

STATE OF VERMONT
AGENCY OF ADMINISTRATION
DEPARTMENT OF FINANCE AND MANAGEMENT

Subject: **VISION Service Request (VSR) Procedure**

Effective Date: **June 29, 2017**

Applicable To: **All State Agencies and Departments**

Issued By: **Department of Finance & Management**

Approved By: **Brad Ferland, Commissioner**

Purpose:

This procedure outlines the VISION Service Request (VSR) process including the responsibilities of the requesting agency/department and the Department of Finance and Management.

Background:

As agency and departmental business needs change because of new initiatives, programs, internal controls, reporting requirements, etc., changes to how agencies and departments utilize VISION may also need to occur. The VSR process provides a mechanism for agencies and departments to request new VISION services including updated or new interfaces, new VISION functionality added to their business process, updated or new modifications, and updated or new reports, while also allowing the Department of Finance and Management to manage the requests and ensure the agency/department's needs and the Department of Finance and Management's needs are both met.

Procedure and Guidelines:

The following will govern the submission of requests by agencies and departments for new VISION services.

I. Definitions:

- **Interface** – VISION data sent to or received from a third-party system (anything other than VISION). The five types of interfaces currently supported in VISION are: A/P vouchers, direct journal deposits, ONL journals, billing and data extracts.
- **New Functionality** – Supported functionality in VISION that the agency/department does not currently use. An example is a request to use the billing module. Also considered new functionality is a request for a new business unit.

- **Modification** – Delivered functionality, fields or views are altered in VISION to capture additional data or address a specific State need.
- **Report** – An extraction of data from VISION compiled in a useful form to meet the needs of the reviewer.

II. Agency/Department Procedure and Responsibilities:

- The **VISION Service Request (VSR) Form** must be completed to request a new VISION service including updated or new interfaces, new VISION functionality added to their business process, updated or new modifications and updated and new reports. The form can be found under Other Forms at: <http://finance.vermont.gov/forms/vision>.
- The VSR Form must be completed per VSR Form instructions which are included on the form.
- The VSR Form must be submitted by the agency/department's lead Financial Manager to VISION.FINHelpDesk@vermont.gov.
- The agency/department must have knowledgeable staff available to assist with the implementation and testing of the new VISION service when needed.
- If the VSR is part of a larger agency/department initiative or project, the agency/department must provide timely communication to the Department of Finance and Management regarding initiative/project status and any issue that may alter the established timeline for the VSR implementation. Lack of prompt communication from the agency/department, may result in the VSR being put 'On Hold' and resources reassigned.

III. Department of Finance and Management Procedure and Responsibilities:

- Upon receipt of the VSR Form, the VISION Support Team will review it for completeness. If the VSR is found to be incomplete, the submitter will be notified that the missing required information must be added to the form and that it must be resubmitted.
- All VSR forms that the VISION Support Team has marked as complete will be reviewed by the VSR Team within 10 business days to determine whether the request will be Accepted, Rejected or Returned for more information.
- If the request does not have sufficient information to assess the request, it will be Returned for more information.
- If the request meets the criteria below, it will be Accepted.
 - Request aligns with statewide financial requirements or meets a legislative mandate, federal requirement or administrative directive.
 - Request can be accommodated in VISION.

- If the request does not meet the criteria above, the request will be Rejected.
- Accepted VSR Forms will be analyzed to determine the estimated effort and time needed to implement the request. An estimated start and end date will then be determined based on requested completion date, work effort, time required, and staff availability.
- The agency/department will then be notified of the proposed start date.

IV. Disclaimers

The start dates and timelines proposed by the Department of Finance and Management to complete VSR's are dependent on agency/department staff being available when needed for testing, providing information, etc. Timelines and project status may need to be adjusted if agency/department staff are not readily available when needed.

VISION Production support will take precedence over VISION Service Requests. Timelines may be adjusted if unforeseen VISION Production issues arise affecting the availability of Department of Finance and Management and/or Agency of Digital Services staff.

Communication will occur to discuss any timeline changes.

If you have any questions or need clarification on any aspects of this procedure please contact VISION Support at 802-828-6700, option 2 or at: VISION.FINHelpdesk@vermont.gov.