

MOU Reallocation Reprogramming – (DGS PM)

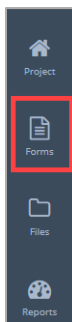
The MOU Reallocation Reprogramming form is used by DGS project managers to compile the necessary documentation for MOUs, reallocations, or reprogrammings and send it to their EPM for processing and execution. Supporting documentation files are attached to the record and the record is routed to the EPM for review and approval via workflow in ProjectTeam.

Copies of the processed/executed/signed requests will be added to the associated record in ProjectTeam by the BDI team once the request has been executed/signed/processed or otherwise completed.

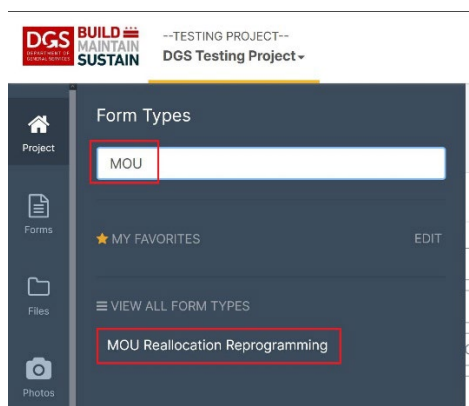
NOTE: Some older projects may include a previous version of the workflow which will not submit the form to the EPM properly. Please reach out to DGS.ProjectTeam@dc.gov if you need to submit an MOU, reallocation, or reprogramming and the workflow in your project is titled **MOU and Reprogramming Approval** or the DGS Project Manager receives the workflow notification and is assigned the workflow when it is started.

Creating MOUs and Reprogramming Records

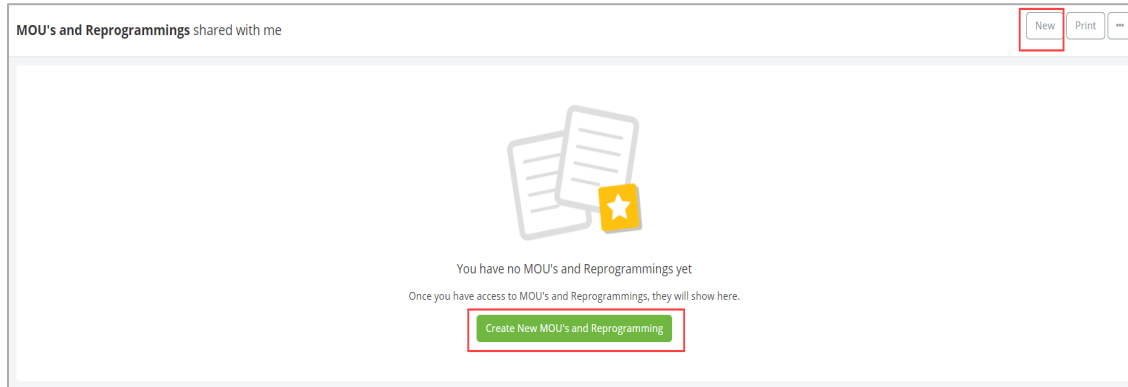
1. Within the project, click the **Forms** icon on the left navigation pane.



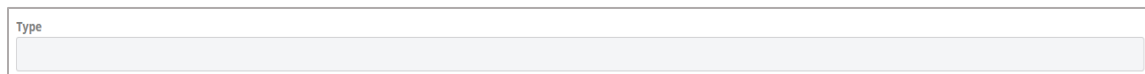
2. In the search area of the Form Types, begin typing **MOU** and click to select the **MOU Reallocation Reprogramming** form.



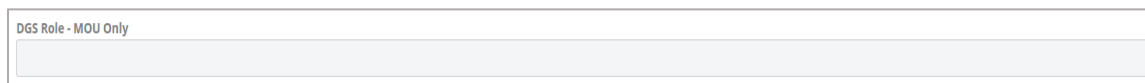
- If this is the very first record for this form, click the **Create New MOU Reallocation Reprogramming** button located in the middle of the log or click the **New** button in the upper right corner.



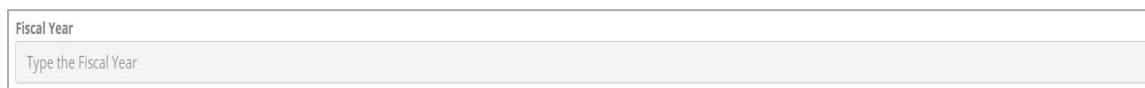
- Click inside the **Type** field and select the appropriate record type from the pick list.



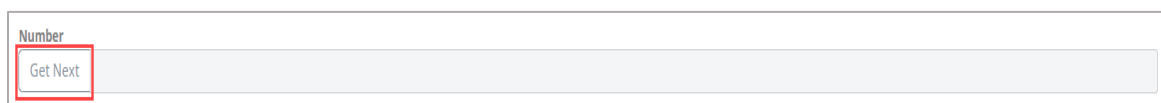
- Click inside the **DGS Role – MOU** only field and select the DGS role for the MOU from the picklist if the request is for an MOU. Otherwise, leave the field blank.



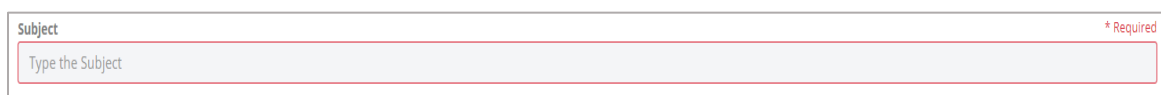
- Enter the **Fiscal Year** the request is for (use 4-digit year format i.e., 2022).



- Click the **Get Next** button to assign a request **Number**.



- Enter a brief description of the request subject in the **Subject** field.



9. Select the date of the request from the calendar in the **Created Date** field.

Created Date

< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

10. Select the date the processed request is needed by from the calendar in the **Due Date** field.

Due Date

< April 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

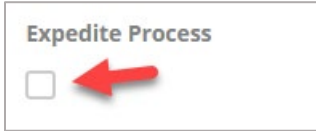
11. Select the date which the lack of a processed request will adversely affect the project schedule, cost, or scope/quality if not executed/signed/processed by from the calendar in the **Deadline Date** field.

Deadline Date

< April 2020 >

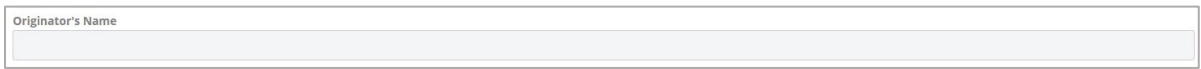
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	01	02
03	04	05	06	07	08	09

12. Click the checkbox for **Expedite Process** if the request requires expediting and meets the requirements to be expedited. Reach out to your EPM or the BDI team to determine requirements for expediting requests.



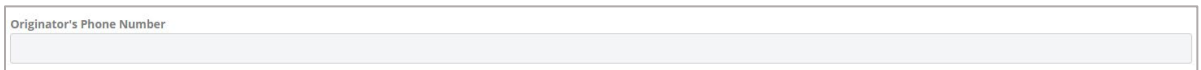
A rectangular box with the text "Expedite Process" at the top. Below the text is a small, empty square checkbox. A red arrow points from the right towards the checkbox.

13. Enter the **Originator's Name**. This is often someone from your Client Agency or even the Director. Reach out to your EPM to determine who the originator is if you are not sure.



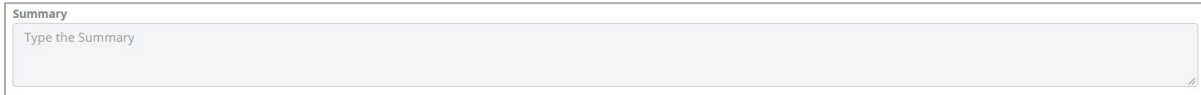
A horizontal text input field with the placeholder text "Originator's Name" at the top left.

14. Enter the **Originator's Phone Number**.



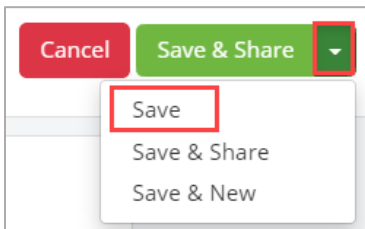
A horizontal text input field with the placeholder text "Originator's Phone Number" at the top left.

15. Add a brief summary of the reason, purpose, or intent of the request in the **Summary** field.



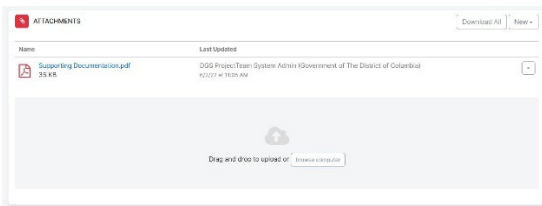
A horizontal text input field with the placeholder text "Summary" at the top left and "Type the Summary" below it.

16. To save the **MOU Reallocation Reprogramming** document and open the record in view mode to allow attachment of the required documentation files, click the dropdown arrow beside **Save & Share** and click the **Save** button.



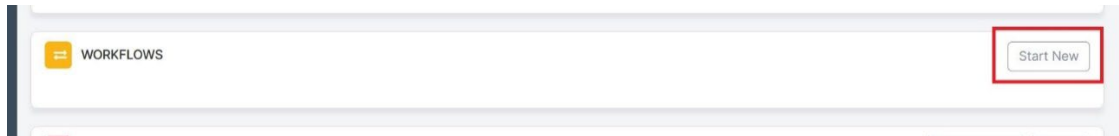
A button labeled "Save & Share" with a small downward-pointing arrow on its right side. A dropdown menu is open below the button, showing three options: "Save", "Save & Share", and "Save & New". The "Save" option is highlighted with a red border.

17. Add any supporting documentation in the **Attachments** section on the record.

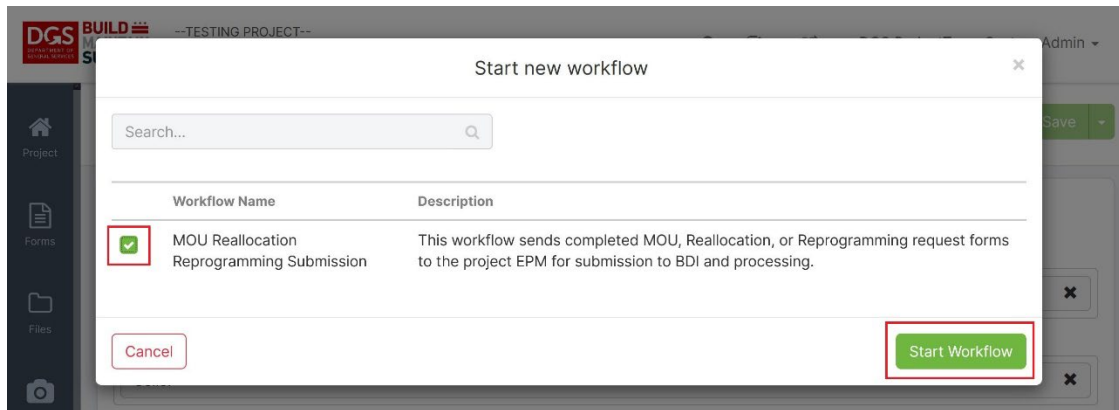


A screenshot of the "ATTACHMENTS" section. It shows a table with columns "Name" and "Last Updated". One attachment is listed: "Supporting Documentation.pdf" (35 KB) with a last updated date of "10/20/2021 4:10:00 AM". Below the table is a large area with a cloud icon and the text "Drag and drop to upload or Insert content".

18. Click the **Start New** button in the Workflows section of the record once you are ready to submit the request to your EPM for processing.



19. Select the workflow using the **checkbox** and click the **Start Workflow** button



20. Click the **Share** button and share the record with additional share groups as appropriate using the checkboxes and Share button in the modal window.

NOTE: these records are internal to DGS/DC Government and are not to be shared with vendor share groups.

