOT Value Stream Progress (Checks Only)



## Did you know?

Value Streams are the “guardrails” to keep the team focused on the core priorities of what is needed:

**Stream 1** represents the functionality needed for checkbook reporting.

**Stream 2** represents the happy path cancellations that are initiated by Fiscal Service.

**Stream 3** represents the Claims and exception processing.

**Stream 4** is the remaining items necessary for information sharing for internal and external customers.



## Bureau of the Fiscal Service

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### PPMI - PIVOT

Bureau of the Fiscal Service  
Philadelphia Financial Center

Our vision is to transform the work we do now by engaging our customers and re-engineering to a modern, data-driven efficient process along with aligning to changes in the payment industry. PIVOT will be the single system of record for our customers, offering a holistic view of their payment data.

## Upcoming Events

Agency Summit—February 2021

Benefit Agency Summit—May 2021

Summit registration and training opportunities are posted on the [Bureau of the Fiscal Service - Training \(treasury.gov\)](https://www.treasury.gov) website when they become available.

Agencies are welcome to email our Outreach Team at [PPMI@fiscal.treasury.gov](mailto:PPMI@fiscal.treasury.gov) to schedule a one-on-one session.