1) Project Workflow
2) Project Background Information Check List
3) Cabinet Review Information
4) IT Procurement Review Worksheet
5) IT Security Requirements
6) Accessibility Compliance Requirements
Section 1
Proposed Project Workflow

1. Information Technology Procurement Review; includes Public Private Partnerships (PPPs), Chancellor’s Office (CO) Master Enabling Agreements (MEAs) and Pilot Projects
2. Request for Information (RFI), Request for Quote (RFQ), Request for Proposal (RFP)
3. Information Resources (IRES)
Section 2
Information Technology
Background Information Check List (1)(2)(3)
(In collaboration with Information Resources' Project Liaison)

- Project Executive Sponsor

- Project Liaison

- Estimated Year-One Investment
  (Software, licensing, hosting services)
    - Funding source

- Estimated Annual Expenses
  (Software maintenance, licensing, hosting)
    - Funding Source(s)

- Project Management
  - Internal or External (list)
  - Estimated Cost
  - Project Manager (Name)

- Project Staffing Requirements
  - Additional Staff (Number)
  - Foundation, Career or Expert Level
  - Estimated Annual Cost with Benefits

- Technology Infrastructure Requirements
  - Initial Year Investment:
    - Annual Ongoing Costs

- Technology Integration Requirements
  (Identity Management)
  - Initial Year Investment
  - Annual Ongoing Costs

- Mobile Technology Integration
  - Initial Year Investment
  - Annual Ongoing Costs

- Does the Application Utilize (list)
  - HIPAA; PII; FERPA; PCI

(1) Please attach a narrative of the project information if applicable
(2) Cabinet review if the project's exceeds $250K Year 1/$500K five years including:
application, infrastructure, consulting, staffing, training, maintenance and/or hosting
(3) Chancellor's Office initiatives, mandates, multicampus collaboration efforts, or Master Enabling
Agreements (MEAs); includes:
(4) Health Insurance Portability and Accountability Act (HIPAA), personally Identifiable Information
(PII), Family Educational Rights and Privacy Act (FERPA), Payment Card Industry (PCI) Data
Section 3
Cabinet Review Information

CSU, Chico
Technology Acquisitions
Cabinet review where...

- Implementation has significant impact to internal business processes; or
- Project impacts more than one division; or
- Project involves emerging or new technologies for this campus; or
- Implementation requires additional project/staff resources; or
- The project’s Total Cost of Ownership (TCO) exceeds $250K Year 1/$500K five years including the following components: application, infrastructure, consulting, staffing, training, maintenance and/or hosting

Projects with Cabinet approval are then required to complete the following:

- CSU, Chico’s IT Procurement Review (ITPR) process and supporting documents

- For projects greater than $1M, over a five year period, including application, infrastructure, consulting, staffing, training, maintenance and/or hosting, we are required to complete the Chancellor’s Office (CO) “CSU-IT Procurement Project” information
IT Procurement Review (ITPR)

The Information Technology Procurement Review (ITPR) process is required for all Electronic & Information Technology (E&IT) purchases, regardless of cost.

Subject
A short description to explain the nature of a ticket.

Requested For
The person for whom the service is being requested.

Department
The campus department of the person for whom the ticket is being requested.

Product Name

Vendor

Product Web Site

Purchase Amount

Term

Renewal or Purchase

Budget Contact
Enter the name of the person who handles the budget for your area.

Associated Students Request
Is this request for Associated Students (AS)?
<table>
<thead>
<tr>
<th>Product Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Computer accessories/peripherals</td>
</tr>
<tr>
<td>☐ Computers (Desktop/laptop/server)</td>
</tr>
<tr>
<td>☐ Digital or video camera</td>
</tr>
<tr>
<td>☐ Printer/Scanner/Fax Machine</td>
</tr>
<tr>
<td>☐ Kiosk/Self-Service Equipment Mobile device (tablet, smartphone)</td>
</tr>
<tr>
<td>☐ Mobile or web-based application</td>
</tr>
<tr>
<td>☐ Scientific Equipment</td>
</tr>
<tr>
<td>☐ Software (new or upgrade)</td>
</tr>
<tr>
<td>☐ Software Maintenance</td>
</tr>
<tr>
<td>☐ Service Contract</td>
</tr>
</tbody>
</table>

**Purpose of product or service**

Full description of the purpose the product or service being requested.

---

**Student Users**

How many and what type of STUDENTS will use this product/service?

---

**Faculty Users**

How many and what type of FACULTY will use this product/service?

---

**Staff Users**

How many and what type of STAFF will use this product/service?

---

**Visitor/Public Users**

How many and what type of VISITORS OR GENERAL PUBLIC will use this product/service?

---

**Other Users**

How many and what type of OTHER USERS will use this product/service?
Area(s) of Use

Select the area(s) of use.

- One (1) department, organization or course
- Multiple departments, organizations or courses
- Campus-wide

Location(s) of Use

Select the location(s) of use.

- Non-Public (office/restricted)
- Public (Lab/Classroom/Public Space)

Product Use Required

Will use of this product be required?

- Required for academic or curricular purposes only
- Required for maintaining continuous employment in good standing only
- Required for both academic/curricular and employment purposes
- Not required for either

Administration and Maintenance

Who will administer the server/hardware or software application, and provide on-going maintenance and security? (vendor or name of campus staff)

If this question does not apply, indicate NA.

System Location

Where will the server/hardware or software application reside?

System Location Details

If necessary, please provide any additional relevant information about where the server/hardware or software application will reside.

Chico State User Account Login

Do users log in to the system with their campus account?

External Administration

If the system is hosted locally, will vendor or other non-campus personnel need to access the system for administration purposes?
Confidential Information - Level 1

Please check all the types of confidential information collected or stored as part of this application.

☐ Bank account information
☐ Biometric information
☐ Credit card numbers
☐ Driver's license, state ID, or passport number
☐ Electronic/digitized signature
☐ Health insurance information
☐ Individual medical records
☐ Passwords or credentials
☐ Personal Identification Numbers (PINs)
☐ Psychological counseling records

Confidential Information - Level 2

Please check all the types of confidential information collected or stored as part of this application.

☐ Employee information (e.g. salary, home address, personal telephone/email, performance evaluations)
☐ Student Records (e.g. grades, courses taken, test scores, schedule)
☐ Attorney-client communications
☐ Campus or system vulnerability/security information
☐ Identification photo
☐ Trade secrets or intellectual property (IP)
☐ Other

VPAT, Vendor Documents, and Security Data Requirements Checklist

Please attach the following files: Vendor Documents, VPAT, and Security Data Requirements Checklist (if required)

Be sure to select all documents for upload at the same time. Selecting one document at a time will result in the system replacing the first document with the second document.

Browse... | No file chosen

Request

IT Support Services
California State University, Chico
Chico, CA 95929
Phone: 530-898-HELP (4357)

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Report an accessibility issue (http://www.csuchico.edu/arc/accessibility.shtml)
Download Adobe Reader (http://get.adobe.com/reader/)
Section 5
IT Security Requirements

(http://www.calstate.edu/icsuam/documents/Section8000.pdf)

- Following CSU ICSUAM[^1] Section 8000 – Information Security
- Identify the controls supporting the use and storage of Level 1[^2] and Level 2[^3] data elements
- Facilitate record custodian approval for use of all Level 1 and Level 2 data elements
- Identify and facilitate access to all Level 1 and Level 2 data elements
  - On campus
  - Remote access
    - Using university assets, privately owned assets and mobile devices
- Support annual audit requirements for all Level 1 and Level 2 data elements
  - Pre implementation documentation of CSU 8070 application security standard

[^1]: Integrated CSU Administrative Manual
[^2]: Level 1 Data – confidential data (social security number, driver’s license, account numbers, etc.)
[^3]: Level 2 Data – use of (birth dates, campus identification number, grades, etc.)
Section 6
Accessibility Compliance Requirements

Information Technology Accessibility Requirements
Following EO 926 and Coded Memo AA-2013-03 Guidelines
http://www.calstate.edu/eo/EO-926.html
https://www.calstate.edu/AcadAff/codedmemos/AA-2013-03.html
- Identify, through VPAT \(^\text{(1)}\) review, areas or functions of potential risk
  (Impact level guidelines)
- Facilitate equally effective alternative access plans
- Work closely with the vendor to create acceptable roadmaps
  (CSU Vendor Roadmap Form)
- Facilitate re-evaluation during major upgrades, patches, new releases

\(^\text{(1)}\) Voluntary Product Accessibility Template