

# JFS Technology Roadmap

**FY 2019/2020**

## Guiding Objectives

The following is a list of objectives that guide the decisions around technology change that JFS is looking to make. These objectives are longer term than the current fiscal year, and each year they may be modified or updated to reflect the organization's needs.

### #1 Make better use of the technology tools we already have

JFS has invested in a number of applications to help the staff be more effective and efficient in accomplishing their jobs. Some of these applications have much more functionality than we are currently using. We will look for ways to explore using this additional functionality and to train staff when new features are discovered that we want to use.

### #2 Consolidate information and applications

Managing information across multiple databases/applications increases complexity in reporting and managing information. Where it makes sense, JFS wants to use fewer applications where those applications meet the functional and information needs of the organization.

### #3 Use cloud-based tools

JFS has been moving to the cloud for the past five years and all major applications except for file sharing are provided in the cloud. Cloud-based tools eliminate the need to invest in and maintain server infrastructure and can provide enterprise-grade accessibility and security.

### #4 Increase security according to real risks and threats

JFS will continue to evaluate and implement many security best practices. Because these security best practices are generic for all organizations of all sizes, we will also evaluate the threats we actually face and the impact and costs for mitigating those risks. We will then implement and enforce security measures that are appropriate for the size and type of organization JFS is while meeting regulatory compliance requirements such as HIPAA and PCI.

### #5 Provide reliable devices and connectivity to staff where they need to work

JFS staff frequently provide services to clients outside of our offices and need access to technology tools wherever they are. Because our applications are all cloud-based, they can be accessed by almost any internet connected device. We will provide portable devices where necessary and will maintain these devices and replace them according to a standard replacement schedule.

## FY19/20 Technology Projects

| Project Description  | Objectives | Completion | Cost           |
|--|------------|------------|----------------|
| <b>EMR Implementation</b>                                  | 2, 3       | 12/31/19   | \$xxx,xxx      |
| <b>Security Awareness training &amp; testing</b>           | 4          | 9/1/19     | \$x,xxx        |
| <b>Evaluate &amp; possibly replace IT support provider</b> | N/A        | 11/1/19    | Reduce monthly |

|  |         |         |                     |
|--|---------|---------|---------------------|
| <b>Provide laptops &amp; mobile devices to staff who need them</b> | 3, 5    | 12/1/19 | \$xx,xxx            |
| <b>Replace aging desktops with new repurposed desktops</b>         | 5       | 2/28/20 | None                |
| <b>Multifactor authentication for O365</b>                         | 4       | 1/31/20 | None                |
| <b>Build SharePoint for Teams and file storage</b>                 | 1, 2, 3 | 3/31/20 | \$xx,xxx            |
| <b>Implement use of Microsoft Teams</b>                            | 1, 3, 5 | 3/31/20 | None                |
| <b>Payroll app additional modules –</b>                            | 1, 2, 3 | 6/30/20 | Up to \$xxx/mo.     |
| <b>Tamarac phone system replacement</b>                            | 3, 5    | 4/30/20 | \$xx,xxx            |
| <b>Wi-Fi replacement</b>   | 3, 4, 5 | 5/31/20 | \$xx,xxx            |
| <b>Network switch replacements</b>                                 | 5       | 5/31/20 | \$x,xxx             |
| <b>HIPAA Security Policies rewrite</b>                             | 4       | 6/30/20 | Unknown             |
| <b>Evaluate Donor CRM to replace Volunteer app</b>                 | 1, 2    | 6/30/20 | Lessen monthly cost |

### EMR Implementation

Objectives: 2, 3

Timeline: April 2019 - December 2019

Costs: \$xxx,xxx

EMRNew was selected as a new client records system to replace OldEMR1 and OldEMR2. It was selected due to its strength in clinical systems and billing as well as its flexibility to accommodate other JFS programs. The implementation process will span 9 months.

### Security Awareness Training & Testing

Objectives: 4

Timeline: Begin August 2019, on-going

Costs: \$x,xxx for three-year subscription

One of the biggest security threats that JFS faces is from phishing emails. Unfortunately, email security filtering is not foolproof and the only way to protect the organization from these types of emails is to educate all of our staff about how to recognize these types of emails. We will be using a service from KnowBe4 to both educate and test all staff.

### Evaluate & possibly replace IT support provider

Objectives:

Timeline: Complete by 11/1/19

Costs: Possibly lower month support costs

JFS has been using MSPOld for over four years for IT support. Now that we have an IT Manager position, we want to evaluate and company how MSPOld is doing compared to what we might get with another provider. Ideally, we are also looking to reduce our costs while maintaining or getting better service.

### Provide laptops and mobile devices/connectivity to staff

Objectives: 3, 5

Timeline: Complete by 12/1/19

Costs: \$xx,xxx out of capital budget

A number of staff have been identified as needing a laptop either for field work or to enable portability in the office. In addition, some field staff need mobile connectivity to access EMRNew. This also includes purchasing Android tablets for Homemakers to access CareLogic and signature pads for field staff.

### Replace aging desktops with newer, repurposed desktops

Objectives: 5

Timeline: Q1 2020

Costs: None

Many of the users who will be getting new laptops have a desktop computer that is less than three years old. The IT Manager will take those computers and replace the oldest desktop computers, reducing the need for replacements in the next fiscal year.

### Multifactor authentication for Office 365

Objectives: 4

Timeline: 1/31/2020

Costs: None

While JFS has taken steps to educate staff about phishing emails to compromise accounts, we have still have incidents of passwords being given out. Multifactor authentication will prevent account compromises when this happens. This is an included feature with Office 365 and staff can use a mobile app or other methods of authentication. The biggest challenge will be training staff.

### Build SharePoint for teams and file storage

Objectives: 1, 2, 3

Timeline: Q1 2020

Costs: \$xx,xxx for consulting

Microsoft SharePoint and Teams are both tools provided by Office 365 for collaboration and information storage and sharing. Currently, most of our files are stored and shared on our servers in-house. This project would be to build out a type of "intranet" for staff to find information and to store files. All of this is in the Microsoft Cloud and allows for easy sharing and document co-editing in real-time.

### Implement use of Microsoft Teams

Objectives: 1, 3, 5

Timeline: Q1 2020

Costs: Minimal, if any

Microsoft Teams is a collaboration application that allows for chat, audio and video conferencing, and team discussions. Teams is integrated with SharePoint and other Microsoft applications so files can

easily be shared. This project would be to ensure all staff have Teams installed on their computers and have some training on how to use Teams. The build out planning would be part of the SharePoint project.

### Payroll app additional modules

Objectives: 1, 2, 3

Timeline: Q1 – Q2 2020

Costs: Additional monthly costs for each module up to additional \$xxx/mo.

Payroll app offers additional modules that can help JFS streamline process such as timesheets, time-off requests, expense handling and onboarding employees. In addition, staff can fill out forms easily online and check the status of approvals, cutting down on paper and allowing for quicker response times.

### Tamarac phone system replacement

Objectives: 3, 5

Timeline: Install by 4/30/20

Cost: \$xx,xxx one-time or ongoing monthly charges

The phone system at the Tamarac office is about 10 years old and the desk handsets go back at least another 10 years. The system itself has some problems and instability that our vendor has not been able to repair and they have warned us that the system could crash and be difficult to repair.

Initial research was previously conducted and a five year cost analysis indicated that purchasing an in-house Voice Over IP (voip) system would cost significantly less than subscribing to a cloud-based system with monthly per-user fees.

### Wi-Fi replacement

Objectives: 3, 4, 5

Timeline: Install by 5/31/20

Cost: \$xx,xxx

The wi-fi system at JFS is around five years old and does not have a current support contract. It does not support the latest, faster wireless technologies and our coverage is spotty in areas. We would replace the current system for better performance and coverage with a full support contract.

### Network switch replacements

Objectives: 5

Timeline: Install by 5/31/20

Costs: \$x,xxx

Network switches are the backbone for our computers to connect to resources such as the internet, files, and printers. Several aging switches were replaced last year and there are two switches left. This will ensure reliability and support for our infrastructure.

## HIPAA Security Policies rewrite

Objectives: 4

Timeline: Complete by 6/30/20

Costs: Unknown

As part of the last HIPAA Security Risk Analysis, JFS received suggested HIPAA security policies from our HIPAA attorneys. In reviewing the policies, it was determined that JFS cannot implement these as-is as some are not appropriate for our size/purposes. We need to review these with a HIPAA professional to determine what policies and specifics are essential and where we have latitude to adjust.

## Evaluate Donor CRM to replace Volunteer app

Objectives: 1, 2, 3

Timeline: Complete by 6/30/20

Costs: None

Volunteer app is a cloud-based application used to track volunteers and their service at JFS. One of the challenges this present is that we have individuals who are both volunteers and donors (information stored in Donor CRM) have information in two separate databases. This makes it difficult to get the “full picture” of an individual’s involvement with JFS and poses challenges when we do mailings or events.

Donor CRM has a volunteer management module that JFS has included. This project would be to evaluate if it could replace the functionality of Volunteer app, thereby bringing these databases together and reducing monthly costs.