

## Longview for Capital Planning (CBT) – Status Reference Guide

Status Value	Description
<b>Proposed Need</b>	This is the initial status value for all capital needs during the submission process. This status should be utilized when the need and project request details and budget information are being defined.
<b>Capital Plan Review</b>	Used to identify all capital needs that are ready for review for the one-year capital budget and five-year capital plan.
<b>Pre-Planning</b>	This status value should only be used when a need or project is in very early discussions and may not yet be ready for publication in the one-year capital budget or five-year capital plan. It is important to have the need or project in the Longview CPT, but we may want to filter and report on it differently than other, more informed projects. Projects with a status of “Pre-Planning” may have a Project Categorization of “Uncertain Solution – Program.”
<b>Approved – Tentative</b>	Used during the capital project review cycle (Fall-May) to identify projects that are likely to be in the approved one-year capital budget and five-year capital plan.
<b>Approved</b>	This status value identifies all projects included in the one-year capital budget or the five-year capital plan. This status represents a fiscal approval for inclusion in the capital plan; it does not represent authorization of any individual project.
<b>Authorized</b>	This status value identifies all projects that are active and authorized to spend through the PAR process.
<b>Sub-Project</b>	A project that is one of several included in a portfolio or master <sup>1</sup> project listed in the one-year capital budget and/or five-year capital plan. Sub-projects might be executed as discrete projects within the larger program. In a PAR, the capital plan line and budget for any sub-project is the portfolio that contains the sub-project. If the sub-project was not included in a portfolio, then the PAR needs to request a capital plan variance.
<b>Deferred</b>	This status value identifies projects that are deferred in time due to prioritization, sequencing, or other timing issues.
<b>Subsumed by</b>	Used to designate a need or project that will be addressed by another capital plan project (referred to as the <i>lead project</i> ), but not as a discrete phase or sequence within another project. Subsumed should never be applied to a new entry in Longview CPT, but only to existing entries that can be removed as individual rows (entries) because some other project is taking the lead for the scope of work identified in the subsumed project. Projects should not be left

<sup>1</sup> A master project is a project of large scope, scale and budget managed as one entity in the capital plan. The only two recent examples of master projects are Cornell Tech Roosevelt Island Campus and North Campus Residential Expansion. Units would not normally ever be creating a master project without direction from senior administration.

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	in Subsumed By status if the project and its associated lead project is in close out, is complete or if the Subsumed By project should be annulled.
<b>Close Out</b>	Identifies a project for which the scope of work and the expenditures are substantially complete, with the end of the project work and expenses completing in the upcoming fiscal year. Projects with no further PARs required should go into Close Out unless the remaining active work will extend into the upcoming fiscal year. For example, FY21 projects of limited duration and relatively small budgets with all authorizations completed should likely be put into Close Out when submitting the FY22 projects, while a large project in construction for several years should remain in authorized status until the construction phase is expected to wind down in a future fiscal year.
<b>Complete</b>	Identifies a project with both a completed scope of work and completed expenditures. Accounts for these projects should be closed by the start of the upcoming fiscal year (i.e., July 1 <sup>st</sup> of the impending one-year capital budget year).

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