REPUBLIC OF THE PHILIPPINES
DEPARTMENT OF FINANCE
BUREAU OF INTERNAL REVENUE

November 30, 2023

REVENUE MEMORANDUM ORDER NO. 9-2024

Subject: **STANDARDIZING THE USE OF ROLLOUT TOOLS/TEMPLATES**

To: **All Revenue Officials, Employees and Others Concerned**

I. BACKGROUND

The Systems for Philippine Internal Revenue Information Technology (SPIRIT) Mass Rollout Manual was established through RMO No. 43-98 and has been used as reference document concerning process, guidelines and procedures for the mass rollout of the application systems nationwide. The manual describes in detail the activities and tasks involved in the rollout process. Since then, rollout methods and tools evolved, in consideration of the scope and requirements of an application system. Hence, the need to standardize the tools and templates in all rollout activities and re-emphasize the responsibilities of concerned offices to ensure uniformity in the implementation of new or enhanced application systems.

II. OBJECTIVES

This Order is issued to:

1. Re-impose the use of standard rollout tools/templates during pre-rollout, rollout preparation and post-rollout monitoring for all developed/enhanced application systems (whether in-house developed or outsourced);

2. Eliminate the risk of issues that might hinder or delay successful implementation to ensure smoother rollout and reduce potential problems; and

3. Put emphasis to the responsibilities of concerned offices in the preparation and accomplishment of the rollout tools/templates specified in this Order.

III. POLICIES AND GUIDELINES

1. New or enhanced application systems that are to be implemented, whether to a single or multiple offices, shall be rolled out using the following rollout tools/templates. However, application systems that will undergo minor enhancement such as updates in browser support, shall be implemented through the issuance of Rollout Announcement Memorandum (please see A.4) only.

A. Rollout Tools/Templates

Name of Template	Description	When to Use	Person/Office Responsible
A.1 Rollout Workplan Template (Annex A)	It refers to a formal, approved document of rollout activities and timelines regularly updated throughout the rollout; provides the Project Proponent with a tool to plan and monitor the accomplishment of the activities and tasks in each rollout phase (pre-rollout, rollout, post-rollout); and, may be customized depending on the scope of the rollout and shall serve as reference in determining the target start and completion date.	From Pre-Rollout to Post-Rollout Phase	• Process Owner (PO) / Project Proponent (PP) • ISG Counterpart
A.2 Checklist of Rollout Requirements Template (Annex B)	It refers to the checklist that highlights the details of the activities and tasks in the Rollout Work Plan and contains all pre-requisites for the rollout of the new or enhanced system. The checklist may be customized depending on the requirement/s of the rollout.	During the Pre-Rollout Phase	• PO / PP • ISG Counterpart • Revenue Data Center (RDC)
A.3 Rollout Readiness Issues List (Annex C)	It refers to a log of all issues pertaining to the completion of the rollout requirements. This facilitates the monitoring, reporting and resolution of issues/ blockers which may delay the rollout. Responsible office for each issue must be identified and must be followed up accordingly.	During Pre-Rollout Phase	• PO / PP • ISG Counterpart
A.4 Rollout Announcement/ Go Live Memorandum (Annex D)	It refers to a memorandum addressed to the Site Heads to announce the rollout of the system which states the modules/features of the system.	At least 1 week before the scheduled rollout	• PO / PP • ISG Counterpart
A.5 Operations Evaluation Checklist (Annex E)	It refers to the checklist that highlights the business functionalities which shall be performed by the end-users upon rollout. This shall be prepared simultaneously with the Rollout Workplan. This shall be used to assess integration of the newly rolled out system with the site	During the Post-Rollout Phase	• PO • End user to accomplish

Name of Template	Description	When to Use	Person/Office Responsible
	operations. This shall be distributed, communicated and properly explained to the personnel who shall complete the form.		
A.6 Key Performance Indicator (KPI)/Exit Criteria (Annex F)	It refers to measurable values that will determine the success of the Rollout. The key performance indicators are being monitored on a weekly basis.	During the Post-Rollout Phase	PO/PP
A.7 Post Rollout Issues List (Annex G)	It refers to a log of all issues raised during implementation which shall be tracked/ monitored and/or escalated (if necessary) to concerned office/s for resolution.	During the Post-Rollout Phase	• PO/Site Head • PP ◦ RDC, if applicable

B. Other Rollout Requirements

Name of Template	Description	When to Use	Person/Office Responsible
B.1 Privacy Impact Assessment (PIA) Form (Annex H)	It refers to an instrument for assessing the potential impacts on privacy of a process, information system, program, software module, device or other initiative which processes personal information and in consultation with stakeholders, for taking actions as necessary to treat privacy risk. A PIA report may include documentation about measures taken for risk treatment.	During the Post-Rollout Phase	PIA Team in coordination with PO / PP and ISG Counterpart
B.2 Change Request (CR) (Annex I)	It refers to a formal request made to modify or update an existing system or process. The request may be initiated by a user, stakeholder, or business owner who identifies a need to improve the system's functionality, performance, or security. CR is typically submitted through a formal process that outlines the proposed changes, the reasons for the change, and any potential impacts that the change may have on the system or the organization.	During the Post-Rollout Phase	◦ PO / PP ◦ ISG Counterpart

2. The Process Owner / Project Proponent shall ensure that all MANDATORY requirements listed in the rollout checklist, including the conduct of PIA (in coordination with the PMIS-PIA Team), have been satisfied before Rollout Announcement Memo (Annex D) is released. Additionally, they shall ensure that the checklist is signed off.

3. The Process Owner/Project Proponent, in coordination with ISG Counterpart, shall initiate the rollout activities, as well as develop the KPI/Exit Criteria (Annex F) once the User Acceptance Testing is completed and Ready for Use Memo (Annex J) is signed.

4. The Project Proponent and Site Heads shall be equally responsible for the rollout of the new or enhanced system at their respective areas and shall coordinate with the Process Owner and ISG Counterpart.

5. The Process Owner shall safe-keep all signed documents such as rollout checklist, Rollout Announcement Memo, etc. However, upon completion of the rollout activities, said documents shall form part of the documentations attached to the Project Closure Report (PCR) as stated in The BIR Project Management Manual prescribed under RMO No. 8-2022.

6. The ISG Counterpart shall provide a copy of said documents to ISG Technical Library.

IV. EFFECTIVITY

This Order takes effect immediately.

ROMEO D. LUMAGUI, JR.
Commissioner of Internal Revenue