



Document Type	Phoenix Screen Aid
Title	Assessment Type
Revision	1.0
Effective Date	10/19/26

1.0 SCOPE

This document assists with entering field-level information into the Assessment Type screen in the EPMO Phoenix Project Management System. The purpose of entering this information is to evaluate the general risk posture the project presents to the organization. This is independent of individual Risk items captured.

This information is required for the project's Business Case and is to be maintained as a function of ongoing applied project management.

2.0 DATA ENTRY ASSIST

- The Project Manager (PM) is responsible for all data entry and ensuring the project is completely represented in Phoenix and kept current.
- When unsure, consult with your Project Management Advisor (PMA) for any project related questions or data entry selections. Your PMA will periodically review this information and may recommend changes.
- The contents of this document cover the fields in the Assessment Type screen. Other fields may contain information already populated from elsewhere within Phoenix and inherited here.
- Open your project at [NCDIT EPMO Project Governance & Oversight](#).
- Fields icons:

*	Required – no saving or advancing until data entry is satisfied.
🔒	Locked – no data entry is allowed.
▼	Dropdown – click on icon to select from list.
🔍	Search – click on icon to engage search function.
📅	Date – click on icon to engage calendar selection.
🔗	Go to Record – click icon to edit record.

- All other fields are text entry and have edit and length limitations based on purpose or a project's workflow phase.
- ALWAYS Save!

3.0 PROJECT RISK ASSESSMENTS

A project Risk Assessment is a structured process used to analyze and evaluate the listed areas to create a general awareness of a project's risk posture. It is used to examine uncertainties, e.g., financial, organizational, or environmental, and to determine the likelihood of either impact to the project or of the need for additional risk oversight based on the evaluated score. The assessment helps both the project's stakeholders and Information Security personnel to prioritize their risk awareness based on a Project Managers assessed position. This will ultimately lead to developing mitigation, monitoring, and response strategies to reduce the chance of disruption, risk-to-issue escalation, or worse, project failure.

It is expected that each project maintains a risk register in the Risk section of the project. The Risk Assessment forms a general overview of risk potential to the project, whereas the Risk items themselves draw direct attention to any uncertain event or condition that, if it occurs, could positively or negatively affect an IT project's outcomes.

A Risk Assessment may be performed each time the perception of each area changes, based on project performance or expectation, and should minimally be reevaluated if a Change Request is needed. When subsequent assessments are



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performed, it is understood that the latest one will be the most representative of the project's current position. Historical assessments may be used for risk analysis to demonstrate how projects change over time.

3.1 General

Estimated Project Budget	Based on the level of financial investment to be made, initially when submitting the Business Case for approval, select the option suited to the project’s budget.		
	Budget	Rating	Weighted Score
	< \$1M	1	15
	\$1M to < \$3M	2	30
	\$3M to < \$6M	3	45
	\$6M to < \$10M	4	60
	+ \$10M	5	75
Estimated Project Duration	Based on the project schedule, select the option indicative of the overall project length, less Operations and Maintenance.		
	Duration	Rating	Weighted Score
	< 18 months	1	15
	18 to < 24	2	30
	24 to < 30	3	45
	30 to < 36	4	60
	+ 36 months	5	75
Business Owner Involvement	The level of availability to provide executive-level leadership and decision making, when necessary, or observable commitment to the project’s stated goals and objectives by the Business Owner. This should be estimated for the duration of the project, less Operations and Maintenance.		
	Involvement	Rating	Weighted Score
	Engaged	1	10
	Highly Consulted	2	20
	Consulted	3	30
	Minimally Consulted	4	40
	Informed	5	50
Impact on Owning Organization	The level of meaningful change, positive or negative, that a project delivers to the organizations. This includes how the project improves system performance and access, offers efficiency increases, removes excessive process constraints, how it strengthens economic performance, or elevates overall user experience. It reflects the operational value created within the agency by focusing on outcomes felt by the organization.		
	Impact	Rating	Weighted Score
	Minimal	1	10



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	Low	2	20
	Moderate	3	30
	High	4	40
	Significant	5	50
Impact to Citizen, Business, or Industry	The level of meaningful change, positive or negative, that a project delivers to the people or organizations it serves. This includes how the project improves access to services, enhances efficiency, reduces burden, strengthens economic activity, or elevates overall user experience. It reflects the real-world value created beyond the agency, focusing on outcomes felt by the broader community and marketplace.		
	Impact	Rating	Weighted Score
	Minimal	1	10
	Low	2	20
	Moderate	3	30
	High	4	40
	Significant	5	50
Required for Legislation or Mandate	Has this project been legislatively mandated?		
	Required	Rating	Weighted Score
	Yes	Yes	75
	No	No	0
Resource Availability	A general determination regarding the level of workforce resources capable of contributing to the overall delivery and success of the project.		
	Availability	Rating	Weighted Score
	Sufficient	1	20
	Barely Sufficient	2	40
	Neither Sufficient nor Insufficient	3	60
	Barely Insufficient	4	80
	Insufficient	5	100
Sensitive Information	A general determination regarding the level of protection granted to a pool of data used by the solution of the project. This may be a combination of confidential, PII, PHI, financial, or other data types. This rating is to be estimated based on the entire dataset being used. Consult your agency's Information Security team for assistance. If you have limited resources, the NC DIT Enterprise Security and Risk Management Office may also be consulted.		
	Sensitivity	Rating	Weighted Score
	Information not specifically made sensitive by State or Federal Law	1	5



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	Some of the information made confidential by State or Federal law	2	10												
	Half of the information made confidential by State or Federal law	3	15												
	All information made confidential by State or Federal law	4	20												
	Information made confidential by State or Federal law that has the potential to cause great harm to individuals or institutions if breached or disclosed	5	25												
Security Data Classification	The category given to State data based on its level of sensitivity and potential impact in the event of unauthorized disclosure, modification, or loss. • Public – Available and intended for public access. • Internal – Typically used within the agency and not for public sharing. Most documents are classified as Internal within the organization, and most employees would have access. • Confidential – Often limited to a small audience on a need-to know basis. • Restricted – Represents the highest level of sensitivity and presents the highest risk if disclosed. Access to this information is restricted to a limited audience. For details, go to it.nc.gov and search on “Statewide Data Classification and Handling Policy.”														
Total Assessment Rating	This is the calculated numeric score associated with the selections made for an assessment; it is the sum of each weighted score above. The score is Red-Yellow-Green banded across three ranges for a general view of the risk posture of the project. <table><tr><th>Rating</th><th colspan="2">Rating Score Range</th></tr><tr><td>Low</td><td>85</td><td>165</td></tr><tr><td>Medium</td><td>166</td><td>330</td></tr><tr><td>High</td><td>331</td><td>500</td></tr></table> This is a calculated field and is locked from edit.			Rating	Rating Score Range		Low	85	165	Medium	166	330	High	331	500
Rating	Rating Score Range														
Low	85	165													
Medium	166	330													
High	331	500													
Project Assessment Type	This is the Low, Medium, or High rating type based on the Total Assessment Rating. This field is locked from edit.														

4.0 CONTACT EPMO

- EPMO@nc.gov
- [Feedback](#)
- [NCDIT EPMO Project Governance & Oversight](#)