Statewide IT Policy and Standard Development Process
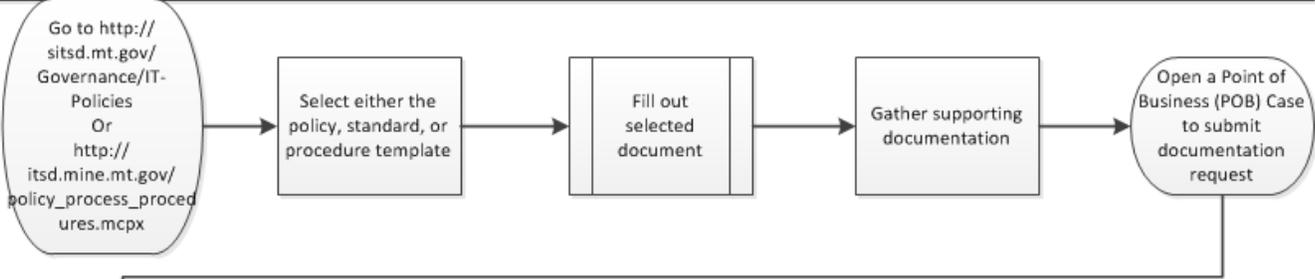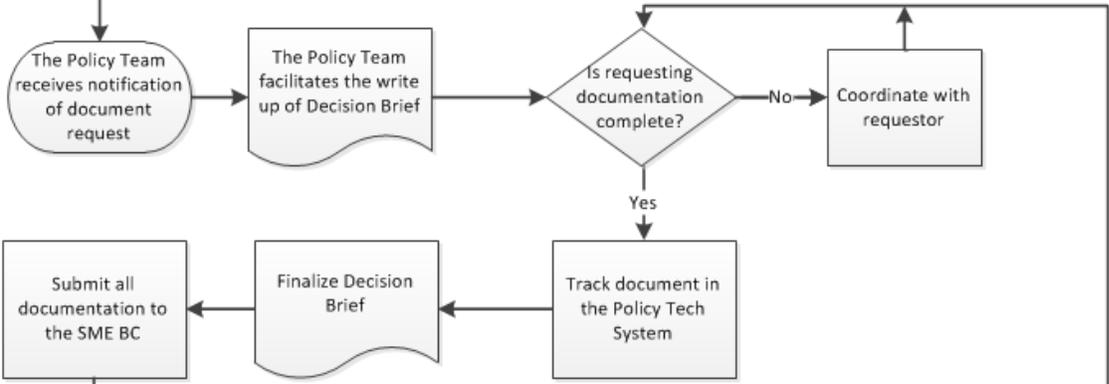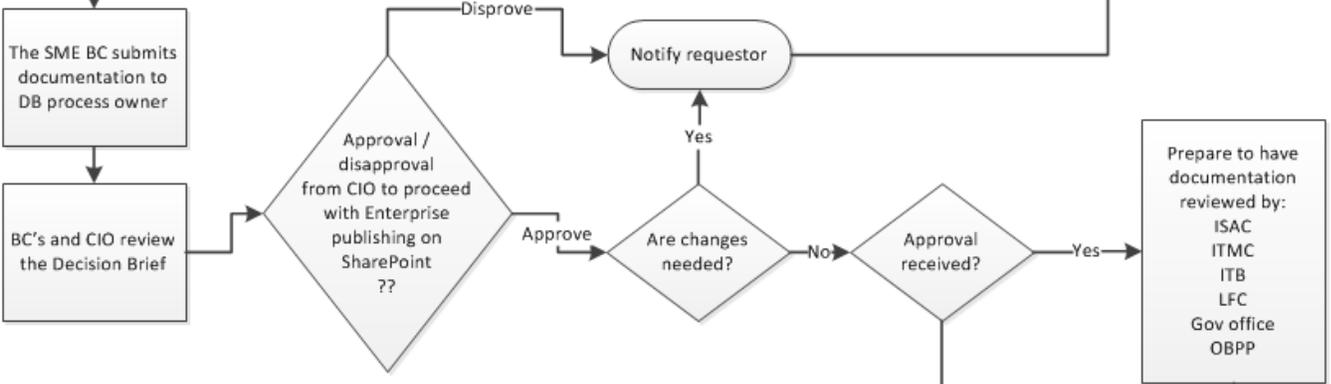
Requestor Role
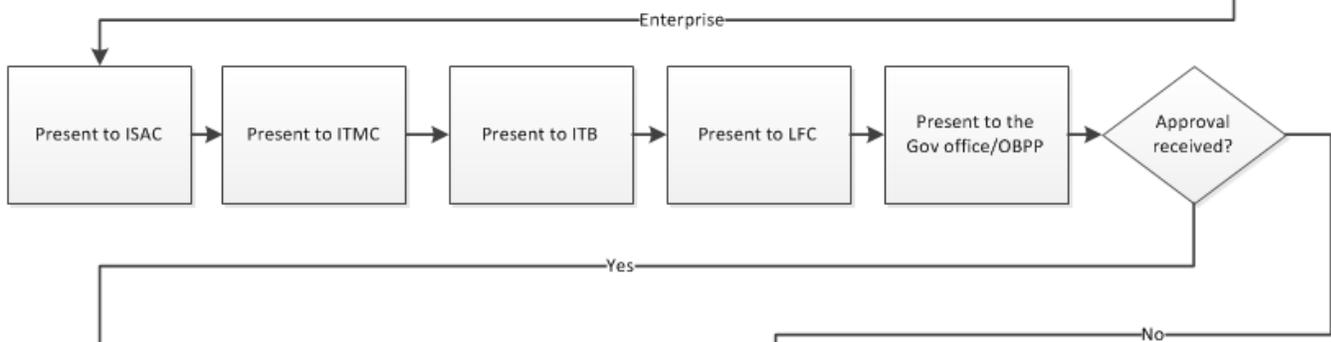
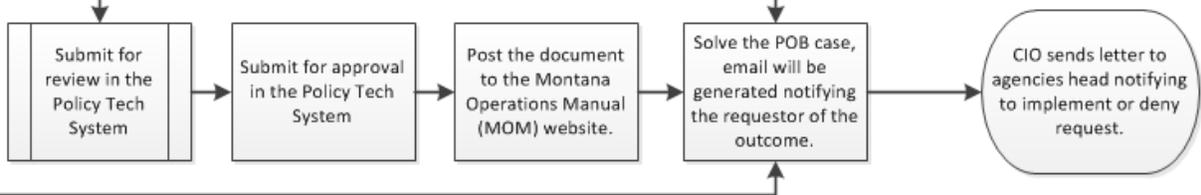Go to http://sitsd.mt.gov/Governance/IT-Policies Or http://itsd.mine.mt.gov/policy_process_procedures.mcpx → Select either the policy, standard, or procedure template → Fill out selected document → Gather supporting documentation → Open a Point of Business (POB) Case to submit documentation request

Policy Team Role

The Policy Team receives notification of document request → The Policy Team facilitates the write up of Decision Brief → Is requesting documentation complete? — No → Coordinate with requestor

Is requesting documentation complete? — Yes → Track document in the Policy Tech System → Finalize Decision Brief → Submit all documentation to the SME BC

BC & CIO Role

The SME BC submits documentation to DB process owner → BC's and CIO review the Decision Brief → Approval / disapproval from CIO to proceed with Enterprise publishing on SharePoint ??

Disprove → Notify requestor

Approve → Are changes needed? — Yes → Notify requestor

Are changes needed? — No → Approval received? — Yes → Prepare to have documentation reviewed by: ISAC, ITMC, ITB, LFC, Gov office, OBPP

Enterprise Role

Enterprise → Present to ISAC → Present to ITMC → Present to ITB → Present to LFC → Present to the Gov office/OBPP → Approval received?

MOM Policy Role

Approval received? — Yes → Submit for review in the Policy Tech System → Submit for approval in the Policy Tech System → Post the document to the Montana Operations Manual (MOM) website. → Solve the POB case, email will be generated notifying the requestor of the outcome. → CIO sends letter to agencies head notifying to implement or deny request.

Approval received? — No (to MOM Policy Role / Solve the POB case)
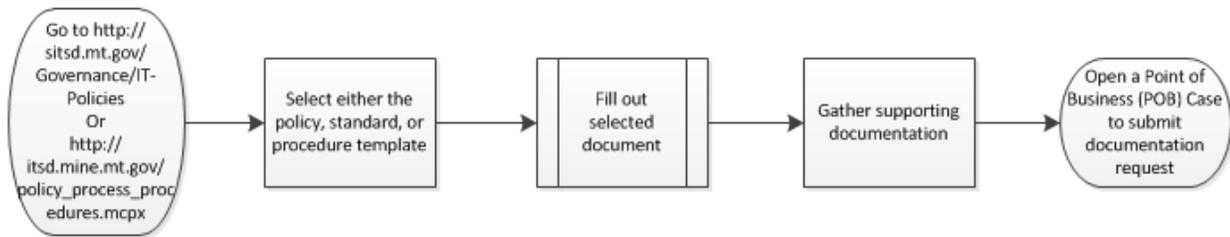
## A. Requestor Role

The Business Owner / System Owner / Document Requestor Role is:

1. Go to the Montana Operations Manual website at: http://sitsd.mt.gov/Governance/IT-Policies or http://doa.mine.mt.gov/policies/default.mcpx
    2. Select the desired document template needed; i.e. policy, standard, or procedure
    3. Completely fill out the document template selected
    4. Gather supporting documentation
    5. Open a Point of Business (POB) case to submit documentation request

B. Policy Team Role
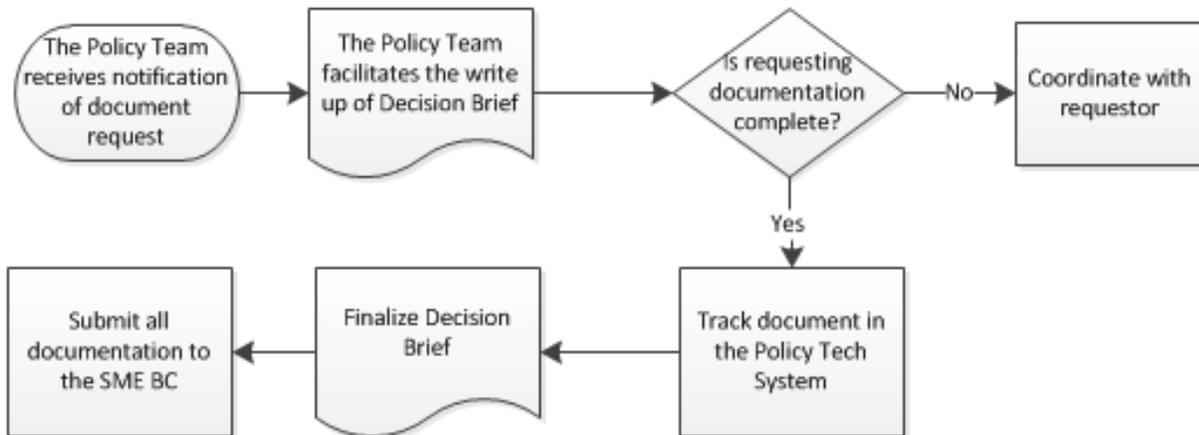
The Policy Team Role is:

1. Receive notification when documents are requested
2. Facilitate the Decision Brief write-up of the desired document
3. Review and make certain the paperwork is filled out completely
4. If not; coordinate with the document requestor / business owner / system owner until complete
5. If yes; track the documentation in the Policy Tech System
6. Finalize the Decision Brief
7. Submit all documentation including supporting documents to the Subject Matter Expert (SME) Bureau Chief (BC)

C. BC and CIO Role
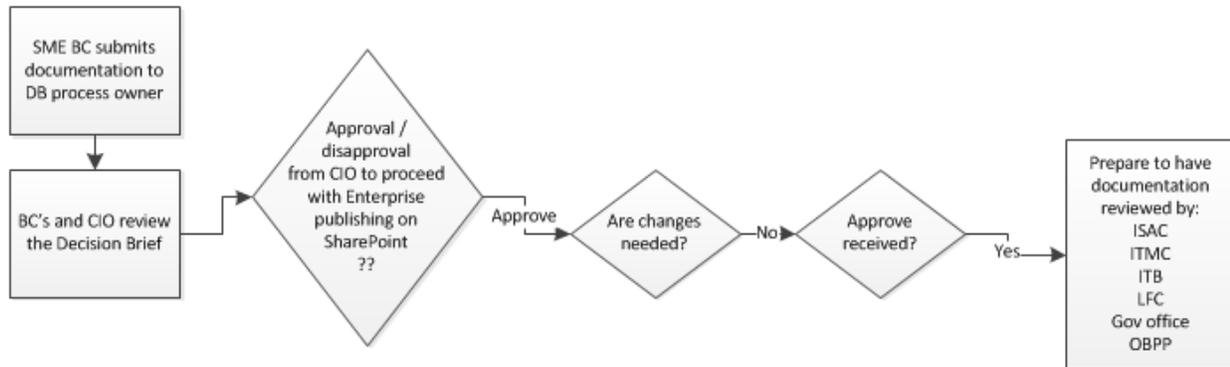
The BC's and CIO Role is:
1. The SME BC submits the documentation to the DB process owner.
2. The BC's and the CIO review the Decision Brief and supporting documentation
3. If request is disapproved; go to MOM Policy Role #4 (below)
4. If request is approved; proceed
5. Prepare to present documentation to the following groups of people:
    a. Information Security Advisory Council (ISAC)
    b. Information Technology Managers Council (ITMC)
    c. Information Technology Board (ITB)
    d. Legislative Finance Committee (LFC)
    e. Governor's Office
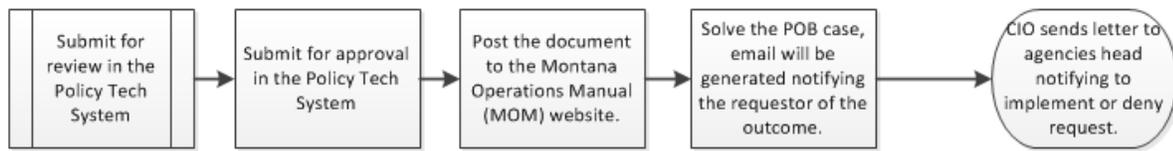   f. Office of Budget and Program Planning (OBPP)

D. Enterprise Role
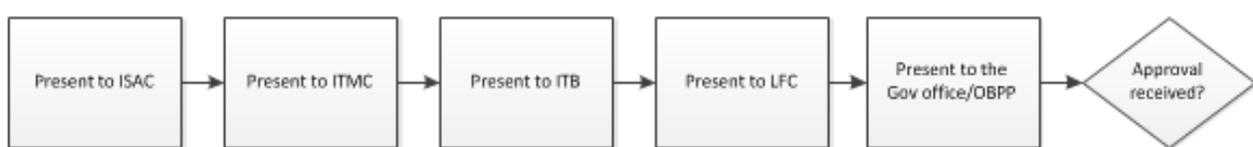
The Enterprise Role is:

1. Present to the following groups of people:
    a. Information Security Advisory Council (ISAC)
    b. Information Technology Managers Council (ITMC)
    c. Information Technology Board (ITB)
    d. Legislative Finance Committee (LFC)
    e. Governor's Office
    f. Office of Budget and Program Planning (OBPP)
2. If request is approved; proceed
3. If request is disapproved; the document is denied. Go to MOM Policy Role #4 (below)

E. MOM Policy Role

| Submit for review in the Policy Tech System | → | Submit for approval in the Policy Tech System | → | Post the document to the Montana Operations Manual (MOM) website. | → | Solve the POB case, email will be generated notifying the requestor of the outcome. | → | CIO sends letter to agencies head notifying to implement or deny request. |

The MOM Policy Role is:

1. Submit the document for review in the Policy Tech System
2. Submit the document for approval in the Policy Tech System
3. Post the document on the Montana Operations Manual website
4. Solve the POB case, an email will be generated to notify the requestor of the outcome
5. The CIO will send a letter to the agency head copying the document requestor / business owner / system owner notifying to implement or deny request

Action and Exception Requests

Requests for a review or change to an instrument are made by submitting an Action Request form.

The following steps will be taken to manage changes:

The CIO will evaluate the requested change to determine its merit, and approve or deny the change

- If the change is denied, the requestor will be notified
- If the change is approved; the policy, standard or procedure will be prioritized and scheduled for return to the Policy Team.

Requests for exceptions are made by submitting an Exception Request form. Changes to policies, standards, and procedures will be prioritized and acted upon based on impact and need.

The CIO shall maintain written documentation and inform the Information Technology Board, the Office of Budget and Program Planning, and the Legislative Finance Committee of all exception requests (approved and denied) and action taken.

Direct questions or comments about this instrument to the State of Montana, Chief Information Officer.