

Section 4: Change Request Process

Overview

A *Project Change* is defined as any request to expand or reduce the project scope, modify policies, processes, plans or procedures, modify costs or budgets, or revise schedules. OCIT has four basic types of *Project Changes*: *Scope Change Management* budgets within detailed project plans, *Project Renegotiations* due to projects exceeding variance thresholds for *Total Usage* or *Planned Project Finish Date*, *Enhancement Budgets*, and putting a project on hold.

Scope Change Management Budgets

Detailed projects at OCIT are initially planned with change in mind. A *Scope Change Management* budget, which is typically estimated at 5% of the project's core work, is included in each project plan. The *Scope Change Management* budget is used to manage:

- *Scope Increase* – any work not identified in the project's *Scope & Approach* document or the detailed project plan that is added to the project at the customer's request. This frequently happens when additional system functionality is asked for. For example, the customer wishes to add a new calculation to an on-line application screen.
- *Unplanned Tasks* – any task added to the project by IT because the work is required to produce additional deliverables needed to successfully complete the project. Some typical *Unplanned Tasks* include adding vendor requirements that were not clearly communicated and making adjustments for incompatible system technologies.
- *Scope Decrease (Descope)* – a task that was included in the original project plan but is no longer needed. Descope can be caused by time, budget, or resource restrictions, as well as by changing requirements. Frequently, when a task is de-scoped it is moved to another phase of the project, or even to a new project. The work is not necessarily eliminated; it may just defer until a later date so that project constraints can be met.

Project Managers, with the *Project Sponsor's* approval, have the authority to manage project change without renegotiating and rebaselining the project, provided that the *Scope Change Management* budget is not exceeded and that the project does not exceed usage variance or date variance thresholds.

The *Scope Change Management* budget is sometimes confused with *Contingency*, since both involve additional hours budgeted in the project plan. *Contingency* is used when the work was defined in the original project plan, but it took more effort than expected to complete (i.e., the original estimate was low). Decrementing hours from a *Contingency* task is not considered a *Project Change*. Refer to [Section 7: Weekly Tracking](#), *Contingency Status* for more information about managing *Contingency*.

Project Renegotiation

Other types of *Project Change* occur when a project must be renegotiated and rebaselined, either due to the *Scheduled Project End Date* exceeding the *Planned End Date* (baseline) by more than +/- 30 days, additional *Scope Increase* or *Unplanned Tasks* exceeding the project's *Scope Change Management Budget*, the project's *Total Usage* exceeding the *Baseline Usage* by more than +20 / -10%, or the project coming off hold.

Renegotiating the next phases of a project (i.e. preliminary role-level estimates now being planned in detail) is not considered a change and does not follow the *Change Request* process. Refer to [Section 5: Scheduling, Project Renegotiation Process](#), for more information.

Enhancement Budgets

Managing requests for *Enhancement Budgets* or other such budget projects is considered a *Project Change*. All requests made for *Enhancement Budgets* must follow the *Change Request Process*.

Project On Hold

Putting a project on hold is considered a *Project Change*. All *Project On Hold* requests must follow the *Change Request Process*.

S *The Change Request Process will be used for all detailed project plans and enhancement budgets at Oakland County Information Technology (OCIT).*

Goals and Benefits

The goal of the *Change Request* process is to clearly define and document all changes to a project and to monitor the impact of the changes on the project's budget and schedule. All *Change Requests* will be documented, reviewed, and evaluated to verify the change is beneficial to the project, and approved by the *Project Sponsor, Project Manager* and/or the *IT Steering Committee*. Once approved, the additional work will be incorporated into the project plan.

The benefits that will be realized by adhering to this process include:

- The impact of proposed changes on project cost and schedule is clearly communicated to *IT's* customers, thus enabling them to make sound business decisions regarding the requests.
- Any work not included in the original project plan is identified and documented, allowing *Project Managers* to monitor and control variance to the original project budget and schedule.
- The business justification for adding or deleting work from a project is documented, as is the reason the *Change Request* may be denied. This information may need to be referenced throughout the life of the project.
- Capturing and categorizing *Change Requests* builds a knowledge base of lessons learned and facilitates continuous process improvement within IT.
- Variance in project work effort is reduced; unapproved work is not being done.
- Failure to monitor and manage *Change Requests* will typically have an adverse effect on a project's schedule and budget, as well as on the quality of work produced.

Roles and Responsibilities

Several parties participate in the *Change Request* process:

Role	Responsibility
Project Sponsor	Initiates a <i>Change Request</i> . Reviews and approves <i>Change Requests</i> .
Project Manager	Initiates a <i>Change Request</i> . Analyze the impact of <i>Change Requests</i> . Creates and maintains <i>Change Requests</i> in <i>Clarity</i> . Reviews with the <i>Project Sponsor</i> and <i>Steering Committee</i> and obtains approval. Manages the project's <i>Scope Management Budget</i> task. Maintains the project plan.
Team Member	Initiates a <i>Change Request</i> . Analyzes the impact of <i>Change Requests</i> . Implements approved <i>Change Requests</i> .
IT Steering Committee	Reviews and approve <i>Change Requests</i> .
Project Management Office	Reviews and monitors the <i>Change Request</i> process. Monitors project variances.

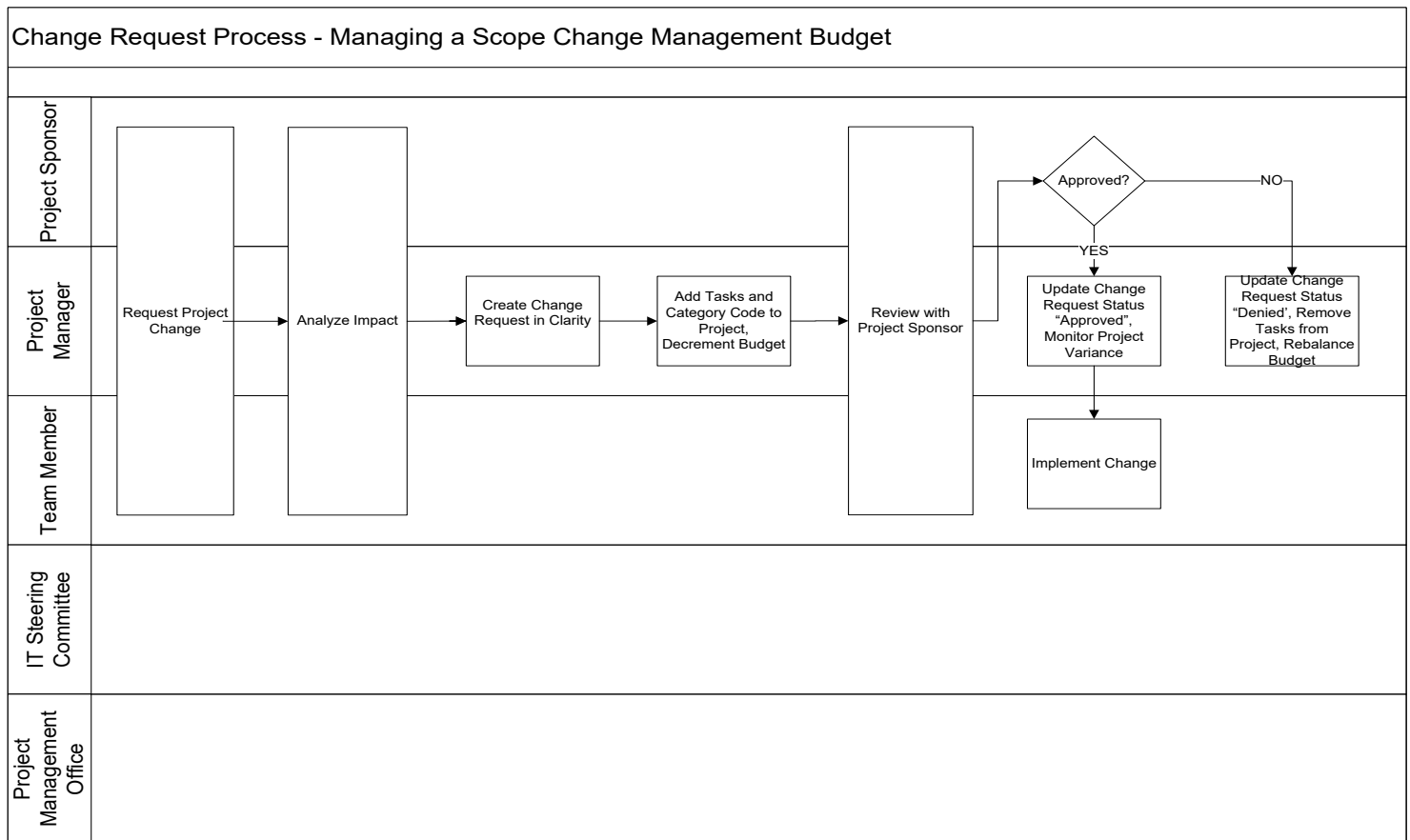
Change Requests to a project can be initiated by the *Project Sponsor*, *Team Member*, *Project Manager*, or *IT Management*. All requests should be directed to the *Project Manager*.

Change Request Process – Managing a Scope Change Management Budget

Project Managers have the authority to manage a detailed project’s *Scope Change Management* budget without renegotiating and rebaselining the project, given that the following criteria have been met:

- The *Project Sponsor* has reviewed and approved the *Change Request*.
- There are sufficient hours left in the project’s *Scope Change Management* budget to implement the *Change Request*.
- The project does not exceed +20 / -10% *Total Usage* variance.
- The project does not exceed +/- 30 days *Planned Project Finish Date* variance.

If any of the above conditions are not met, the *Change Request Process – Project Renegotiation* process must be followed instead.



1. *Project Sponsor, Project Manager, or Team Member* requests a *Project Change*.
2. *Project Manager, along with the Project Sponsor and Team Members,* analyzes the impact of the *Change Request*.
3. *Project Manager* creates a *Change Request in Clarity*.
4. *Project Manager* adds tasks to the project plan in *Open Workbench*, codes each task appropriately for *Scope Change (C), Unplanned Task (U) or Descope (D)*, and decrements the *Scope Change Management* task.

5. *Project Manager* reviews the *Change Request* with the *Project Sponsor* and obtains *Sponsor* signature on the *Change Request* form.
6. If approved:
 - a. *Project Manager* updates *Change Request Status = Approved*.
 - b. *Team Members* implement the change.
 - c. *Project Manager* monitors variance in the *Scope Change Management* task.
7. If denied:
 - a. *Project Manager* updates *Change Request Status = Denied*.
 - b. *Project Manager* removes the tasks from the project plan and rebalances the *Scope Change Management* task.
8. *Project Manager* files all signed *Change Request* forms in the IT Administration office.

Request a Project Change

Project Sponsors, Team Members, Project Managers, and IT Management can all request a *Project Change* by contacting the *Project Manager*.

Analyze the Impact of a Change Request

The *Project Manager* must gather the following information for each *Change Request*:

- What is the detailed description of the *Change Request*? Was a deliverable overlooked in the requirements gathering? Is this *Change Request* the result of a design error? Is the *Change Request* a mandated requirement? Is this an *Enhancement Change Request*?
- What is the business justification for the change? What is the benefit of completing the *Change Request*? What is the risk of not completing this *Change Request*? Is this a mandated *Change Request*? The person who requested the change should be able to provide a justification in business terms, not technical ones.
- What deliverables will be impacted? What is the impact to the project deliverables by completing or not completing the *Change Request*? Are there new deliverables because of the *Change Request*?
- Determine the estimated number of hours to complete the *Change Request*. The *Project Manager* may want to have *Team Members* validate or participate in determining the *Estimate to Complete (ETC)*.
- What is the impact on the project's budget and end date? In order to fully analyze the impact of the proposed change on the project end date, the *Project Manager* may want to perform some "what if" scenarios in the project plan. This can be done by creating a copy of the project plan (.rmp file). Depending on the impact to the project end date, the *Project Manager* may need to re-negotiate the project for a revised project end date.

Create a Change Request in Clarity

The *Clarity* application is used by *Oakland County IT* to capture project-related *Change Requests*.

S A *Change Request* must be created in *Clarity* to document the status of all project-related changes.

1. From the **Project Dashboard** page, click the **Risks/Issues/Changes** tab.
2. Click the **Change Requests** link.
3. Click the **New** button.

Below are the form fields for creating and managing *Change Requests* in *Clarity*:

General Properties

Field (Characters)	Value
Form Indicator	Select one of the descriptions below: <ul style="list-style-type: none"> • <i>Project Change Request</i> – Used when changing the project end date (baseline), adding additional work to the project that was not planned for in the <i>Scope & Approach</i>, removing planned work from a project (descope), adding tasks to an <i>Enhancement Budget</i>. • <i>Project On-Hold Request</i> – Used when placing the project on hold for an extended period of time.
Change Request ID	Automatically generated by <i>Clarity</i> .
Change Request Name	Enter a name that will help identify the <i>Change Request</i> for reporting purposes.
Requested By	Defaults to <i>Clarity</i> user name. Browse for the appropriate <i>IT Resource</i> . If the requestor is not an <i>IT Resource</i> (e.g. requested by the customer) enter the <i>Project Manager</i> as the requestor.
Request Date	Defaults to the date the <i>Change Request</i> was created in <i>Clarity</i> .

Attachments

Field (Characters)	Value
Document	Attach any documents that pertain to the <i>Change Request</i> .

Change Request Status

Field (Characters)	Value
Approval Status	Select one of the status descriptions below: <ul style="list-style-type: none"> • <i>Approved</i> – <i>Change Request</i> approved. • <i>Denied</i> – <i>Change Request</i> denied. • <i>Pending</i> – Further action required.
Approved By	Browse for the appropriate <i>IT Resource</i> .
Date Approved	Enter the date the <i>Change Request</i> was approved.

Reason Denied	If <i>Change Request</i> is denied, enter in explanation for why the <i>Change Request</i> was denied.
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4. Click the **Save** button.
5. Click the link that appears under the **Change Request Properties** header (*either Project Change Request or Project On-Hold*). The name of the link is dependent upon the type of *Change Request* that was selected in the **Form Indicator** field. Refer to the appropriate section below for the information specific to each type of form.

Project Change Request

Complete the following fields for a *Project Change Request*.

Field (Characters)	Value
Description / Reason	Define the <i>Project Change Request</i> in detail. This section should describe in detail what needs to be changed.
Business Justification	Enter the business justification for the <i>Project Change Request</i> .
Deliverables Impacted	Enter in any deliverables that will be impacted by the <i>Project Change Request</i> .
Category	Select one of the categories below: <ul style="list-style-type: none"> • <i>Customer</i> • <i>Project Issue</i> • <i>Resource</i> • <i>Scope</i> • <i>Vendor</i>
Comments	Enter comments that pertain to the <i>Change Request</i> . If the person who requested the change is not an <i>IT Resource</i> (e.g. requested by the customer), enter the requestors name in the Comments .
Estimated Hours to Complete Change	If the <i>Project Change Request</i> is for an <i>Enhancement Budget</i> or for adding tasks within the project's existing <i>Scope Budget</i> , enter the number of estimated hours required to complete the <i>Project Change Request</i> . Otherwise, this field can be left blank.
Original Project Total Usage Hours	Enter the original total usage hours (baseline) of the project.
Renegotiated Project Total Usage Hours	Enter the proposed new total usage hours of the project.
Original End Date	Enter the original planned end date (baseline) of the project.
Renegotiated End Date	Enter the proposed new planned end date of the project.

Click the **Save** button.

Printing a Change Request

To print a single *Change Request* form:

1. From the **Project** page, select the **Change Requests** link on the **Risks/Issues/Changes** tab.
2. Click the icon in the **Print Report** column of the list next to the specific *Change Request* to be printed.
3. The standard **Change Request** report will pop-up, populated with the information for the specific *Change Request* selected from the list.

Change Requests can also be printed by running the **Change Request** report on the **Reports and Jobs** menu. When running the report, multiple *Change Requests* for a particular project can be printed at one time. Refer to [Section 10: Reports and Jobs](#) for more information.

Update the Project Plan

All time spent planning and analyzing the request is tracked to the *Scope Change Management* task. The *Project Manager* adds the new tasks to the project plan and codes them appropriately.

S *Any time spent by the Project Manager or by Team Members analyzing and documenting Change Requests, obtaining approval of Change Requests, and planning for Change Requests will be charged directly to the project's Scope Change Management task.*

Since the *Scope Change Management* task is initially assigned only to a generic resource, *Team Members* must add the *Scope Change* task to their time sheet. Refer to [Section 7: Weekly Tracking](#), for more information.

The *Project Manager* must add tasks for all requested *Scope Changes* to the project plan. The following standards describe the process for doing this.

S *Scope Increase Task - New tasks that result from an approved customer-initiated scope increase must be added to the project plan at an appropriate point in the body of the project. These tasks must be flagged by entering a "C" in the first position of the **Task Category** field. The ETC of the Scope Management Task in the Project Management Phase must be decremented by the total ETC of all the added Scope Increase Tasks.*

S *Unplanned Task – All Unplanned Tasks must be added to the project plan at an appropriate point in the body of the project. These tasks must be flagged by entering a "U" in the first position of the **Task Category** field. The ETC of the Scope Management Task in the Project Management Phase must be decremented by the total ETC of all the added Unplanned Tasks.*

S *Time spent completing the work for an added Scope Change Task will be tracked to the newly added task.*

Scope Increase Tasks and *Unplanned Tasks* are handled essentially the same way. In both cases, the task(s) are added to the project plan and the *ETC* for these tasks is decremented from the project's *Scope Change*

Management budget. The only difference is that *Scope Increase Tasks* are flagged with a "C" in the **Category** field, and *Unplanned Tasks* are flagged with a "U".

Once a task is added to the project plan, it should be assigned to a resource, not the generic *Scope Role (SCP)*. The "7/70" guideline, which states that a resource should be assigned no less than 7 hours and no more than 70 hours of work per task, should be followed when adding unplanned or scope increase tasks to a project plan.

Tasks that are being de-scoped must be updated according to the following standard. Never release a resource from a task when descopeing. Instead set the resource's *ETC* to 0. Do not add the de-scoped hours into the *Scope Change Management* task.

S *Scope Decrease Task – Tasks that are de-scoped must be flagged by entering a "D" in the first position of the **Task Category** field. The ETC for each resource assigned to the task must be changed to 0. The task end date must be set to the current date. Then the task status must be set to "completed".*

The **Scope Budget – Non-Preliminary Only** portlet on the project's **Dashboard** tab can be used to quickly determine if the project's *Scope Change Management* budget has been exceeded. To see more detail about the budget, use the *Scope Change Management Status* view in the *Weekly Analysis* folder in *Open Workbench*. The total of the *Revised Total Estimate* column should equal the total of the *Original Estimate* column. This indicates that the *Scope Change Management* budget is balanced, and there are enough hours remaining in the budget to implement the requested *Scope Change*. If the total *Revised Total Estimate* exceeds the total *Original Estimate*, the amount of *Scope Change* added to the project is more than the budget allows for, and the project must be renegotiated.

Review with the Project Sponsor

Project Sponsor approval is required before any *Scope Change* can be implemented. Typically the *Project Manager* will review all requested changes with the *Project Sponsor*, but occasionally a *Team Member* may be assigned to do this. However, only the *Project Manager* can approve or deny a request. The *Project Manager* (or *Team Member*) should create a *Change Request* form and print the *Change Request* report in *Clarity*.

The *Project Manager* should also print the *Scope Change Management Status* view from the *Weekly Analysis Folder* in *Open Workbench* and attach it to the *Scope Change Request* form. This view will illustrate to the *Project Sponsor* the impact of the *Scope Change*.

All project-related *Change Requests*, approved or denied, must be stored in *Clarity* and the *Project Change Request Authorization* must be signed by the *Project Manager* and the *Project Sponsor*. The signed, authorized *Project Scope Change Request* is forwarded to *IT Administration* for filing with the project documentation.

Change Request Denied - Update the Project Plan

If the *Change Request* is denied, the *Project Manager* must update the project plan accordingly. Any tasks added to the plan as part of the request must be removed. The hours must be added back into the *Scope Change Management* task.

In the case of a de-scope request being denied, the *Project Manager* should leave the tasks in the plan, but remove the "D" from the **Category** field. *ETC* should be reassigned to these tasks. No adjustments to the *Scope Change Management* task are needed.

Change Request Approved - Implement

Once the necessary approval is obtained, work can begin on the *Change Request* tasks. *Team Members* should track time to the newly added task(s). The *Project Manager* should monitor the task the same way any other task is monitored, with a few small exceptions:

- If the task's total usage (the actual hours worked plus the *ETC*) exceeds the initial *ETC*, the additional hours are decremented from the *Scope Change Management* task.
- Once the task is complete, if the task's total usage is less than the initial *ETC*, the remaining hours are added back to the *Scope Change Management* task.

S Any unused *ETC* in an added *Project Change* task must be added back into the *Scope Change Management* task once the task is complete.

Change Request - Monitoring Variance

Scope Change Management Budget Variance can be caused by a number of factors:

- Numerous *Project Changes* can add a significant amount of work to a project. Once the estimates for *Project Change* tasks exceed the *Scope Change Management* budget, the project can be in negative variance. Conversely, if a number of tasks are de-scoped the project can be in positive variance.
- If *Scope Change Management* tasks are decremented correctly, the negative variance caused by the extra work will be balanced out by the positive variance in these budget tasks. If these processes are not followed consistently, and the budgets are not decremented, the project will appear to be in negative variance.

The *Project Manager* is responsible for monitoring *Scope Budget Variance*.

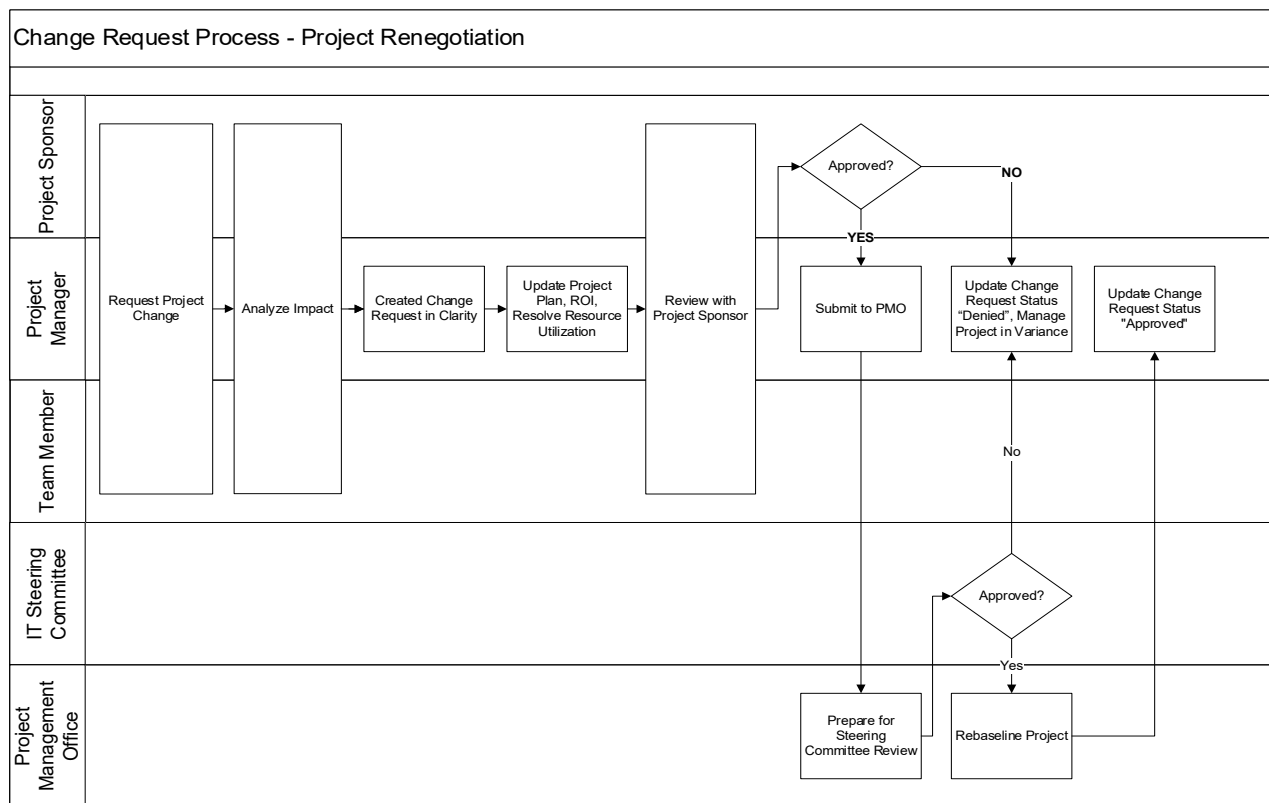
Project Managers should monitor *Scope Budget Variance* on a weekly basis, when weekly tracking and analysis is performed. Refer to [Section 7: Weekly Tracking](#) and [Section 8: Weekly Analysis](#), for more information. The most useful *Open Workbench* views for monitoring *Scope Budget Variance* caused by scope increase or decrease are the *Scope Change Management Status* and the *De-scope Change Management Status* views found in the *Weekly Analysis* folder and the *Variance Explanation* and *Variance Explanation Detail Plan* views in the *Weekly Tracking* folder.

Change Request Process – Project Renegotiation

Some *Project Changes* may have a significant impact on the project’s cost and schedule. These changes require the project to be renegotiated, approved by the *IT Steering Committee*, and rebaselined. Renegotiation is required when:

- A *Scope Change (C)* or *Unplanned Task (U)* is necessary, but there are not enough hours left in the project’s *Scope Change Management* budget to implement the *Change Request*.
- The project is expected to exceed +20 / -10% *Total Usage* variance.
- The project is expected to exceed +/- 30 days *Planned Project Finish Date* variance.
- The project is coming off hold.

Renegotiating the next phases of a project (i.e. preliminary role-level estimates now being planned in detail) is not considered a change and does not follow the *Change Request* process.



1. *Project Sponsor, Project Manager, or Team Member* requests a *Project Change*.
2. *Project Manager, along with the Project Sponsor and Team Members*, analyzes the impact of the *Change Request*.
3. *Project Manager* creates a *Change Request in Clarity*.
4. *Project Manager* adds new tasks and updates ETC in the project plan, adjusts fixed and locked tasks and milestones, updates the *ROI Analysis* document to reflect the requested change, and resolves any *Resource Utilization* issues. Refer to [Section 5: Scheduling, Project Renegotiation Process](#), for more information.

5. *Project Manager* reviews the *Change Request* with the *Project Sponsor* and obtains *Sponsor* signature.
6. *Project Manager* submits the project to *PMO* for *Project Renegotiation*.
7. *Project Manager* presents the *Project Renegotiation* to the *IT Steering Committee*.
8. If approved
 - a. *Project Manager* updates *Change Request Status = Approved*.
 - b. *PMO* rebaselines the project.
9. If denied
 - a. *Project Manager* updates *Change Request Status = Denied*.
 - b. *Project Manager* removes the changes from the project plan and continues to manage the project in variance.
10. *Project Manager* files all signed *Change Request* forms in the IT Administration office.

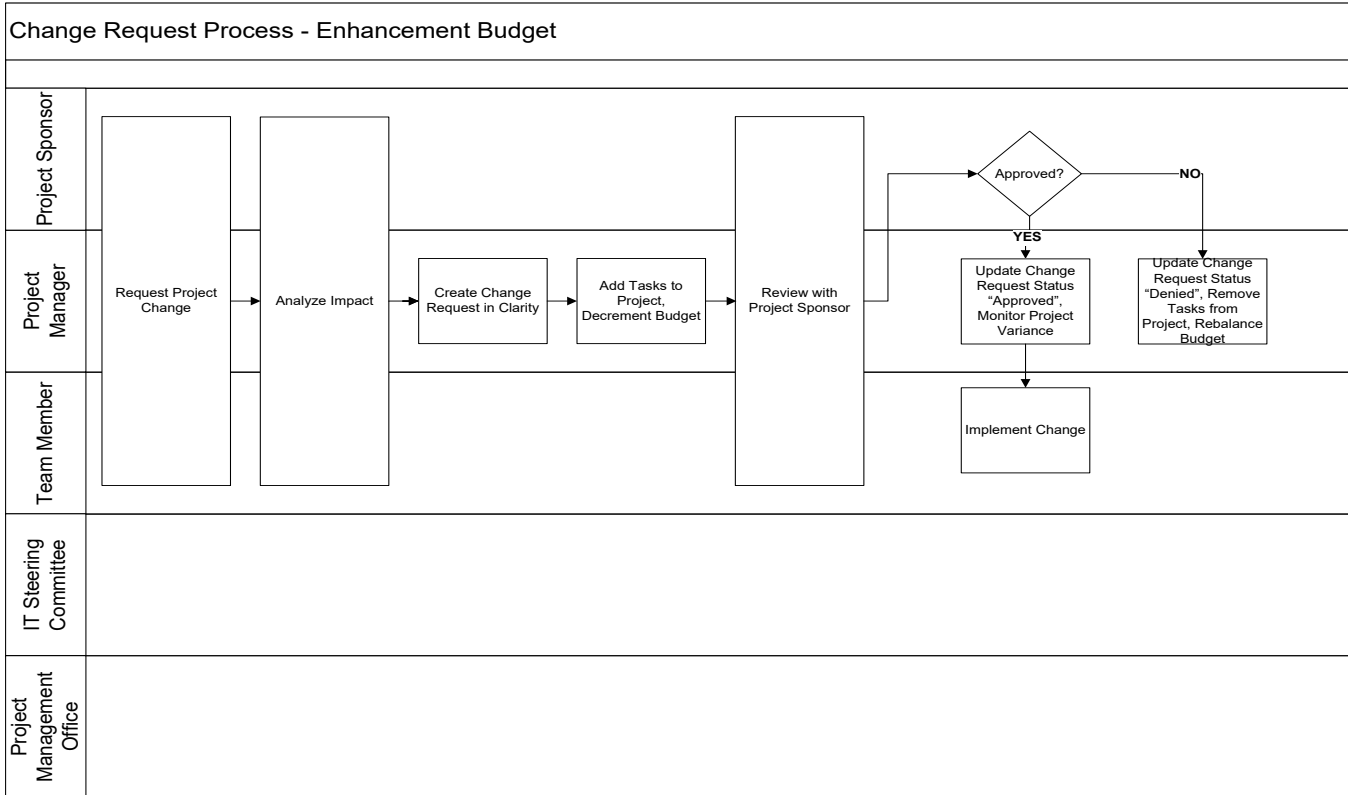
The *Change Request Process* for *Project Renegotiation* follows essentially the same steps as the process for [Managing a Scope Change Management Budget](#), with a few small differences:

- Time spent planning for the *Change Request* is tracked to the *Tracking & Control* task.
- No coding is needed for new tasks added to the project plan.
- No budgets are decremented.
- The project must be renegotiated, submitted to *PMO* for *Assurance & Compliance* review, approved by the *IT Steering Committee*, and baselined by *PMO*.

S *Time spent analyzing and updating the project for a Change Request that requires Project Renegotiation will be tracked to Project Management Tracking & Control task in the Project Management phase.*

Change Request Process – Enhancement Budgets

Managing requests for *Enhancement Budgets* or other such budget projects is considered a *Project Change*. All requests made for *Enhancement Budgets* must also follow the *Change Request Process*.



1. *Project Sponsor, Project Manager, or Team Member* requests a *Project Change*.
2. *Project Manager, along with the Project Sponsor and Team Members,* analyzes the impact of the *Change Request*.
3. *Project Manager* creates a *Change Request in Clarity*.
4. *Project Manager* adds tasks to the project plan in *Open Workbench* and decrements the *Enhancement Budget* task.
5. *Project Manager* reviews the *Change Request* with the *Project Sponsor* and obtains *Sponsor* signature on the *Change Request* form.
6. If approved:
 - a. *Project Manager* updates *Change Request Status = Approved*.
 - b. *Team Members* implement the change.
 - c. *Project Manager* monitors variance in the *Enhancement Budget* project.
7. If denied:
 - a. *Project Manager* updates *Change Request Status = Denied*.

- b. *Project Manager* removes the tasks from the project plan and rebalances the *Enhancement Budget* task.
8. *Project Manager* files all signed *Change Request* forms in the IT Administration office.

The *Change Request Process* for *Enhancement Budgets* follows essentially the same steps as the process for [Managing a Scope Change Management Budget](#), with a few small differences:

- Time spent planning for the *Change Request* is tracked to the actual task, not to the budget task.
- No coding is needed for new tasks added to the project plan.

S *Enhancement Task - New tasks that result from an approved enhancement must be added to the project plan at an appropriate point in the body of the project. The ETC of the Enhancement Budget Task must be decremented by the total ETC of all the added enhancement tasks.*

S *Time spent planning and negotiating for an enhancement will be tracked to the appropriate enhancement task in the Enhancement Budget.*

The *Enhancement Budget Status* view in the *Enhancement Budget* folder in *Open Workbench* can be used to monitor the status of the *Enhancement Budget*. Each *Leadership Group* has one *Enhancement Budget* project, which is shared by multiple customers and applications. Each customer is identified by a separate *Phase* in the *EB*. The *Original Estimate* column (baseline) of the *Phase* indicates how many hours were allocated to each customer. The *Revised Total Estimate* column should equal the total of the *Original Estimate* column. This indicates that the *Enhancement Budget* is balanced, and there are enough hours remaining in the budget to implement the requested enhancement for that customer.

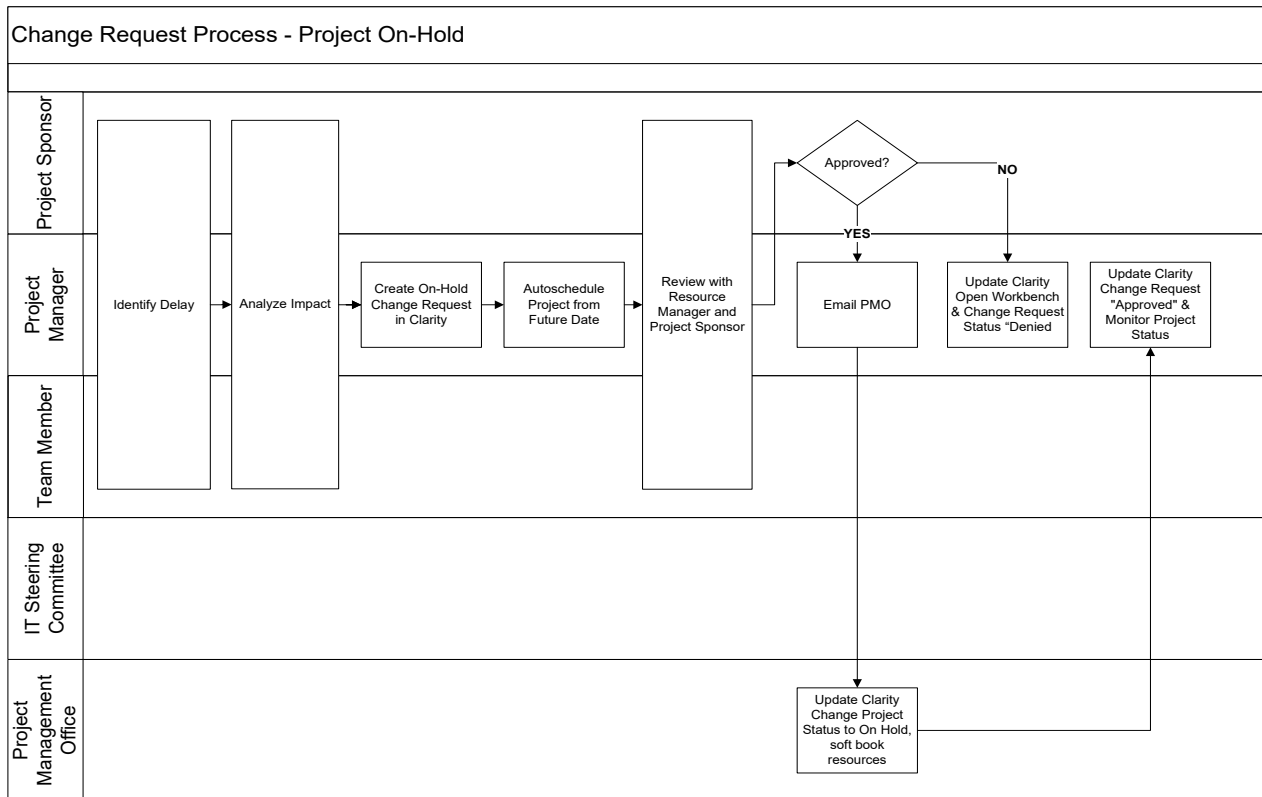
If the *Revised Total Estimate* at the *Phase* level exceeds the total *Original Estimate*, the amount of *Change Requests* added to the project is more than that customer's *Enhancement Budget* allows for. When this situation occurs, *IT Chiefs* and *Managers* may approve that hours be moved between customers, provided that the overall *EB* allocation will not be exceeded and that the customer who is reducing hours has given approval. Once the hours have been moved, contact *PMO* to request the project be rebaselined.

If the *Revised Total Estimate* for the overall project exceeds the total *Original Estimate*, additional hours must be requested from the *Leadership Group* before any work can be done. The *Project Sponsor* must contact their *Leadership Group Chairperson* and request that the allocation increase request be put on the agenda for the next *Quarterly Status Meeting*. If approved, *PMO* will increase the allocation and rebaseline the project.

Refer to [Section 12: Prepare and Manage Budgets](#) for more information regarding *Enhancement Budgets*.

Change Request Process – Project On Hold

Putting a project on hold is considered a *Project Change*. All *Project On Hold* requests must follow the *Change Request Process*.



1. *Project Sponsor, Project Manager or Team Member* identifies a project delay.
2. *Project Manager*, along with the *Project Sponsor* and *Team Members*, analyzes the impact.
3. *Project Manager* creates a *Project On-Hold Change Request* in *Clarity* and obtains the necessary approval.
4. *Project Manager* updates the project plan in *Open Workbench*.
 - a. *ETC* on all remaining tasks is evaluated and updated.
 - b. *Dependencies* are reviewed and modified as needed.
 - c. *Project* is *autoscheduled* to push the remaining *ETC* to the new *planned start date* (date in the future).
 - d. *Project Management* and all fixed/locked/uniform loaded tasks and milestones are reviewed to reflect the revised project end date and ensure resource *ETC* is scheduled accurately.
 - e. The project *Task Plan* and *Project On Hold Request* are reviewed with the *Supervisor* and/or *Division Manager*.
5. *Project Manager* sends an email to the *Project Management Office (PMO)* indicating the Project Name and ID that is being placed on hold.
6. *PMO* updates the project *status* and resource *booking status* in *Clarity*.

- a. From the **Project Properties** page, click the **Schedule** link under **Properties** and change the **Status Indicator** to On-Hold.
- b. From the **Project Properties** page, click the **Team: Staff** link and change the **Booking Status** to Soft for each resource.

7. *Project Manager* files all signed *Change Request* forms in the IT Administration office.

The *Change Request Process* for *Project On Hold* follows essentially the same steps as the process for [Managing a Scope Change Management Budget](#), with a few small differences:

- Time spent planning for the *Change Request* and placing the project on hold is tracked to the *Tracking & Control* task.
- The *Project On Hold Change Request* form in *Clarity* has different properties than the general *Project Change Request* form that is used by all other types of *Change Requests*. See below for the details of the form.
- No new tasks are added to the project plan. Instead, the project is autoscheduled for a future date.

S *Time spent analyzing and updating the project for a Project On-Hold Request will be tracked to Project Management Tracking & Control task in the Project Management phase.*

When creating the *Change Request* in *Clarity*, select *Project On-Hold Request* as the *Form Indicator*.

Field (Characters)	Value
Form Indicator	Select one of the descriptions below: <ul style="list-style-type: none"> • <i>Project Change Request</i> – Used when changing the project end date (baseline), adding additional work to the project that was not planned for in the <i>Scope & Approach</i>, removing planned work from a project (descope), adding tasks to an <i>Enhancement Budget</i>. • <i>Project On-Hold Request</i> – Used when placing the project on hold for an extended period of time.

Populate the remaining fields on the *Change Request*. Refer to the [Creating a Change Request in Clarity](#) section of this document for more information.

Once the information is entered, Click the **Save** button. Click the **Project On-Hold** link that appears under the **Change Request Properties** header. The remaining fields for *Project On Hold* are different than the general *Project Change Request* form:

Field (Characters)	Value
Description / Reason	Enter the reason the project is being put on-hold.
Comments	Enter comments that pertain to the <i>Change Request</i> . If “ <i>Non-IT Resource</i> ” is selected in the Requested By field, the requestor name should be added in the Comments field.
Estimated Date Work Will Resume	Enter the date that work is expected to being again on the project.

Once the project is placed on hold, no time can be tracked to the project until the project comes off hold. The only exception is the *Project Manager* may track time to *Initial Planning* or *Tracking and Control* when they are preparing the project to come off hold. Projects on hold can be monitored via the **Projects On-Hold** portlet or the **On-Hold with Actuals** portlet, both which can be found on the *Clarity Project Variance* menu.

If the project on hold date is extended beyond the *Estimate Date Work Will Resume*, the *Project Manager* must create a second *Project On Hold Change Request*, autoschedule the project for the new expected end date, etc.

When the project is ready to come off hold and resume work, the *Project Manager* must perform a complete project renegotiation, including a new *Change Request*. Refer to the [Change Request Process – Project Renegotiation](#) section for more information.

Commonly Asked Questions

- **When do I need to create a *Change Request*? When do I need to renegotiate and rebaseline a project? When do I need to do both?**

Submitting a new project for initial approval and renegotiating next phases (i.e. taking high-level role estimates to detail) are not considered *Project Changes*. They need to be submitted for project approval, but they do not require a *Change Request*.

Managing a *Scope Change Management* budget within an approved detailed project plan, putting a project on hold, and *Enhancement Budget* requests are *Project Changes*. They require a *Change Request*, but they do not need submitted for project approval.

Any other type of change to a previously approved detailed project requires a *Change Request* and must be submitted for project approval.

- **Which *Change Request* form should I use?**

The *Project On Hold* form is used when putting a project on hold. All other *Change Requests* use the *Project Change Request* form.

- **What is the difference between the *Scope Change Management Budget* and the *Contingency Budget*? I'm not always sure which one I should use.**

The *Scope Change Management Budget* should be used when a new deliverable is added to the project, such as a new report or an additional system interface. The *Contingency Budget* should be used when the deliverable hasn't changed, but your *ETC* for that deliverable is too low. For example, you planned on 40 hours to code a system interface, but it actually took 52 hours to do the work.

- **How do my customers request *Project Changes* and receive updates about the status of their requests? Are they supposed to monitor *Clarity*?**

Clarity is only available to *IT* staff. However, the report generated in *Clarity* can be used as a tool for communicating status to the customer. *Clarity* is not intended to replace normal communication, such as status meetings that take place with the customer. Customers should request *Project Changes* by contacting the *Project Manager*, and the *Project Manager* should provide regular status updates to the customer.

- **How can I tell when my project's *Scope Change Management Budget* has been exceeded?**

The **Scope Budget – Non-Preliminary Only** portlet on the project's **Dashboard** tab can be used to quickly determine if the project's *Scope Change Management* budget has been exceeded. The *Scope Change Management* and *De-scope Change Management* views, found in the *Weekly Analysis* folder, can be used to view more detail about the project's *Scope Change Management Budget*. The *Variance Explanation* and *Variance Explanation Detail Plan* views in the *Weekly Tracking* folder are useful for monitoring overall project variance.

- **My project was put on hold with an anticipated date work would resume. I now know that work will not begin again by that date. What do I do?**

Once it is known that work will not resume as expected on a project that is already on hold, the *Project Manager* should create a second *Project On Hold* change request and autoschedule the project with the new expected date that work will resume. Refer to the [Change Request – Project On Hold](#) process for more information.

- **What do I do when it's time to take a project off hold?**

Follow the [Change Request - Project Renegotiation](#) process when it is time to take a project off hold and begin working again.