

**Commonwealth Technology Portfolio (CTP)  
Data Cleanup Requirements Supporting the 2011 RTIP Report**

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**May 16, 2011**

The VITA investment management and project management staff will begin reviewing agency portfolio information on major IT projects in support of the 2011 RTIP Report as soon as it is updated in the Commonwealth Technology Portfolio (CTP) – ProSight. Agencies are strongly encouraged to begin data updates now. Past history has shown that agencies may need an additional week for data updates after the initial VITA review, so please start early. Agencies are asked to complete data updates on existing projects and submit data for new projects by **June 15**.

Please remember the budget requirement that all active major IT projects greater than \$1 million must be called out in the Governor’s Budget and, subsequently, the Appropriations Act. Projects not active on the 2011 RTIP Report or listed with intent to obtain development approval must go through a special emergency approval process with the Governor’s Office to proceed.

If an agency identifies a new Major IT project during the strategic planning process later this summer, project management staff will work with the agency on a case-by-case basis to include the information in the 2011 RTIP Report. The RTIP Report is due to the Governor and General Assembly on September 1, 2011.

The following checklist will assist agencies when updating major IT project information in support of the 2011 RTIP Report.

**Major IT projects Identified for Preliminary Planning, Business Case Approved (Approved for Planning) or Project Initiation Approved (Approved for Development)**

- Ensure that the information requested on the Application Tab located in the Project Business Alignment form is completely filled out.
- Review the service areas tab on the Project Business Alignment form and make any necessary changes. Agencies must select the appropriate service areas that the project supports from the new updated service area portfolio. Note: Since higher education does not follow the Department of Planning and Budget Strategic planning process, all service areas for higher education have been removed.
- Ensure the PPEA Flag, which signifies if a PPEA is involved in the project, is set. This flag is located on the General Information Tab within the Project Business Alignment Form.

**\*\*Budget Plan form, Yearly Spend Tab and new Operations and Maintenance Tab (Active Projects Only)\*\***

- Make sure that the Funding Source tables in the middle of the form are updated and accurate. **The dollar amounts that are entered into these tables will be**

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**pulled into a file for the Department of Planning and Budget to input into the Governor's Budget in November and ultimately into the Appropriation Act. It is critical that agencies keep this information up to date on a monthly basis. This is the only location where the dollars are broken down by funding source.**

- \*\*\* New Update the operations and maintenance costs projected for the first 6 years once the project is completed in the new O&M tab on the Budget Plan. \*\*\*New**

**Major IT projects Identified for Preliminary Planning, Business Case Approved (Approved for Planning) ONLY**

**Project Business Alignment Form**

- Update the project description on the General Information tab with any new pertinent information that may have developed in the past year. Please ensure the project description is an initial, high-level statement describing the purpose, benefits, customer(s), general approach to development and characteristics of the product or service required by the organization.
- Answer the question, Is this a Change/Update to an existing Project in the Agency Strategic Plan? on the General Information tab.
- Fill out the Request for Service data fields at the bottom of the General Information tab if appropriate.

**Project Business Alignment – Biennium Funding Form**

- Ensure anticipated project expenditures are in the right fiscal years. (Note: If expenditures are not aligned to the right fiscal years, move them into the correct fiscal years.)
- Ensure funding source information is correct and that the dollar amounts are entered into the corresponding fields on the form.
- Ensure that the sum of the dollar amounts on the Project Business Alignment - Biennium Funding forms, 10 – 12 Funding tab, 12 – 14 Funding tab, etc., balances with the following fields on the General Information tab of the Project Business Alignment form:
  - Project Cost
  - Total General Fund Project Cost'*Make sure that the funding is entered into the correct Funding tabs.*
- Update the following dates:
  - Planned Initiation Start Date
  - Planned Start Date (Development Approval)
  - Planned Completion Date

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### **Investment Business Case Form**

- Ensure information on the Investment Business Case form is up to date. In particular, review the following questions and update them with any new pertinent information that may have developed in the past year:
  - Question 2, Define the scope of the project. Please ensure the project scope identifies the work that must be performed to deliver the product, service, or result with the specified features and functions. List the key features and functions.
  - Question 8, Does this project benefit or have the potential to benefit one or more of the following?
  - Questions 10a and 10 b – Questions relate to the Governor’s IT improvement initiatives and priorities.

### **Investment Funding Status Scorecard**

- Set the budget appropriation / funding status. (Note: The easiest place to find this scorecard is to reference the AITR Processes, which can be found in the dropdown box in My ProSight.)

### **Agency Prioritization Scorecard**

- Set priorities for major/non-major projects. (Note: The easiest place to find this scorecard is to reference the AITR Processes, which can be found in the dropdown box in My ProSight.)

### **Approvals**

- Do not forget to submit any project updates or new projects for all required approvals to include AITR and agency head approvals.

Should you have any questions, please contact:

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- Jan Van Horn at [jan.vanhorn@vita.virginia.gov](mailto:jan.vanhorn@vita.virginia.gov) or (804) 358-9438 (Monday, Wednesday and Friday) or (804) 416-6180 (Tuesday and Thursday, VITA Commonwealth Project Management Division.
- Constance Scott at [constance.scott@vita.virginia.gov](mailto:constance.scott@vita.virginia.gov) or (804) 416-6179, VITA Commonwealth Project Management Division.