



State of Indiana

Call for IT Projects and Procurements Portal User Reference Guide

Section 5 Create and Manage a CFPP Project Profile

**October 10, 2017
Version 1.0**

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Create and Manage a CFPP Project Profile

5.1 Process Overview

An agency must complete and submit a Project Profile for any IT project that exceeds \$250,000 in development and implementation costs. A project profile may also be required if IOT selects a project for advanced review as an outcome of IOT/IDOA review of an agency's Operating Plan. For each selected project, a state agency is required to complete and submit the information specified in the CFPP portal prior to procuring project resources that exceed \$75,000.

The Project Profile review process works in concert with agency project management practices. An IOT review will trigger action limited to projects or procurements where additional information is needed or where a stipulation or condition for a future project management and reporting action will need to be coordinated with IOT or IDOA.

- **Note:** After filing the Project Profile with IOT, if no additional information is requested within 30 days, an agency may proceed on project activities, including procurement of IT goods and services exceeding \$75,000, subject to applicable policies and procedures.

5.2 Project Profile Review Scope

IOT coordinates with the submitting agency to conduct its review of a Project Profile. The review is focused on an assessment of the project's alignment with statewide strategies that strengthen delivery of IT services. IOT's assessment is to ensure that the project

- is aligned with, and delivers business outcomes, that support agency and statewide goals
- is aligned with, and adopts enterprise IT shared solutions where applicable
- leverages opportunities to minimize duplicative activities across the enterprise through shared resources within and across state agencies
- resources are sufficiently analyzed to strengthen aggregate sourcing opportunities across the state
- has been initially evaluated for risk, complexity, and alignment with statewide business and technology priorities
- is managed by governance processes that are consistent with its risk, complexity and priority

5.3 Project Profile Review Process

The Project Profile review process is illustrated in Figure 2.

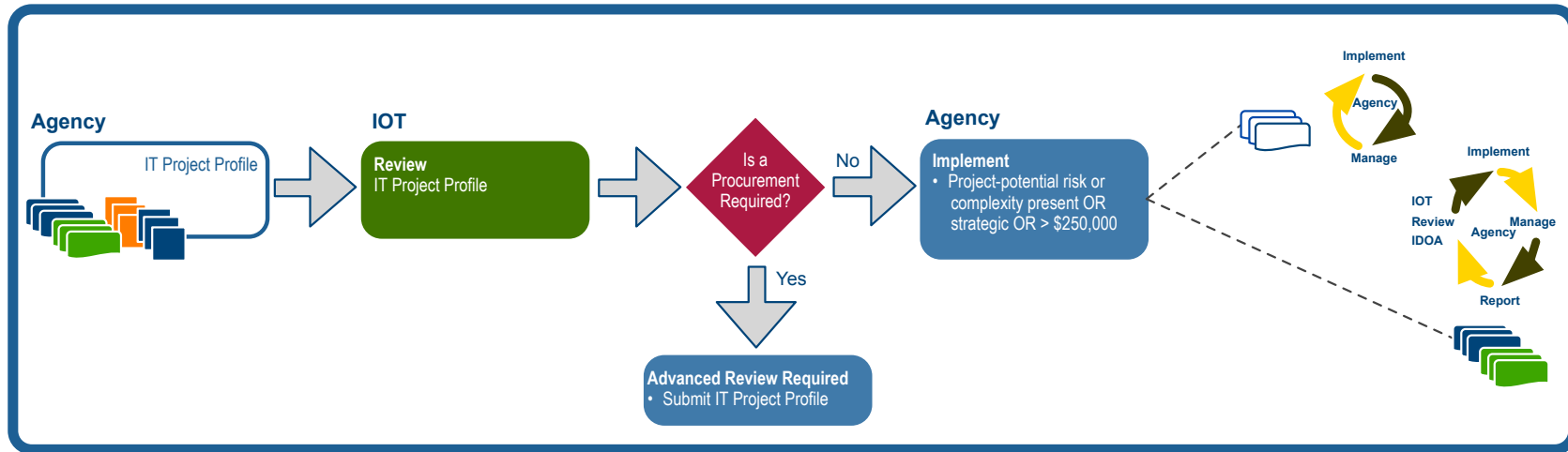


Figure 2. Project Profile Review Process

Step Description

1. Agency prepares a Project Profile for each project that will exceed \$250,000 or has been selected by IOT/IDOA based on its complexity or level of risk.
2. The Project Profile should be reviewed and approved by agency executive management.
3. Agency submits agency-approved Project Profile to IOT Project Success Center for review.
4. IOT Project Success Center conducts initial review for completeness.
5. IOT Project Success Center determines whether either or both of the following conditions are present:
 - a. Enterprise or IOT Infrastructure Services are applicable to the project.
 - b. Procurement support that may entail a formal RFP review prior to issuance
 - If determination of Step 5 is Yes, IOT Project Success Center routes Project Profile to either (or both) the affected IOT business unit or IDOA Procurement. See Step 6.
 - If determination of Step 5 is No, IOT Project Success Center assesses project risk to determine if project is a candidate for monitoring and the reporting requirements for ongoing project review activities. See Step 8.

6. IOT Business Unit representative and/or IDOA Procurement representative conduct(s) a review of the Project Profile to determine requirements for planning enterprise support or procurement actions. These activities may involve outreach to the agency's project lead.
7. IOT Business Unit representative and/or IDOA Procurement representative submit(s) a recommendation to the IOT Project Success Center for managing project outcomes or activities that affect the enterprise. This may include a stipulation that the project provides additional information as an outcome of project planning activities.
8. IOT Project Success Center notifies the agency of any stipulations related to project and procurement planning functions or project reporting activities.

Once a Project Profile receives approval the agency can proceed with planned project activities according to the conditions of approval. For example, if the project requires a procurement that is flagged for an advanced review, a Procurement Profile should be submitted to IDOA prior to initiating the procurement. Refer to Section 6 for more information on preparing and submitting a Procurement Profile.

- **Note:** If a determination has been made to utilize the state's Managed Service Provider (MSP) contract, much of the information that is required in the MSP Request for Project Services is contained in the Project Profile. This information is pre-populated within the Procurement Profile, thus facilitating an agency's submission of the required information for IDOA's advanced review of the procurement.

5.4 CFPP Project Profile Features

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

5.4.1 Collaborate on a Project Profile

Operating Plan 99999-18

Operating Plan Line Items (2) | Files (0)

Operating Plan Detail

Agency Information

Owner	Tom Morrow	Agency Code	99999
Operating Plan ID	99999-18	Fiscal Year	2018
Agency	CFPP Test Agency		

Submission Information

Status	Submitted	Submitted for Review Date	6/16/2017
--------	-----------	---------------------------	-----------

Operating Plan Line Items

Action	ID	Agency Name	Activity Type	Activity Name	Owner	Status
Edit Del	99999-18-1	CFPP Test Agency	Ongoing Operations	Network Expansion	Tom Morrow	Returned to Agency for More Information
Edit Del	99999-18-2	CFPP Test Agency	Project	Immunization Information System (Registry) Modernization Needs Assessment	Roberta Smith	Approved - IT Project Profile Required

Files

No records to display

☆ Call for Projects and Procurements

Sandbox: ACTION REQUIRED: Operating Plan Line Item 99999-18-2 Status has changed to Approved - IT Project Pr...

To: rsmith@cfpp.in.gov

Dear Roberta Smith,

IOT or IDOA have changed the Status for Operating Plan Line Item 99999-18-2 to Approved - IT Project Profile Required.

Please submit a Project Profile. Given the short turnaround on this project, PSC recommends that its PM services are secured early so that it can review the Agency's project plan after the profile is submitted.

Please use the following link access the Project/Procurement record: <https://ind-tech.force.com/a00r0000001L80x>

Indiana Office of Technology/IDOA

Note 1

Note 1

Note 2

Note 3

Operating Plan Line Item 99999-18-2

Post

@Stella Luna This project is approved. IOT has requested a Project Profile. Please complete the information and schedule a review with the CFPP IT Project Steering Committee. Thanks!

To this operating plan line item

Share

☆ Indiana Procurement Management Portal

Sandbox: Roberta Smith mentioned you in a post

To: sluna@cfpp.in.gov

Reply-To: Reply to Call for Projects and Procurement Portal

99999-18-2 – Roberta Smith (Customer)

@Stella Luna (Customer) This project is approved. IOT has requested a Project Profile. Please complete the information and schedule a review with the CFPP IT Project Steering Committee. Thanks!

[View/Comment](#) or reply to this email

Steps

1. Click on the link to the Operating Plan Line Item.
2. Toggle the Show Feed/Hide Feed button to display the Chatter discussion thread and type request to Agency User to Create a Project Profile.

Notes

1. If IOT status requires an action, in this case, advanced review through a Project Profile, a system-generated email will notify the agency. In addition to an email notification, the Operating Plan Line Item status is displayed under the Status column on the Operating Plan page.
2. The Chatter widget on the Operating Plan Line Item page can be used to assign follow-up action on the activity.
3. All Chatter messages shared will generate an email to the agency user mentioned in the message.

5.4.2 Create a New Project Profile

IN.gov
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Operating Plan Line Item
99999-18-2

[Show Feed](#)

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Project Profiles [0] | Activity Resources [2]

Operating Plan Line Item Detail

ID	99999-18-2
Operating Plan	99999-18
Agency	CFPP Test Agency
Created By	Roberta Smith

Operating Plan Information

- Activity
- Activity f
- Business Area Su
- Business Capabilities and Applica
- Des
- IT Project/Ongoing Operations Su
- Des

Contact Information

- Main Co
- Main Contact Email Ad
- Main Contact Phone Nu

Budget Information

- Is the Activity Budge
- Source of F

Note 1

Status Approved - IT Project Profile Required

Status Explanation Please submit a Project Profile. Given the short turnaround on this project, PSC recommends that its PM services are secured early so that it can review the Agency's project plan after the profile is submitted.

Line Item Submitted Date

Project Profile Submitted (anticipated) 9/1/2017

Procurement Issued (anticipated) 11/1/2017

Contract Awarded (anticipated) 12/1/2017

Summary of Activity Resource Cost Estimates

Fiscal Year	Initial and Recurring Cost
FY 17 Initial and Recurring Cost	\$0.00
FY 18 Initial and Recurring Cost	\$550,000.00
FY 19 Initial and Recurring Cost	\$0.00
FY 20 Initial and Recurring Cost	\$0.00
FY 21 Initial and Recurring Cost	\$0.00
Activity Resource Cost Summary	\$550,000.00

IOT/IDOA Review Information

Is an Advanced Review Required? ☒

Additional comments

IOT/IDOA Preferred Method of Procurement

Additional comments

Is Reporting or Monitoring Required? ☐

Additional comments

System Information

Created By [Roberta Smith](#), 6/6/2017 12:30 PM

Last Modified By [Brandi Riggle](#), 6/24/2017 7:07 AM

Project Profiles [New Project Profile](#)

No records to display

Activity Resources

Action	Project Resource ID	Resource Category	Resource Sub-Category
Edit Del	PR-357	Services	RFP/RFS Required for Contract Project Services
Edit Del	PR-358	Other	Other

Steps

1. Click on New Project Profile button.

Notes

1. Operating Plan Line Item status and explanation of status is displayed on the Operating Plan Line Item page.
2. IOT/IDOA review information and comments appear in the IOT/IDOA Review Information block.

5.4.3 Enter New Project Profile Information

The screenshot displays the 'Project Profile Edit' form on the IN.gov portal. The form is titled 'New Project Profile' and includes a 'Note 1' annotation. The form is divided into several sections, each with a red arrow pointing to it and a '1' annotation:

- Information**: Contains fields for 'Project Profile ID' (99999-18-2-1) and 'Operating Plan Line Item' (99999-18-2). A 'Note 2' annotation points to the 'Project Profile ID' field.
- General Project Information**: Contains fields for 'Project Sponsor' (Roberta Smith), 'Request an IOT Project Manager?' (None), 'Estimated Duration' (8 months), and 'Billing Information' (This project will use federal).
- Project Description, Goals and Objectives**: Contains fields for 'Problem or Issue' and 'Goals, Objectives, Expected Outcomes'.
- Project Stakeholders and Customers**: Contains a field for 'Project Stakeholders'.
- Project Scope, Technological Environment**: Contains a field for 'General Scope'.

The form also includes a 'Project Profile Edit' header with 'Save', 'Save & New', and 'Cancel' buttons. The 'IN.gov' logo is visible in the top left corner. The 'Sandbox: UAT' label is in the top right corner. The 'Stella Luna' user name is in the top right corner. The 'Search' button is in the top right corner. The 'My Agency', 'Contacts', 'Operating Plans', 'Operating Plan Line Items', 'Project Profiles', 'Procurement Profiles', and 'Reports' tabs are visible in the top navigation bar.

Steps

1. Enter information in new fields related to the Project Profile.
2. Click on the Save button.

Notes

1. **IMPORTANT:** The New Project Profile page displays only the new fields for the project. After the New Project Profile page is saved, the additional Operating Plan Line Item fields will pre-populate the Project Profile and will allow editing to enable the user to update project information.
2. The Project Profile number is associated with the Operating Plan Line Item and is appended to the line item numbering sequence.

5.4.4 Review and Edit Project Profile

Sandbox: UAT
Stella Luna ▾

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Project Profile
99999-18-2-1

[Printable View](#)

[Show Feed](#)

Project Profile has been saved.

[Back to List: Agencies](#)

[Risk Assessments \(0\)](#) | [Procurement Profiles \(0\)](#) | [Activity Resources \(0\)](#)

Project Profile Detail

1

→

Project Profile ID	99999-18-2-1	Status	Draft
Operating Plan Line Item	99999-18-2	Status Explanation	
Agency	CFPP Test Agency	Project Profile Submitted Date	
Owner	Roberta Smith		

General Project Information

Note 2

Project Name

Immunization Information System (Registry) Modernization Needs Assessment

Request an IOT Project Manager?

Yes

Project Description, Goals and Objectives

Note 3

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.

Note 2

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.

Project Scope, Technological Environment

Note 2

General Scope

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.

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.

Agencies/Departments Impacted

Dept of Health only

Existing Systems/Technology Environment

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

10

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Steps

1. Click the Edit button to update the Project Profile.

Notes

1. Project Profile is saved.
2. Operating Plan Line Item fields are pre-populated and able to be edited.
3. New Project Profile fields are displayed and able to be edited.

5.4.5 Copy Activity Resources



Search...

Sandbox: UAT

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Contacts

Operating Plans

Operating Plan Line Items

Project Profiles

Procurement Profiles

Reports

Project Profile

99999-18-2-1

Printable View

Show Feed

Project Profile has been saved.

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Risk Assessments [0]

Procurement Profiles [0]

Activity Resources [0]

Note 1

Project Profile Detail

Edit

Delete

Copy Activity Resources

Submit

Project Profile ID

99999-18-2-1

Status

Draft

Operating Plan Line Item

99999-18-2

Status Explanation

Agency

CFPP Test Agency

Project Profile Submitted Date

Owner

Roberta Smith

General Project Information

Project Name

Immunization Information System (Registry) Modernization Needs Assessment

Request an IOT Project Manager?

Yes

Main Contact

Stella Luna

Estimated Duration

8 months

Main Contact Email Address

sluna@cfpp.in.gov

Main Contact Phone Number

Project Sponsor

Roberta Smith

Project Sponsor Email Address

rsmith@cfpp.in.gov

Project Sponsor Phone Number

Project Description, Goals and Objectives

Problem or Issue

Existing issues of the State's in System is based on out-dated Cost of system maintenance a The system is not sufficiently i The system lacks robustness i The system is no longer the o The system cannot handle ne The current system has inad Medical home model needs to Disease Control.

Initial Review of Project Resource Requirements

Will Procurements be Services Only? ☐ Yes. The project resources will be procured through MSP agreement. Additionally IOT Project Success Center will provide project management.

Is Project Estimated to Exceed \$500K? ☐ Yes

Summary of Activity Resource Cost Estimates

FY 17 Initial and Recurring Cost

FY 18 Initial and Recurring Cost

FY 19 Initial and Recurring Cost

FY 20 Initial and Recurring Cost

FY 21 Initial and Recurring Cost

Activity Resource Cost Summary

Note 1

IOT/IDOA Review Information

Is an Advanced Review Required?

☐

Additional comments

IOT/IDOA Preferred Method of Procurement

Additional comments

Is Reporting or Monitoring Required?

☐

Additional comments

System Information

Created By

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

Last Modified By

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

Edit

Delete

Copy Activity Resources

Submit

Risk Assessments

New Risk Assessment

No records to display

Procurement Profiles

New Procurement Profile

No records to display

Activity Resources

New Activity Resource

No records to display

Note 1

Steps

1. Click on the Copy Activity Resources button.

Notes

1. Newly created Project Profile will not include an Activity Resource.

IMPORTANT: Activity Resources related to the Operating Plan Line Item should be copied from that record to be included in the Project Profile. Once copied to the Project Profile, an Activity Resource can be updated or deleted. New Activity Resources can be added to the Project Profile.

5.4.6 Edit Activity Resource

Summary of Activity Resource Cost Estimates

FY 17 Initial and Recurring Cost	\$0.00
FY 18 Initial and Recurring Cost	\$550,000.00
FY 19 Initial and Recurring Cost	\$0.00
FY 20 Initial and Recurring Cost	\$0.00
FY 21 Initial and Recurring Cost	\$0.00
Activity Resource Cost Summary	\$550,000.00

IOT/DOA Review Information

Is an Advanced Review Required? ☐

Additional comments [?](#)

IOT/DOA Preferred Method of Procurement

Additional comments [?](#)

Is Reporting or Monitoring Required? ☐

Additional comments [?](#)

System Information

Created By [Stella Luna](#), 6/24/2017 2:57 PM

[Edit](#) [Delete](#) [Copy](#)

Risk Assessments

[New Risk Assessment](#)

No records to display

Procurement Profiles

[New Procurement Profile](#)

No records to display

Activity Resources

[New Activity Resource](#)

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

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Search

Sandbox: UAT

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Activity Resource

PR-362

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[Printable View](#)

Activity Resource Detail

Project Resource ID

PR-362

Project Profile

99999-18-2-1

Save

Cancel

Resource Information

Resource Category

Other

Resource Sub-Category

Other

Resource Description

Project Management through IOT

Vendor Status

Procurement Method

IOT Services

Specify Contract No. If Existing

Explain Need for Special Procurement

Describe

Estimate of Initial and Recurring Costs

FY 2017 Initial Cost

FY 2018 Initial Cost

30000

FY 2019 Initial Cost

FY 2020 Initial Cost

FY 2021 Initial Cost

FY 2017 Recurring Cost

FY 2018 Recurring Cost

FY 2019 Recurring Cost

FY 2020 Recurring Cost

FY 2021 Recurring Cost

Has Agency's HPA Reviewed Procurement?

Yes

If No, When is HPA Review Planned?

Project Resource Justification

Justification

System Information

Created By [Stella Luna](#), 6/24/2017 3:00 PM

Last Modified By [Stella Luna](#), 6/24/2017 3:00 PM

Save

Cancel

Note 1

Note 2

Steps

1. Click on the Project Resource ID to modify the Activity Resource.
2. Edit information in the Activity Resource.
3. Click on the Save button.

Notes

1. Activity Resources copied from the Operating Plan Line Item. The record will reflect a new number according to the numbering sequence.
2. New Activity Resources can be added to the Project Profile.

5.4.7 Create a Project Risk, Complexity and Priority Assessment

Summary of Activity Resource Cost Estimates

FY 17 Initial and Recurring Cost	\$0.00
FY 18 Initial and Recurring Cost	\$555,000.00
FY 19 Initial and Recurring Cost	\$0.00
FY 20 Initial and Recurring Cost	\$0.00
FY 21 Initial and Recurring Cost	\$0.00
Activity Resource Cost Summary	\$555,000.00

IOT/IDOA Review Information

Is an Advanced Review Required? ☐

Additional comments

IOT/IDOA Preferred Method of Procurement

Additional comments

Is Reporting or Monitoring Required? ☐

Additional comments

System Information

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

[Edit](#) [Delete](#) [Copy Activity R](#)

Risk Assessments

[New Risk Assessment](#)

No records to display

Procurement Profiles

[New Procurement Profile](#)

No records to display

Activity Resources

[New Activity Resource](#)

Action	Project Resource ID	Resource Category
Edit Del	PR-361	Services
Edit Del	PR-362	Other



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Risk Assessment Edit

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

Risk Assessment Summary

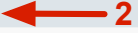
Project Profile 99999-18-2-1 [Note 1](#)

Overall Project Risk Score
Overall Project Complexity Score
Overall Project Priority Score

Assess the following factors that ask: "Does this project?"

[Note 1](#)

1 

2 

Fulfill a regulatory requirement

Impact public health or safety

Align with a Governor's Initiative

Impact security of systems or records

Improve access to information/services

Align with State strategy/business model

Develop better public relations

Improve job efficiency and processes

Improve system supportability

RFP/RFS Required for Contract Project Services

Other

Steps

1. Click on the New Risk Assessment button.
2. Complete the questions that assess the project's alignment with agency business and statewide priorities.

Notes

1. The Risk Assessment page enables the user to complete a self-assessment of project risk, complexity and priority.

5.4.8 Complete Risk Assessment

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Risk Assessment Edit
New Risk Assessment

Risk Assessment Edit Save Save & New Cancel

Risk Assessment Summary = Required Information

Project Profile Overall Project Risk Score

Assess the following factors that ask: "Does this project?"

- Fulfill a regulatory requirement
- Impact public health or safety
- Align with a Governor's Initiative
- Impact security of systems or records
- Improve access to information/services
- Align with State strategy/business model
- Develop better public relations
- Improve job efficiency and processes
- Improve system supportability

Assess the following factors and provide information on each

- Estimated # of internal resource hours
- Estimated total cost for hardware
- Estimated total cost for software
- Estimated development/configuration cost
- Confidence level in estimated costs
- Funds budgeted, approved and allocated
- Number of project team members planned
- Project resources controlled by Sponsor
- Technology experience of project team
- Level of management commitment
- Dependence on vendor services
- Schedule variation tolerance
- External dependencies
- Similar projects in agency
- Multiple information technology areas
- Political sensitivity
- Impact of project failure
- Organizational impact

Note 1

2 Save Save & New Cancel

Steps

1. Complete the questions that assess the project's risk and complexity factors.
2. Click on the Save button.

Notes

1. Each question or self-assessment factor provides a drop-down list that contains four options to select from.

5.4.9 Review and Edit the Risk Assessment



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Risk Assessment

RAN-23

Printable View



Risk Assessment has been saved.

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1

→

Edit

Delete

Risk Assessment Detail

Risk Assessment Summary

Risk Assessment Number	RAN-23	Overall Project Risk Score	33
Project Profile	99999-18-2-1	Overall Project Complexity Score	35
		Overall Project Priority Score	84

Assess the following factors that ask: "Does this project?"

Fulfill a regulatory requirement	ⓘ	Fulfills Federal/State regulatory requirement in next 12 months
Impact public health or safety	ⓘ	Adds new public health or safety service
Align with a Governor's Initiative	ⓘ	Fulfills a Governor's Initiative related to providing citizen information/services
Impact security of systems or records	ⓘ	Some direct impact to systems, files, or records
Improve access to information/services	ⓘ	Adds functionality/improves Citizens' access to information/services
Align with State strategy/business model	ⓘ	Aligns with an Agency's focus to meet the State strategy or business model
Develop better public relations	ⓘ	Adds functionality/improves citizen outreach and public relations
Improve job efficiency and processes	ⓘ	Adds functionality to State employees' job efficiency, productivity, or information flow
Improve system supportability	ⓘ	Improves support team monitoring/maintenance effectiveness for applications, or services

Assess the following factors and provide information on each

Estimated # of internal resource hours	ⓘ	Between 600 and 1,200
Estimated total cost for hardware	ⓘ	Less than \$50,000
Estimated total cost for software	ⓘ	Less than \$50,000

Note 1

Note 2

Steps

1. Click the Edit button to update the Risk Assessment.

Notes

1. Project Profile Risk Assessment can be reviewed and edited if needed.
2. Project Risk, Complexity and Priority score.

5.4.10 Collaborate on Agency Approval of the Project Profile

The screenshots illustrate the workflow for collaborating on the agency approval of a Project Profile. The interface includes a top navigation bar with the IN.gov logo, a search bar, and a user profile (Stella Luna). The main navigation menu includes My Agency, Contacts, Operating Plans, Operating Plan Line Items, Project Profiles, Procurement Profiles, and Reports.

Note 1: The Project Profile 99999-18-2-1 is shown in the 'Draft' status. A green banner indicates 'Project Profile has been updated.' The 'Show Feed' button is visible.

Note 2: The 'Project Profile Detail' section shows the Project Profile ID (99999-18-2-1), Operating Plan Line Item (99999-18-2), Agency (CFPP Test Agency), and Status (Draft). The 'Project Profile Submitted Date' is also displayed.

Note 3: The 'General Project Information' section shows the Project Name (Immunization Information System (Registry) Modernization Needs). The 'Project Profile Detail' section shows the Project Profile ID (99999-18-2-1), Operating Plan Line Item (99999-18-2), Agency (CFPP Test Agency), and Owner (Roberta Smith).

Note 4: The 'Project Profile Detail' section shows the Project Profile ID (99999-18-2-1), Operating Plan Line Item (99999-18-2), Agency (CFPP Test Agency), and Owner (Roberta Smith). The 'General Project Information' section shows the Project Name (Immunization Information System (Registry) Modernization Needs).

The screenshots also show the 'Post' button, the 'Share' button, and the 'Follow' button. The 'Post' button is highlighted with a red arrow and the number 1. The 'Share' button is highlighted with a red arrow and the number 2. The 'Follow' button is highlighted with a red arrow and the number 3. The 'Post' button is also highlighted with a red arrow and the number 1. The 'Share' button is highlighted with a red arrow and the number 2. The 'Follow' button is highlighted with a red arrow and the number 3.

Steps

1. Toggle the Show Feed/Hide Feed button to display the Chatter discussion thread.
2. Create the message with @mention to display the system users and select a specific user name.
3. Click on the Share button when complete.

Notes

1. Ensure Project Profile record is saved prior to posting a message in Chatter.
2. Project Profile elements include Risk Assessment and Activity Resources.
3. Note that the Owner of the Project Profile is the individual who is responsible for submitting the Project Profile and coordinating information exchange with IOT and IDOA.

IMPORTANT: Only the Agency Lead can change the Owner of the Project Profile. Ownership can be assigned prior to or after the creation of the Project Profile, however, ownership must be assigned prior to submitting the Project Profile to IOT. Only the assigned Owner can submit the Project Profile to IOT.

4. Chatter can provide a means for the agency project lead to communicate and obtain approval on the Project Profile. The Project Profile discussion thread retains a record of the internal agency discussion thread.

5.4.11 Change the Owner of the Project Profile

The screenshots illustrate the steps to change the owner of a project profile in the IN.gov system.

Screenshot 1 (Left): Shows the 'Project Profile Detail' for ID 99999-18-2-1. The 'Owner' field is highlighted with a red box and labeled with a red '1'. The current owner is Roberta Smith.

Screenshot 2 (Middle): Shows the same 'Project Profile Detail' page. A red box labeled with a red '2' highlights the 'Owner' field, which now displays 'Stella Luna'. A red arrow labeled with a red '3' points to the 'Save' button.

Screenshot 3 (Right): Shows the 'Project Profile Detail' page after the change. The 'Owner' field is now 'Stella Luna'. A blue 'Note 1' is visible. The 'Status' is 'Draft'. The 'General Project Information' section includes details for the Immunization Information System (Registry) Modernization Needs Assessment, with contact information for Stella Luna (Main Contact) and Roberta Smith (Project Sponsor).

Steps

1. Select the Change link adjacent to the Owner.
2. Enter or search the Agency User name in the Lookup field.
3. Click on the Save button when complete.

Notes

1. Only the Agency Lead can change Owner of the Project Profile and only the assigned Owner can submit the Project Profile to IOT.

5.4.12 Submit the Project Profile to IOT for Review

Project Profile
99999-18-2-1

Project Profile ID: 99999-18-2-1
Operating Plan Line Item: 99999-18-2
Agency: CFPP Test Agency
Owner: Stella Luna

Status: Draft

Note 1

Note 2

Project Profile
99999-18-2-1

Project Profile ID: 99999-18-2-1
Operating Plan Line Item: 99999-18-2
Agency: CFPP Test Agency
Owner: Stella Luna

Status: Review
Project Profile Submitted Date: 6/24/2017

Note 2
Note 3

Call for Projects and Procurements

Sandbox: IT Project Profile 99999-18-2-1 has been submitted by CFPP Test Agency
To: sluna@cfpp.in.gov

Dear Stella Luna,

Your IT Project Profile 99999-18-2-1 has been submitted to IOT/IDOA for review.

The results of this review will be determined within a 30-day period and a representative from either IOT or IDOA will notify you if additional information is needed.

Thank you and have a nice day!

Note 4

Steps

1. Click on the Submit button.

Notes

1. Only the Owner can submit the Project Profile.
2. Upon submission, the Draft status changes to Review status.
3. The Project Profile Submitted Date is displayed in the Project Profile Detail block.
4. After submitting the Project Profile a system-generated email notifies the Owner that the Project Profile has been submitted and that IOT will conduct its review within a 30-day review period from the date submitted.