



State of Indiana

Call for IT Projects and Procurements Portal User Reference Guide

Section 7 Review a CFPP Plan or Profile

**October 10, 2017
Version 1.0**

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Review a CFPP Plan or Profile

7.1 Overview

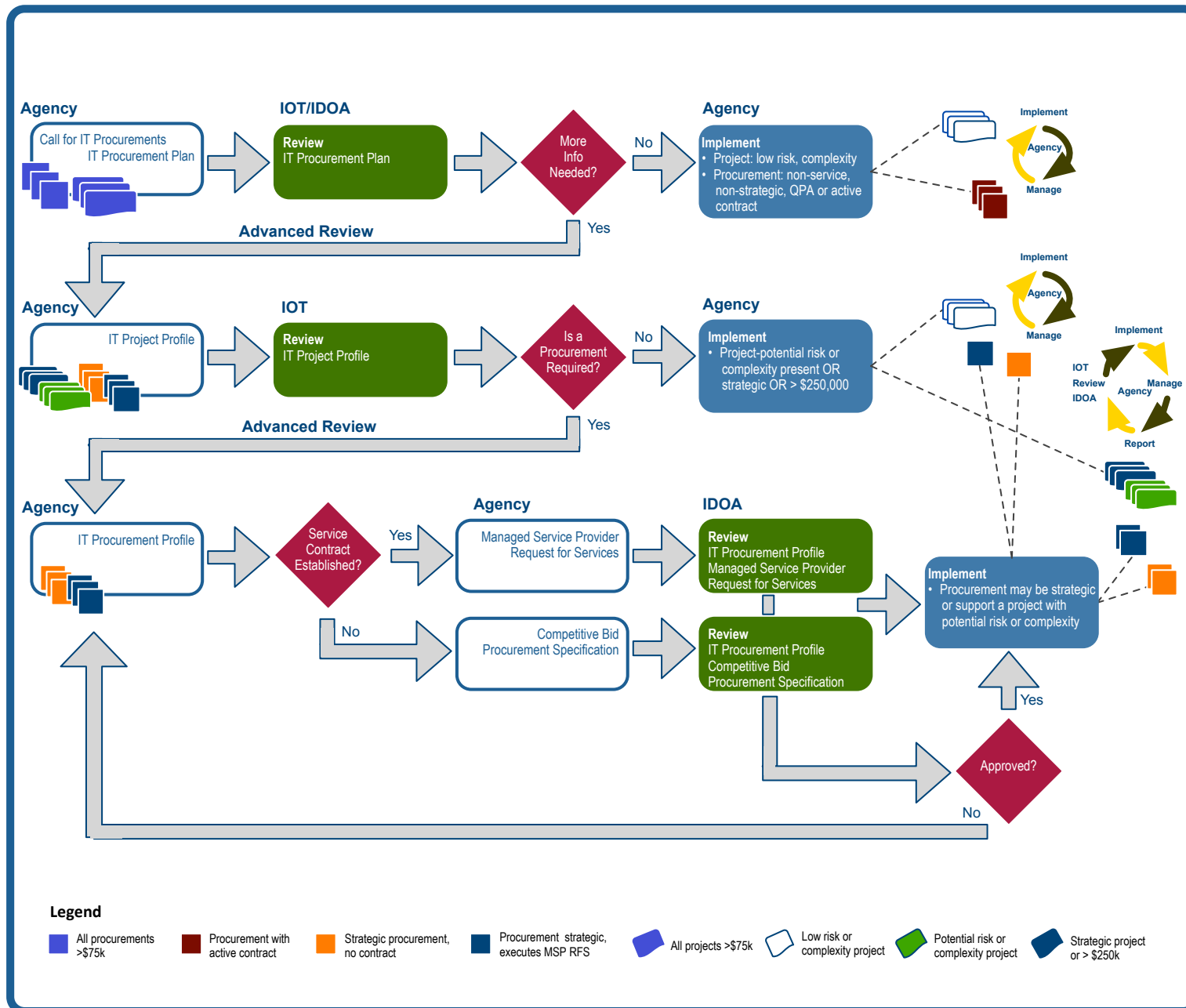
IOT, in conjunction with IDOA, conducts a review of agency CFPP Operating Plans and Profiles related to planned IT projects and procurements. The focus of these reviews is to

- determine impact of a planned project or procurement on IOT or statewide resource planning,
- determine opportunities for leveraging shared services opportunities,
- assess a PSC level of engagement, based on project risk, complexity, or priority, or
- determine whether additional information is required through an advanced review of a planned project.

This section describes the IOT/IDOA review process of an Operating Plan Line Item. The review process of a Project or Procurement Profile is similar to the Operating Plan Line Item review. Subsequent reviews are primarily distinguished by the review outcome.

For example, the review of a Project Profile may result in the transfer of a project to PSC if project management resources are requested or a level engagement is determined based on IOT's review of project risk, complexity, or priority. Additionally, a Project Profile review may result in Managed Services Provider statewide agreement, and a Procurement Profile will be requested to initiate that procurement.

A consolidated view of the CFPP review cycle process is provided on the following page.



7.2 Review a List of Submitted Operating Plans

The screenshot displays the IOT CFPP Portal interface. At the top, there is a search bar and a navigation bar with tabs: Home, Chatter, Agencies, Contacts, **Operating Plans**, Operating Plan Line Items, Project Profiles, Procurement Profiles, Reports, Dashboards, Change Requests, and Files. A red arrow labeled '1' points to the 'Operating Plans' tab. Below the navigation bar, the 'Operating Plans' section is active, showing a 'View' dropdown menu with '3. Submitted Operating Plans' selected. A red arrow labeled '2' points to this dropdown. Below the view selector, there is a 'Go!' button and links for 'Clone' and 'Create New View'. The main content area displays a table titled 'Recent Operating Plans' with columns: Operating Plan ID, Agency, Fiscal Year, Status, and Submitted for Review Date. The table lists three entries: 99999-18 (CFPP Test Agency, 2018, Submitted, 6/16/2017), 9999-17 (Test Agency 071816, 2017, Submitted, 6/19/2017), and 9999-16 (Test Agency 071816, 2016, Draft). A 'Recently Viewed' dropdown is located at the top right of the table.

Operating Plan ID	Agency	Fiscal Year	Status	Submitted for Review Date
99999-18	CFPP Test Agency	2018	Submitted	6/16/2017
9999-17	Test Agency 071816	2017	Submitted	6/19/2017
9999-16	Test Agency 071816	2016	Draft	

Steps

1. Select Operating Plans tab.
2. Select Submitted Operating Plans view from the drop-down list.
3. Click on the Go! Button.

Notes

1. IOT Reviewer profile, settings and logout are accessed here.

7.3 Select a Submitted Operating Plan and Operating Plan Line Item




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3. Submitted Operating Plans
[Clone](#)
[Create New View](#)

List
Feed

Action	Operating Plan ID ↑	Agency	Agency Code	Fiscal Year	Status	Submitted for Review Date
Edit	1-17	HT Test Agency 001	00001	2017	Submitted	4/4/2017
Edit	99999-18	CFPP Test Agency	99999	2018	Submitted	6/16/2017
Edit	800-17					
Edit	9-17					
Edit	9-18					
Edit	999-17					




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Operating Plan 99999-18

Show Feed

[Back to List: Operating Plans](#)

Operating Plan Line Items [2]
Files [0]

Operating Plan Detail
Edit
Sharing

Agency Information

Owner
Tom Morrow [\[Change\]](#)

Operating Plan ID
99999-18

Agency
CFPP Test Agency

Created By
Roberta Smith, 6/6/2017 12:17 PM

Agency Code
99999

Fiscal Year
2018

Submission Information

Status
Submitted

Submitted for Review Date
6/16/2017

Operating Plan Line Items
Operating Plan Line Items Help

Action	ID	Agency	Activity Type	Status	Line Item Submitted Date	Review Days Remaining	Review Color
Edit	99999-18-1	CFPP Test Agency	Ongoing Operations	Review	6/16/2017	30	
Edit	99999-18-2	CFPP Test Agency	Project	Review	6/16/2017	30	




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Steps

1. Click on the Operating Plan ID to view the agency Operating Plan.
2. Click on the Operating Plan Line Item ID to view the agency Operating Plan Line Item to begin the review process.

Notes

1. All agency Operating Plans with a status of Submitted are displayed and can be resorted on any column.
2. The Edit action should not be used as it has limited functionality. IOT and IDOA reviewers should click on the link to the Operating Plan or the Operating Plan Line Item to fully access all the records, information, and functions associated with that item.
3. The Review Color will indicate a Green, Yellow, or Red status depending on the number of days remaining in the Review period. A 30-day review period is allowed for each Operating Plan Line Item. After that period is reached, the status of a line item will automatically be assigned an Approved-Review Window Closed status if no other status has been assigned.

7.4 Review an Operating Plan Line Item

Operating Plan Line Item
99999-18-2

[Show Feed](#)

[Back to List: Operating Plans](#)

Project Profiles [0] | Activity Resources [2] | Review Update History [4] | Child Projects (Enterprise) [0]

Operating Plan Line Item Detail [Edit](#)

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

Operating Plan Information

Activity Type	Project
Activity Name	Immunization Information System (Registry) Modernization Needs Assessment
Business Area Support	Epidemiology, Vital Statistics
Business Capabilities and Applications	Case/Client Management
Describe	
IT Project/Ongoing Operations Support	Deploy new applications or systems; Maintain or enhance existing systems
Describe	

Activity Resources

Action	Project Resource ID	Resource Category
Edit	PR-357	Services
Edit	PR-358	Other

Activity Resource
PR-358

[Back to List: Operating Plans](#)

Notes & Attachments [0]

Activity Resource Detail [Edit](#)

Project Resource ID	PR-358
Operating Plan Line Item	99999-18-2

Resource Information

Resource Category	Other	Procurement Method	IOT Services
Resource Sub-Category	Other	Specify Contract No. If Existing	
Resource Description	Project Management through IOT	Explain Need for Special Procurement	
Describe			

Estimate of Initial and Recurring Costs

FY 2017 Initial Cost		FY 2017 Recurring Cost	
FY 2018 Initial Cost	\$25,000.00	FY 2018 Recurring Cost	
FY 2019 Initial Cost		FY 2019 Recurring Cost	
FY 2020 Initial Cost		FY 2020 Recurring Cost	
FY 2021 Initial Cost		FY 2021 Recurring Cost	
Has Agency's HPA Reviewed Procurement?	Yes		
If No, When is HPA Review Planned?			

Steps

1. Review information for Operating Plan Line Item.
2. Click on Activity Resource.
3. Review information for Activity Resource.

Notes

7.5 Collaborate with IOT Business and IDOA Procurement Reviewers

▼ Project Information

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

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.

Project Customer(s) Epidemiology, Vital Statistics

Planned Start Date 8/1/2017

Planned End Date 6/6/2018

Project Budget (Total Estimated Cost) \$550,000.00

▼ Anticipated Planning Timeline (Major Milestones)

Project Profile Submitted (anticipated) 9/1/2017

Procurement Issued (anticipated) 11/1/2017

Contract Awarded (anticipated) 12/1/2017

▼ Review Timeline

Review Days Remaining 22

Review Color

▼ 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 Business - Please @mention Reviewers on Chatter to request review.

Review Required - IOT Business ☒

Review Required Date - IOT

Review Notes - IOT Business **PSC: Heads up on the PM resources specified for this project.**

Review Complete - IOT Business ☐

Review Complete Date - IOT

▼ IDOA Review - Please @mention Reviewers on Chatter to request review.

Operating Plan Line Item 99999-18-2

Hide Feed

Post File Thanks

@[Frank Spicuzza] @[John Helmer] Request review on this line item. See my notes in the review field blocks.

Share

Follow

Followers

No followers.

Note 1

Steps

1. To assign to an IOT business unit or IDOA for review, select Review Required – IOT Business. You can select more than one business unit to receive feedback from multiple reviewers. Alternatively, you can request feedback sequentially, once feedback from a reviewer is received.
2. Identify the business unit within IOT, for example, “PSC:” and describe the particular items the reviewer should focus on.
IMPORTANT: Click the Save button to save the record.
3. Click on Show Feed/Hide Feed toggle and use @mention to post a message to one or more individuals and communicate a request that they review the Operating Plan Line Item.
4. Click on the Share button to post the message. By posting the message an email is sent to the reviewer.

Notes

1. The information contained in the review request is posted on the site and an email message is sent to the named individual who can then click on the View/Comment button in the email to access, review, and comment on the line item.

7.6 Conduct an IOT Business Review

Operating Plan Line Items Table:

Action	ID	Agency	Activity Name	Activity Type	Operating Plan	Review Days Remaining
Edit +	99999-18-2	CFPP Test Agency	Immunization Information System...	Project	99999-18	30
Edit +	99999-18-1	CFPP Test Agency	Network Expansion			

Operating Plan Line Item Detail View (99999-18-2):

- Project Information:**
 - Project Description: Migrate the existing platform for the state's immunization registry to...
 - Agencies/Departments Impacted: Dept of Health only
 - Existing Systems/Technology Environment: Agency's shot scheduler system; Exchanges information (interfaces)
 - Project Customer(s): Epidemiology, Vital Statistics
 - Planned Start Date: 8/1/2017
 - Planned End Date: 6/6/2018
 - Project Budget (Total Estimated Cost): \$550,000.00
- Anticipated Planning Timeline (Major Milestones):**
 - Project Profile Submitted (anticipated): 9/1/2017
 - Procurement Issued (anticipated): 11/1/2017
 - Contract Awarded (anticipated): 12/1/2017
- Review Timeline:**
 - Review Days Remaining: 22
 - Review Color: Green
- 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 Business Review:**
 - Review Required - IOT Business: ☒
 - Review Required Date - IOT: 6/16/2017
 - Review Notes - IOT Business: Project Mgt: Heads up on this resource needed for the Agency's project PS&C. Thanks. We are aware of this project and it has tentatively placed on our schedule pending IOT and IDOA approval. A Project Profile should be requested. Also, because of the tight turnaround, we will want to meet with the Agency early on its project plan.
 - Review Complete - IOT Business: ☒
 - Review Complete Date - IOT: 6/16/2017

Review Feed:

- John Heimer changed Review Notes - IDOA. (Today at 2:14 PM)
- Brandi Riggie to Indiana Office of Technology Only @Frank Spicuzza @John Heimer Request review on this line item. See my notes in the review field blocks. (Today at 2:13 PM)

Steps

1. Click on Operating Plan Line Item to review the information.
2. Review the project information and activity resources as requested by the PSC.
3. Enter review comments and feedback in the IOT Business Review block.
IMPORTANT: Click the Save button to save the record.
4. Post a response to the same message thread of the original review request and click on the Comment button to notify PSC that the business review is complete.

Notes

1. All IOT and IDOA reviewers share a common portal view. Field level updates are permitted based on the reviewer's profile.

7.7 Review IOT Business Review Comments

▼ Anticipated Planning Timeline (Major Milestones)

Project Profile Submitted (anticipated) 9/1/2017

Procurement Issued (anticipated) 11/1/2017

Contract Awarded (anticipated) 12/1/2017

▼ Review Timeline

Review Days Remaining 30

Review Color 

▼ 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 Business Review

Review Required - IOT Business	☒
Review Required Date - IOT	6/16/2017
Review Notes - IOT Business	Project Mgt: Heads up on this resource needed for the Agency's project PSC: Thanks. We are aware of this project and it has tentatively placed on our schedule pending IOT and IDOA approval. A Project Profile should be requested.
Review Complete - IOT Business	☒
Review Complete Date - IOT	6/16/2017

1

Note 1

Activity Resources			Activity Resources Help ?	
Action	Project Resource ID	Resource Category	Resource Sub-Category	
Edit	PR-357	Services	RFP/RFS Required for Contract Project Services	
Edit	PR-358	Other	Other	

Review Update History					Review Update History Help ?	
Action	Field Name	Description		Updated By	Created Date	
	Review Notes - IOT('IOT Business Review')	Changed from " To 'Project Mgt: Heads up on this resource needed for the Agency's project'		Brandi Riggle	6/16/2017	
	Review Notes - IDOA('IDOA Review')	Changed from " To 'IDOA: Please advise if the project scope conforms to an an RFP or if the MSP agreement meets the assessment needs.'		Brandi Riggle	6/16/2017	
	Review Notes - IOT('IOT Business Review')	Changed from 'Project Mgt: Heads up on this resource needed for the Agency's project' To 'Project Mgt: Heads up on this resource needed for the Agency's project PSC: Thanks. We are aware of this project and it has tentatively placed on our schedule pend...		Brandi Riggle	6/16/2017	

Note 2

Steps

1. Review the comments and feedback from the IOT Business Unit review.

Notes

1. Reviewer comments are saved in the IOT Business Review block, which is displayed in the IOT/IDOA portal view only.
2. Review Update History provides an audit trail of actions performed in IOT and IDOA. This information is displayed in the IOT/IDOA portal view only.

7.8 Determine Review Results and Document Information to Agency

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

IOT/IDOA Review Information

Is an Advanced Review Required? ☒

Additional comments Given the short turnaround on the project, a Project Profile should be submitted within 30 days. **Note 1**

IOT/IDOA Preferred Method of Procurement MSP

Additional comments MSP appears to be best option, however, a Project Profile is needed to confirm.

Is Reporting or Monitoring Required? ☐

System Information

is reporting or monitoring required? ☐

Operating Plan Line Item Detail

ID: 99999-18-2
Operating Plan: 99999-18
Agency: CFPP Test Agency
Owner:

Operating Plan Information

Activity Type:
Activity Name:
Business Area Support:
Business Capabilities and Applications:
Describe:
IT Project/Ongoing Operations Support:
Describe:

Contact Information

Main Contact:
Main Contact Email Address:
Main Contact Phone Number:

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: 9/14/2017

Steps

1. Enter review information in the IOT/IDOA Review Information block.
Note: The PSC reviewer profile is the only profile with update privileges of the IOT/IDOA Review Information block. Information entered in this block is displayed in the agency's portal view and should provide supporting detail on the status assigned by IOT.
2. Click on the Status Explanation field to enter summary information related to the results of the review, referencing the IOT/IDOA Review section of the Operating Plan Line Item for any detail information regarding the next action.
IMPORTANT: Information provided in this field should summarize the results of the review as this will be included in the email message to the agency.
3. Click on the Save button.

Notes

1. **IMPORTANT:** It is important to save the record before changing the Status field. Saving the record will enable you to revise any review information prior to finalizing your review. Once the status field is changed, saving the record will trigger a change to the status, and will either initiate an email message to the agency or other action, depending on the status type.

7.9 Finalize Review and Change Status Field




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Operating Plans

Operating Plan Line Items

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Operating Plan Line Item

99999-18-2

Show Feed

Back to List: Project Profiles

Project Profiles (1)

Activity Resources (2)

Review Update History (5+)

Child Projects (Enterprise) (0)

Operating Plan Line Item Detail

ID

99999-18-2

Operating Plan

99999-18

Agency

CFPP Test Agency

Owner

Roberta Smith

Save

Cancel

Status

Review

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

Operating Plan Information

Activity Type

Project

Activity Name

Immunization Information System (Registry) Modernization Needs Assessment

Business Area Support

Epidemiology, Vital Statistics

Business Capabilities and Applications

Case/Client Management

IT Project/Ongoing O

Contact Information

Main Contact

Main Contact

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 submitted.

Please use the following link access the Project/Procurement record: <https://ind-tech.force.com/a00r0000001L8Ox>

Indiana Office of Technology/IDOA

Sandbox: ACTION REQUIRED: Operating Plan Line Item 99999-18-2 Status has changed to Approved - IT Project Profile Required — Indiana

Call for Projects and Procurements

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

To: rrousseau@civicinitiatives.com

Indiana

June 24, 2017 at 6:07 AM

Note 1

Steps

1. Click on the Status field to display and select an action that results from the Operating Plan Line Item review.
2. Click the Save button to save the record and trigger the next action.

Notes

1. Saving the Operating Plan Line Item review record automatically generates an email notification containing the information entered in the Status and Status Explanation fields ***only if additional agency action*** is needed. If the project or ongoing operations activity does not require additional action, the change in status will not trigger an email, however, the change in status information will be displayed in the agency's Operating Plan Line Items.