SLIP Enhancements	
Project Plan Updated	09/14/2021
Target Completion Date:	**Nov 30, 2022**
Owner:	JoAnn Delgatto, Jody Black, and Vani Ganti
Support Personnel	- Vani Ganti (IT) - Mitchell Mercurio (IT) - Jody Black (DA) - JoAnn Delgatto (E&C)
Scope:	This project will result in usability and consistency improvements to SLIP by implementing high-value enhancements. This project will include: - Design and implement SLIP improvements identified by DA and E&C, such as updated screen layouts, search functionality, increased instructional text, and overall system responsiveness. - Fix existing Reports and add new reports if needed. - Refreshing and/or create new SLIP training for Brokers, including videos and training materials. - Automate SL-2 form (e.g. auto-fill info., DocuSign functionality, pull down for how search performed, etc.). No material changes to form unless the SL-Forms redesign is approved by CDI. - Create an automated workflow that will send SL-2 with instructions to the retailer (and ping with reminders) until filed. - Provide Members with an annual tax document that they can easily access, edit and submit to the CDI. - Ability to update Broker Contact information in SLIP to keep it up to date. - Broker SLIP AMS Integration Support & Excel Transaction Merge Tool - Improvements to existing XML/AMS APIs.
Vendor (Y/N):	Yes. SLA Technology staff and Kikoda LLC.
Budget:	$200,000
Budget Line Item(s) Where Funding Exists:	6284 – Expense (SW Support & Maintenance)
Benchmark:	The main benchmarks for this project are as follows: - Improve the workflow of the SL2 Form. - SL2 Form Automation - Annual Tax document ready to submit to CDI. Additional benefits will include improving the overall responsiveness of SLIP and providing a better user experience to ease the filing process.
Review Dates:	

Benchmark	Dependency	Status	Start	Finish
	SLA IT/Kikoda			
Comments:				
Benchmark	**Dependency**	**Status**	**Start**	**Finish**

2 0 2 2   S L I P   E n h a n c e m e n t s
O w n e r :   J o A n n   D e l g a t t o ,   J o d y   B l a c k   &   V a n i   G a n t i
U p d a t e d :   1 4 S e p 2 0 2 1   P a g e   1 | 2

		SLA IT/Kikoda			
Comments:					

Benchmark		**Dependency**	**Status**	**Start**	**Finish**
		SLA IT/Kikoda			
Comments:					

Benchmark		**Dependency**	**Status**	**Start**	**Finish**
		SLA IT/Kikoda			
Comments:					

Accounting:	**Date Paid**	**Funds Paid To**	**Amount Paid**
	2/23/2022 – Jan Invoice	Kikoda	$4,075.00
	3/14/2022 – Feb Invoice	Kikoda	$6,532.50
	4/26/2022 – Mar Invoice	Kikoda	$2,205.00
Total Paid on this Project:			$12,812.50

Budget Ledger:

Date	Remaining Budget	Invoiced Amount	Estimate to Complete	Variance	Notes
12/1/2021	$ 200,000.00	$ -	$ -		
2/23/2022	$ 200,000.00	$ 4,075.00	$195,925.00		
3/14/2022	$ 195,925.00	$6,532.50	$189,392.50		
4/26/2022	$ 189,392.50	$2,205.00	$187,187.50		

General Comments:

5/4/2022 – SLIP Entry enhancements are in testing.
5/4/2022 – Broker specific analytics project requirements and scoping is in progress. The work will start soon.