MOU Reallocation Reprogramming – (DGS PM)

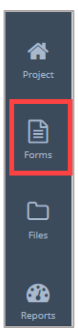
The MOU Reallocation Reprogramming form is used by DGS project managers to compile the necessary documentation for MOUs, reallocations, or reprogrammings and send it to their EPM for processing and execution. Supporting documentation files are attached to the record and the record is routed to the EPM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

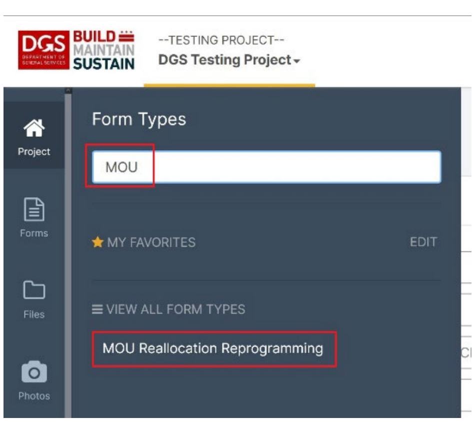
NOTE: Some older projects may include a previous version of the workflow which will not submit the form to the EPM properly. Please reach out to DGS.ProjectTeam@dc.gov if you need to submit an MOU, reallocation, or reprogramming and the workflow in your project is titled ***MOU and Reprogramming Approval***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

Creating MOUs and Reprogramming Records

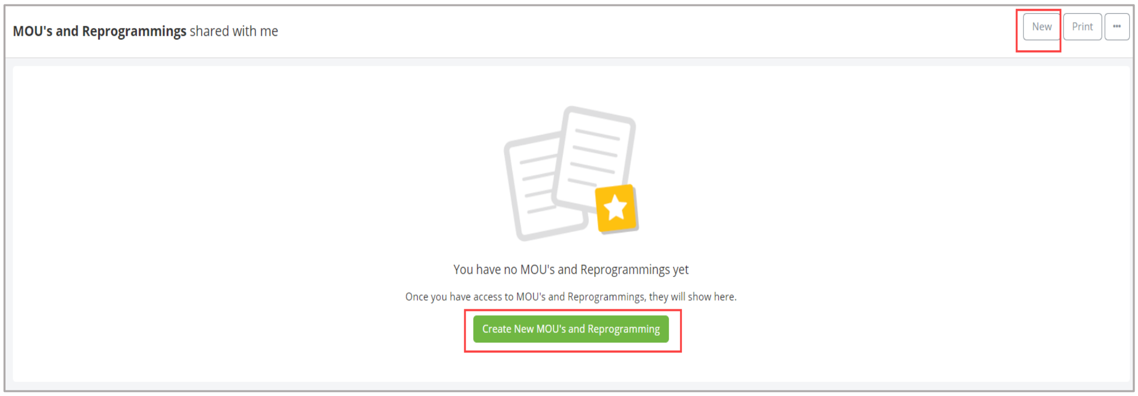
1. Within the project, click the **Forms** icon on the left navigation pane.



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



3. 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.



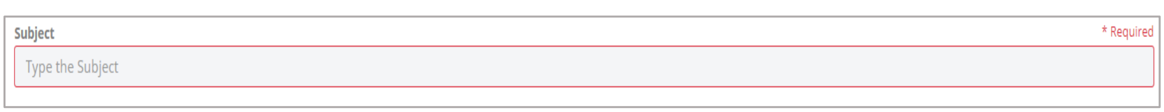
4. Click inside the **Type** field and select the appropriate record type from the pick list.

5. 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.

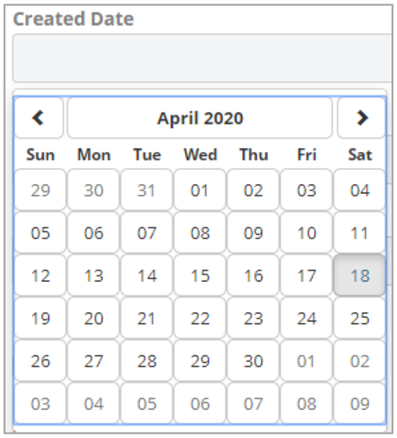
6. Enter the **Fiscal Year the request is for (use 4-digit year format i.e., 2022)**.

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

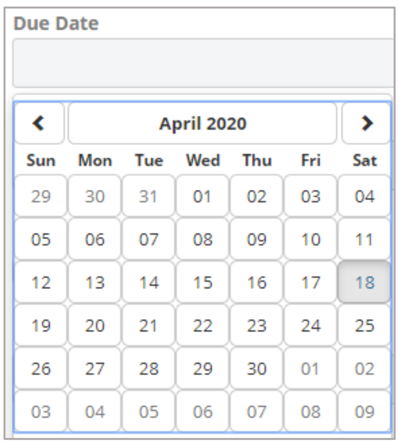
8. Enter a brief description of the request subject in the **Subject** field.



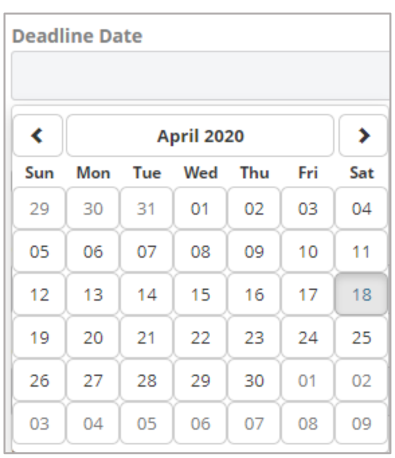
9. Select the date of the request from the calendar in the **Created Date** field.



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



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.



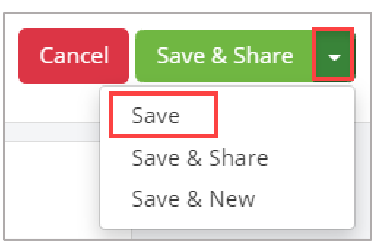
12. Click the checkbox for **Expedite Process** if the request requires expediting **<u>and meets the requirements to be expedited</u>**. Reach out to your EPM or the BDI team to determine requirements for expediting requests.

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.

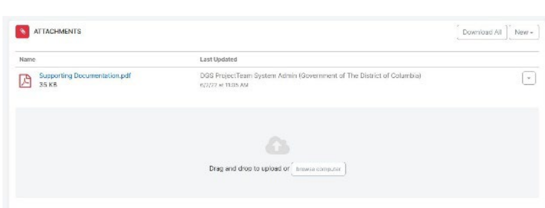
14. Enter the **Originator's Phone Number**.

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

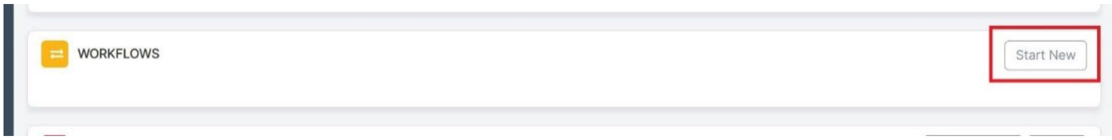
16. To save the **MOU Reallocation Reprogramming** document and open the record in view mode to allow attachment of the required documentation files, click the dropdown arrow beside **Save & Share** and click the **Save** button.



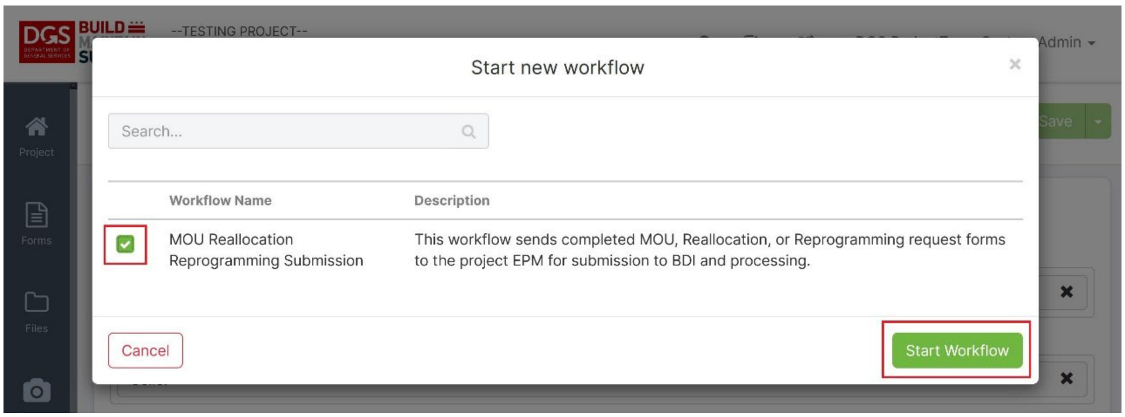
17. Add any supporting documentation in the **Attachments** section on the record.



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.