Spend Request Checklist

Departments should use this checklist for spend requests over $100K. This checklist is categorized by **hardware and software requests**. This checklist should be used in addition to the LeanIX Project Roadmap Requirements and together with the Detailed Spend Request Walkthrough guidance. Departments should refer to the appropriate sections below when creating or updating LeanIX Projects.

General

- ❑ Project titles should be written in following naming convention:
    - o **[Department-Agency] <Project Title>**
    - o Include the fiscal year at the end of the title if it is related to renewals/maintenance **[Department-Agency] <Project Title> [FYXX]**
- ❑ Fill out the required sections -- if certain fields are not applicable denote using *N/A*:
    - o Complete all fields in the **Project Summary Section**
        - ▪ **Name & Description**
        - ▪ **Budget Costs**
        - ▪ **Budget Information**
        - ▪ **Business Value & Risk**
        - ▪ **Benefit –** both the Benefit Description and any applicable detailed benefit estimates
    - o Complete the following fields in the **Project Environment**
        - ▪ **Project Lifecycle**
        - ▪ **Affected User Groups**
        - ▪ **Affected Business Capabilities**
        - ▪ **Providers** (only if known)
        - ▪ **Predecessors**
    - o For spend requests related to maintenance (**renewals/reoccurring requests only**): complete the **Maintenance** section. Complete the **Warranty** section, if applicable.
    - o For maintenance costs that were provided as part of a new system, please include that under the **Budget Costs** section**.**
    - o For spend requests related to tech refresh: complete the **Tech Refresh** and **Warranty** section.
- ❑ For spend requests over $1M, please refer to the PAC Presentation Template and align the LeanIX Project content in the PAC Presentation

Hardware

- ❑ For hardware spend requests, please complete the **Warranty** section and include the quantity in the corresponding item description.
    - o E.g. **Item 1 Description:** *Dell Latitude Laptops (Qty: 100)*, **Item 1 OpEx cost:** *$200,000*
- ❑ For spend requests related to tech refresh: complete the **Tech Refresh** and **Warranty** section

- ❑ All service/equipment purchases tied to a project that is over $100K needs to be approved by ETS.
- ❑ For PC purchases please confirm that the new purchase meets the technical requirements outlined [here](#) and provide the following:
  - o Details on the PC's or systems currently in use.
  - o Confirm this is following the recommended 4-year replacement cycle, replacing roughly 25% of the PC's in the agency every fiscal year. If not please provide a replacement plan for each PC that is deployed.
  - o Provide the plan for the disposal of decommissioned PC's. The agency must destroy or securely delete its data as part of the decommissioning before the PC leaves the agency. Please follow any compliance requirements that the agency falls under. If the agency does not fall under any compliance requirements, please perform a secure wipe (minimum 1 pass) of the disk or destroy the disk. For additional guidance, please contact the Security Operations Center via email at soc@hawaii.gov.
  - o Provide the plan for the implementation of the new PC's.
    - ▪ What is the timeline of the implementation?
    - ▪ Which district offices are included in the implementation?
    - ▪ What specific applications will need to be installed/added to this PC?
    - ▪ Who will oversee the implementation?
  - o Confirm that this spend request covers all necessary accessories for the PC to be fully utilized for its intended purpose (i.e. if the purchase is for field specific laptops are they LTE-enabled?). Any accessories needed should be separately itemized in the budget.

Software Systems / Software Services

- ❑ For software spend requests please make sure to:
  - o Create an Application fact sheet for both the current (sometimes multiple existing Applications) and proposed information system.
  - o Link the spend request (Project fact sheet) with both the current and proposed applications.
- ❑ For the Application fact sheets, in addition to the [Application Roadmap Requirements](#), please provide:
  - o **Hosting model**
  - o **Predecessors**
  - o **Data**
- ❑ For software spend requests related to project implementation confirm that there is a maintenance cost post go-live. Include the maintenance cost (annual/multi-year) in the spend request.