IT COLLECT "HOW TO" SERIES

How to Manage Services Across Submission Periods

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v1.0

General Services Administration
Office of Government-wide Policy

DOCUMENT CHANGE LOG

Version Number	Date	Description
Beta 0.1	February 2022	Initial document creation, outlining how to manage services (investments) across submission periods.
1.0	May 2025	Updated to remove old BY references, as well as other edits, and implemented new How To format.

CONTENTS

WHAT ARE IT COLLECT SERVICES?

The IT Collect Services endpoint is a data collection mechanism for investment-level descriptive data. The Services collection allows Agencies to submit investments and their data on type, status, description, etc. as specified within the OMB Circular A-11 Section 55 and the IT Collect Submission Overview Document. Each Service in IT Collect corresponds with a given IT investment record, with a unique UII value (and unique back-end "Agency ID" value).

For an overview of submitting Services, please see the IT Collect Services How To Guide, available on [GitHub.]

HOW DO I MANAGE AN EXISTING SERVICE OVER MULTIPLE SUBMISSION PERIODS?

Once a Service (investment) is submitted to IT Collect, the Service will remain active in your Agency's IT Portfolio (and within IT Collect and the IT Dashboard) until it is retired. For President's Budget submissions (and subsequent submissions), this means that Services submitted in the Pre-Decisional submission period will carry over and Agencies do not need to re-submit/overwrite their full IT Portfolio. Instead, Agencies are expected to update any relevant data points within the Service during each budget cycle submission. The Data Quality Report (DQR) can be used to review which Services have been updated in the current submission period and which records have not been updated.

When a new submission period begins, the specific updates to make for a given Service depend on several factors, including its current status in your Agency's IT Portfolio, the current submission period/budget year (BY), and the data you intend to report on IT Collect. This How To guide outlines several possible scenarios and instructions for updating the Service on IT Collect for each scenario.

1. Keep a Service as Active

No action is needed to retain a Service as active on IT Collect. As noted above, once a Service is added to IT Collect, it will remain active until "isRetired" is set to "true." Agencies are expected to update any relevant data points within the Service during each budget cycle submission.

Note on Change in Status and Previous UII: The "Change in Status" and "Previous UII" fields are validated against values submitted in the prior BY. In most cases, these field values will not change *within* a given BY.

- For example, values submitted in BY 2026 (both Pre-Decisional and President's Budget submissions) are validated against values submitted in BY 2025.

- A Service reported as "new" (10) in the Pre-Decisional submission period would remain "new" in the same BY's President's Budget submission period. The "Change in Status" value will not be updated until the next BY's Pre-Decisional submission period, at which point this field would be validated against prior BY data.
- Each "Previous UII" value must match an active Service from the prior BY IT Portfolio, and all Services where "Change in Status" does not equal "new" (10) must provide "Previous UII" data.

2. Report a Service as Eliminated

Set (or keep) the Service's "Change in Status" value as one of the "eliminated" options: 06, 07, 08, or 09. Update the Service's other data on IT Collect as relevant, and you can continue updating its data, as desired, throughout the BY. Investments reported as eliminated remain in the Agency's IT Portfolio for the current BY and are reported on the front-end IT Dashboard site, including the data feeds.

Typically, Services are "eliminated" once they have PY funding but no CY or BY funding. The following BY, once the Service has no PY, CY or BY funding, it can then be retired to remove it from the IT Dashboard (see scenario #3 below).

3. Retire a Service

Retiring a Service (setting isRetired to "true") deactivates the Service, along with its embedded documents (e.g., Projects, CIO Ratings, Performance Metrics) from IT Collect. That said, isRetired = "false" Ledger records are retained for retired Services for longitudinal data collection purposes and included in financial data roll-ups. For example, a Service retired in BY2026 may not have any PY-BY (2024-2026) Ledger records, but its historical Ledger data (for 2023 and prior) would still count for 2023 and prior financial totals.

In most cases, after a Service is reported as "eliminated" in one BY with PY funding, Agencies will then retire the Service the next BY once it has no PY, CY, or BY funding. Agencies must directly retire a Service to remove it, as Services can no longer be "eliminated by omission" in IT Collect (as they were in the legacy IT Dashboard).

Note on validation error: If you attempt to retire a Service before it is first reported as "eliminated" (via the "Change in Investment Status" field), you will receive a validation error. You'll need to first ensure that "Change in Status" is set to one of the "eliminated" options and submit a PATCH/PUT update for the Service, and then you can retire it from IT Collect.

4. Retire a Service Reported as "new" in the Current BY (Remove from IT Collect)

If your Agency submitted a Service as "new" earlier in the current BY but now needs to remove this Service from IT Collect, you can retire this record in a two-step process. This scenario applies to a case when your Agency requested funding for a new Service in the Pre-Decisional submission period, but the Service needs to be removed in the President's Budget submission period.

- First, retire all Ledger records for this Service by setting isRetired to "true." This ensures that funding associated with this Service is removed from IT Collect and your Agency's funding totals accurately reflect this change in your IT Portfolio. (In other words, because this Service was not submitted in prior BYs and is being removed in the current BY, no Ledger data should remain on IT Collect.)
    - For more information on retiring Ledger records, see the "IT Collect Ledger How To Guide" on GitHub ("How do you retire Ledger entries?" section).
- Then as a second step, keep the Service's "Change in Status" value as "new" (10) and set "isRetired" to "true" to retire (remove) the Service and its other embedded documents from IT Collect.

Note on new validation error: If you attempt the second step (retiring the Service) before completing the first step, you'll receive a validation error indicating that the Service has active Ledger records on the IT Collect, which must be removed before you can retire the Service.

5. Re-organize, Consolidate, or Split a Service

When re-organizing, consolidating, or splitting Services in your Agency's IT Portfolio, you will update the relevant records' "Change in Status" values to reflect the change from the prior BY and report Ledger records in a way that ensures that no funding is double-counted.

See the next page for an illustrative example showing how reorganized, split, or consolidated Services can be reported over several BYs:

Budget Year	"New" Service (added to IT Portfolio)			"Old" Service (being phased out)		
	Change in Status	Previous UII	Ledger Records	Change in Status	Previous UII	Ledger Records
Year 1	Reorg, Cons, Split (03, 04, 05)	"Old" Service's Current UII	BY only	"No Change in Status" (11)	Same as Current UII	PY & earlier, CY (no BY)
Year 2	"No Change in Status" (11)	Same as Current UII	CY and BY	Eliminated by reorg, cons, or split (07, 08, 09)	Same as Current UII	PY & earlier (no CY or BY)
Year 3	"No Change in Status" (11)	Same as Current UII	PY, CY, BY	Eliminated by reorg, cons, or split (07, 08, 09) **isRetired = true**	Same as Current UII	No PY, CY, or BY (may have earlier funding)

6. Change the Investment Title for an Existing Service

To change the "Investment Title" value for an existing Service on IT Collect, there are two possible approaches. It is recommended that you reach out to your Agency's OMB Desk Officer for insight into which approach best fits each particular situation for this scenario.

Option 1 – Simple Name Change: Update the "Investment Title" value via a PATCH/PUT operation. In this approach, the Service's Agency ID, Current UII, Change in Status, and other data are unchanged on IT Collect.

Option 2 – Change in Scope: Eliminate the existing Service record (by updating its "Change in Status" value to one of the eliminated options). Create a new Service (with a new UII and "Change in Status" set to "New") and leverage the "Previous UII" field to link the new and old Services. Ensure that Ledger data does not overlap between the two Services to avoid double-counting on IT Collect (for instance, the "old" Service may have CY and prior Ledger records, while the "new" Service just has BY Ledger records).