**PROJECT CLOSEOUT**

1. **SCOPE**

This Quality Work Instruction (QWI) defines the Enterprise Project Management Office (EPMO) procedure to effectively close an Information Technology (IT) Project. The Project Closeout procedure is completed as part of the [0300-0300-005-B PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open) and represents the final phase of the IT Project.

1. **OWNER**
   1. The Enterprise Project Management Office (EPMO) Director owns this QWI. No changes, additions or alterations may be made without the owner’s written approval.
2. **REFERENCE DOCUMENTS**

|  |  |
| --- | --- |
| **DOCUMENT IDENTIFICATION** | **DOCUMENT TITLE** |
| [EPMO RECORDS PER CHAPTER 121 & 132](http://stateschedules.ncdcr.gov/Schedules/Office%20of%20the%20Governor/Office%20of%20Information%20Technology%20Services/Enterprise%20Technology%20Project%20Management%20Office/GovOff_EnterpriseTechProjMgn.pdf) | PROGRAM RECORDS RETENTION & DISPOSITION SCHEDULE |
| 0100-0800-010-B | **FORMS AND RECORDS CONTROL** |
| 0300-0300-005-B | [PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open) |
| 0300-0370-005-C | [PROJECT WEEKLY STATUS REPORT](https://it.nc.gov/media/1033/open) |
| 0300-0390-005-C | [LESSONS LEARNED](https://it.nc.gov/media/1126/open) |
| 0300-0395-005-C | [CUSTOMER FEEDBACK](https://it.nc.gov/media/1127/open) |
| 0400-0400-005-B | **RISK IDENTIFICATION AND MITIGATION** |

1. **ASSOCIATED FORMS**

|  |  |
| --- | --- |
| **FORMS IDENTIFICATION** | **FORM TITLE** |
| 0300-0350-005-D | [PROJECT CLOSEOUT REPORT](https://it.nc.gov/media/1013/open) |
| 0300-0370-005-D | [PROJECT WEEKLY STATUS REPORT](https://it.nc.gov/media/1033/open) |
| 0300-0390-005-D | [LESSONS LEARNED FORM](https://it.nc.gov/media/1131/open) |
| 0300-0395-005-D | [CUSTOMER FEEDBACK FORM](https://it.nc.gov/media/1128/open) |

1. **DEFINITIONS**

* NONE

1. **PROCEDURE**
   1. While in the Project Closeout phase, the Project Manager (PM) continues to submit the [0300-0370-005-D PROJECT WEEKLY STATUS REPORT](https://it.nc.gov/media/1033/open) until all invoices have been paid and the total (final) actual costs are posted to the Weekly Status Project Detail Page (PDP). The PM will work with the agency budget office to confirm all invoices have been submitted and processed.
   2. The PM closes all issues and risks in the TOUCHDOWN System. Any outstanding issues or risks are moved to the Agency’s risk mitigation system.

**6.3** The Business Owner, with the assistance of the PM, completes and submits [0300-0390-005-D LESSONS LEARNED FORM](https://it.nc.gov/media/1131/open) to the EPMO Project Management document repository.

**6.4** The assigned Project Management Advisor (PMA) submits a request for customer feedback [using 0300-0395-005-D CUSTOMER FEEDBACK FORM](https://it.nc.gov/media/1128/open) to the State Chief Information Officer (SCIO), Business Owner, PM and other appropriate stakeholders.

**6.5** The PM initiates the Project Closeout process by submitting the project for closeout review and approval. The PMA is responsible for closing the project.

**6.6** The PMA runs an initial [0300-0350-005-D PROJECT CLOSEOUT REPORT](https://it.nc.gov/media/1013/open) and reviews and assesses the form. The PMA coordinates any recommended report corrections with the PM.

**6.9** The PMA runs a final [0300-0350-005-D PROJECT CLOSEOUT REPORT](https://it.nc.gov/media/1013/open).

6.9.1 The PMA archives the completed [0300-0350-005-D PROJECT CLOSEOUT REPORT](https://it.nc.gov/media/1013/open) in the EPMO

Project Management document repository.

6.9.2 The PMA updates the Project Status to “Complete” in the TOUCHDOWN System and advises Office of State Budget and Management (OSBM) that the project is complete.

1. **RECORDS**
   1. Unless otherwise specified in this Procedure/QWI, Records shall be maintained in accordance with **0100-0800-010-B FORMS AND RECORDS CONTROL** procedure.
2. **REASON FOR CHANGE**
   1. Corrected errors in section 3.0 REFERENCE DOCUMENTS and section 4.0 ASSOCIATED FORMS. Updated paragraph 6.1 and sub-paragraph 6.9.2 to clarify requirements.
   2. Update EPMO Manager to EPMO Director.