

WEBVTT

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00:00:05.009 --> 00:00:18.600

Narrator: Welcome to CMS IT Governance Training - CMS IT Intake Form. In this short video we're going to walk you through the IT Intake Form and describe the information needed to process your request.

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00:00:19.440 --> 00:00:29.160

Narrator: The link to the Intake Form is on the IT Governance Sharepoint homepage. There is also a link to the form from [cms.gov/tlc](https://cms.gov/tlc)

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00:00:29.850 --> 00:00:43.140

Narrator: To complete the Intake Form, you must be a CMS employee and log into the EASi system using your EUA credentials. Please note that EASI is not compatible with Internet Explorer.

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00:00:47.130 --> 00:01:02.370

Narrator: So let's jump into the form. What is your request for? This will give us a general idea of what you are looking to do. Add a new system? Building a new system may be the best bet to meet a new business need.

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00:01:03.750 --> 00:01:16.350

Narrator: Select this option if you have a new business need. Once you have identified a gap, issue, or area for improvement, we recommend submitting an intake form as early as possible, and our team, with the assistance of various subject matter experts or SMEs, will assist you in determining your best options.

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00:01:26.430 --> 00:01:39.570

Narrator: Major changes or upgrades to an existing system? Choose this option if you have an existing system that requires major upgrades or is undergoing modernization or optimization efforts.

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00:01:40.110 --> 00:01:51.690

Narrator: This could also include moving data centers, changes to software platforms, new system integrations, or changes in functional alignments or data categories.

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Narrator: If you are unsure if your changes are considered major, go ahead and select this option: our team will evaluate each intake form, based on the significance, complexity, and costs associated with the changes to determine next steps.

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00:02:09.090 --> 00:02:18.360

Narrator: Re-compete a contract, without any changes to systems or services? Select this option if you are re-competing an existing IT contract

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00:02:18.810 --> 00:02:26.820

Narrator: or renewing an Interagency Agreement or IAA, and there is no significant cost increase or major new development plans.

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00:02:27.390 --> 00:02:39.750

Narrator: You will need a new Life Cycle ID for the new contract. Decommissioning a system? If your system is being retired, select this option, and our team will provide you with the appropriate guidance.

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00:02:40.950 --> 00:02:52.110

Narrator: Do your best to choose the option that best suits your business need. Our team reviews the information provided in each intake form before determining the next steps for your specific project.

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00:02:52.740 --> 00:02:57.660

Narrator: Providing your statement of work or statement of objectives will be helpful as well.

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00:02:58.590 --> 00:03:12.480

Narrator: If you're still unsure or have additional questions, there is also a link to the OIT Navigator mailbox. OIT Navigators can respond to general inquiries associated with OIT services and processes, recommend appropriate OIT services and resources, and connect you with the right OIT resources and services.

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00:03:23.340 --> 00:03:31.320

Narrator: Continuing on to the next page, you'll see the governance approval steps outlined that you may need to complete in order to get your Life Cycle ID.

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00:03:32.040 --> 00:03:43.050

Narrator: This is a feature in the EASI system that will track and show your progress as you proceed through the governance process. Select "start" in the first step to finish completing the intake form.

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00:03:46.290 --> 00:04:01.050

Narrator: The next few questions include important contact information for your project, including project or product manager, and business owner, who is generally the director or deputy group director who owns the primary business need or function

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00:04:01.350 --> 00:04:11.760

Narrator: that is addressed by your request. If the requestor is also the project manager or business owner, there is a checkbox option that will auto copy the name and component.

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00:04:12.810 --> 00:04:19.920

Narrator: All of the questions on the form are mandatory, however, you may answer "I don't know" or n/a if not applicable.

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00:04:21.090 --> 00:04:40.050

Narrator: If you have one, please also provide the name of your Information System Security Officer, or ISSO, and the name of any OIT SMEs that you are already working with. This information helps us to discuss and obtain additional information about your project without duplication.

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00:04:42.690 --> 00:05:00.330

Narrator: This page is where we get into the real meat of your request. What is your business need? This is an important question to help our team understand the core issue or problem that the request addresses. Providing a bit of context here will help us better understand how to route your project.

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00:05:01.440 --> 00:05:17.010

Narrator: We also ask "how are you thinking of solving it?". Let us know if you have a solution in mind. Have you done any market research? Have you considered leveraging an existing in house solution or shared service? Are you planning to contract out the work?

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00:05:18.120 --> 00:05:25.860

Narrator: Do you require Enterprise Architecture support? The Enterprise Architecture team is a key partner in the intake process.

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00:05:26.520 --> 00:05:36.030

Narrator: Enterprise architects are available to help explore business solutions that might exist elsewhere within CMS and alternatives you might not have thought of.

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00:05:36.900 --> 00:05:46.740

Narrator: They also offer business process modeling that is often a great starting point for process improvements, and lessons learned from similar projects around the Agency.

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00:05:47.520 --> 00:05:58.230

Narrator: They have an enterprise level view and a wealth of knowledge that can and should be leveraged at the outset of a new project, and there is no cost to your team to take advantage of it.

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00:06:02.310 --> 00:06:10.530

Narrator: Will this project be funded out of an existing funding source? Here you'll identify your funding source, also known as an account.

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00:06:11.010 --> 00:06:25.920

Narrator: This can be found, using the link provided to the CMS Operating Plan or by asking your Contracting Officer Representative. If your project involves multiple accounts, you can select that, as well as unknown, new, or other.

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00:06:27.060 --> 00:06:41.670

Narrator: If known, please also include your funding number. This is an important piece of information, so please ask your budget shop if you don't know. You may also find this by accessing the CMS Operating Plan at the link provided.

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00:06:42.900 --> 00:06:55.260

Narrator: Do the costs for this request exceed what you are currently spending to meet your business needs? This is another important piece of information that helps us to decide on the right approval process for your request.

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00:06:56.430 --> 00:07:10.380

Narrator: Please approximate how much you expect the cost to increase. If this is a contract re-compete simply compare the cost of first year of the new contract to the last year of the ending contract for a year over year comparison.

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00:07:11.130 --> 00:07:17.010

Narrator: If you are mid contract, how much will this new effort cost compared to what you are currently spending?

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00:07:18.210 --> 00:07:28.020

Narrator: If you're unable to determine the cost increase, select "I don't know" and we'll follow up with you for more information, as your request cannot be processed without this information.

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00:07:30.840 --> 00:07:37.590

Narrator: Lastly, let us know the status of your contract. Do you already have a contract in place to support this effort?

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00:07:38.400 --> 00:07:44.580

Narrator: If you already have a contract or inter-agency agreement (abbreviated IAA) in place, or if you are currently working on your Acquisition Plan or IAA documents, you will be prompted to include additional information.

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00:07:53.610 --> 00:08:07.500

Narrator: Please provide the vendor, vehicle, and period of performance, including all option years. You may also choose "I haven't started acquisition planning yet" or "I don't anticipate needing contractor support".

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00:08:12.120 --> 00:08:21.060

Narrator: Before submitting your response, you will have the opportunity to review your responses and go back to edit them if you need to. So what happens next?

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00:08:21.600 --> 00:08:32.670

Narrator: And IT Governance team Member will review your request and reach out to you, within two business days, to provide you with a Life Cycle ID or provide guidance on the next steps.

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00:08:36.330 --> 00:08:54.150

Narrator: For questions about IT Governance or more information, you may contact us at [IT\\_Governance@cms.hhs.gov](mailto:IT_Governance@cms.hhs.gov) or visit our website at [www.cms.gov/tlc](http://www.cms.gov/tlc). Thank you.