



State of Indiana

Call for IT Projects and Procurements Portal User Reference Guide

Section 6 Create and Manage a CFPP Procurement Profile

**October 10, 2017
Version 1.0**

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Create and Manage a CFPP Procurement Profile

1.1 Process Overview

The Procurement Profile review process is intended to focus on high value, strategic or complex IT procurements. This review will evaluate opportunities to effectively provision the necessary technology resources, using the appropriate procurement method, and leverage enterprise initiatives where appropriate.

Completion of the IT Procurement Profile is the first step in IDOA's review of a request for services or development of an RFP or other procurement instrument. Agencies are encouraged to begin the process of developing the IT Procurement Profile early in the procurement planning process and work with IDOA to refine their plans and procurement documentation.

6.2 Procurement Profile Review Scope

The Procurement Profile review process is required for an IT procurement that has been flagged for advanced review as a result of IOT/IDOA's review of an agency's Project Profile. For each IT procurement that meets this criteria, a state agency is required to complete and submit a Procurement Profile that is tailored to the type and method of procurement.

6.3 Procurement Profile Review Process

The Procurement Profile review process is illustrated in Figure 3.

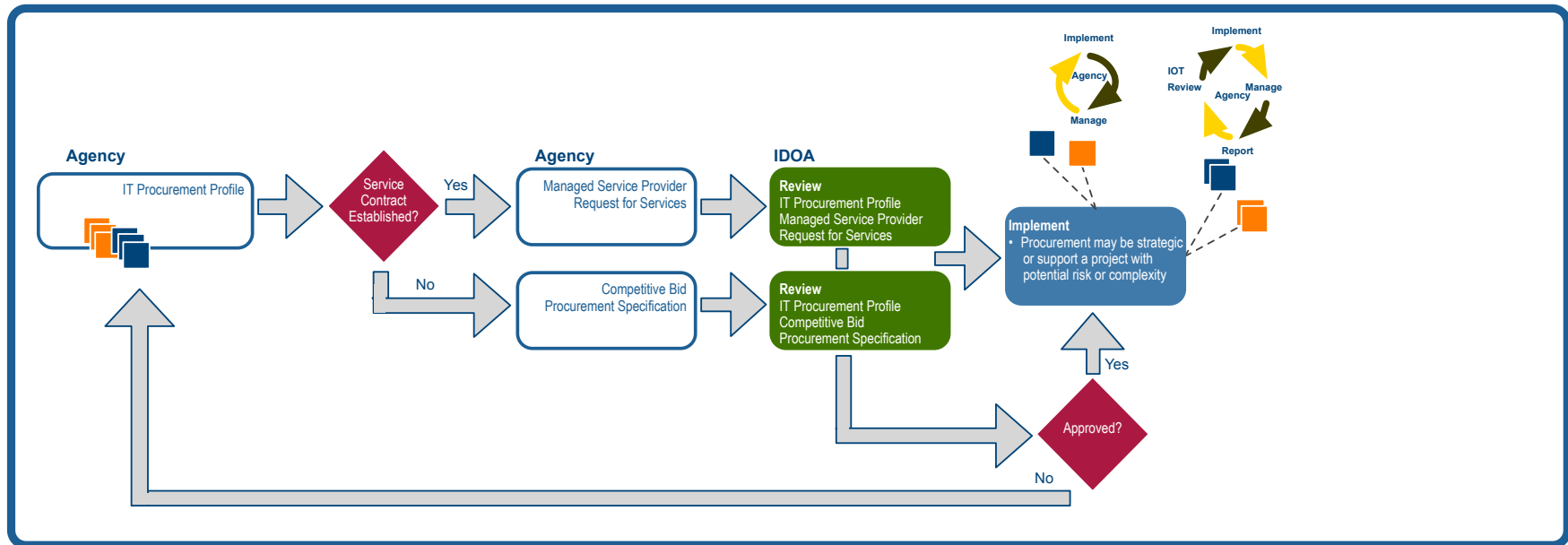


Figure 3. Procurement Profile Review Process

Step Description

1. Agency prepares Procurement Profile.
2. The Procurement Profile should be reviewed and approved by agency executive management.
3. Agency submits Procurement Profile to IDOA for review.
4. IDOA conducts initial review for completeness.
5. IDOA determines the most appropriate sourcing method and validates submitted agency approach in Procurement Profile.
 - If determination of Step 5 is MSP Request for Project Services and agency has submitted satisfactory documentation for Procurement Profile, conduct review and refer to steps 6-8.
 - If determination of Step 5 is Competitive Bid Procurement Specification and agency has submitted satisfactory documentation for Procurement Profile, conduct review and refer to steps 9-12.
 - If determination of Step 5 is either MSP Request for Project Services or Competitive Bid Procurement Specification, but the agency has not submitted satisfactory documentation for Procurement Profile, consult with the agency.

1 | MSP Request for Project Services Review

Step	Description
6.	IDOA reviews the Request for Project Services and Scoring Criteria for Consistency and Rankability.
7.	IDOA coordinates technical review of Request for Project Services with IOT, as applicable.
8.	IDOA determines if additional information is needed and consults with agency to revise as necessary prior to agency issuance of the Request for Project Services to Managed Services Provider for project opportunity posting.

2 | Competitive Bid Procurement Specification Review

Step	Description
9.	IDOA incorporates technical requirements from the Procurement Specification Template into a draft Request for Proposal (RFP) or other format depending on the procurement method.
10.	IDOA submits draft RFP (or other format) to IOT SME and Management team for review and approval.
11.	IDOA incorporates feedback and finalizes RFP (or other format) and submits to requesting agency for review and approval.
12.	IDOA finalizes procurement instrument and posts solicitation accordingly.

6.4 CFPP Procurement Profile Features

This section provides screen shots of the CFPP Procurement Profile and describes the steps to create, manage, and submit a Procurement Profile.

6.4.1 Create a New Procurement Profile



Sandbox: UAT

Search... Search

Stella Luna

My Agency

Contacts

Operating Plans

Operating Plan Line Items

Project Profiles

Procurement Profiles

Reports

Project Profile

99999-18-2-1

Note 1

Printable View

Show Feed

Back to List: Agencies

Risk Assessments [1]

Procurement Profiles [0]

Activity Resources [2]

Project Profile Detail

Project Profile ID

99999-18-2-1

Operating Plan Line Item

99999-18-2

Agency

CFPP Test Agency

Owner

Stella Luna

Status

Approved - IT Procurement Profile Required

Status Explanation

Based on the contract services required, a Procurement Profile is needed to produce the MSP Request for Services.

Project Profile Submitted Date

General Project Information

IOT/IDOA Review Information

Is an Advanced Review Required? ☒

Additional comments

Will transfer this project to Project Online for PSC PM activities.

IOT/IDOA Preferred Method of Procurement

MSP

Additional comments

Procurement Profile needed to create the Request for Services.

Is Reporting or Monitoring Required?

☒

Additional comments

Transfer to Project Online

System Information

Created By

Stella Luna, 6/24/2017 2:57 PM

Last Modified By

Brandi Riggle, 7/2/2017 6:12 PM

Risk Assessments

Action	Risk Assessment Number	Overall Project Risk Score	Overall Project Priority Score	Overall Project Complexity Score
Edit Del	RAN-23	35	84	37

Procurement Profiles

New Procurement Profile

No records to display

Activity Resources

Action	Project Resource ID	Resource Category	Resource Sub-Category
Edit Del	PR-361	Services	RFP/RFS Required for Contract Project Services
Edit Del	PR-362	Other	Other



4

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Steps

1. Click on New Procurement Profile button.

Notes

1. The Project Profile can be accessed from the Project Profile tab.
2. Status and explanation of IOT/IDOA review.
3. Additional IOT/IDOA review information and comments appear in the IOT/IDOA Review Information block.

6.4.2 Select MSP Procurement Profile Type

Select Procurement Profile Record Type

Select a record type for the new procurement profile.

Select Procurement Profile Record Type

Record Type of new record: Competitive Bid **MSP** ← 1

2 → Continue Cancel

Available Procurement Profile Record Types

Record Type Name	Description
Competitive Bid	Select this record type for any Competitively Bid Procurement.
MSP	Select this record type for any Managed Services Provider Procurement Profiles.

Note 1

Procurement Profile Edit Save Save & New Cancel

Information Required Information

Procurement Profile ID: Status: Draft

Project Profile: Status Explanation:

Owner: Stella Luna

Please list any specific Acronyms or Definitions. ← 3

Acronyms / Definitions

- AAFP - American Academy of Family Physicians
- AAHP - American Association of Health Plans
- AAP - American Academy of Pediatrics
- ACIP - Advisory Committee on Immunization Practices
- AFIX - Assessment, Feedback, Incentives, eXchange
- AIM - Association of Immunization Managers
- AIRA - American Immunization Registry Association
- AMIA - American Medical Informatics Association

Pricing Model

Pricing Model:

Steps

1. Select MSP from the drop-down list the type of procurement.
2. Click on the Continue button.
3. Enter Procurement Profile information.

Notes

1. The state's Managed Services Provider is issued the Request for Project Services document that is generated from the Procurement Profile **MSP** procurement type.

The **Competitive Bid** procurement type includes other methods of soliciting bids or proposals for products and services that are not provided through the state's MSP. IDOA uses the information that is included in a Procurement Profile Competitive Bid procurement type to draft an RFP's scope of work.

6.4.3 Select Pricing Model and Enter Award Criteria Data



Sandbox: UAT

Stella Luna ▾

My Agency

Contacts

Operating Plans

Operating Plan Line Items

Project Profiles

Procurement Profiles

Reports

Procurement Profile Edit

New Procurement Profile

Procurement Profile Edit

Error: Invalid Data.
Review all error messages below to correct your data.
The total of all Award Criteria weightings must = 100%

Note 1

Pricing Model

Note 2

Award Criteria

Pricing Model

Milestone/Deliverable ▾

--None--

✓ Milestone/Deliverable

Fixed Bid

Hourly Billing

Approach Weight (%)

20

Experience Weight (%)

15

Staff Weight (%)

10

References Weight (%)

10

Project Plan Weight (%)

15

Other Weight (%)

10

Cost Weight (%)

25

Comment

Comment

Comment

Comment

Comment

Comment

Comment

3 →

4 ↓

Save

Save & New

Cancel

Steps

1. Select one of three pricing models available for services delivered through the MSP.
2. Enter the weight for each evaluation factor that will be used to select and award a service provider.
3. Enter a comment that describes minimum and preferred requirements related to an evaluation factor.
4. Click on the Save button.

Notes

1. The total weight of the evaluation factors for award criteria must be equal to 100.
2. When the record is saved, an agency can access more in depth information on each of the Pricing Model types and the consideration of each of the evaluation factors under Award Criteria. After reviewing this information, the agency should verify and edit any of the information entered on this page.

6.4.4 Verify Pricing Model



Procurement Profile
99999-18-2-1-1

My Agency | Contacts | Operating Plans | Operating Plan Line Items | Project Profiles | **Procurement Profiles** | Reports

Procurement Profile has been saved.

Back to List

Pricing Model

Pricing Model Milestone/Deliverable

Pricing Model Descriptions [Click here!](#)

Award Criteria

Approach Weight (%)	20%
Experience Weight (%)	15%
Staff Weight (%)	10%
References Weight (%)	10%
Project Plan Weight (%)	15%
Other Weight (%)	5%
Cost Weight (%)	25%
Total Weight	100%

Award Criteria Description [Click Here!](#)

Sandbox: UAT

7. Pricing Model Options

a. Pricing Model Option 1 – To be utilized when invoicing/payment will be submitted after approval of milestones and/or deliverables. Project Manager and/or Project Sponsor to indicate Milestones/Deliverables for which they are looking to be submitted.

b. Pricing Model Option 2 – To be utilized when invoicing/payment will be submitted when the project is completed.

c. Pricing Model Option 3 – To be utilized when invoicing/payment will be submitted monthly, based upon hours worked.

Examples of Pricing Model Options

Option 1 – Milestone/Deliverable Pricing Model

Milestone/Deliverable	Cost
Milestone/Deliverable 1:	\$ -
Milestone/Deliverable 2:	\$ -
Milestone/Deliverable 3:	\$ -
Milestone/Deliverable 4:	\$ -
Milestone/Deliverable 5:	\$ -
Total Project Milestone/Deliverable Costs:	\$ -
Project Expense Costs: (Itemize by airfare, lodging, meals, mileage etc.)	\$ -
Total Project Costs*:	\$ -

* Note: Total Project Costs are not to exceed amount submitted/proposed.

Option 2 – Fixed Bid Pricing Model

Project Labor Costs:	\$ -
Project Expense Costs: (Itemize by airfare, lodging, meals, mileage etc.)	\$ -
Project Misc. Costs:	\$ -
Total Project Fixed Costs*:	\$ -

* Note: Total Project Costs are not to exceed amount submitted/proposed.

Option 3 – Hourly Billing Pricing Model

Resource's Role / Job Title	Hourly Bill Rate	Project Hours	Total Costs
Role 1:	\$ -	0.00	\$ -
Role 2:	\$ -	0.00	\$ -
Role 3:	\$ -	0.00	\$ -
Role 4:	\$ -	0.00	\$ -
Role 5:	\$ -	0.00	\$ -
Total Labor Costs:		0.00	\$ -
Project Expenses Cost 1: (Itemize by airfare, lodging, meals, mileage etc.)			\$ -
Project Expenses Cost 2: (Itemize by airfare, lodging, meals, mileage etc.)			\$ -
Project Expenses Cost 3: (Itemize by airfare, lodging, meals, mileage etc.)			\$ -
Total Project Expenses Costs:			\$ -
Total Project Costs:			\$ -

Steps

1. Click on the link next to the Pricing Model Description to verify the selected pricing model.

Notes

1. Description of pricing model options include:
 - Pricing Model Option 1 – Used when invoicing/payment will be submitted after approval of milestones and/or deliverables.
 - Pricing Model Option 2 – Used when invoicing/payment will be submitted when the project is completed.
 - Pricing Model Option 3 – Used when invoicing/payment will be submitted monthly, based upon hours worked.

6.4.5 Verify Award Criteria

Award Criteria

Approach Weight (%)	20%
Experience Weight (%)	15%
Staff Weight (%)	10%
References Weight (%)	10%
Project Plan Weight (%)	15%
Other Weight (%)	5%
Cost Weight (%)	25%
Total Weight	100%

Note 1

Award Criteria Description [Click Here!](#)

2 → **Comment** Number of comparable engagements within last 24 months

Comment Number of staff that participated in engagements within last 24 months

Comment References from comparable engagements within last 24 months

Comment

8. Award Criteria

- Award Process**
 - Method of Evaluation – Any responses not meeting the mandatory requirements will be eliminated and not scored further.
 - Quality Evaluation – Each area identified in the Criteria of the Selection Criteria Form will be scored as described in 2. Scoring Quality. The points will be weighted to obtain the Quality Score for each Criterion.
 - Cost Evaluation – Cost will be scored as described in 3. Cost.
 - Award Decision – The response receiving the highest Total (Quality and Cost) will receive the award.
- Scoring Quality (Instructions)**
 - Project Manager and/or Project Sponsor will need to assign respective weights in the Selection Criteria Form.
 - The State requires a minimum weight of 25 assigned to cost scoring
 - Points should be assigned as follows:

Rationale	Points
Respondent has not addressed any of the requirements or has provided a response that is limited in scope, vague, or incomplete. Response did not provide a description of how the State's needs would be met.	0
Respondent has agreed to comply with the requirements and provided some details on how the requirements would be met. Response does not clearly indicate if all the needs of the State will be met.	1
Respondent has agreed to comply with the requirements and provided an adequate description of how the requirements would be met. Response indicates adequate ability to serve the needs of the State.	2
Respondent has agreed to comply with the requirements and provided a good and complete description of how the requirements would be met. Response clearly demonstrates a high degree of ability to serve the needs of the State.	3
Respondent has agreed to comply with the requirements and provided a clear and compelling description of how each requirement would be met, with relevant supporting materials. Respondent's proposed approach frequently goes above and beyond the minimum requirements and indicates superior ability to serve the needs of the State.	4

- Cost**
 - Cost must be calculated as the Lowest Proposed Cost (LPC) divided by the Proposal Cost (PC) multiplied by the Total Cost Points (TCP) or $(LPC / PC * TCP)$.

As an example,

If: Vendor A's proposal cost = \$150,000
Vendor B's proposal cost = \$100,000
Total Cost Points = 25

Then: Vendor A's cost score = $17(100,000 / 150,000 * 25)$
Vendor B's cost score = $25(100,000 / 100,000 * 25)$

Steps

1. Click on the link next to the Award Criteria Description to verify the assigned weighting.
2. Add or modify Comments that relate to the evaluation factors.

Notes

1. Description of the award process includes consideration of quality evaluation and cost evaluation. Weighting assigned in the Procurement Profile will be applied in the quality and cost evaluation.

6.4.6 Enter New Procurement Profile Information

Sandbox: UAT

Search...

Search

Stella Luna

My Agency

Contacts

Operating Plans

Operating Plan Line Items

Project Profiles

Procurement Profiles

Reports

Procurement Profile

99999-18-2-1-1

Printable View

Show Feed

✓ Procurement Profile has been saved.

Back to List: Agencies

Project Deliverables [0] | Files [0]

Procurement Profile Detail

Save

Cancel

Procurement Profile ID

99999-18-2-1-1

Status

Draft

Project Profile

99999-18-2-1

Status Explanation

Agency

CFPP Test Agency

Type

MSP

Owner

Stella Luna [Change](#)

1. IT Project Profile

Project Name

Immunization Information System (Registry) Modernization Needs Assessment

Project Type

Assessment

Project Manager/Lead

Stella Luna

Expected Start Date

8/1/2017

Email Address

Expected End Date

6/6/2018

Phone Number

Project Description

Migrate the existing platform for the state's immunization registry to improve data exchange capabilities, improve scalability, robustness, and comply with HL-7 interoperability standards.

Goals, Objectives, Expected Outcomes

The goal of the modernization project is to develop the documentation and requirements needed to issue a future Request for Offer to deliver a comprehensive and modern immunization registry for the State.

4. Project Stakeholders and Customers

Project Stakeholders

Physician Societies: Indiana Medical Association (TMA), Indiana Academy of Family Physicians TAFP; Indiana Hospital Association; IDHS Community Preparedness; Women, Infants, and Children (WIC) program, Emergency Responders, IISD school nurses

Final Customer

Epidemiology, Vital Statistics

5. Project Scope, Technological Environment, Key Milestones and Deliverables

General Scope

1) The Needs Assessment must assess the State's policies, practices and system capabilities regarding the existing immunization registry system.

In Scope

2) The Scope of Work that will be included in a future Request for Offer must contain specific details of each requirement for a replacement system based on identified requirements including requirements discovered through the needs assessment evaluation, legislative changes, input from stakeholders, patient record needs for Meaningful Use in the health care industry based on Health Level Seven (HL7) immunization data management standards (<http://www.hl7.org>) as applied to immunization data. Specific activities in scope include: • Inventory state and federal regulations regarding immunization information systems (IIS). • Evaluate agency policy and practices to determine gaps between existing system and business practices with federal and state requirements regarding data quality, privacy, security, and accessibility. • Evaluate agency and system conformance to HL7 2.5.1 to support eligible hospital and providers attestation requirements Stage 3 Meaningful Use. • Benchmark peer state health department's immunization information systems and programs. • Report on findings and gaps. • Report on recommendations for future state and provide a roadmap to implement business improvements and modernize the IIS. • Develop a requirements specification that will define a Scope of Work for IIS modernization.

Not In Scope

The project does not include: • Acquisition and implementation of a functional system to replace the current system. • Tasks associated with the migration of data from the current to the new system.

Scope Management

Requirements will be elicited, prioritized, reviewed and accepted by all stakeholders and change management steering committee will be seated to ensure effective requirements management.

Technological Environment

Agency's shot scheduler system; Exchanges information (interfaces) with CDC, emergency responders, WIC, vaccine administration systems.

Note 1

1

2

Steps

1. Enter profile information in fields that are either new or are not pre-populated from the Project Profile and save the record.

Notes

1. The saved record displays pre-populated data that was entered in the Project Profile and can be edited as needed.

6.4.7 Enter Project Deliverables for Pricing Model Option 1

IOT/IDOA Review Information

IOT/IDOA Preferred Method of Procurement MSP

Additional comments Procurement Profile needed to create the Request for Services.

Is Reporting or Monitoring Required? ☒

Additional comments Transfer to Project Online

Pricing Model or Award Criteria Comments

Additional IDOA Comments

System Information

Created By [Stella Luna](#), 7/2/2017 6:27 PM

Last Modified By [Stella Luna](#), 7/2/2017 6:27 PM

[Save](#) [Cancel](#)

Project Deliverables

[New Project Deliverable](#)

No records to display

IN.gov Search... [Search](#) Sandbox: UAT [Stella Luna](#)

[My Agency](#) [Contacts](#) [Operating Plans](#) [Operating Plan Line Items](#) [Project Profiles](#) [Procurement Profiles](#) [Reports](#)

Project Deliverable Edit

New Project Deliverable

Project Deliverable Edit [Save](#) [Save & New](#) [Cancel](#)

Information

Project Deliverables Number

Procurement Profile

Deliverable

Deliverable Name

Deliverable Description

Format

Due Date

[Save](#) [Save & New](#) [Cancel](#)

IN.gov [My Agency](#) [Contacts](#) [Operating Plans](#) [Operating Plan Line Items](#) [Project Profiles](#) [Procurement Profiles](#) [Reports](#)

Project Deliverable 1.1.1 **Note 1**

Project Deliverable has been saved.

[Back to List: Agencies](#)

Project Deliverable Detail [Edit](#) [Delete](#) [Clone](#)

Project Deliverables Number 1.1.1

Procurement Profile 99999-18-2-1-1

Deliverable

Deliverable Name Detailed Project Work Plan

Deliverable Description At the task level, break down consistently; (i.e., everything must roll up to a subtask or task); and manageable size (no more than 40 work hours per task or must break in to smaller tasks). Tasks will include: · Duration, · Dependencies, · Start/Finish

Format MS Project or Comparable

Due Date 7/28/2017

Created By [Stella Luna](#), 7/2/2017 6:44 PM

[Edit](#) [Delete](#) [Clone](#)

Steps

1. Click on New Project Deliverable to create a project deliverable.
2. Enter the project deliverable number consistent with the project plan.
3. Enter the description of the project deliverable.
4. Click on the Save button.
5. Click on the Clone button to continue adding project deliverables by cloning and modifying the cloned record. Alternatively, return to the Procurement Profile page and click on New Project Deliverable button.

Notes

1. Saved project deliverable number.

6.4.8 Enter “Not Applicable” in Project Deliverables for Pricing Model Options 2 and 3

Pricing Model

Pricing Model Fixed Bid **Note 1**

Pricing Model Descriptions [Click here!](#)

[Edit](#) [Delete](#) [Submit](#) [Generate Document](#)

Project Deliverables [New Project Deliverable](#) **1**

Action	Project Deliverables Number	Deliverable Name	Deliverable Description	Format	Due Date
Edit Del	1				

Project Deliverable Edit [Save](#) [Save & New](#) [Cancel](#)

Information **1** = Required Information

Project Deliverables Number

Procurement Profile 9999-46-1-1-1

Deliverable

Deliverable Name **2**

Deliverable Description

Format

Due Date

3 [Save](#) [Save & New](#) [Cancel](#)

Project Deliverables [New Project Deliverable](#)

Action	Project Deliverables Number	Deliverable Name	Deliverable Description	Format	Due Date
Edit Del	1	Not applicable			

Note 2

Steps

1. Click on New Project Deliverable to create a project deliverable.
2. Enter “Not applicable” in the Deliverable Name field.
3. Click on the Save button.

Notes

1. For options other than milestone/deliverable-based pricing models, project deliverables are not included in the Request for Project Services.
2. No additional information should be entered in Project Deliverables if the pricing model option is not Milestone/Deliverable.

6.4.9 Edit Procurement Profile and Prepare to Generate Procurement Document

Sandbox: UAT
Stella Luna

My Agency
Contacts
Operating Plans
Operating Plan Line Items
Project Profiles
Procurement Profiles
Reports

99999-18-2-1-1
Printable View

Back to List: Agencies
Project Deliverables (3) | Files (0)

Procurement Profile Detail

Edit
Delete
Submit
Generate Document

Procurement Profile ID: 99999-18-2-1-1
Project Profile: 99999-18-2-1
Agency: CFPP Test Agency
Status: Draft
Status Explanation:

3. Business Problem or Issue, Project Description, Goals and Objectives

Problem or Issue Existing issues of the State's immunization registry (Immunization Information System (IIS)) include: System is based on out-dated, non-standard technology including the platform, database, and system architecture. Cost of system maintenance and remediation is cost prohibitive. Keeping the current system/technology or remediating it is not the best value for the state. The system is not sufficiently integrated or interoperable with the IDHS exchange partners. The system lacks robustness and appropriate scalability to meet the demands of an ever expanding population that continues to produce immunization events/instances that produce records that must be kept. The system is no longer the optimum fit for the business needs of the Agency. The system cannot handle new stakeholder requirements except through retro-fitting which has proven to be problematic for maintaining adequate system stability and availability. The current system has inadequate reporting functionality and capabilities. Medical home model needs to be implemented to meet the minimum requirements of the 13 Immunization Registry Functional Standards identified by the American Immunization Registry Association and the Centers for Disease Control.

Project Description Migrate the existing platform for the state's immunization registry to improve data exchange capabilities, improve scalability, robustness, and comply with HL-7 interoperability standards.

Goals, Objectives, Expected Outcomes The goal of the modernization project is to develop the documentation and requirements needed to issue a future Request for Offer to deliver a comprehensive and modern immunization registry for the State.

4. Project Stakeholders and Customers

Project Stakeholders Physician Societies: Indiana Medical Association (TMA), Indiana Academy of

Award Criteria

Approach Weight (%)	20%	Comment
Experience Weight (%)	15%	Number of comparable engagements within last 24 months
Staff Weight (%)	10%	Number of staff that participated in engagements within last 24 months
References Weight (%)	10%	References from comparable engagements within last 24 months
Project Plan Weight (%)	15%	
Other Weight (%)	5%	
Cost Weight (%)	25%	
Total Weight	100%	

Award Criteria Description [Click Here!](#)

IOT/IDOA Review Information

IOT/IDOA Preferred Method of Procurement MSP

Additional comments Procurement Profile needed to create the Request for Services.

Is Reporting or Monitoring Required? ☒

Additional comments Transfer to Project Online

Pricing Model or Award Criteria Comments

Additional IDOA Comments

System Information

Created By: Stella Luna, 7/2/2017 6:27 PM
Last Modified By: Stella Luna, 7/2/2017 6:53 PM

Edit
Delete
Submit
Generate Document

Project Deliverables

New Project Deliverable

Action	Project Deliverables Number	Deliverable Name	Deliverable Description	Format	Due Date
Edit Del	1.1.1	Detailed Project Work Plan	At the task level, break down consistently; (i.e., everything must roll up to a subtask or task); and manageable size (no more than 40 work hours per task or must break in to smaller tasks). Tasks will include: Duration, Dependencies, Start/Finish	MS Project or Comparable	7/28/2017
Edit Del	1.1.2	Phase 1: Current State Assessment	Current State Assessment report providing an overview of the current organization, assessment of competencies, capabilities, processes, and policies supporting ITS Division's functions.	Microsoft Power Point document	8/16/2017
Edit Del	1.1.3	Phase 2: Peer State Assessment & Target Future State Identification	Peer State Assessment report providing an overview of a recommended future state model for the ITSD functions including recommendations for changes to the organizational structure, workforce development, internal business practices and processes.	Microsoft Power Point document	9/22/2017

Steps

1. Click on the Edit button to update Procurement Profile fields.
2. Click on the Generate Document button to create a Request for Project Services document.

Notes

1. Procurement Profile in Draft status enables you to revise the Procurement Profile, as needed. Additionally, you can generate and revise the Request for Project Services document as needed before submitting the Procurement Profile to IDOA.

6.4.10 Generate Request for Project Services Document

Generate Documents | Note 1

<< Back

Search in ALL Categories for : Search

Choose Document(s) then click the 'Next Step' button

← 2

Name	Description
☐ Request for Project Services Template	MSP Template for Procurement Profile Object

1

View Document(s) | Note 2

<< Back

View Document(s)

The following S-Docs have been created

View	Edit	Document Number	Document Name	Comments	Status	Created By	Created On
☒	☐	SD-199	Request for Project Services Template	Add	Generated	Stella Luna	7/3/2017 11:20 AM

3 3 4

Steps

1. Click in the box adjacent to Request for Project Services Template.
2. Click on the Next Step button.
3. Click on the View icon or the Document Number to access the Request for Project Services document.
4. Click on the Add button under Comments to add a comment to the Request for Project Services document, if applicable.

Notes

1. Generate Documents page.
2. View Document(s) page.

6.4.11 Review and Edit Request for Project Services Document

Instructions for Completing the Request for Project Services Template

1. On page 3, the Agency Project Manager/S
fields. Required fields are:
 - a. Pre-Proposal Conference (if applicable)
specifics (Suite Number, S)
 - b. In the Deadline for Written Questions
from vendors are due.
 - c. In the Answers to Written Questions
answers will be provided to vendors
 - d. In the Proposals/Responses Due Date
from vendors are due
 - e. In the remaining fields (Evaluation
Services Awarded, Services Start)
for those applicable to the project.
2. On page 5 of the Project Services Template
complete the Project Background fields.
 - a. Project Purpose and Objective (required)
 - b. Background (required)
 - c. Services Required (required)
 - d. Deliverables (optional) If Pricing
Manager/Sponsor may include the services
 - e. Pricing Model (required) Select or
vendors will use to provide pricing
3. On page 8, Award Criteria, The Agency
standard description for Quality Evaluation
evaluation.
4. On page 9, Scoring Criteria, The Agency
the criteria that vendors will be scored against
be scored against. Agencies may use the

Knowledge Services MSP

SOW/Project

Request for Project Service

Template

Request for Project Services

Project Name: Immunization Information System (Registry) Modernization Phase 1 Assessment

Date:  1

Project Background

PROJECT OVERVIEW (To be completed by Project Manager and/or Project Sponsor)

Note: The Knowledge Services MSP Team will assist in creating and will provide instructions on the process, pricing options and information to be included.

1. Project Identification
- a. Project Purpose and Objective
- Existing issues of the State's immunization registry (Immunization Information System (IIS)) include: • System is based on out-dated, non-standard technology including the platform, database, and system architecture. • Cost of system maintenance and remediation is cost prohibitive. Keeping the current system/technology or remediating it is not the best value for the state. • The system is not sufficiently integrated or interoperable with the IDHS exchange partners. • The system lacks robustness and appropriate scalability to meet the demands of an ever expanding population that continues to produce immunization events/instances that produce records that must be kept. • The system is no longer the optimum fit for the business needs of the Agency • The system cannot handle new stakeholder requirements except through retro-fitting which has proven to be problematic for maintaining adequate system stability and availability. • The current system has inadequate reporting functionality and capabilities. • Medical home model needs to be implemented to meet the minimum requirements of the 13 immunization Registry

3. Scope of Work & Deliverables

- 1.

name	deliverable name	deliverable description	format
1.1.1	Detailed Project Work Plan	At the task level, break down consistently; (i.e., everything must roll up to a subtask or task); and manageable size (no more than 40 work hours per task or must break in to smaller tasks). Tasks will include: · Duration, · Dependencies, · Start/Finish	MS Project or Comparable
1.1.2	Phase 1: Current State Assessment	Current State Assessment report providing an overview of the current organization, assessment of competencies, capabilities, processes, and policies supporting ITS Division's functions.	Microsoft Power Point document
1.1.3	Phase 2: Peer State Assessment & Target Future State Identification	Peer State Assessment report providing an overview of a recommended future state model for the ITSd functions including recommendations for changes to the organizational structure, workforce development, internal business practices and processes.	Microsoft Power Point document

- 2.

- a. **Services Required**
 - 1) The Needs Assessment must assess the State's policies, practices and system capabilities regarding data exchange, provider reporting and state reporting and develop a roadmap to implement a modernized IIS.
- b. **Deliverables**
- c. **In Scope**
 - 2) The Scope of Work that will be included in a future Request for Offer must

Award Criteria

Selection Scoring Overview	
Criteria	Weight (%)
Quality of Approach	25%
Quality of Experience	10%
Quality of Staff	10%
Quality of References	10%
Quality of Project Plan	10%
Other:	10%
<i>Cost *State requires a minimum cost score of 25 points</i>	25%
Total	100%

Note 1

Steps

1. Edit the MS Word document, providing information not contained in the Procurement Profile fields.

Notes

1. Request for Project Services document can be edited in MS Word (document should be saved in .docx format). Alternatively, the Procurement Profile can be modified and a new Request for Project Services document can be generated.

6.4.12 Submit the Procurement Profile to IDOA for Review

IN.gov Search... Sandbox: UAT Stella Luna

My Agency Contacts Operating Plans Operating Plan Line Items Project Profiles **Procurement Profiles** Reports

Procurement Profile **99999-18-2-1-1** Printable View

Show Feed

Back to List: Agencies

Project Deliverables [4] | Files [0]

Procurement Profile Detail

Procurement Profile ID 99999-18-2-1-1 Status Draft

Project Profile 99999-18-2-1 Status Explanation

Agency CFPP Test Agency

Edit Delete **Submit** **Note 1**

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Procurement Profile Detail

Procurement Profile ID 99999-18-2-1-1 Status Review **Note 1**

Project Profile 99999-18-2-1 Status Explanation

Agency CFPP Test Agency

Type MSP

Owner Stella Luna (Change)

1. IT Project Profile

Project Name Immunization Information System (Registry) Modernization Needs Assessment Project Type Assessment

Project Manager/Lead Stella Luna Expected Start Date 7/21/2017

Email Address sluna@cfpp.in.gov Expected End Date 6/6/2018

Phone Number

2. MSP Project Work Requirements

Acronyms / Definitions

- AAFP - American Academy of Family Physicians
- AAHP - American Association of Health Plans
- AAP - American Academy of Pediatrics
- ACIP - Advisory Committee on Immunization Practices
- AFIX - Assessment, Feedback, Incentives, eXchange
- AIM - Association of Immunization Managers
- AIDA - American Immunization Registry Association

S-Docs Relationships New SDoc Relationship

Action	Sdoc Relationship Name
Edit Del	SDR-205 Note 2

Steps

1. Click on the Submit button.

Notes

1. Upon submission, the Draft status changes to Review status.

Note: The Procurement Profile is submitted to IDOA for further processing and it is not subject to a specified review period in the system. IDOA will work directly with the agency to coordinate or conduct a procurement.

2. The Procurement Profile includes documents generated from the information contained in the profile, such as, the Request for Project Services.