



BY 2024 IT Collect

Submission Overview

January 2023

v5

General Services Administration
Office of Government-wide Policy

DOCUMENT CHANGE LOG

Version Number	Date	Description
1	May 18, 2022	Original version
2	June 1, 2022	Updated to include: <ul style="list-style-type: none">• Slightly updated field definition for “System IDs” (pg. 7 in Section 1: Investment Descriptive Data)• Added additional context on submission expectations for Performance Metrics (pg. 13 in Section 7: Performance Metrics)• Added additional clarification on submission cadence (pg. 18-19 in Appendix)• Added link to Technology Modernization Fund Initiative list
3	June 16, 2022	Removed Section 10: NIST Cybersecurity Function data collection in its entirety from the BY 2024 Submission Overview document
4	July 22, 2022	Added the BY 2024 Pre-Decisional ITPfM submission window dates to the BY 2024 Submission Overview Appendix.
5	January 27, 2023	Added the BY 2024 President’s Budget ITPfM submission window dates to the BY 2024 Submission Overview Appendix

CONTENTS

Document Change Log 2

Contents 3

Introduction 4

Submission Overview 4

 Baselined Data..... 4

 Section 1: Investment Descriptive Data 5

 Section 2: Investment Financial Data 7

 Section 3: CIO Evaluation Report Data..... 10

 Section 4: Contracts Data 10

 Section 5: Projects Data 11

 Section 6: Operational Analysis Data 12

 Section 7: Performance Metrics..... 13

 Section 8: Investment Risks 14

 Section 9: Budget Account Summary..... 16

BY 2024 Submission Overview Appendix: Key Terms and Submissions Processes 17

 BY 2024 Submission Dates 17

 Key Business Processes and Terminology for the BY 2024 Submission Cycle 17

 Reporting Cadence 17

 How frequently should Agencies update IT Collect data? 18

 Do Agencies need to submit out-year (non PY, CY, or BY) cost object data to IT Collect?..... 18

INTRODUCTION

This Submission Overview provides instructions for Chief Financial Officer (CFO) Act Agencies to comply with OMB Circular A-11 IT investment submission requirements through data elements in the General Service Administration’s (GSA) IT Collect Application Programming Interface (API). GSA’s Submission Overview is written and maintained by GSA and supports the IT Portfolio submission process directed by A-11.

For data collection samples, please refer to the [IT Collect API Schema documentation](#). The Submission Overview is not a technical replacement of the IT Collect API Schema documentation, but instead an overall data architecture.

SUBMISSION OVERVIEW

In IT Collect, Agencies are expected to provide the following data elements for each investment type based on that investment’s type selection. Agencies set the Investment Type value during the Descriptive Data submission to IT Collect. See Section 1 below.

Investment Type	Investment Descriptive Data	Investment Financial Data	CIO Evaluations	Contracts	Projects	Operational Analysis	Performance Metrics	Investment Risks
Type 01: Major Investments	Expected	Expected	Expected	Expected	Expected	Expected	Expected	Expected
Type 02: Non-Major Investments	Expected	Expected	Optional	Expected	Optional	Optional	Optional	Optional
Type 03: Migration Investments	Expected	Expected	Optional	Optional	Optional	Optional	Optional	Optional
Type 04: Funding Transfer Investments	Expected	Expected	Optional	Optional	Optional	Optional	Optional	Optional
Type 05: Standard Investments	Expected	Expected	Expected	Expected	Optional	Optional	Optional	Optional

Baselined Data

OMB mandates that to change certain data fields, once established on IT Collect, Agencies must associate those changes with a Baseline Change Event. Agencies can create Baseline Change Events in IT Collect at the portfolio level by providing the following fields:

Data Field	Data Input
Baseline Change Type	<p>Select one of the following enumerated codes:</p> <ul style="list-style-type: none"> 1: Rebaseline - significant changes in funding level or availability of funds 2: Rebaseline - significant change in contracting 3: Rebaseline - scope and objectives evolve due to incremental or iterative system development 4: Rebaseline - current baseline is no longer useful as a management tool 5: Rebaseline - other reason consistent with Agency policy and M-10-27 6: Replan - adding or modifying detail within the overall cost and

Data Field	Data Input
	schedule goals <ul style="list-style-type: none"> 7: Correction
Baseline Change Date	Enter the date of the Baseline Change Event Date YYYY-MM-DD
Comment	Enter a comment 2500 character max

In Section 5 and Section 7, certain fields are marked with an asterisk (*). Per OMB request, Agencies are asked to align all changes to fields marked with an asterisk (*) with a Baseline Change Event. Furthermore, anytime Agencies wish to un-retire a record, they must associate that change with a Baseline Change Event (more details on retiring and un-retiring IT Collect resources can be found on the [IT Collect API Schema documentation](#)).

Section 1: Investment Descriptive Data

Submission Expectations: Descriptive data is required for all investments.

The following data fields compose investment Descriptive Data:

Data Field	Data Input
Current UII	Enter a Unique Investment Identifier Unique Investment Identifiers should be structured using the following format. UIIs must be unique across IT Collect: <ul style="list-style-type: none"> 123-xxxxxxx These first three digits must correspond with your Agency Code. (See: Appendix C of OMB Circular No. A-11) xxx-123456789 These last nine digits are an Agency assigned unique identifier
Previous UII	Enter an identifier depicting Agency Code and unique investment number used to report the investment in the previous BY 2023 Agency IT Portfolio submission to OMB Array of UIIs must correspond with either active or formerly active UIIs in IT Collect. All investments where Change in Status does not equal “new” must provide Previous UII data.
Investment Title	Open Text Box 255 character max
Investment Description	Enter and explain the purpose of the investment and what program(s) it supports, including the value to the public 2500 character max
Shared Services Category	Select one of the following enumerated codes: <ul style="list-style-type: none"> 00: Not Applicable 24: E-Gov initiatives or an individual Agency's participation in one of the E-Gov/LoB initiatives 48: Any Multi-Agency (Inter- or Intra-Agency) IT collaboration or an individual Agency's participation in one of these initiatives, such as use of a centralized FOIA portal
Shared Services Identifier	Enter four-digit code applicable to all shared service categories of 24 and 48
Mission Support Investment Category	Select one or more of the following enumerated codes: <ul style="list-style-type: none"> 01: Not Applicable

Data Field	Data Input
	<ul style="list-style-type: none"> • 02: Financial Management • 03: Human Resources • 04: Procurement • 05: Travel / Transportation • 06: Grants Management • 07: Electronic Records Management • 08: Cybersecurity Services • 09: Other
Bureau Code	Two-digit code to indicate the bureau code of the investment. If this is a department-level or an Agency-wide activity, use "00" as your bureau code. (See: Appendix C of OMB Circular No. A-11)
Part of Agency IT Portfolio	Select one of the following enumerated codes: <ul style="list-style-type: none"> • 01: Part 1. IT Investments for Mission Delivery • 02: Part 2. IT Investments for Mission Support Services • 03: Part 3. IT Standard Investments
Standard Infrastructure and Management Category	Select one of the following enumerated codes. All Part 3 investments should select a code other than "01: Not Applicable," while all Part 1 and 2 investments should select "01: Not Applicable": <ul style="list-style-type: none"> • 01: Not Applicable • 02: IT Security and Compliance • 03: IT Management • 04: Network • 05: Data Center and Cloud • 06: End User • 07: Output • 08: Application • 09: Delivery • 10: Platform
Mission Delivery and Management Support Area	Enter a two-digit code to indicate the mission delivery and management support area. Agencies shall provide a reference table for mission areas via email (ofcio@omb.eop.gov) to include: <ul style="list-style-type: none"> • Agency Code • Mission Delivery & Management Support Area
Type of Investment	Select one of the following enumerated codes: <ul style="list-style-type: none"> • 01: Major IT Investments • 02: Non-major IT Investments • 03: IT Migration Investments: The portion of a larger asset and for which there is an existing Business Case for the overall asset. The description of the IT investment should indicate the UII of the major asset investment of the managing partner. • 04: Funding Transfer Investments: These are primarily used to indicate the partner contribution to a Lead Agency investment through inter- or intra-Agency transfers. The description of the IT investment should indicate the UII of the Lead Agency's investment. • 05: Standard IT Investments.
National Security Systems	Select one of the following enumerated codes: <ul style="list-style-type: none"> • 01: Non-National Security System Investment • 02: National Security System Investment (these investments will not be publicly viewable on the IT Dashboard)

Data Field	Data Input
Public URL(s)	Enter an array of any website or digital service that is supported primarily by this investment Comma delimited array
Change in Status Identifier	Select one of the following enumerated codes: <ul style="list-style-type: none"> 01: Upgraded from non-major to major IT investment 02: Downgraded from major to non-major IT investment 03: Split into multiple investments 04: Consolidation of investments 05: Reorganization 06: Eliminated by funding 07: Eliminated by split 08: Eliminated by consolidation 09: Eliminated by reorganization 10: New 11: No Change in Status
Agency Description of Change in Status	Enter your Agency's description of the Change in Status Identifier selection. This data is optional in BY 2024 255 character max
Return on Investment	Enter and briefly describe the investment's quantitative and qualitative return on investment (ROI) 3500 character max Return on Investment is only required for investments that select Investment Type 01: Major
System IDs	Enter an array of Continuous Diagnostics and Mitigation (CDM) designated High Value Asset (HVA) systems financed by this investment Comma delimited array

Section 2: Investment Financial Data

Submission Expectations: In BY 2024, all investments must report financial data at the Budget Account, Cost Pool, and IT Tower level for the following fiscal years: 2022, 2023, and 2024. Agencies will submit a collection of the cost objects, as detailed below, to report Budget Account, Cost Pool, and IT Tower data within these fiscal years.

Section 2a: Funding Data Cost Objects

Agencies should use the following table to report financial totals at the Budget Account level for the following fiscal years: PY 2022, CY 2023, and BY 2024.

Data Field	Data Input
Budget Account Code	Specify which Budget Account code the cost object is associated with. Additional information can be found in OMB Circular A-11 Appendix C. Budget Account Codes should be structured using the following format: <ul style="list-style-type: none"> 123-xx-xxxx-x These first three digits must correspond with your Agency Code. (See: Appendix C of OMB Circular No. A-11) xxx-12-xxxx-x These next two digits correspond with your Bureau Code. (See: Appendix C of OMB Circular No. A-11) xxx-xx-1234-x These next four digits correspond with a Budget Code. (See: Section 79.2 of OMB Circular No. A-11) xxx-xx-xxxx-1 This last digit corresponds with an optional transmittal code. (See: Section 79.2 and 79.3 of OMB Circular No. A-11)

Data Field	Data Input
Amount	Financial total in \$millions 6 decimal max
Year	Fiscal Year YYYY
DME or O&M	Specify whether the cost object is associated with either: <ul style="list-style-type: none"> DME (Development, Modernization, Enhancement) O&M (Operations & Maintenance)
Internal Funding or Contributions	Specify whether the cost object is associated with either: <ul style="list-style-type: none"> Internal Funding Contributions

Section 2b: Cost Pool Cost Objects

For the BY 2024 submission, Agencies should use the following table to report financial totals at the Cost Pool level for the following fiscal years: PY 2022, CY 2023, and BY 2024. If an investment does not have any funding associated with a given Cost Pool, Agencies do not need to submit cost objects associated with that Cost Pool.

Data Field	Data Input
Cost Pool	Specify which Cost Pool the cost object is associated with: <ul style="list-style-type: none"> Internal Labor External Labor Outside Services Hardware Software Facilities & Power Telecom Other Internal Services
Amount	Financial total in \$millions 6 decimal max
Year	Fiscal Year YYYY

IT Collect will build the following report using submitted cost objects:

Cost Pool	PY 20XX	CY 20XX	BY 20XX
Internal Labor			
External Labor			
Outside Services			
Hardware			
Software			
Facilities & Power			
Telecom			
Other			

Cost Pool	PY 20XX	CY 20XX	BY 20XX
Internal Services			

Section 2c: IT Tower Cost Objects

For the BY 2024 submission, Agencies should use the following table to report financial totals at the IT Tower level for the following fiscal years: PY 2022, CY 2023, and BY 2024.

Data Field	Data Input
IT Tower	Specify which IT Tower the cost object is associated with: <ul style="list-style-type: none"> • End User • Application • Delivery • Security & Compliance • IT Management • Data Center • Network • Compute • Storage • Platform • Output
Amount	Financial total in \$millions 6 decimal max
Year	Fiscal Year YYYY

IT Collect will leverage submitted cost objects to build the following report:

IT Tower	PY 20XX	CY 20XX	BY 20XX
End User			
Application			
Delivery			
Security & Compliance			
IT Management			
Data Center			
Network			
Compute			
Storage			
Platform			
Output			

Section 2d: Budget Authority Cost Objects

Agencies should use the following table to report Budget Authority financial totals at the Budget Account level for fiscal year 2024.

Data Field	Data Input
Budget Account Code	Enter a Budget Account Code matching a value submitted in a Section 2a cost object
Amount	Financial total in \$millions 6 decimal max
Year	Fiscal Year YYYY
DME or O&M	Specify whether the cost object is associated with either: <ul style="list-style-type: none"> DME O&M
Internal Funding or Contributions	Specify whether the cost object is associated with either: <ul style="list-style-type: none"> Internal Funding Contributions <p>Agencies are only expected to provide Budget Authority cost objects associated with Internal Funding</p>

Section 3: CIO Evaluation Report Data

Submission Expectations: CIO Evaluation Data is expected for Type 01: Major and Type 05: Standard Investments.

The following data fields compose investment CIO Evaluation Report data:

Data Field	Data Input
Rating	Select one of the following enumerated codes: <ul style="list-style-type: none"> 1: High Risk 2: Moderately High Risk 3: Medium Risk 4: Moderately Low Risk 5: Low Risk
Comment	Open Text Box 2500 character max
Date	Date of evaluation: YYYY-MM-DD

Section 4: Contracts Data

Submission Expectations: Contracts data is expected for Type 01: Major, Type 02: Non-Major, and Type 05: Standard Investments.

The following data fields compose investment Contracts data:

Data Field	Data Input
Procurement Investment Identifier (PIID)	Enter the unique identifier for each contract, agreement, or order associated with this investment (Federal Procurement Data Systems (FPDS) data element). Please see the latest FPDS data dictionary for more information

Data Field	Data Input
	255 character max

Reference PIID	Enter the Reference PIID per FPDS instructions for element. Please see the latest FPDS data dictionary for more information 255 character max
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Section 5: Projects Data

Submission Expectations: Projects data is expected for Type 01: Major Investments.

The following data fields compose investment Projects data:

Data Field	Data Input
Unique Project ID	Enter an Agency-specified code that uniquely identifies the project 255 character max
Project Name	Enter a name used by the Agency to refer specifically to the project 100 character max
Project Goal	Enter a brief description of primary goal/outcome the project is planning to provide for the investment upon completion 250 character max
Planned Start Date*	Enter the planned start date of this project YYYY-MM-DD
Projected Start Date	Enter the projected start date of this project YYYY-MM-DD
Actual Start Date	Enter the actual start date of this project YYYY-MM-DD
Planned Completion Date*	Enter the planned completion date of this project YYYY-MM-DD
Projected Completion Date	Enter the projected completion date of this project YYYY-MM-DD
Actual Completion Date	Enter the actual completion date of this project YYYY-MM-DD
Planned Total Cost*	Enter the planned total cost of this project in \$millions 6 decimal max
Projected Total Cost	Enter the projected total cost of this project in \$millions 6 decimal max
Actual Total Cost	Enter the actual total cost of this project in \$millions 6 decimal max
Project Status	Enter the project's current status: <ul style="list-style-type: none"> • Not started • In progress

Data Field	Data Input
	<ul style="list-style-type: none"> Completed Deferred Canceled
Project Health	Enter the Agency self-assessment of the current health of the project: <ul style="list-style-type: none"> Red Yellow Green
TMF Initiative	Enter the Technology Modernization Fund (TMF) Initiative that finances this project. Enter N/A if this project is not financed by the TMF.
Primarily a Software Development or Deployment Project?	Enter whether this project is developing or deploying software solutions as a primary focus of this project Boolean: <ul style="list-style-type: none"> True False
Incremental Development	Enter whether information technology projects are adequately implementing incremental development methodology Boolean: <ul style="list-style-type: none"> True False
Release Iteration Frequency Amount	Enter the frequency of the incremental development release iterations 6 decimal max
Release Iteration Release Frequency Unit	Select the frequency of incremental development release iterations units using the following options: <ul style="list-style-type: none"> Days Weeks Months Years
Iterative Description	Enter a description of the iterative development methodology being employed 500 character max

Section 6: Operational Analysis Data

Submission Expectations: Operational Analysis data is expected for Type 01: Major Investments.

The following data fields compose investment Operational Analysis data:

Data Field	Data Input
Date of Analysis	Date YYYY-MM-DD
Analysis Results	Enter a summary of the results including identified actions 2500 character max
Analysis Conclusion	Drop-down List: <ul style="list-style-type: none"> Continue as-is

Data Field	Data Input
	<ul style="list-style-type: none"> • Initiate remediation action • Initiate innovation action • Initiate modernization/replacement action • Initiate disposal action

Section 7: Performance Metrics

Submission Expectations: Performance Metrics data is expected for Type 01: Major Investments.

Each major investment shall report a minimum of five performance metrics, drawing on those that best reflect the value of the investment based upon the following ‘Performance Measurement Category Mapping’ selection criteria:

1. Customer Satisfaction (Process Results): Provide a minimum of one metric that reflects this category.
2. Strategic and Business Results: Provide a minimum of three metrics that reflects this category.
 - a. At least one of the metrics must have a monthly reporting frequency.
3. Financial Performance: Reporting metrics that reflect this category is optional.
4. Innovation: Reporting metrics that reflect this category is optional.

(Note: The fifth metric, or more as Agencies may report more than five metrics, can come from any category.)

Section 7a: Performance Metrics

The following data fields compose investment Performance Metrics data:

Data Field	Data Input
Service ID	Enter the Service ID of the investment that this performance metric applies to here
Metric Description	Enter a 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 500 character max
Unit of Measure*	Enter a brief indication of what quantity is measured (e.g., number, percentage, dollar value) for each metric 50 character max
Performance Measurement Category Mapping	Identify the measurement category of this metric: <ul style="list-style-type: none"> • Customer Satisfaction • Strategic and Business Results • Financial Performance • Innovation Definitions of each Performance Measurement Category Mapping are available within Section III.3 of Capital Programming Guide in OMB Circular No. A-11
Agency Baseline Capability*	Enter the quantitative value of your Agency’s capability per this metric prior to this investment’s life cycle. If your Agency has not measured this capability before, you may leave this field blank; otherwise, provide the numeric value of the historic capability measurement 6 decimal max
PY Target*	Enter the metric target value from FY 2022, relative to the reporting frequency 6 decimal max

Data Field	Data Input
CY Target*	Enter the metric target value from FY 2023, relative to the reporting frequency 6 decimal max
Measurement Condition*	Indicate whether a desired result would be “Over target,” indicating that the trend should maintain or increase, or “Under target,” indicating that the trend should maintain or decrease: <ul style="list-style-type: none"> Over target Under target
Reporting Frequency*	Indicate 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: <ul style="list-style-type: none"> Monthly Quarterly Semi-Annually Annually
Agency Strategic Objective or Priority Goal	Provide the Agency Strategic Objective or Priority Goal code for this metric 11 character max
Is Metric Retired?	Set this value to true when this performance metric is no longer useful for investment management Boolean: <ul style="list-style-type: none"> True False

Section 7b: Metric Actual Results

Submission Expectations: Metric Actual Results data is expected for all metrics established in Section 7a.

Agencies should report Section 7b: Metric Actual Results data for each Performance Metric and NOT at the investment level.

The following data fields compose Metric Actual Results data:

Data Field	Data Input
Actual Result*	Enter the actual result measured 6 decimal max
Date of Actual Result	Enter the end date of the most recent reporting period Date YYYY-MM-DD
Comment	Provide a comment for results that have not met their target 500 character max

Section 8: Investment Risks

Investment Risks data is expected for Type 01: Major Investments.

The following data fields compose investment Risks data:

Data Field	Data Input
Risk Area	<p>Provide data for relevant risks related to the A-11 Risk Area below. Definitions of each Risk Area are provided in the Capital Programming Guide Appendix 5 within OMB Circular No. A-11. Risk Areas include:</p> <ul style="list-style-type: none"> • Technology • Project Schedule and Resources • Business • Organizational and Change Management • Strategic • Security • Privacy • Data • Integration • Project Team • Requirements • Cost • Project Management
Active Risk	<p>For each Risk Area, indicate whether the investment has identified at least one active risk</p> <p>Boolean:</p> <ul style="list-style-type: none"> • True • False
Risk Probability	<p>The likelihood that risk associated with each Risk Area will become realized as an issue. Investments should only report Risk Probability for Risk Areas that reported “True” to Active Risk:</p> <ul style="list-style-type: none"> • Very Low • Low • Medium • High • Very High <p>For the purposes of standard reporting across Agencies, the following probability benchmarks have been provided for each response to indicate the estimated likelihood that a given risk will become realized as an issue:</p> <p>1) Very Low – 0-10%, 2) Low – 11-30%, 3) Medium – 31-60%, 4) High – 61-90%, 5) Very High – 91-100%</p>
Risk Impact	<p>The level of a potential negative impact for the Risk Area if realized as an issue. Investments should only report Risk Impact for Risk Areas that reported “True” to Active Risk:</p> <ul style="list-style-type: none"> • Very Low • Low • Medium • High • Very High <p>For the purposes of standard reporting across Agencies, the following impact benchmarks have been provided for each response to indicate the estimated detriment to investment outcome objectives in the event that a given risk is realized as an issue:</p> <p>1) Very Low – little or no impact on achieving investment objectives</p> <p>2) Low – some impact on achieving investment outcome objectives, but has little or no impact on achieving the Agency’s mission</p> <p>3) Medium – significant impact on achieving investment outcome objectives, with moderate impact on the Agency’s ability to deliver core mission functions</p>

Data Field	Data Input
	<p>4) High – significant impact on both achieving investment outcome objectives and the Agency’s ability to deliver core mission values but has little or no impact on the Government as a whole</p> <p>5) Very High – severe impact on executing the Agency’s core mission with ramifications for the Government as a whole</p>
Mitigation Strategy / Contingency Plan	<p>For each Risk Area with a risk score of a “10” or greater, provide a short description of each individual risk with a risk score of “10” or greater along with both the investment’s mitigation strategy for preventing each risk from becoming realized as an issue and the contingency plan should the mitigation strategy fail.</p> <p>The risk score will be the product of the probability and impact estimates using the numerical designations for each probability and impact benchmark provided; for example, a Risk Area with probability rated as “Low” (2) and impact rated as “High” (4) will have a risk score of 2 x 4 = 8.</p> <p>The mitigation strategy and contingency plan should deal with methods for avoiding or pre-empting risk as well as addressing any realized issues 1000 character max</p> <p>This field is optional for Risk Areas with scores of “9” or lower. Investments should only report Mitigation Strategy/Contingency Plan data for Risk Areas that reported “True” to Active Risk</p>

Section 9: Budget Account Summary

Agencies should report Section 9 data at the portfolio level and NOT the investment level.

The following data fields compose portfolio Budget Account Summary data:

Data Field	Data Input
Budget Account Code	Enter a Budget Account Code matching a value submitted in a Section 2a cost object
CIO Oversight Authority	Financial total in \$millions 6 decimal max
Year	Fiscal Year YYYY

BY 2024 Submission Overview Appendix: Key Terms and Submissions Processes

BY 2024 Submission Dates

- **Tue September 6, 2022, 5:00:00 PM EST** : BY 2024 Draft Agency IT Portfolio Summary (AITPS) is due on Max.gov (https://community.max.gov/x/p7_fiQ)
- **Thurs September 15, 2022, 1:00:00 AM EST** : BY 2024 ITPfM submissions open on IT Collect
- **Thurs September 29, 2022, 5:00:00 PM EST** : BY 2024 Pre-Decisional Funding Lock is due on IT Collect
- **Thurs October 27, 2022, 5:00:00 PM EST** : All ITPfM projects, performance metrics, and investment risks must be added/updated on IT Collect in accordance with BY 2024 reporting requirements
- **Thurs February 16, 2023, 1:00:00 AM EST** : BY 2024 President's Budget ITPfM submissions open on IT Collect
- **Thurs March 2, 2023, 5:00:00 PM EST** : BY 2024 President's Budget Funding Lock is due on IT Collect

Key Business Processes and Terminology for the BY 2024 Submission Cycle

With the start of the BY 2024 Budget Cycle, Agencies should be aware of key business processes and their associated terminology:

- **Funding Lock:** As done in BY 2023, Agencies are asked to submit a funding lock to IT Collect once Agencies are complete with submitting their IT Portfolio Financial Data. Section 1: Investment Descriptive Data, Section 2: Investment Financial Data, and Section 9: Budget Account Summary Data. OMB expects Agencies to continuously update Section 3: CIO Evaluation Report Data, Section 4: Contracts Data, Section 5: Projects Data, Section 6: Operational Analysis Data, Section 7: Performance Metrics Data, and Section 8: Risks Data.
- **IT Portfolio Financial Data:** When referenced throughout this process document and elsewhere, IT Portfolio Financial Data encompasses the following submission areas of data in the BY 2024 Submission Overview document:
 - Section 1: Investment Descriptive Data
 - Section 2: Investment Financial Data
 - Section 9: Budget Account Summary Data
- **Retired Investments:** As in BY 2023, Agencies must actively retire an investment to remove that investment from their IT Portfolio. IT Collect does not auto-eliminate investments from Agencies' IT Portfolios. With IT Collect, Agencies will have full control of their IT Portfolio content.
- **IT Collect Data Retention:** In IT Collect, Agencies submit to a centralized environment, in contrast to the legacy IT Dashboard process of submitting to unique environments for each budget year. As a result, Agencies will no longer have to overwrite all their AITPS data each budget cycle. Instead, Agencies will update their existing data in IT Collect each budget cycle where applicable. All data in IT Collect will remain active, and retained by IT Collect for distribution purposes, until Agencies either retire or delete that data.

Reporting Cadence

Agencies should anticipate updating submission areas established within the BY 2024 Submission Overview document at the following cadence:

- Section 1: Investment Descriptive Data – update during OMB specified BY 2024 ITPfM Budget submission windows

- Section 2: Investment Financial Data – update during OMB specified BY 2024 ITPfM Budget submission windows
- Section 3: CIO Evaluation Report Data – continuously update
- Section 4: Contracts Data – continuously update
- Section 5: Projects Data – continuously update
- Section 6: Operational Analysis Data – continuously update
- Section 7: Performance Metrics Data – continuously update
- Section 8: Risks Data – continuously update
- Section 9: Budget Account Summary Data – update during OMB specified BY 2024 ITPfM Budget submission windows

How frequently should Agencies update IT Collect data?

Per definitions established during the OMB BY 2022 Capital Planning Guidance (and updated for IT Collect), Agencies should make every effort to maintain current data on IT Collect. When providing updates to IT Collect, OMB expects that updates are provided within 30 days from the corresponding event (e.g., TechStat sessions, baseline changes, CIO evaluations, status change in projects).

Do Agencies need to submit out-year (non PY, CY, or BY) cost object data to IT Collect?

Agencies may submit Section 2a: Funding Data Cost Objects to IT Collect outside of the current PY, CY, or BY (2022, 2023, and 2024 respectively) to provide a more holistic view of the lifecycle funding of any given investment. IT Collect will allow the submission of Cost Objects if the year is within the range of 2015 to 2034. This flexibility of Cost Object submissions allows Agencies to create a financial lifecycle narrative for each investment.

That said, OMB is only expecting Agencies to submit the following:

- Major investments provide Section 2a: Funding Data Cost Objects for PY 2022, CY 2023, and BY 2024. Plus, Agencies can opt into providing Section 2a Cost Objects for PY -1 2021, BY +1 2025, BY +2 2026, BY +3 2027, & Beyond
- All other investments provide Section 2a: Funding Data Cost Objects for PY 2022, CY 2023, and BY 2024