Information Technology Request Job Aid

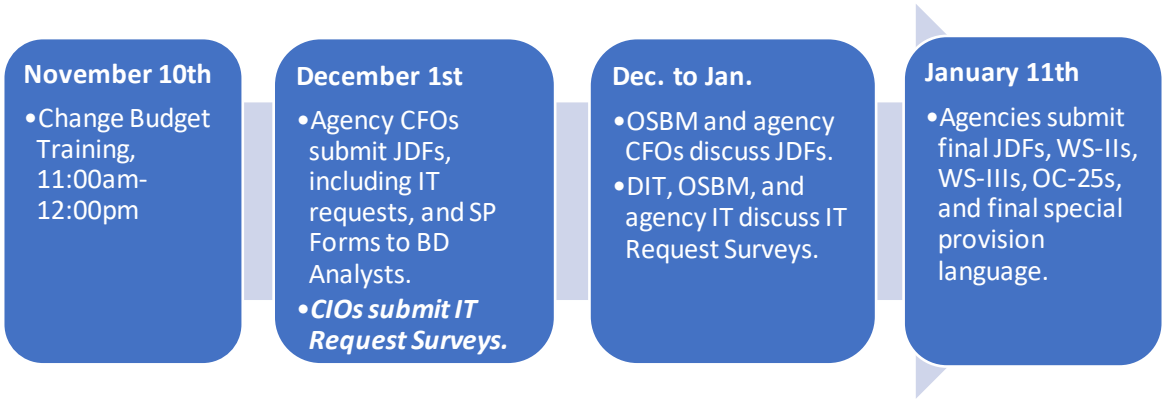
This job aid describes the agency process of submitting information technology (IT) requests.

G.S. 143B-1320(a)(11)) defines information technology as electronic data processing goods and services, telecommunications goods and services, security goods and services, microprocessors, software, information processing, office systems, any services related to the foregoing, and consulting or other services for design or redesign of information technology supporting business processes including personnel.

Please submit a Justification Documentation Form (JDF) for each IT request **December 1st, 2026.** These JDFs will be used as agencies discuss their requests with OSBM. Finalized JDFs will be attached to the Worksheet II (WS-II) request forms in IBIS when they are due on **January 11th, 2027**. Agencies should rank IT requests among their operational requests (there is a ranking field in the JDF). See the Change Budget Request Job Aid for more information.

For all IT change budget requests that meet the criteria below, agencies must complete an IT Request Survey in addition to the JDF and WS-II. The survey facilitates review by the State Chief Information Office (CIO) in accordance with G.S. 143C-3-3 and OSBM. **The General Assembly, the Administrative Office of the Courts, and the University System are exempt from the IT Request Survey requirement.**

Key dates and deliverables in the 2027-29 budget process are outlined below and on the OSBM website.



IT Request Survey Process and Timeline

Requests subject to the IT Request Survey:

- New IT solutions that will process or transmit sensitive data, including PII, PHI, FERPA, IRS 1075, PCI, or other federal/state classifications, regardless of cost.
- IT requests of any kind over $500,000.
- Any custom-developed solution (either by a vendor or in-house), regardless of cost.
- Operations and maintenance (O&M) for *new* solutions. Must match DIT's project portal or explain why different.
- Any server or data center-related hardware purchases.
- Licenses for software not included in existing enterprise or convenience contracts managed by Statewide IT Procurement.

Requests exempt from the IT Request Survey:

- Funds for personnel.
- Fund shifts (e.g. approved and unchanging projects that were funded with federal receipts for which the agency now requests net General Fund appropriations or vice versa).

- Continuing program requests under $500,000, including *continuing* O&M.
- PC refreshes, peripherals, and other desktop-related hardware.
- Licenses for software through existing enterprise or convenience contracts managed by Statewide IT Procurement (e.g. Microsoft, Adobe, Docusign, Visio, etc.).

Survey Completion Requirements

The Department of Information Technology (DIT) will provide a survey link to all agency CIOs and CFOs by **December 1st, 2026**. Each Agency survey is the same, but each agency receives its own survey to ensure that only authorized users have access to their responses. Agencies should email Caitlin.Mullen@nc.gov at DIT to add additional authorized contributors beyond their CFO and CIO to their survey environment (which includes both the survey and a summary list of all agency submissions).

The agency CIO or designee completes this form, but they must coordinate with the agency budget team since only items that appear on both the IT Request Survey *and* a JDF will be considered.

To begin a new survey, click the "+New" button in the upper left of the survey environment. Agencies may review and edit their submissions through **January 11th, 2027**. If you finish sooner, email paul.devenish@osbm.nc.gov to alert OSBM and DIT to begin the review process.

Survey Review Process

OSBM analysts will review the JDFs and associated survey responses with key DIT personnel, potentially bringing in agency staff to answer follow-up questions. OSBM and DIT analysts will then work with agencies to further develop request business cases, such as brainstorming evidence that demonstrates the need for these solutions and why their requests will address stated challenges. This review will prepare agencies for subsequent WS-II submissions. This review also ensures that all requests meet minimum thresholds for architecture, security, integration, structure, and risk.

Survey Questions Guide

Please do not include any data that is classified as highly confidential in this form (PII, PHI, FERPA, IRS 1075, PCI, or other federal/state classifications). Here are the survey questions and tips for completing the IT Request Survey:

- **Title:** This must exactly match the title on the JDF
- **Budget Session:** Please select the budget session for which this request is being made. Long sessions are noted as FY XXXX-XX, short sessions as FY XXXX. The default is set to "FY 2027-29".
- **Agency:** Please select the agency requesting this expansion.
- **Agency Business Owner:** Provide the first and last name of the business owner for this request.
- **Have your CFO and CIO signed off on this request?** *Do not proceed unless the answer is "yes"*.
- **Is this request for an IT solution?** Select "yes" if this request is to develop, implement, maintain, or replace a solution or an IT infrastructure project. Select "no" if this request is for hardware only. Selecting "yes" requires the following additional questions.
    - **Will this solution be public facing?**
    - **What is the end-user's role?** End-users may include students, teachers, county personnel, state personnel, business users, etc.
    - **What, if any, confidential data classifications will the solution collect, use, disseminate, or maintain?** Select ALL that apply. Click the check mark to confirm your selection.

- **Is this a new solution, enhancement or maintenance of an existing solution, or replacement of an existing solution?** "Enhancement or maintenance of an existing solution" or "replacement of existing solution" requires the following additional questions.
  - **If enhancing or maintaining an existing solution(s), what will be enhanced or maintained?** Select ALL that apply. Click the check mark to confirm your selection.
  - **If replacing an existing solution(s), what will be replaced?** Please select ALL that apply. Click the check mark to confirm your selection.
- **What type of implementation are you planning for this solution?**
- **Where will this solution be hosted?**
- **With what application(s) will this solution interface?** Please select ALL the applications that will interface. Click the check mark to confirm your selection. If there will be no interfaces, type "none."
- **Which other applications will require changes due to this request?** Please select ALL the applications requiring changes. Click the check mark to confirm your selection. If no other applications require changes, type "none."
- **Are the costs of changes to other applications included here, already funded, included in other requests, or neither included nor funded?** Selecting "included in other requests" or "neither funded nor requested" will require the respective following additional question.
  - **If included in other requests: Please provide costs for necessary changes to other applications that are being requested in other expansion items.** Please provide a dollar figure.
  - **If neither fund is not requested: Please provide additional costs that are neither funded nor requested.** Please provide a dollar figure.
- **How many years will this take to complete?** If you expect it to take less than a year, please use decimals (ex. 6 months would be entered as 0.5).

- **Who will directly and indirectly benefit from this request?** Please designate beneficiaries (e.g., general public, local government, state agency, etc.) of the project and how they will benefit.
- **Which government services, functions, or processes are impacted by this request?** Please provide a list with some details of how these elements will be impacted.
- **List all agencies impacted by this request.** Check ALL the answers that apply. If only your agency will be impacted, click your agency from the list. Click the check mark to confirm your selection.
- **Explain the impact on selected agencies.**
- **Please provide the quantitative (dollar savings or cost avoidance) benefits of this request.** Will this request save money by increasing efficiency in some way? Will it increase revenue? Please provide a dollar figure.
- **Please provide the qualitative benefits of this request.** Describe expected non-monetary benefits.

- **What are the risks of NOT receiving this funding?** This may include, but is not limited to, a legacy application no longer being supported, the inability to meet a federal requirement, or the identification of a data security vulnerability.