

State of Texas

Department of Information Resources



Exhibit 3.4-A

**Reports
Version 1.6**

DIR-ESS-TGOV-PMNT-254

Overview

This Exhibit contains a summary description of the format, content, and frequency of key reports required by DIR and Customer.

NOTE: The reports listed under the following Report Categories apply to all Service Components: Scorecard; Finance; CMDB/Software Reports; SLAs; and, Strategic.

Column Name	Column Description
Contract Reference	MSA reference, if applicable
Report Category	Functional Category
Report ID	Identification title of the report, if applicable
Report Name	Name of report
Description	Short description of the report and report content
Milestone Deliverable Date (if other than Commencement)	The milestone deliverable date for each report
Frequency	How often the report is distributed.
Recipient	DIR or DIR Customer for whom report is created.
Report Location	Where the report is published (i.e., Portal, etc...)
Report Generator Tool	Tool from which the Service Provider creates the report
New or Existing Report	If the report is currently provided by the Existing or being requested New
Report Data and Creation	Each column indicates which Service Component Provider provides the data for the report and which Service Component Provider creates the report.

Report Data and Creation
MSI publishes all reports. Column
indicates who: (C) creates report for
publication, (D) provides data to MSI

Contract Reference	Report Category	Report ID	Report Name	Description	Milestone Deliverable Date (if other than Commencement)	Frequency	Recipient	Report Location	Report Generator Tool	Existing or New Report	MSI	Texas.gov Services	Texas.gov Payment
	Scorecard												
Ex 3.5		PMT-OPS-SCD01	Monthly Service Provider Scorecard	Service Delivery Solution Group approved Customer Scorecard of Vendor's Performance.		Bi-Monthly	DIR, Customer	Web Portal	ServiceFlow	Modification of Existing	C,D	D	D
	DCS Customer Downloads												
Ex 2.1.1, 3		PMT-OPS-DIRCD01	Open items by DIR Shared Service Customer (e.g., Incidents, Requests, Problems and Changes)	For all open Incidents, Problems, Requests, Changes by DIR Shared Service Customer for all Service Components as applicable.		Daily	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 3		PMT-OPS-DIRCD02	Resolved Incidents and Closed Changes	For all Resolved Incidents and Closed Changes by DIR Shared Service Customer for all Service Components as applicable.		Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 4.2.1.1		PMT-OPS-DIRCD04	Application Availability Report	All Incidents related to unavailability of Payment Services.		Monthly	DIR, Customer	Web Portal	ServiceFlow	New	C,D	D	D
	CMDB / Asset Reports												
Ex 2.1.1, 3		PMT-OPS-SACM01	CMDB Update Requests	Listing of all assets in CMDB, including proxy assets, that have an open Change Management ticket assigned to them.		Weekly	DIR, Customer	Web Portal	BMC Analytics	Existing	C,D	D	D
Ex 2.1.1, 3		PMT-OPS-SACM02	Asset Change Activity Report	List of proxy assets that have been Decommissioned, deleted and additions to CMDB.		Monthly	DIR, Customer	Web Portal	ServiceFlow	Modified of Existing	C,D	D	D
Ex 2.1.1, 3		PMT-OPS-SACM03	All Hardware Assets	List of all Hardware proxy assets in CMDB.		Monthly	DIR, Customer	Web Portal	BMC Analytics	Existing	C,D	D	D
Ex 2.1.1, 3		PMT-OPS-SACM04	Asset Inventory and Management	Produce periodic reports as necessary, and respond within designated timeframes to queries and requests concerning the inventory data or supporting information. At a minimum, such reports shall include: Exception reports on errors and corrections, by DIR Shared Service Customer; and Reports on the results of periodic audits and inventories.		As needed	DIR	Web Portal	BMC Analytics	Existing	C,D	D	D
	Capacity Reports												
Ex. 2.1.1, 4.2			Availability Management Report	Performance and Availability statistics for each Application/environment with planned performance and Availability. Provide post Commencement trend analysis of the performance for each Application and Environment during the thirteen (13) most recent months Provide regular reporting with respect to the following measures for all services and components for both current reporting period and trend over the prior twenty-four (24) months, and make available through the Portal: Number and impact of instances of unavailability. Mean time to restore. Mean time between Service/System Incidents. Mean time between failure. Cost and impact of unavailability.		Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
	Change Management												

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publication, (D) provides data to MSI

Contract Reference	Report Category	Report ID	Report Name	Description	Milestone Deliverable Date (if other than Commencement)	Frequency	Recipient	Report Location	Report Generator Tool	Existing or New Report	MSI	Texas.gov Services	Texas.gov Payment
Ex. 2.1.1.1, 3.5		PMT-OPS-CHG01	All Open Changes - DIR Shared Service Customer	Report all Open changes, high risk, past Due, three month look ahead. Includes at a minimum a breakdown of metrics by type, category, priority, effected service or system, and success/failure. Provide integrated CAB reports containing all changes (both digitally and traditionally managed) in a formats agreed with DIR that, at a minimum, includes: The status of all Changes active at the beginning of the week and all Changes raised during the week. The Changes to be implemented the following week. The Changes submitted for approval. Change Advisory Board method used for review and approval (e.g., digital CAB, traditional meeting) Provide statistical reporting on change activity to DIR as requested. Maintain a list of changes reclassified as standard and associated justification.		Daily/ Monthly	DIR, Customer	Web Portal	ServiceFlow	Modification of Existing	C,D	D	D
Ex. 2.1.1.1, 3.5		PMT-OPS-CHG02	Enterprise Change Reports	Report all Open changes, high risk, past Due, three month look ahead. Includes at a minimum a breakdown of metrics by type, category, priority, effected service or system, and success/failure. Provide integrated CAB reports containing all changes (both digitally and traditionally managed) in a formats agreed with DIR that, at a minimum, includes: The status of all Changes active at the beginning of the week and all Changes raised during the week. The Changes to be implemented the following week. The Changes submitted for approval. Change Advisory Board method used for review and approval (e.g., digital CAB, traditional meeting) Provide statistical reporting on change activity to DIR as requested. Maintain a list of changes reclassified as standard and associated justification.		Daily/ Monthly	DIR	Web Portal	ServiceFlow	New	C,D	D	D
	Disaster Recovery												
Ex. 2.1.1.1, 3.9		PMT-OPS-DR01	Application DR Recovery Time Objective (RTO) and Recovery Priority	List of Payment Services Applications for DR. Source of RTO data to be determined (perhaps CMDB).		Monthly	DIR, Customer	Web Portal	BMC Analytics	Existing	C,D	D	D
	Finance												
Ex. 2.1.1.1, 4.3		PMT-OPS-FIN01	DIR Shared Service DIR Invoice	DIR Invoice.		Monthly As Needed	DIR, Finance	Email, Web Portal	ITFM	Existing	C,D	D	D
Ex. 2.1.1.1, 4.3		PMT-OPS-FIN02	Invoice Dispute Metrics	Invoice dispute statistics including dispute aging and log.		Bi-Weekly	DIR, Finance	Web Portal in a downloadable format	HAL	Existing	C,D	D	D
Ex. 2.1.1.1, 4.3		PMT-OPS-FIN03	HUB Spend Report	Tracks spending by Service Provider with HUB-qualified subcontractors.		Monthly	DIR, Finance and DIR HUB Coordinator	Web Portal in a downloadable format	Excel	Existing	C,D	D	D
Ex. 2.1.1.1, 4.3		PMT-OPS-FIN04	RU Forecast Report	Forecast of Resource Unit usage trends and projected demand.		Semi-Annual	DIR, Finance	Web Portal in a downloadable format	Excel	Existing	C,D	D	D
Ex. 2.1.1.1, 4.3		PMT-OPS-FIN05	Invoice Detail Reports	Various detail supporting the Service Provider Invoice for Services (e.g., optional services, rate card resources, and PPA detail)		As Needed Monthly	DIR, Finance	Web Portal in a downloadable format	ITFM	Existing	C,D	D	D

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Ex. 2.1.1, 4.3		PMT-OPS-FIN06	Aged A/R Report	Aging receivables comparison between MSI/SCPs and DIR.		As Needed Monthly	DIR, Finance	TBD	TBD	Existing	C,D	D	D
Ex. 2.1.1, 4.3		PMT-OPS-FIN08	RU Trend Reports	Shows growth/decline in RUs over the past 18 months and how current volumes fit within the band.		Monthly	DIR, Finance	Web Portal in a downloadable format	ITFM	Existing	C,D	D	D
Ex. 2.1.1, 4.3		PMT-OPS-FIN10	Service Level Credit and Earnback Report	Tracks all SLA credits invoiced at the DIR level and any prior period adjustments to credits in the appropriate month of service. Indicates whether and what portion of a credit in each SLA performance measure has lost earn back and what portion remains eligible for earn back.		Monthly	DIR, Finance	Web Portal	Excel	Modification of existing	C,D	D	D
Ex. 2.1.1, 4.3			Texas.gov Financial Report	Financial reporting (includes # of transactions, dollars received, agency, application, instance, state/local dollars, online fees received) for both online and offline; and by ACH, cash and credit card.		Monthly	DIR, Customer	Web portal	TBD	New	C, D	D	D
	Incident												
MSI 2.1 A.1.2.2		PMT-OPS-INC01	Executive Operations Review Report	Executive overview of monthly statistics for Incident, Change, Backups, Restores, Requests, Projects and PBIs.		Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
		PMT-OPS-INC02	Average Close Time Trend	Chart - Average Incident close time - 6 month view.		Daily / Weekly/ Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
		PMT-OPS-INC04	Average Resolution Time Trend - Non Hardware	Chart - Average Resolution time for Non HW P1 & P2 - 6 month view.		Daily / Weekly/ Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
		PMT-OPS-INC05	Customer Closure Time	Chart - Incident Customer Closure Time for P1 & P2.		Daily / Weekly/ Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
		PMT-OPS-INC06	Daily Status Report	Listing of all Open P1 & P2 Incident tickets.		Daily	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
		PMT-OPS-INC07	Distribution of Resolution Time	Chart - Incident Distribution of Resolution Time for P1 & P2.		Daily / Weekly/ Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
		PMT-OPS-INC08	Incident & Change Dashboard	Summary of Incident / Change tickets.		Daily	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex. 2.1.1, 3.1		PMT-OPS-INC09	Incidents Caused by Changes	Summary of Incidents caused by Change requests.		Daily / Weekly/ Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex. 2.1.1, 3.1		PMT-OPS-INC11	Incident Upgrade Report	Summary of Incident tickets where priority is upgraded.		Adhoc	DIR, Customer	Web Portal	BMC Analytic	Existing	C,D	D	D
Ex. 2.1.1, 3.1		PMT-OPS-INC13	P3/P4 Incidents	Multiple charts detail P3 / P4 Incidents - age, type, resolution.		Daily / Weekly/ Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D

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Ex. 2.1.1.1, 3.1			Monthly Incident Management Report	Key issues relating to Incident Management processes. Number of Incidents during the month, grouped by severity, service, agency, region, classification or other criteria as appropriate. List of Incidents, short description, reference number, and a shortcut to detailed description. Detailed description, including timing of activities. Links to Problems and Known Errors. Trend analysis of the Incidents reported during the thirteen (13) most recent months. Calculate metrics and provide monthly reports to DIR and Customers, which include: The number of Incidents. Sources of the Incidents. Frequency regarding the types or categories of Incidents. The duration of open Incident (average and quantities by age). Number and percentage of Incidents Resolved upon first contact. Trending metrics in terms of MTTRS (mean time to restore service) by category, priority and by service or SLA. Number and percentage of SLA impacting Incidents. Number and percentage of Incidents (by category, priority, service and SLA) that were handled within the SLA targets. Number and percentage of Incidents (by category, priority, service and SLA) reopened. Number and percentage of Incidents (by category, priority, service and SLA) reoccurring. Number and percentage of Incidents that have resulted in the creation of problem records. Percentage (by category, type and priority) of Incidents that were resolved by use of an Incident Model; Number and percentage of Incidents escalated by organization, category, priority and Service. The association of Incidents by cause and resolution by Service Component. Other pertinent information regarding Incident Resolution, including Service Level measurement reporting.		Monthly	DIR, Customer	Web portal	TBD	Existing	C, D	D	D
Ex. 2.1.1.1, 3.1			Enterprise Event Management Report	Provides statistics, lists and charts illustrating the Events collected in the STC supported environment including the number of, source, destination and type of event. Provides reports on Incidents and Problems initiated by the Enterprise Event Management system with trends over the past 13 months. Number of events per CIs. Number of occasions when an event is collected and can't be matched with a CI Summary and details of events which resulted in an automated correction made to remediate errors. Statistical information about the number of, source, destination and type of event.		Weekly	DIR	Web Portal	TBD	New Report	C, D	D	D
	Projects												
Ex 2.1.1.1, 3		PMT-OPS-PROJ01	Project and Procurement Status	Master Project and Procurement list. Status of all solution requests - includes custom and commodity procurements, catalog requests, RFNS. Includes status of all server builds and focus list priorities. Includes status of solution requests assigned to standard resources and project pool resources.		Weekly	DIR, Customer	Web Portal	Clarity	Existing	C,D	D	D

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Ex 2.1.1, 3		STC-OPS-PROJ05	Open Projects Status Report	Status report will include, at a minimum, the following: (a) any milestones achieved; (b) any variances to the schedule set forth in the applicable Service Proposal; (c) if the Project is behind schedule, a recovery plan that describes the actions that Service Provider will undertake in order to return to such schedule; (d) Deliverables and other Work Product that have been created, developed, and/or completed, in whole or in part, pursuant to the Service Proposal or otherwise as part of the Project and the status of each such Deliverable and other Work Product; (e) variances, if any, to the specifications of the Project; (f) any charges incurred to date, including hardware, software, labor and any other charges associated with the performance of the Project and execution of the Service Proposal, to the extent that such charges are relevant to STC Customer's payment obligations; (g) an identification of any potential known or reasonably anticipated risks regarding the Project (such as potential disruptions to STC Customer operations), and the actions that would need to be taken in order to mitigate and/or eliminate such risks; and (h) any relevant issues identified by either Party since the previous report.		Weekly	DIR, Customer	Web Portal	Clarity	Existing	C, D	D	D
Ex 2.1.1, 3		STC-OPS-PROJ06	Texas Project Delivery Framework	Measurement and reporting mechanisms for large projects, as defined by the Texas Project Delivery Framework, when applicable upon DIR request		As Needed	DIR, Customer	Web Portal	Excel, Word	New Report	C, D	D	D
Ex 2.1.1, 3		STC-OPS-PROJ08	User Acceptance Testing	Report User Acceptance Test (UAT) results, as applicable based on approved application development or modification requests		As Requested	Customer	Web Portal	Excel	New Report	C, D	D	D
Ex 2.1.1, 3			Enterprise Projects	Master Project and Procurement list for Enterprise projects. Status of all solution requests - includes custom and commodity procurements, catalog requests, RFS. Includes status of all server builds and focus list priorities. Includes status of solution requests assigned to standard resources and project pool resources.		Weekly	DIR	Web Portal	TBD	New Report	C, D	D	D
	RCA												
Ex 2.1.1, 3,2		PMT-OPS-RCA01	RCA Report	Summary RCA Tracking Report.		Weekly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 3,2		PMT-OPS-RCA02	Problem Management Report	Percentage and number of Problems in total and grouped by category, priority, severity, status, Customer, system/component, region, classification or other criteria as appropriate. Report to include: Statistics on total numbers of Problems. Logged (by requestor, site, category, summary, detail) Outstanding (by assigned group, assigned manager, assigned owner, category, site, status, summary, detail, aging timeframe) Completed (by assigned group, assigned manager, assigned owner, category, site, status, summary, detail, resolution timeframe, within target timeframe, outside of target timeframe). Repeat Problems. SLA Performance. Problem trends and analysis. The percentage and number of Problems and Corrective Actions in total and grouped by category, priority, severity, status, Customer, system/component, region, classification or other criteria as appropriate. Information regarding Major Problem Reviews, including all details set out above. Information regarding Problem analyses and RCAs conducted in the previous period. Problem trend analysis findings. Information regarding new Known Error records and/or workarounds added to the Known Error Database / Knowledge Database (including number, category, priority, etc.)		Monthly	DIR, Customer	Web Portal	ServiceFlow	New Report	C,D	D	D
	CMDB / Software Reports												
		none	none										
	Contract Management												
		none	none										
	Service Requests												

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Ex 2.1.1, 3.4		PMT-OPS-REQ01	Monthly Service Request Report	Progress toward fulfillment and status of all Service Requests, committed fulfillment times, anticipated completion times and status, ownership and activities toward fulfillment and changes in service request status throughout the service request lifecycle. see section MSI 2.1 A.1.7.3		Monthly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 3.4		PMT-OPS-REQ02	P3/P4 User Requests	Chart of P3 & P4 open request tickets.		Weekly	DIR, Customer	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 3.4		PMT-OPS-REQ03	Service Request Report	Show weekly demand snapshot and monthly trends of: Resource hours as listed in Clarity, Server count with the categories of (Physical, Virtual, Existing brought into DIR Shared Service Scope, Upgrade only, ADC/SDC/LDC), Time to Solution, Time to Implement and Backlog of Pre Solution, Solution, Implementation.		Weekly	DIR, Customer	Web Portal	Clarity	Existing	C,D	D	D
	Risk												
Exh 2.1, A.2.6, 7.7.1		PMT-OPS-RISK01	Risk Mgmt Meetings	Participate in regularly scheduled Risk Management meetings.		Annually	DIR	Web Portal	Excel	Existing	C,D	D	D
	SLAs												
Ex 2.1.1, 4.2		PMT-OPS-SLA01	Individual Monthly Reports for Critical Service Levels	Enterprise compliance reporting for Critical Service Levels		Monthly	DIR	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 4.2		PMT-OPS-SLA02	Individual Monthly Reports for Key Service Levels	Enterprise compliance reporting for Key Service Levels		Monthly	DIR	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 4.2		PMT-OPS-SLA03	Various reports and data required to validate SLAs	Detailed element data to validate SLA.		Monthly	DIR	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 4.2		PMT-OPS-SLA04	Monthly SLA Report by DIR Shared Services Customer	Customer-level compliance reporting for Critical Service Levels and Key Service Levels		Monthly	DIR	Web Portal	ServiceFlow	New	C,D	D	D
	Security												
Ex 2.1.1, 3.3		PMT-OPS-SEC01	Daily Managed Security Service Report	Daily security dashboard: scan results, OEM security/vulnerability announcements, previous 7-day window, open tasks/incidents, security tickets.		Daily	DIR	Web Portal	ServiceFlow	Existing	C,D	D	D
Ex 2.1.1, 3.3		PMT-OPS-SEC02	Monthly Security Incident Reports (SIRS)	List of Security Incidents and their status		Monthly	DIR, Customer	Web Portal	ServiceFow	Existing	C,D	D	D
Ex 2.1.1, 3.3		PMT-OPS-SEC03	Monthly Security Status Review	Roll-up of multiple sources: Monthly Identity and Access Management Services status report Monthly Background Checks Monthly ISeC status reports (number of exceptions, number pending, DCSCustomer issues with ISeC implementation (delays in implementation, DCS Customer failure to submit exceptions, etc.) Monthly Security Reports information derived from ISS Security Services		Monthly	DIR	Web Portal	Web Portal	Existing	C,D	D	D
Ex 2.1.1, 3.3		PMT-OPS-SEC06	Semi-Annual Privileged ID Report	Customer Privileged ID report; validating what is in Security Clearance Database to what is coming from each SCP.		Weekly	Customer	Web Portal	BMC Analytics	Existing	C,D	D	D

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Ex 2.1.1, 3.3		PMT-OPS-SEC09	Monthly On-boarding/Off-boarding Report	Identify new personnel on-boarded and off-boarded personnel. Limited to dedicated and Key Personnel.		Monthly	DIR	Web Portal	ServiceFlow	New	C,D	D	D
Ex 2.1.1, 3.3		PMT-OPS-SEC10	Access Management Report	Report on all Access Requests and their status, access rights granted or removed, approver and dates of the request lifecycle.		Weekly	DIR, Customer	Web Portal	ServiceFlow		C, D	D	D
Ex 2.1.1, 3.3		PMT-OPS-SEC11-AOC	PCI Attestation Of Compliance (AOC)	Annual PCI Attestation Of Compliance (AOC)		Annual	DIR	Web Portal	TBD		n/a	D	C, D
	Post Transition												
		none	none										
	Other												
Ex 2.1.1		PMT-OPS-OTHR02	Service Management Manual Status Updates and Review	List of the current SMM sections in review and updated.		Monthly	DIR	Email	Excel	Existing	C,D	D	D
Exh 3.5		PMT-OPS-OTHR03	Customer Satisfaction Improvement Plan	Improvement Plan created in response to Customer Satisfaction Survey, with monthly reports on progress toward plan		Quarterly	DIR	Web Portal	Word	Existing	C,D	D	D

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Ex 3.5		PMT-OPS-OTHR07	Portal Customer Satisfaction Feedback Submissions	Report of all customer feedback portal submissions, actions identified and tracked.		Monthly	DIR	Email	Excel, PowerPoint	New	C,D	D	D
Ex 3.5		PMT-OPS-OTHR12	Action Plan for Suggested Improvements to Successful Respondent's Service	Report on Progress and improvements made.		Quarterly	DIR	Web Portal	TBD	Existing	C,D	D	D
Ex 2.1.1		PMT-OPS-OTHR08	Operations Documentation	Report the assessment of operations documentation findings to DIR on a regular basis, and where it is determined that documentation is inaccurate (e.g. erroneous or out of date), correct and replace such documentation.		As needed	DIR, Customer	Web Portal	Excel	Existing	C,D	D	D
Ex 2.1.1		PMT-OPS-OTHR10	Training for Successful Respondent Personnel	Report on the effectiveness of such training and the metrics associated with each staff that received training.		Annual	DIR	Web Portal	Excel, PowerPoint	New	C,D	D	D
Executive & Leadership													
			DIR Board Report	Executive level Report on metrics and statistics for all Shared Services Programs - DCS, MSS, MAS, Texas.gov		Quarterly, As Needed	DIR	Email	PowerPoint	Existing	C,D	D	D
			Monthly Operations Statistics Dashboard - DCS, MAS, MSS, Texas.gov	Dashboard report showing operational statistics for Shared Services Programs. Report to include, but not limited to, SLA results, Scorecard results, HW currency, SW currency and forecast, Operational statistics.		Monthly	DIR	Email	PowerPoint	New	C,D	D	D
	Texas.gov												
Ex 2.1.2, 2.7			Accessibility Scan Results	Monthly report showing the results of the Hosted Payment Page (HPP) scans for compliance with DIR's accessibility standards		Monthly	DIR	Web Portal	TBD	New	C, D	D	D