PIVOT Year in Review

This past year was a continued year of change with working remotely due to Covid and continuing outreach virtually. One benefit of virtual meetings is our ability to allow more agency participation as room size or location is no longer an issue.

The team has been working hard behind the scenes on development of check functionality and redesigning the processes to modern technology and platforms.

Some of the most significant changes:

- Validated use of updating agency transcript to pass credits for cancellations to agency using the Central Accounting Reporting System (CARS) to move to a simplified one schedule approach for accounting transactions
- On-line business intelligence for claims and enabled processing through the User Interface enhancing the Payment History view and continuing the holistic view of the payment
- Started establishing disposition values for claims
- Updated on-line queries to incorporate feedback received from agency summits
- Incorporated business logic to adjust public money symbol reporting based on system activity
- Mapped business date to processes and started to automate the end of day processing of activities based on pre-defined business logic
- Continue to stay current with technology and modernization by continuously updating and refining our architecture goals
- Developed and tested a migration conversion of legacy data
- Ran an internal parallel validation test
- Change in Product/Business Owner
Welcome back to the PIVOT IT Corner where we highlight the different areas of IT regarding PIVOT. In this quarter we will interrupt our regularly scheduled program to discuss an important topic — testing.

PIVOT is currently working on a test plan for agency readiness. The goal of the test plan is to ensure that external agencies are prepared and ready for PIVOT. Agencies must be able to receive and process post payment data from the PIVOT application and reconcile check payments they issue through the Payment Automation Manager (PAM).

As noted in our previous IT Corner the primary Post payment data from PIVOT is the Standard Cancellation File (SCF), which gives agencies a listing of any cancellations on check payments for a given day. Agencies will need to use that information to close out or reconcile any check payments that were issued but were then returned in the mail, expired, or have a non-receipt action placed against the payment by Treasury or the agency.

Before any agency can begin testing with PIVOT, they must be able to connect to PIVOT. Connectivity to PIVOT is what the team is calling “Phase 0” and is an important prerequisite for agencies to be able to receive the SCF from PIVOT (as well as any other data files, like the Claim Disposition File), which we will discuss in our next article for PIVOT IT Corner.

“It is better to fail in originality than succeed in imitation.”
—Herman Melville
Agency Outreach Update

The Payment Information & View of Transactions (PIVOT) Agency Summit held on October 14, 2021, was well attended by over 100 participants representing multiple vendor/miscellaneous agencies. The success was apparent through their interactive participation during the event and the immediate emails requesting participation for testing/piloting. Daniel Kwiatkowski introduced himself as the new PIVOT product owner. He explained that the vision of PIVOT has not changed, and the plan continues to be delivering to agencies and stakeholders a functional, reliable, and efficient post payment system replacing legacy systems as they are sunset. Dan walked through the current implementation plan and progress on the value streams.

Kathy Gave, PIVOT Project Manager, provided demonstrations that showcased the built-in business intelligence of the claim’s functionality, updates to the cancellation listing based on user feedback, and viewing the attachment of correspondence to return checks. William Burkett, Business Analyst, discussed the internal validation of operations achievements that validated the re-engineered business modernization and the additional scope of handling online non-receipt claims and agency roles access by Agency Location Code.

The PIVOT IT Team discussed the impacts to agency systems for checks via the standard cancellation file (SCF) and processing of legacy bulk claims, piquing interest from the agencies on how these changes will affect them. Additional feedback from the stakeholders provided a few new considerations for the product owner. Closing out the event, the PIVOT Outreach Analyst, Juanita Stokes, reviewed and affirmed our customer focus commitment and opportunities for engagement. In addition to the summits, one-on-one sessions can be scheduled by emailing the outreach team.

“We are what we repeatedly do. Excellence then, is not an act, but a habit.”

– Aristotle
PIVOT Agency Outreach

During the last quarter we held some one-on-one discussions on, file formats, accounting, Hello World– PHASE 0 testing. with the following agencies at their request:

- CNCS
- DOI
- VA
- HHS
- IRS
- SBA
- RRB
- USDA
- GPO
- SSA/SSI
- HUD

Agencies are welcome to contact our Outreach Team to schedule a session.

“Be the change that you wish to see in the world.” — Mahatma Gandhi
PPMI (PIVOT)
Bureau of the Fiscal Service
National Payment Integrity & Resolution 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.

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