



Information Technology (IT) Reporting Format and Requirements for the BY 2017 Budget Submission



Based on the Office of Management and Budget
BY 2017 Major IT Business Case Guidance

June 2015



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1 OMB Major IT Business Case: Overview and Required Documentation

1.1 Major IT Business Case

While the purpose of the Major IT Business Case remains the same, sections and/or content may change from year to year. This guidance is based on the Office of Management and Budget (OMB) BY 2017 Major IT Business Case draft guidance and is subject to change.

OMB's Major IT Business Case guidance describes the justification, planning and implementation of an individual capital asset included in the agency IT investment portfolio and serves as a key artifact of the agency's EA and IT CPIC processes.

A major IT investment is a system or project requiring special management attention because the investment:

- Has a cumulative steady state or mixed life cycle funding of \$25 million or more across the Prior Year (PY), the Current Year (CY), and the Budget Year (BY);
- Is an OMB directed portfolio IT investment (Managing Partners for Government-wide E-Gov and Line of Business Investments are required to submit Major IT Business Cases unless they get a waiver from OMB. Refer to Appendix A for a list of Managing Partners);
- Requires special management attention because of its importance to the mission or function of the agency;
- Has significant program or policy implication;
- Has high executive visibility;
- Has high development, operating, or maintenance costs;
- Is funded through other than direct appropriations.

Systems not considered 'major' are classified as 'non-major.'

NOTE: If the Major IT Investment is a High Performance Computer (HPC), please contact the DOE.CPICmailbox@hq.doe.gov for an alternate reporting template and instructions.

2 Investment Documents Required in the Major IT Business Case Submission

The following documents are used in the decision-making process for selecting IT investments and **are required** for all major IT investments, as applicable:

- Risk management plan;
- Investment charter, including IPT;
- Investment-level alternative analysis and benefit-cost analysis;
- Operational analyses (for operational or mixed life cycle systems);
- Post implementation review results (investment level or project-specific); and,
- Documentation of investment re-baseline management approval(s)



- Documentation/Justification of an investment's elimination by: funding, consolidation, reorganization, or split.

Major IT business case project managers are required to develop, maintain, and submit artifacts to the OCIO. Provide updated versions [including date of last update] as a) significant changes are made, b) within 30 days of its presentation to an Agency's governance board review (e.g. IRB/CIO review), or c) as available throughout the investment's lifecycle. New Major Investments should submit the documents by the end of the month following the submission of the Final FY 2017 President's Budget Major Investment Business Cases.

The OCIO will upload the IT PM artifacts to OMB's Max site, and will not be visible to the public without agency approval. The IT PM templates for the above requirements are located on the [eCPIC Resource Library](#).



3 Major IT Business Case Sections to Complete

When completing the Major IT Business Case, investment owners should only fill out the sections that pertain to the individual investment. All major investments should complete the Major IT Business Case: Sections A, B, C and D.

For the Major IT Business Case Detail, all major investments should ensure Section A: General Information is complete. Development/Maintenance/Enhancements (D/M/E) and Maintenance investments should also complete Section B: Project Execution Data. Operational investments should omit Section B and complete Section C: Operational Data.

The following table demonstrates the specific sections of the Major IT Business Case and Major IT Business Case Detail to be completed based on the type of investment.

Sections of the Major IT Business Case and Detail to be Completed	D/M/E, Maintenance	Operations
Major IT Business Case: IT Capital Asset Overview and Justification		
Section A: General Information	x	x
Section B: Investment Detail	x	x
Section C: Life Cycle Costs	x	x
Section D: Acquisition/Contract Strategy	x	x
Major IT Business Case Detail: Performance Plan and Measurement Report		
Section A: General Information	x	x
Section B: Project Plan and Execution Data	x	
Section C: Operational Data		x

Due to OMB's Major IT Business Case and Detail template changes, the Life Cycle Costs table and the Project and Activity tables may not match as they have in prior years. Please refer to the [Performance Plan and Measurement Report](#) section for further explanation.

Refer to the eCPIC Resource Library for [IT Budget](#) and [Integrated Data Collection \(IDC\)](#) definition of terms. Additional budget terms and definitions are included in the Glossary in [OMB Circular A-11, Appendix J](#), "Principles of Budgeting for Capital Asset Acquisitions."



4 Major IT Business Case Question Guidance

This section provides guidance to investment owners for answering each question in the Major IT Business Case.

Question	Guidance
5 Major IT Business Case: IT Capital Asset Overview and Justification	
Part I: Summary Information and Justification – Part I should be completed by all investments.	
5.1.1 Section A: General Information	
1. Investment Name:	Investment name will be auto-populated from the Agency IT Portfolio Summary providing a short definitive title that clearly indicates the investment’s intent. Each investment name should start with the PSO acronym (e.g., SC, NNSA, EM, and EE) followed by the field site acronym (e.g., RL, LANL, CBFO). For example, NNSA Y12 ERP [Limit 250 char]
2. Unique Investment Identifier (UII) 9 Digit Code:	The UII Code has been pre-populated for existing Major IT Business Cases. To receive a UII Code for a new Major IT Business Case, contact the eCPIC Help Desk at 202-586-5437. [Limit 13 char]
5.1.2 Section B: Investment Detail	
1. Briefly describe the investment’s purpose, goals, and current or anticipated benefits (quantitative and/or qualitative). Include the investment’s specific contribution to mission delivery or agency management support functions, and identify key customers, stakeholders and other beneficiaries.	Clearly describe the primary intent of this investment. What are the primary goals, objectives, and mission functions that the investment will support? Explain why it is important for this investment to be funded and/or include an assessment of the program impact if this investment is not fully funded. Include current or anticipated quantitative and/or qualitative benefits. Ensure all information is up-to-date in this response and consistent with other sections of the Major IT Business Case. For example, if specific investment details are updated in other sections of the Major IT Business Case, and are mentioned in the summary section, be sure to update the specific details in the summary as well. [Limit: 2500 char]



Question	Guidance
2. Provide at least one Agency Strategic objective code (A-11 Section 230) and/or Agency Priority Goal code (A-11 Section 250) that this investment aligns to on performance.gov. If this investment aligns to more than one Agency strategic objective code and/or Agency Priority goal code list all that apply.	Refer to performance.gov and then narrow by Goal Type, Agency (DOE), and Theme in order to identify DOE strategic objective codes and/or Agency Priority goal codes which align to this investment. List all codes that apply. [Limit: 5 digits]
3. Briefly describe the investment’s return on investment, including benefits internal and external to the Government.	Describe the investment’s return on investment and expected benefits. [Limit 2,500 char]
4. Indicate if the investment in whole or in part specifically addresses any of the following types of requirements.	Requirements include: Legislative Mandate, Outstanding Audit Finding or Material Weakness, Published Agency Strategic Plan/Annual Performance Plan, Presidential Direction (i.e. Presidential Directive, Presidential Memorandum, or Executive Order), and Other Requirement. Where "Yes" is indicated, provide a brief description of the requirement, and how the investment will meet the requirement. Include citations within descriptions, if available. Provide any URLs associated with each requirement.
5. Identify the foremost program supported by this investment, using the Program Code in the Federal Program Inventory Reference Table (http://archive-goals.performance.gov/federalprograminventory bottom of list on right side of the screen).	If this investment does not primarily support a single program (e.g. provides Department-wide infrastructure, or supports multiple programs evenly), enter “No Primary Program.” [XXX-XXX or “000-000” for “No Primary Program”]



<p>6. Provide a description of any corrective actions this investment has been asked to make (and by whom, e.g., GAO, Agency CIO, etc.) in the PY or CY to address performance deficiencies, mitigate risk, or as the result of any Agency TechStat or PortfolioStat.</p>	<p>PY = FY 2015 and CY = FY 2016 [Limit: 2,500 char]</p>
<p>7. If this investment eliminates or reduces another major or non-major investment(s)?</p>	<p>If yes, provide the investment UII and either select “to be eliminated” or “to be reduced” for each investment. (Note: Eliminated or reduced investments should be listed below until they are removed from the Agency’s IT Investment Portfolio Summary. For most investments it takes two years before eliminated investments roll-off and no longer appear in the Agency’s IT Investment Portfolio Summary.)</p>
<p>8. Does this investment include the following? [Yes/No]</p>	<p>Check all that apply: 8.a A shared service (intra- or inter-agency—current and/or planned) 8.b Are all systems in this investment PIV-enabled systems (per HSPD-12 OMB memo M-11-11) 8.c APIs (application programming interfaces) consistent with the Digital Government Strategy</p>
<p>9. Does the Agency CIO certify that this investment’s plan for the current year adequately implements incremental development?</p>	<p>(Common definitions defines “adequate incremental development” as: “For development of software or services, planned and actual delivery of new or modified technical functionality to users occurs at least every six months.”) (FITARA 831.B.ii & 832.B.i) Answer [Yes/No/N/A]. (Note: Answer “Yes” if this investment’s plan for the current year includes development of software or services and planned and actual delivery of new or modified technical functionality to users will occur at least every six months. Otherwise answer “No” or “N/A.”)</p>



<p>10. Provide any/all URLs related to the investment, using the columns/categories below to indicate how each URL is related to the investment and the extent of mobile optimization for each URL.</p> <p>11. PSOs should only report websites that are available on the public internet including publicly-available websites that require login for full access.</p>	<p align="center">10. Relationship to Investment (Include all that apply, must check at least one box)</p>						<p align="center">11. Mobile Optimization of URL (Do not answer for websites external to this investment, such as Data.gov or non- government websites, Otherwise check all that apply)</p>		
	<p>URL <i>(as many as necessary)</i></p>	<p>10.A Provides publicly accessible datasets produced by this investment</p>	<p>10.B Provides one or more publicly accessible API(s) to provide access to data from this investment</p>	<p>10.C Provides links to social media about this investment (e.g., blogging, social networking, podcasts, and other user generated content).</p>	<p>10.D Provides general information about this investment</p>	<p>10.E Provides general information about the business process or program served by this investment</p>	<p>10.F Link to mobile application associated with this investment</p>	<p>11.A Website designed primarily for users on mobile devices.</p>	<p>11.B Website uses responsive web design to improve user experience for users on mobile devices.</p>
	<p>http://...</p>	<p>[Yes/No]</p>	<p>[Yes/No]</p>	<p>[Yes/No]</p>	<p>[Yes/No]</p>	<p>[Yes/No]</p>	<p>Name of Mobile App [250]</p>	<p>[Yes/No]</p>	<p>[Yes/No]</p>
<p>12. Provide names and contact information for IPT members in the table.</p>	<p>If available, insert lines for other IPT members (i.e., enterprise architects, capital planners, and performance specialists). IT Program Manager, Business Process Owner/SME (Subject Matter Expert) and Contracting Specialist must be Federal employees. The business process owner or SME may or may not be the same person listed as the functional/business sponsor on the Agency IT Portfolio Summary -- the functional/business sponsor may be a higher-level agency official or executive.</p>								



5.1.3 Section C: Life Cycle Costs		
1.	Provide the cost summary for the investment.	<p>Provide the total estimated life-cycle cost for this investment by completing the following table. All totals represent all IT resources and budgetary sources of funding, consistent with the Agency IT Portfolio Summary. Totals are to be reported in millions of dollars. Variations from planned expenditures will be reflected in Table C.4 below, as well as in Table B.2 in the Major IT Business Case Detail. Federal personnel costs should be included only in the rows designated as "... Govt. FTE costs" and should be excluded from the other costs.</p> <p>The costs associated with the entire life-cycle of the investment should be included in this report. For years beyond BY+1, please provide your best estimates for planning purposes, understanding that estimates for out- year spending will be less certain than estimates for BY+1 or earlier.</p> <p>For lines in the table that ask for changes in your current submission compared to your most recent previous submission, please use the FY 2016 President's Budget as your previous submission. When making comparisons, ensure that you compare same-year-to-same-year (e.g., 2016 v.2016). Significant changes from the previous submission should be reflected in an updated investment-level Alternatives Analysis, subject to OMB review.</p>
2.a.	In which year did or will this investment begin?	<p>(Report a year—e.g., PY-1=2014)</p> <p>[Limit: 4 char]</p>
2.b.	In which year will this investment reach the end of its estimated useful life?	<p>(Specify year—e.g., BY+5=2022)</p> <p>[Limit: 4 char]</p>



3	<p>Compare the funding levels for PY and CY to the final FY2016 President’s Budget for those same years. Briefly explain any significant changes.</p>	<p>When making comparisons, ensure that you compare same-year-to-same-year (e.g., the FY15 level for 2015 versus the FY16 level for 2015).</p> <p>[Limit: 500 char]</p>
<p>5.1.4 Section D: Acquisition/Contract Strategy</p>		
1.	<p>Contracts/Task Orders Table</p>	<p>In the table below, provide all awarded prime contracts (or task orders) for the investment (sub-award details are not required). Completed or pre-award contracts and/or task orders should not be included in the table. Data definitions can be found at https://www.usaspending.gov/references/Pages/Glossary.aspx. Information on Intra-Agency Agreements (IAA) or Memoranda of Understanding (MOU) is not required by OMB; however these may be tracked at the agency level.</p>



<p>Procurement Instrument Identifier (PIID)</p>	<p>This is the unique identifier for each contract, agreement, or order, as shown on the contract document and on USASpending.gov.</p> <p>Ensure all contracts listed in Section D.1 Acquisition/Contract Strategy Table can be validated in USASpending.gov. OMB has previously provided the following guidance:</p> <p>To assist in the linkage of Contract/Task Order Numbers from the Acquisition Strategy table to FPDS, agencies should provide the following information for “Contract/Task Order Numbers” based on the FPDS-NG data requirements (as specified in the FPDS-NG Data Element Dictionary):</p> <table border="1" data-bbox="527 578 1953 773"> <thead> <tr> <th data-bbox="527 578 877 659">Part of Indefinite Delivery Vehicle (IDV)?</th> <th data-bbox="877 578 1518 659">Procurement Instrument Identifier</th> <th data-bbox="1518 578 1953 659">Example</th> </tr> </thead> <tbody> <tr> <td data-bbox="527 659 877 699">Yes</td> <td data-bbox="877 659 1518 699">Data Element 1A (NTE 50 characters)</td> <td data-bbox="1518 659 1953 699">“00063200203DNBCHC020042”</td> </tr> <tr> <td data-bbox="527 699 877 773">No</td> <td data-bbox="877 699 1518 773">Data Element 1A, and the Referenced PIID, Data Element 1C (NTE 100 characters)</td> <td data-bbox="1518 699 1953 773">“GS09Q08DN0165-IDV-GS10F0216N”</td> </tr> </tbody> </table> <p>Note that the above formats are the only formats allowed in the field; do not include contract mod numbers, text, or extra spaces in the field. Please work with your procurement representative if you have any questions regarding the contracts you are reporting.</p>	Part of Indefinite Delivery Vehicle (IDV)?	Procurement Instrument Identifier	Example	Yes	Data Element 1A (NTE 50 characters)	“00063200203DNBCHC020042”	No	Data Element 1A, and the Referenced PIID, Data Element 1C (NTE 100 characters)	“GS09Q08DN0165-IDV-GS10F0216N”
Part of Indefinite Delivery Vehicle (IDV)?	Procurement Instrument Identifier	Example								
Yes	Data Element 1A (NTE 50 characters)	“00063200203DNBCHC020042”								
No	Data Element 1A, and the Referenced PIID, Data Element 1C (NTE 100 characters)	“GS09Q08DN0165-IDV-GS10F0216N”								
<p>Contracting Agency ID</p>	<p>Provide the contracting agency’s ID. Required only if the contracting agency is different than the agency submitting the Exhibit. If entering the ID for DOE, please use 8900.</p>									
<p>Indefinite Delivery Vehicle (IDV) Procurement Instrument Identifier (IDV PIID)</p>	<p>This is the unique identifier for each Indefinite Delivery Vehicles (IDV), such as a Government-wide Acquisition Contract (GWAC), Indefinite Delivery Contract (IDC), Federal Supply Schedule (FSS), Basic Ordering Agreement (BOA), or Blanket Purchase Agreement (BPA).</p> <p>This field is only required for IDVs.</p>									
<p>Indefinite Delivery Vehicle (IDV) Agency ID</p>	<p>Provide the IDV agency ID. This is a code for an agency, but it does not necessarily represent the agency that issued the contract. Instead, it serves as part of the unique identification for Federal Procurement Data System IDV records.</p>									
<p>Solicitation ID</p>	<p>Identifier used to link transactions to solicitation information.</p>									



Contract Value	<p>Enter the Ultimate Contract Value (contract, task order, etc., represented by the IDV PIID) in millions, to two decimal places. For open solicitations, provide the estimated base contract costs and all anticipated option years. (FPDS element 3A)</p> <p>Assuming the PIID or IDV PIID match with USAspending, this data element will be auto populated for awarded IT acquisitions.</p>
Type of Contract/Task Order (Pricing)	<p>Provide information about the type of contract the investment is. See FAR Part 16 for more classifications. (FPDS element 6A) The drop-down options in eCPIC include:</p> <ul style="list-style-type: none"> • Cost no fee • Fixed price with economic price adjustment • Cost plus award fee • Combination (two or more) • Firm fixed price • Fixed price level of effort • Labor hours • Cost plus incentive • Fixed price award fee • Cost plus fixed fee • Order dependent (IDV only) • Fixed price redetermination • Time and materials • Fixed price incentive • Cost sharing • Other (none of the above) <p>Assuming the PIID or IDV PIID match with USAspending, this data element will be auto populated for awarded IT acquisitions.</p>



Modular Approaches/ Contracting	<p>Do acquisition planning, award, and management actions apply the principles and strategies described in “Contracting Guidance to Support Modular Development”? (Yes or No)</p> <p>Projects within investments are encouraged to use modular development principles. All projects (regardless of whether they use modular development principles), must produce useable functionality at intervals of no more than six months.</p>
EVM Required	(Yes or No)
Is the contract a Performance-Based Service Acquisition (PBSA)?	<p>(Yes/No) indicate whether the contract is a PBSA as defined by FAR Subpart 37.601. A PBSA describes the requirements in terms of results rather than the methods of performance of the work. (FPDS element 6F)</p> <p>Assuming the PIID or IDV PIID match with USAspending, this data element will be auto populated for awarded IT acquisitions.</p>
Effective date	<p>Use YYYY-MM-DD format. Provide the actual or expected start date of the contract/task order that the parties agreed on for the contract’s requirements. (FPDS element 2B)</p> <p>Assuming the PIID or IDV PIID match with USAspending, this data element will be auto populated for awarded IT acquisitions.</p>
Actual or expected End Date of Contract/Task Order	<p>Use YYYY-MM-DD format. The actual or expected End Date of the Contract/Task Order that the parties agree the contract will end. (FPDS element 2C)</p> <p>Assuming the PIID or IDV PIID match with USAspending, this data element will be auto populated for awarded IT acquisitions.</p>
Extent Competed	<p>This field indicates the level of competition that was conducted for the contract. Select one of the following options:</p> <ul style="list-style-type: none"> • Full and open competition • Not available for competition • Not competed • Full and open competition after exclusion of sources • Follow-on to competed action



	<ul style="list-style-type: none"> • Competed under simplified acquisition procedures • Not competed under simplified acquisition procedures • Competitive Delivery Order (CDO) • Non-competitive Delivery Order (NDO) <p>(FPDS element 10A)</p> <p>Assuming the PIID or IDV PIID match with USAspending, this data element will be auto populated for awarded IT acquisitions.</p>
Contract Description	<p>A brief description of the goods or services bought (for an award) or that are available (for an IDV). It may also include a short contract name for awarded contracts, as well as the name of the lead contractor, See https://www.usaspending.gov/references/Pages/FAQs.aspx for more information.</p>
2. If earned value is not required or will not be a contract requirement for any of the contracts or task orders above, explain why:	<p>If applicable, explain why earned value is not required or will not be a contract requirement for any of the contracts/task orders. (This is related to the following question above in the contracts table: Is EVM Required? (Y/N). If “No” is selected, then this question must be answered.)</p> <p>If earned value is required, insert a note in the response that indicates this.</p> <p>[Limit: 2500 char]</p>



Question	Question Text	Guidance
6	<p>Major IT Business Case Detail: Performance Plan and Measurement Report</p>	<p>OMB has indicated that Agencies must report all <i>projects</i> with activities underway in any portion of CY or BY; regardless of where the project occurs in the investment lifecycle (projects may be conducted in Planning, DME, and/or Maintenance). At a minimum, Tables B.1 and B.2 should include:</p> <ul style="list-style-type: none"> • Projects and activities that started in a previous fiscal year (PY and earlier) that have not been completed by the beginning of the CY; • Projects and activities that are scheduled to start and finish in the CY and BY; and • Projects and activities that are scheduled to start in the CY/BY, but won't be completed until after BY. <p>Projects and activities commencing beyond the BY may also be reported, as available.</p> <p>OMB defines a project as a temporary endeavor undertaken to accomplish a unique product or service with a definite start and end point and specific objectives that, when attained, signify completion. Steady State funding is separated into Maintenance and Operations. Maintenance activities are now treated as projects and are reported in Table B1 and B2, while operations activities are not treated as projects and are reported in Table C.1.A. and C.1.B. OMB's definition for maintenance and operations is provided below:</p> <p>Maintenance refers to the activity necessary to keep an asset functioning as designed during the O&M phase of an investment. Examples of maintenance projects may include, but are not limited to: operating system upgrades, technology refreshes, security patch implementations, and license acquisition fees for new licenses and roll out costs. Some maintenance activities should be managed as projects and reported in Section B of the Major IT Business Case Detail. As defined in the Federal Accounting Standards Advisory Board Statement of Federal Financial Accounting Standards Number 10, "Maintenance excludes activities aimed at expanding the capacity of an asset or otherwise upgrading it to serve needs different from or significantly greater than those originally intended."</p> <p>Operations refer to the day-to-day management of an asset in which the asset is in operations and produces the same product or provides a repetitive service. Examples of operations projects include activities to operate data centers, help desks, operational centers, telecommunication centers, end user support services, and license renewals for ongoing operations. Operational activities are reported through Section C of the Major IT Business Case Detail.</p> <p>The Major IT Business Case Details used to provide OMB BY and current FY investment plans and performance data for major investments. Include in this business case detail, at a minimum, all projects, activities and operations scheduled to commence or continue in the CY and/or BY. The information reported in the Major IT Business Case Detail will be submitted to the OMB's IT Dashboard on a monthly basis.</p>



In the Major IT Business Case Detail, investments are described as:

- Investment
 - Projects
 - Activities
 - Operations

Report information about these areas in the following Major IT Business Case Detail sections:

- A.1: **General Information:** Enter basic information about the major IT investment.
- B.1: **Projects:** Identify all of the investment's projects with activities occurring in the current FY.
- B.2: **Activities:** Outline the activities that are performed to achieve the outcome of each project.
- B.3: **Project Risk:** Identify all significant risks to each project's success.
- C.1: **Operational Performance Information:** Identify performance targets and results for evaluating operations.
- C.2: **Operational Risk:** Identify all significant risks to investment achieving operational performance targets.

Question		Guidance
6.1.1 Section A: General Information		
1.	Investment Name: Agency-provided name of investment, consistent with the Agency IT Portfolio Summary.	Pre-populated from the Major IT Business Case, Section A: General Information.
2.	Investment UII: Agency-provided unique investment identifier, consistent with the Agency IT Portfolio Summary.	Pre-populated from the Major IT Business Case, Section A: General Information.



Question	Guidance
6.1.2 Section B: Project Plan and Execution Data	
<p>1. In Table B.1, report, at a minimum, all projects with any activities that started in a previous FY (PY and earlier) and have not completed by the beginning of the CY as well as projects and activities that are scheduled to start in the CY and BY, including planning, DME, and maintenance projects. Include projects and activities commencing beyond the BY as available. This information should be updated at least once every month.</p>	<p>Include the following data in Table B.1:</p> <ol style="list-style-type: none"> 1. Unique Project ID: An agency-specified number that uniquely identifies the project within this investment. 2. Project Name: Name used by agency to refer specifically to this project. 3. Objectives/Expected Outcomes: Description of project functionality, capability or goal. 4. Project Start Date: Date of actual start of in-progress projects or planned start of projects which have not yet begun (may be before current fiscal year or activities listed in activities table B.2). 5. Project Completion Date: Planned date of completion of in-progress projects or actual completion date of projects that have been completed (may be after BY or completion date of activities listed in activities Table B.2). 6. Project Lifecycle Cost: Enter the total cost of all activities related to this project as described in OMB Circular No. A-131 (in \$ thousands). 7. System Development Life Cycle (SDLC) Methodology: Which development methodology does this project use? <ol style="list-style-type: none"> 1) Waterfall 2) Spiral 3) Iterative (Prototyping/Incremental) 4) Agile 5) Mixed 6) Other 7) Not Primarily a Software Development Project 8. Other SDLC? If you selected “Other” provide the name of the SDLC methodology this Project is using. 9. PM Name: Name of project manager responsible for the success of this project. 10. PM Level of Experience: The years of applicable experience or the status of certification for the PM. Available selections include: <ol style="list-style-type: none"> 1) FAC-P/PM(DAWIA-3) – Senior 2) FAC-P/PM(DAWIA-2) – Mid-Level 3) FAC-/PM(DAWIA-1) – Entry Level 4) Other certification with 4 or more years of PM experience (within the last five years) 5) Other certification with between 2 and 4 years of PM experience (within the last five years)



Question	Guidance
	<p>6) Other certification with less than two years of PM experience (within the last five years)</p> <p>7) No certification, but with 4 or more years of PM experience (within the last five years)</p> <p>8) No certification, but with between 2 and 4 years of PM experience (within the last five years)</p> <p>9) No certification, but with less than two years of PM experience (within the last five years)</p> <p>11. PM Phone: Phone number of project manager responsible for the success of this project.</p> <p>11A. PM Phone Extension: Phone number extension of the PM responsible for the success of the project (optional).</p> <p>12. PM Email: Email address of project manager responsible for the success of this project.</p> <p>13. Production Release every 6 months: Does this Project have a production release containing useable functionality at least every 6 months?</p> <p>14. Comment: If this Project does not provide a production release at least every 6 months, please provide a rational as to why.</p>



Question	Guidance
<p>2. In Table B.2, describe, at a minimum, all activities for projects in Table B.1 that started in a previous FY (PY and earlier) and have not been completed by the beginning of the CY, as well as activities that are scheduled to start in the current FY and BY. This table should be updated once a month at a minimum.</p>	<p>In line with modular development principles, each project must produce usable functionality at intervals of no more than six months. Include the following data in Table B.2:</p> <p>A. Unique Project ID: An agency-specified number uniquely identifying the project within investment.</p> <p>B. Activity Name: A short description consistent with the critical steps within the agency project management methodology.</p> <p>C. Activity Description: Describe what work is accomplished by this activity.</p> <p>D. Structure ID: Agency-specified identifier which indicates work breakdown structure agency uses to associate this activity with other activities or a project. Please provide this in the format of "x.x.x.x.x" where the first string is the Unique Project ID and each following string (separated by periods) matches the Structure ID of a parent activity.</p> <p>E. Type of Activity: This should only be provided for activities that do not have a child (i.e. lowest level) and that are active/open as of October 1, 2014. Not every project will have every type of activity listed below. Completion of this activity primarily provides:</p> <ol style="list-style-type: none"> 1) Conceptualization/Planning 2) Requirements Gathering 3) Design / User Experience (UX) 4) Prototype 5) Development 6) Security Testing 7) Iterative Testing 8) Iterative Release 9) Regression Testing 10) User Acceptance Testing 11) Development Operations (DevOps) / Configuration Management 12) Quality Assurance 13) Production Release 14) Retirement 15) This is not a software development related activity 16) Other <p>F. Critical Path: Is this activity on the critical path of the successful completion of the project.</p>



Question	Guidance
	<p>G. Start Date Planned: The planned start date for this activity. This is the baseline value.</p> <p>H. Start Date Projected: If activity has not yet started, enter current planned start date of the activity.</p> <p>I. Start Date Actual: When activity starts, enter actual start date here.</p> <p>J. Completion Date Planned: The planned completion date for this activity. This is the baseline value.</p> <p>K. Completion Date Projected: If activity has not yet completed, enter current planned date of the activity.</p> <p>L. Completion Date Actual: When activity ends, enter actual completion date here.</p> <p>M. Total Costs Planned: The planned total cost for this activity. This is the baseline value.</p> <p>N. Total Costs Projected: When activity has not yet completed, enter current planned total cost of the activity.</p> <p>O. Total Costs Actual: When activity ends, enter actual total costs for the activity here.</p> <p>For programs employing earned value management, agencies should reflect “budget at completion” in the “Total Costs Planned” field and “estimated at completion” in the “Total Costs Projected” field for projected costs.</p>



Question		Guidance					
I	<p>Project Risk: In Table B.3, list all project-related risks for the investment that are currently open and provide risk assessment information.</p> <p>Risks must be identified for each active project.</p> <p>Risk assessments should include risk information from all stakeholders and should be performed at the initial concept stage and then monitored and controlled throughout the life cycle of the investment. A copy of the investment Risk Management Plan must be provided to OMB.</p>	Table B.3					
		Unique Project ID	Risk Name	Risk Category	Risk Probability	Risk Impact	Mitigation Plan
		<i>[Limit: 500 char]</i>	<i>[19 risk categories]</i>	<i>[Low, Medium, High]</i>	<i>[Low, Medium, High]</i>	<i>[Limit: 500 char]</i>	<i>[Check Box]</i>
		<ol style="list-style-type: none"> Unique Project ID: An agency-specified number that uniquely identifies a project within this investment. For each identified risk, lists the associated Project ID. Risk Name: A short description provides details of a risk, the cause of the risk and the effect that the risk may have on the project. Risk Category: Please select the relevant OMB Risk Category for each risk. Risk categories include: 1) schedule; 2) initial costs; 3) life-cycle costs; 4) technical obsolescence; 5) feasibility; 6) reliability of systems; 7) dependencies and interoperability between this investment and others; 8) surety (asset protection) considerations; 9) risk of creating a monopoly for future procurements; 10) capability of agency to manage the investment; and 11) overall risk of investment failure; 12) organizational and change management; 13) business; 14) data/info; 15) technology; 16) strategic; 17) security; 18) privacy; and 19) project resources. (It is not necessary to address all 19 OMB Risk Categories). Risk Probability: The likelihood of a potential negative impact for the risk (Low, Medium, or High) Risk Impact: The level of a potential negative impact for the risk (Low, Medium, or High) Mitigation Plan: A short description of the plan or steps to mitigate the identified risk. Is this Risk Closed: Check this box when the Project Risk is no longer useful for Investment management. 					



6.1.3 Section C: Operational Data	
1	<p>Section C addresses operational activities that are not reported as a part of a project in Section B.</p> <p>All data will be displayed to the public on the IT Dashboard. Ensure that all metrics provided are publicly releasable.</p>
	<p>Operational Performance Ongoing performance of operational investments is monitored to demonstrate the existing investment is meeting the needs of the agency, delivering expected value, and/or that the investment is being modernized and replaced consistent with the Agency's enterprise architecture.</p> <p>Measures should be as "outcome" based as possible rather than "output" based and should help the Investment benchmark its relative performance. The OMB Capital Programming Guide (page 44) directs that operational performance metrics should seek to answer more subjective questions in the specific areas of:</p> <p>1) Customer Satisfaction (Results); 2) Strategic and Business Results; 3) Financial Performance; and 4) Innovation</p> <p>Customer Satisfaction (Results) – Metrics should focus on whether the investment supports customer (internal and/or external) processes as designed. The focus is on how well the investment is delivering exceptional customer services.</p> <p>Strategic and Business Results – Metrics should measure the effectiveness and the efficiency of the investment in meeting its Agency's mission, strategic objectives and or priority goals, as well as its technical ability to deliver at the level of quality and reliability needed by the customer/end user.</p> <p>Financial Performance – Metrics should compare current performance with a pre-established cost baseline. While financial performance is typically expressed as a quantitative measure, the investment should also be subjected to a periodic review for reasonableness and cost efficiency. This type of measure is often referred to as "cost per unit" measures. Possible examples include cost per transaction, cost per mailbox, cost per user, or cost per query. Financial Performance measures are used in the Operational analysis and Alternatives analysis to compare possible alternatives and can also be used to validate the need for future investment.</p> <p>Innovation – Metrics should focus on Research & Development or prototyping activities. A possible example of a performance metric in the innovation category would be "number of new ideas per employee".</p>



A minimum of five metrics must be reported, across three areas:

1. **Customer Satisfaction (Results):** Provide a **minimum of one** metric that reflects results (i.e. service quality, end user satisfaction) with respect to the impact to major stakeholders (customers, affected citizens, inter and intra-agency end users).

2. **Strategic and Business Results:** Provide a **minimum of three** metrics that measures how this investment contributes to the Strategic Objectives / Agency Priority Goals or business need of the Agency. These could come in two different areas. At least one Strategic and Business Results metric must have a monthly reporting frequency.
 - a. **Effectiveness** –quantified desired effect the investment has on the Agency’s mission or business needs (e.g. processing speed, processing quality, backlog reduction, mission outcomes, business outcomes, etc.)
 - b. **Efficiency** - quantified desired effect the investment has on the agency’s operational/technical needs (e.g. reliability, availability, throughput, response time/latency, utilization, etc.)

3. **Financial Performance:** Provide a **minimum of one** metric that measures the reasonableness and cost efficiency of the investment.

4. **Innovation:** Investments are not required to report innovation metrics for every investment, however Agency’s may choose to report under Innovation metrics category if they so choose.



Use Table C.1.A to define the attributes of each individual metric.

Table C.1A										
Metric ID	Metric Description	Unit of Measure	Performance Measurement Category Mapping	Agency Baseline Capability	2015 Target	2016 Target	Measurement Condition	Reporting Frequency	Agency Strategic Objective or Priority Goal	Is the Metric Retired?
[Limit: XXX char]	[Limit: 500 char]	[Limit: 50 char]	[Measurement Category]	[numeric]	[numeric]	[numeric]	[Over target/ Under target]	[Monthly, Quarterly, Semi- Annual, Annual]	[Goal Code]	[Check Box]

- Metric ID:** Unique ID provided by agency for the metric. When reporting actual results (see below), use this ID to reference the correct metric.
- Metric Description:** Description to help the user understand what is being measured. In this field, describe the units used, any calculation algorithm used, and the definition or limits of the population or “universe” measured.
- Unit of Measure:** Brief indication of what quantity is measured (e.g. number, percentage, dollar value) for each metric.
- Performance Measurement Category Mapping:** Identify the measurement category, as shown above table C.1A.
- 2015 Target:** Metric target value from 2015, relative to the reporting frequency.
- 2016 Target:** Metric target value for 2016, relative to the reporting frequency.
- Measurement Condition:** Indicates whether a desired result would be “over the target” or “under the target.” For example, if the target is to reduce the error rate to 10%, then the desired result would be “under the target” so “under target” should be entered for measurement condition.

 Over target = Trend should maintain or increase.
 Under target = Trend should maintain or decrease.
- Reporting Frequency:** How often actual measurements will be reported (**monthly, quarterly, semi-annually, or annually**). Annual reporting frequencies are reserved for annual operating cost measures, performance measures associated with the agency’s annual performance plan, or other measures that can only be appropriately measured on an annual basis.



9. Agency Strategic Objective/Agency Priority Goal: Each investment must have at least one active metric in the Strategic and Business Results category (of any reporting frequency) tied to the foremost agency strategic objective (SO), or agency priority goal (APG) (as required by A-11 Section 230 and Section 250 respectively). Provide that code for the associated metric, using the appropriate code on performance.gov. Agencies that are not required to report to performance.gov may use the “0” code.

10. Is the Metric Retired?: Check this box when performance metrics are no longer useful for Investment management.

3
 In Table C.1.B, report actual results as measured at the appropriate frequency and report as new entries.

 When adding a new metric, include historical actual result information as available.

Table C.1B			
Metric ID	Actual Result	Date of Actual Result	Comment
<i>[Limit: XXX char]</i>	<i>[numeric]</i>	<i>[date]</i>	<i>[500 char] (optional)</i>

- Metric ID:** Unique ID provided by agency for the metric. Use this ID to reference the correct metric.
- Actual Result:** Actual result measured.
- Date of Actual Result:** End date of the most recent reporting period.
- Comment:** Comments for metrics that have not been met will be valuable for OMB and Agency Reviewers.



<p>4 . In Table C.2, list all open operational-related risks for the investment and provide risk assessment information. Investments with current year O&M funding are required to report operational risks. (It is not necessary to address all 19 OMB Risk Categories).</p>	Table C.2					
	Risk Name	Risk Category	Risk Probability	Risk Impact	Mitigation Plan	Is this Risk Closed?
	[Limit: 500 char]	[19 risk categories]	[Low, Medium, High]	[Low, Medium, High]	[Limit: 500 char]	[Check Box]

1. **Risk Name:** A short description that identifies the risk, the cause of the risk and the effect that the risk may have on the operational activity.
2. **Risk Category:** Please select the relevant OMB Risk Category for each risk. Risk categories include: 1) schedule; 2) initial costs; 3) life-cycle costs; 4) technical obsolescence; 5) feasibility; 6) reliability of systems; 7) dependencies and interoperability between this investment and others; 8) surety (asset protection) considerations; 9) risk of creating a monopoly for future procurements; 10) capability of agency to manage the investment; 11) overall risk of investment failure; 12) organizational/change management; 13) business; 14) data/info; 15) technology; 16) strategic; 17) security; 18) privacy; and 19) project resources.
3. **Risk Probability:** The likelihood of a negative impact for the risk (Low, Medium, or High)
4. **Risk Impact:** The level of a potential negative impact (Low, Medium, or High)
5. **Mitigation Plan:** A short description of how to mitigate the identified risk.
6. **Is this Risk Closed:** Check this box when the Operational Risk is no longer useful for Investment management.



7 Data Submission Logistics

This section provides logistics for investment owners to submit their data to their PSOs for submissions to the OCIO for review and feedback.

In the chart below, each organization's senior IT manager who owns a portfolio of IT investments in eCPIC will be responsible for updating, reviewing and certifying via email to DOE CPIC mailbox that their organization's submission is complete for OCIO review. After the OCIO review, PSOs will be notified if the submission is satisfactory or if further modifications are necessary.

Note: The proposed dates are subject to change, pending final guidance from the Office of the Chief Financial Officer and the OMB.

Due Date	Responsible Party	Action
7/8	Headquarters, eCPIC Investment owners, and Portfolio owners	PSO's preliminary BY 2017 IT Portfolio and Agency Provisioned IT Services Spending Summary (Cloud Spending) due to the OCIO. Provide the names of any new, upgraded or downgraded major IT investment(s) to DOE.CPICmailbox@hq.doe.gov .
7/9 - 7/20	OCIO	OCIO reviews preliminary BY 2017 IT Portfolio data and Agency Provisioned IT Services Spending Summary (Cloud Spending) and provides Performance Improvement Plan (PIP) feedback to PSOs by 7/20 COB.
7/14 COB eCPIC Lock-out		eCPIC v7.2 upgrade and migration to the BY 2017 template
7/21 eCPIC Unlocked	PSOs	
7/21 - 7/31		PSOs to incorporate feedback from OCIO preliminary review.
8/3 - 8/10	OCIO	OCIO reviews BY 2017 IT Portfolio, Agency Provisioned IT Services Spending Summary (Cloud Spending), IT Infrastructure Spending Summary, and Major IT Business Cases. OCIO provides PIP feedback to PSOs by 8/10 COB.
8/11 - 8/17	PSOs	PSOs to incorporate feedback from OCIO review in the new BY 2017 Template.
8/18 - 8/27 COB	OCIO	OCIO provides final review of BY 2017 IT Portfolio, Agency Provisioned IT Services Spending Summary (Cloud Spending), IT Infrastructure Spending Summary, and Major IT Business Cases.
8/28 Temporary eCPIC Lock-out	OCIO	eCPIC v7.3 upgrade with final schema validations.
8/31	OCIO	OCIO to submit draft BY 2017 IT Portfolio to OMB for system testing and portfolio validation against new BY 2017 reporting requirements.
8/31	OCIO	OCIO to submit August IDC data to OMB.
9/1 - 9/9	PSOs	PSOs to incorporate feedback from OCIO final review.
9/9 COB Lock-out	OCIO	eCPIC Lock-out in preparation of the final BY 2017 IT Portfolio, Agency Provisioned IT Services Spending Summary (Cloud Spending), IT Infrastructure Spending Summary, and Major IT Business Cases submission.

DOE BY 2017 IT Reporting Instructions Major IT Business Case



Due Date	Responsible Party	Action
9/14	OCIO	BY 2017 IT Portfolio, Agency Provisioned IT Services Spending Summary (Cloud Spending), and IT Infrastructure Spending Summary submitted to OMB's IT Dashboard.
9/15 – 9/18	OCIO	BY 2017 Major IT Business Cases submission to OMB's IT Dashboard.
11/30	OCIO	OCIO to submit November IDC data to OMB.
early January 2016 (tentative)	OCIO	Final President's Budget Request BY 2017 IT Portfolio, Agency Provisioned IT Services Spending Summary (Cloud Spending), and IT Infrastructure Spending Summary due to OMB.
early February 2016 (tentative)	OCIO	Final President's Budget Request Major IT Business Cases due to OMB.
end of March 2016 (tentative)	PSOs	BY 2017 Major IT Business Cases submit supporting artifacts for new investments for submission to OMB's Max site.
Ongoing	PSOs	BY 2017 Major IT Business Cases submit updated versions of supporting artifacts for existing investments - [including date of last update] as a) significant changes are made, b) within 30 days of its presentation to an Agency's governance board review (e.g. IRB/CIO review), or c) as available throughout the investment's lifecycle.



8 How to Access or Add a Resource to an Investment or Portfolio

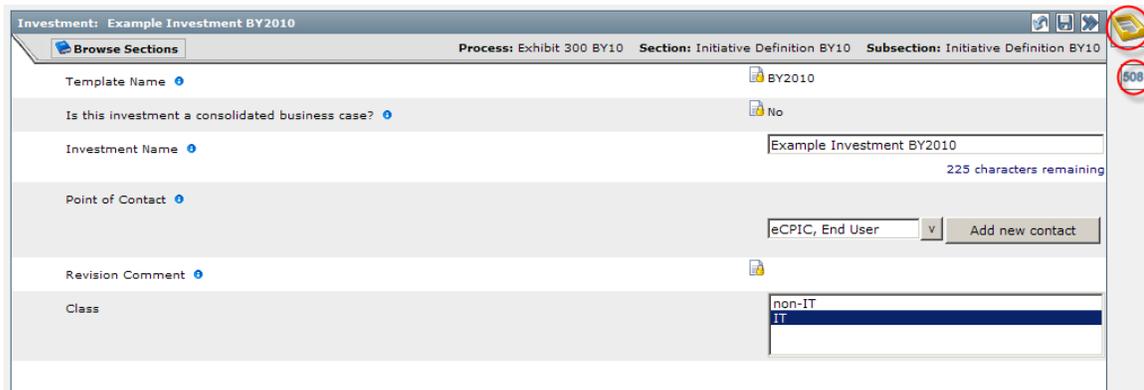
1) Investment Resources

eCPIC provides a **Resource Library** that allows users to access and download reference materials from anywhere in the application, including the Home Page. Users with the “Create” Right can access a resource from the Resource Library of an investment, and a portfolio.

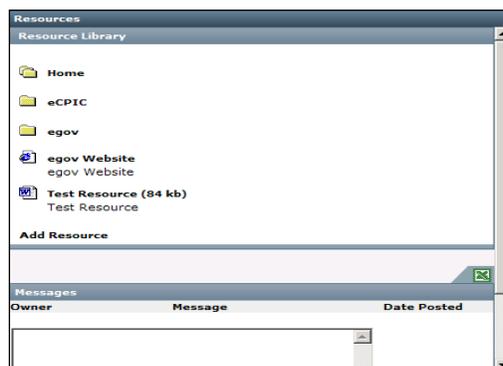
a. Accessing Investment Resources

To Access Investment Resources from within an investment:

1. Click on the **Toggle Resource List** icon (📁). The Resource List icon will appear on the side of the investment. There will also be the (508) icon.



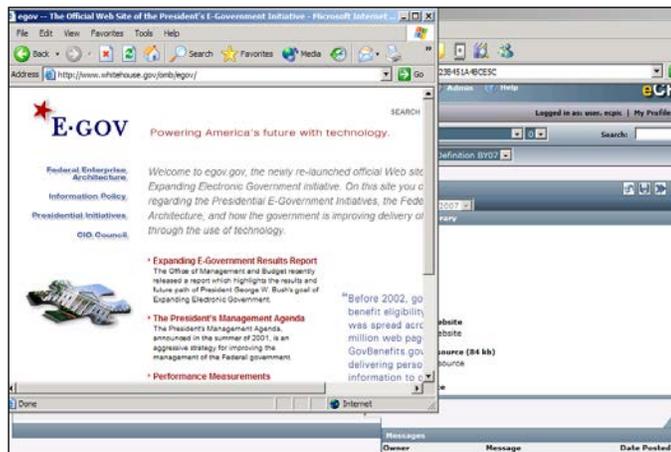
2. Mouse over either icon to show the **Resource Library** and investment **Messages**. The **Resource Library** window contains a list of Resources that relate specifically to the investment.





Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window they can release the click from the icon. *Click on the icon or outside the box to close the pop-up window.* If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position. *Click on the 508 icon again to close the window.* This will show both the Resource Library and 508 icons once again.

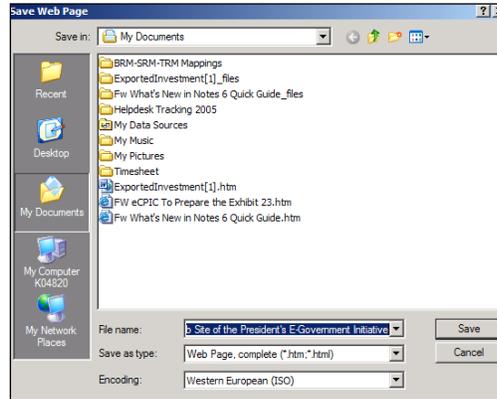
3. Click on a **Resource Title** to open the resource in a separate browser window. The browser window can be resized and kept open as users continue to review or edit the investment data.



4. From the address bar in the new window, highlight the **Name** of the file.
5. Click on **File**.
6. Select **Save As**.



A File download or Save Web Page screen will appear:



7. Select the location to save the file and name the file.
8. Click **Save** to save the document.

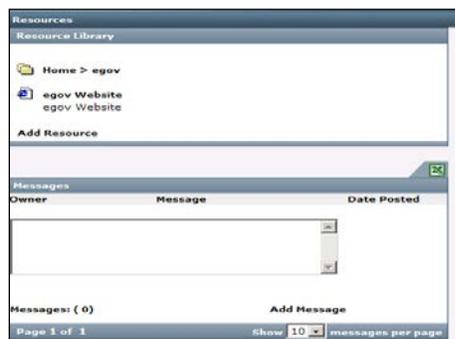
2) Access Portfolio Resources

To Access Portfolio Resources from within a portfolio:

1. From within a Portfolio, click on the **Toggle Resource List** icon (📁). The Resource List icon will appear on the side of the portfolio. There will also be an  icon.

Title	Portfolio	Template	Consolidated Business Case	Rev	In Current Revision	Open Investment Type	Class	Point of Contact
BY2009 Investment	* 2009 Agency-Wide Portfolio	BY2009		4	No	O1 - Major Investment	IT	User, eCPIC
Investment A	* 2009 Agency-Wide Portfolio	BY2009		2	Yes	O1 - Major Investment	IT	User, eCPIC
Investment B	* 2009 Agency-Wide Portfolio	BY2009		2	Yes	O1 - Major Investment	IT	User, eCPIC
Investment C	* 2009 Agency-Wide Portfolio	BY2009		2	Yes	O1 - Major Investment	IT	User, eCPIC
Investment D	* 2009 Agency-Wide Portfolio	BY2009		2	Yes	O1 - Major Investment	IT	User, eCPIC
Investment E	* 2009 Agency-Wide Portfolio	BY2009		2	Yes	O1 - Major Investment	IT	User, eCPIC
Investment F	* 2009 Agency-Wide Portfolio	BY2009		2	Yes	O1 - Major Investment	IT	User, eCPIC

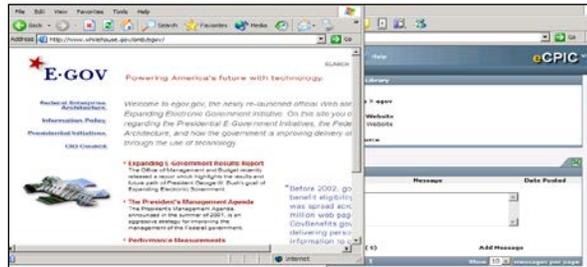
2. Move the mouse over either the icon to view the Resource Library and a Messages field to show the Resource Library and Portfolio Messages. The Resource Library window contains a list of Resources that relate specifically to the portfolio.





Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window where they would like it, they release the click from the icon. *Click on the icon or outside the box to close the pop-up window.* If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position. *Click on the 508 icon again to close the window.* This will show both the Resource Library and 508 icons once again.

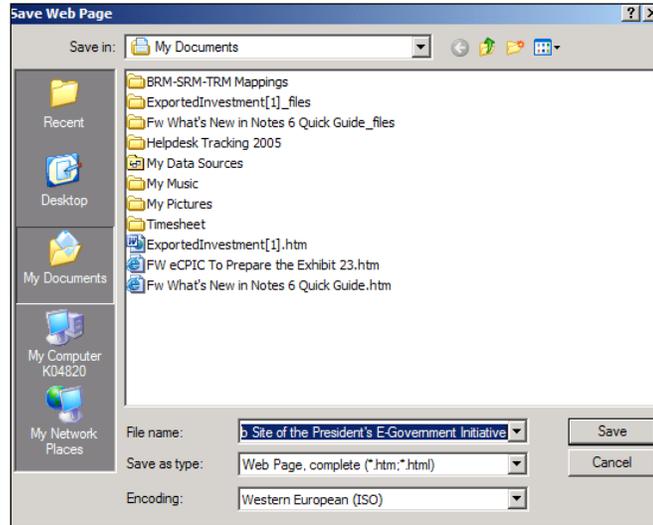
3. Click on a **Resource Title** to open the resource in a separate browser window. The browser window can be resized and kept open as users continue to review the portfolio data.



4. From the address bar in the new window, highlight the **Name** of the file.
5. Click on **File**.
6. Select **Save As**.



A File download or Save Webpage screen will appear:

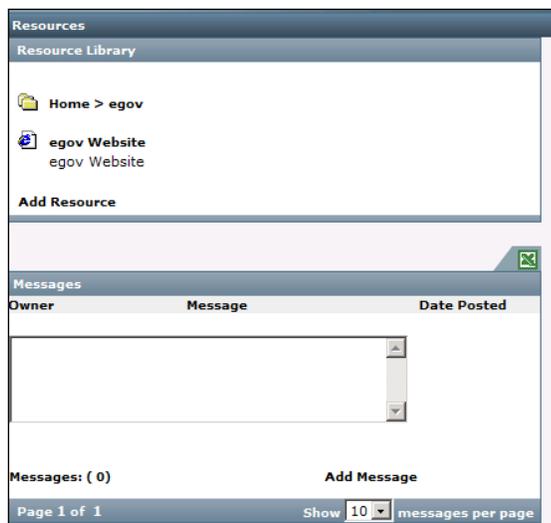


7. Select the location that to save the file and Name the file.
8. Click **Save** to save the document.

3) Add an Investment or a Portfolio Resource

With the “Create” Right for the Resource Library, users will be able to add Resources to the Resource Library of an Investment and a Portfolio.

1. From within an investment or a portfolio for which users would like to add a resource, click on the **Toggle Resource List** icon (📁). The Resource List icon will appear on the side of the investment or portfolio. There will also be the 508 icon.
2. Mouse over either icon to view the Resource Library and a Messages box to show the Resource Library and Investment Messages. The Resource Library window contains a list of Resources that relate specifically to the investment or portfolio.





Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window where they would like it, they release the click from the icon. *Click on the icon or outside the box to close the pop-up window.* If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position. *Click on the 508 icon again to close the window.* This will show both the Resource Library and 508 icons once again.

3. In the Resource Library window, click **Add Resource**. The Add Resource form will appear:

4. In the Add Resource form, enter the Title, Author, and Description.
5. If there are Resources Categories available, users will see them listed in the 'Available Category' box. Users can associate the Resource with a category by highlighting the specific category and clicking the → arrow to move it to the 'Selected Category' box.
- To remove a category from the 'Selected Category', highlight the category and click on the ← arrow to move it back in the 'Available Category' box.

Note: Holding 'Shift' while selecting categories will highlight multiple categories at one time in the order which they are listed. Holding 'Ctrl' while selecting names, will allow users to highlight a category and select other categories that may not be in order.

6. If adding a Web link, enter the address in the 'Reference Web Address' field. (*Don't forget to add the http:// to the beginning of the link*)
7. If adding a document, click **Browse** and navigate to find the appropriate file.



Add Resource

Resource Title* EA Information

Author* Justine Hall

Resource Description* EA Information

This resource will be associated with the Portfolio :
Sample Portfolio

Associate with a Category (optional)

Available Categories : Selected Categories :

eCPIC → egov
SLA Member ←

Reference Web Address

- or -

Choose File To Upload 07_Ref_Model_Mapping_QuickGui Browse...

Add Cancel

8. After all information is complete, click **Add**. The Resource will now be associated with the investment or portfolio and any Category specified.

Resources

Resource Library

- Home > egov
- egov Website
egov Website
- EA Information (327 kb)
EA Information

Add Resource

Messages

Owner	Message	Date Posted



9 Appendix A: OMB E-Gov and Line of Business Initiatives

E-Gov or LoB Initiative	Acronym	Managing Partner Agency	Includes:	UII ending (3-digit Agency Code precedes this ending)
Benefits.Gov		Labor		999990020
Budget Formulation and Execution LoB	BFELoB	Education		999993200
Budget Formulation and Execution Manager	BFEM	Treasury		999990254
Disaster Assistance		DHS		999994100
Disaster Management		DHS		999990130
E-Rulemaking		EPA		999990060
Federal Asset Sales		GSA		999990080
Federal Health Architecture LoB	FHALoB	HHS		999991400
Financial Management LoB	FMLoB	Treasury	Former GMLoB	999991100
Geospatial LoB	GeoLoB	Interior		999993100
Grants.Gov		HHS		999990160
Human Resources LoB	HRLoB	OPM		999991200
Information Systems Security LoB	ISSLoB	DHS		999992100
Integrated Award Environment	IAE	GSA	Former IAE-Loans & Grants	999990230
Performance Management LoB	PMLoB	GSA		999990900
Recreation.Gov		USDA		999990010
Security, Suitability, and Credentialing LoB	SSCLoB	OPM	New UII ending assigned for FY17 process.	999991250
USA Services		GSA		999990040
USAJOBS	USAJOBS	OPM	Former RecruitOnestop	999991218