KANSAS DEPARTMENT ON AGING

INFORMATION SYSTEM CHANGE REQUEST & PROJECT PLAN:

INSTRUCTIONS FOR FORM ORIGINATORS

December 30, 2009

See blank version and samples of this form, attached.

Q1: What is this form for?

A1: Submitting suggestions for changes to KDOA Web Application Systems.

The form provides a consistent, concise way for all suggested changes in KDOA information systems to be submitted for consideration. KDOA staff will review each submission, and estimate the suggestion's impact and technical level of effort it requires, before the form is passed along to the appropriate review authority (e.g., Steering Committee).

Q2: How should I fill out a System Change Request?

A2: The request originator must provide all information in Part I - Request; here are instructions:

TITLE and **ID NR**	LEAVE BLANK - these are filled in by KDOA
DATE	Date you are completing the information in Part I
ORIGINATOR	Originator's name (printed, not a signature)
PHONE	Originator's business phone number, with area code; IMPORTANT for KDOA analyst contact
ORGANIZATION	Where the originator works
E-MAIL	Originator's Internet e-mail address (if none, say "none")
NEED	Briefly explain the business problem you are having as a result of how the system works, or suggestion you have for improving the system. Make your case - what impact would the system change have on how you work? How important is it to Aging programs in Kansas?
URGENCY	Check only one. Selections indicate how long you can afford to wait before your issue is addressed. "Immediate" means you would like immediate consideration - note that it may still take a week or more to review, approve, schedule and implement the requested change. Reason for urgency should be reflected in your writeup for **NEED**. (Hint - if all requested changes come in as "Immediate", then, essentially, none can possibly be responded to immediately - KDOA

staff and the approving authority will arbitrarily determine how fast action can be taken on any of them.)

PROPOSED SOLUTION Briefly explain your idea for resolving the issue or implementing the improvement you identified in the NEED section. If you don't have an idea, put "none".

If your request is for a new or changed report in KAMIS, check the line for **Request for new KAMIS report attached**, and complete an additional page (Part I-A, KAMIS Report Request), explained in Q4 below. You must submit BOTH pages when you do this.

APPROVED BY Signature of the organization head approving the originator's request. See Q5, below.

DATE Date the organization head signs the request form.

TITLE Position title of the person signing to approve the request.

E-MAIL Internet e-mail address of the person signing to approve the request.

Q3: How should I fill out the supplemental Part I-A for requesting a KAMIS report?

A3: Here are the instructions:

ID NR LEAVE BLANK - filled in by KDOA (same as the **ID NR** on the Part I - Request page)

PROPOSED REPORT TITLE The title you think is appropriate for the report

USER(s) / RECIPIENT(s) Who will run this report? Who will get the report, if it's not the person who runs it? (Position titles are more useful here than individuals' names).

INTENDED USE OF REPORT How will this report be used within your business operations? What types of information will it provide?

FREQUENCY Check only one. This shows about how often you think the report will be run. "As needed" means there is no set interval.

REPORT HEADER CONTENTS Other information that should appear in the report header (above the column titles)

COLUMN TITLES & ABBREVIATIONS For each column you want on the report, in the sequence you would like to see them left-to-right above the report columns, provide a suggested column title and an abbreviation of that title that is no more than 12 characters long (including spaces and symbols)

FORMULAS FOR COLUMNS… If the values which are to appear in a particular column are to be calculated based on values in other columns, in the same row, show the formula, using the column names of all the involved values

SORTING, GROUPING AND SPACING This section describes how you want the rows of data arranged on the report.

The sort order tells which columns should be checked, in which order, to sort alphabetically or numerically. Sorts can be ascending (low values to high, such as "a" to "z") or descending ("z" to "a"). Always list the highest-order sort column first.

"Grouping" defines how you want rows collected together. You can have groups within groups - always list the highest-order group first.

"Spacing" describes how much space you want between rows of data, or between groups of rows. "New page" means you want to stop printing on one page when you get to the end of a group, and start the next group at the top of a new page, in the same page-numbering sequence. You can also request horizontal bars or a row of a repeated character, to emphasize a break between groups.

SUBTOTALS, TOTALS AND OTHER CALCULATIONS

You may want subtotals and totals on columns with numeric values, either at the end of the report, at the bottom of each page, or at group breakpoints within the report. Use column names or abbreviations to show which columns should be summed or otherwise used in a calculation. You can get a count of reported rows within a group or for the report as a whole, and use this count within calculations (such as when computing an average). Subtotals and totals will appear in the same column as the data which they sum.

USER INPUT ITEMS… In this section, you identify which data values need to be entered by the user when running this report. Many of the reports in KAMIS allow (or require) the user to enter specific pieces of information (called "parameters" of the report). Common parameters are the start date and end data of a particular period the report is supposed to cover (e.g., start date 07/01/1999, end date 06/30/2000). The parameters are used by the search query that extracts the data rows from the database; only data which meets the criteria of the search parameters is passed along for inclusion in the report.

Please refer to the attached Part I-A blank form and example form for further illustration of how these sections should be completed.

Q4: Who needs to sign the "Approved By" block in Part I? Why is this necessary?

A4: Part I of each System Change Request should be signed by the Executive Director of a non-KDOA organization submitting the request (Area Agency, service provider, etc.), or the cognizant KDOA Commissioner for requests originating within KDOA.

Having a senior individual approve each System Change Request before submission will guarantee that requests sent in to KDOA will be deemed relevant and needed by the submitting organization, as well as by the originating individual. People may have good ideas that appear to require system changes (KAMIS or some other KDOA system), but which, unbeknownst to them, are already being handled through some other mechanism (e.g., change in policy or procedure). Executive Directors and KDOA Commissioners are in positions to be aware of events and plans, including those limited to their own organization, which would make a subordinate's suggestion for a System Change unnecessary.

The System Change Request may, of course, be signed by an alternate to the Executive Director or KDOA Commissioner, provided that individual has the appropriate permission to sign "by direction" on behalf of the organization head, and the KDOA Director of Information Services has been notified by letter or e-mail from the Executive Director / KDOA Commissioner.

Q5: Can a System Change Request form be filled in by hand?

A5: Yes, provided it is legible.

Q6: What if I run out of room in the allotted space?

A6: Try to fit within the space allowed. If that is not possible, continue on an attached page (blank paper, with the label of the form section being continued repeated at the beginning of the text).

Concise explanations of problems, impacts and solutions are important to allow the review authority to consider a large number of System Change Requests in comparison with each other and with work that has already been approved. You should be able to synopsize your problem in five lines or less, if you have thought it through completely and know exactly what the issue is. Extended explanations and context may be something that is better discussed with the KDOA review analyst when they call, rather than writing a long essay about your situation.

Q7: Where do I send a signed System Change Request form?

A7: Mail signed forms to the following address:

Director, Information Services
  ATTN: System Change Request
Kansas Department on Aging
503 S. Kansas Ave
Topeka, KS 66603-3404

Q8: How will I know the outcome of the approval decision, where my suggestion falls in the priority list, and when I can expect it to be put into effect?

A8: KDOA will inform you directly by e-mail. Eventually, KDOA will post a listing of all approved and prioritized System Change Requests on a web page.

When KDOA receives your System Change Request, you will receive an e-mail acknowledgement containing the title and ID number assigned to the request, and the date when the request will be forwarded to the review authority (for KAMIS changes, that would be the KAMIS Steering Committee). If you don't have your own e-mail address, we will send the e-mail to the person who approved your request (Part I signature).

After action by the review authority, you will, for now, receive a second e-mail notifying you of the outcome, and, if approved, the estimated date when the change will be released into production. Eventually, KDOA will add a database display of the current priority list of approved System Changes - on the KAMIS web site for KAMIS changes, and the KDOA Intranet site (for KDOA internal use only) for non-KAMIS system changes. This will take the place of the second e-mail.

Q9: What is the "Project Plan" part about?

A9: This is how KDOA staff plans and tracks action to implement the System Change Request.

You will not have to complete any of the Project Plan which is associated with a System Change Request, or even send these pages in with your request form.

We are providing a copy of the Project Plan portion with these instructions just to show you how the approved change project is handled and documented at KDOA, and the types of information the project leader may need from you.

Q10: Who can I contact if I have questions about this form or the System Change Request process?

A10: Send e-mail to or telephone the KDOA Development Manager, Henry Mace.