



NCDIT Enterprise Project Management Office Phoenix Project Management System

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

1.0 SCOPE

This document assists with entering field-level information into the Change Request (CR) screen in the EPMO Phoenix Project Management System. The purpose of entering this information is for the Project Manager to provide EPMO with enough information to determine the nature of change necessary for an active project to be adjusted, based on established parameters and tolerances, and to keep the State informed of these adjustments.

2.0 COMMON

- 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 Change Request screen. Other fields may contain information already populated from elsewhere within Phoenix and inherited here.
- Open your project at [NCDIT EPMO Project Governance & Oversight](#).
- Icons in Use:

*	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 CHANGE REQUESTS

A CR is a formal proposal to alter the prior approved state of a project as it has been made aware to the State. It is submitted when a modification is needed to a project that exceeds established thresholds of scope, schedule, and budget. The CR serves as the official mechanism for informing State reviewers and approvers of needed change, and helps ensure that modifications are controlled, evaluated, and aligned with project goals. Each CR is maintained within the system to track variance from the original Business Case approval through to Closeout.

Operations and Maintenance (O&M) estimates are to be provided for one year, post implementation. If an awarded contract covers additional annual periods, only the first year’s amount is required.

3.1 General

Change Request Number	The system generated identifier given a Change Request for unique identification and tracking. This field is not editable.
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Driver	A categoric list of items influencing or pushing the project towards change. Multiple items may be at work, and several may be selected from the list. • New Requirement – An obligation to deliver a new item not previously understood as part of the original scope of delivery. • Schedule Slippage - A project's timeline has fallen behind the planned schedule and tasks or milestones are not completed by the initially agreed upon date causing the overall project to run late. • Legislative Mandate - A binding requirement issued by the NC General Assembly which enacts specific rules, actions, or standards the agency must follow. • Federal Requirements – Either an unknown or new obligation to deliver an item not previously understood from the original scope of delivery, and made mandatory by federal authority. • Vendor Performance - Situations where a contacted entity consistently fails to meet expectation, requirement, or obligation outlined in a contract, service agreement, or project plan, and is reflective of a pattern of behavior that results in negatively impacted project timelines, quality, cost, or overall outcomes. • Budget Constraints - A limit has been reached with respect to financial boundaries allowed for the project, and the amount of funding available becomes insufficient for full delivery of expected value and outcomes. • Items Need to be Purchased – Acquisitions are necessary beyond what was originally understood, generally introducing additional cost and time to the project. • Software Defect Resolution – Corrective action in time or cost applied to the project due to identified deficiencies that compromise delivery of functional utility or required value. • Other – A catch-all when the influencing action does not fit within one of the previous selections. A detailed description will be required.
Description	A concise explanation of why the CR is needed, given the Driver selections made, to allow reviewers and approvers insight into the cause and nature of change required. If an Other Driver is selected, it must be included here. This field is editable and limited to 400 characters.
Impact	The generally recognized triple-constraint of project management that demonstrates a change affecting the relationship between the main pillars of stability. • Scope – Selected if any material modification is made to the sum of the product, service, or expected results of a project. • Schedule – Selected when a project requires a timeline extension of ≥ 6-months to a phase Approved Date. • Budget – Selected when a project requires a funding increase of $\geq 5\%$ of the approved Project Budget. This field is editable and cannot be left blank.
CR Status	The standing of the CR within the approval workflow. • Submitted – A proposed change that has been entered and introduced to the change control process to request an adjustment to scope, schedule,



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	or cost. It represents the point at which a change has been officially entered into the system for review, evaluation, and approval. • In-Process – A submitted request that is not yet approved or cancelled, but is actively being reviewed, analyzed, and assessed. • Approved – A submitted request that has cleared any review, analysis, or assessment hurdles and has been accepted by State reviewers and approvers as a required modification to scope, schedule, or budget parameters of the project. • Cancelled - A submitted request that has been rejected during review, analysis, or assessment and has not been accepted by State reviewers and approvers. The modifications to scope, schedule, or budget parameters of the project will need to be reconsidered at the project level, by the agency and PM, and qualified for resubmission or withdrawn. If this occurs, discuss with your PMA what action may be needed prior to resubmission. This field is not editable and is populated from the workflow managing the CR routing.
Agency	This field is not editable and is populated with the selected Agency on the Project Initiation screen.
Project Manager	This field is not editable and is populated with the selected Project Manager on the Project Initiation screen.
Workflow Stage	This field is not editable and is populated with the Workflow Stage on the Project Initiation screen. Your PMA maintains this based on the state of your project.
Impact if Not Approved	A concise explanation of what will happen if the CR is not approved. This generally includes descriptions of limited perceived value, inability to deliver functionality, failure to meet legislation, etc. This field is editable and limited to 400 characters.

3.2 Schedule Impact

[Workflow Stage] Approved Start Date	The phase approved dates are inherited from the Project Dates screen as submitted either in the Business Case or a prior CR. These fields are not editable.
[Workflow Stage] Approved End Date	
[Workflow Stage] New Forecast Start Date	Threshold: ≥ 6-months to any Approved phase date. The proposed updated estimate of phase-based begin and finish dates for the project. At least one phase shall be ≥ 6-months past its approved date for a CR to be submitted for a schedule change. Project Managers have liberty with schedule change at < 6-months. However, change is cumulative through the project's lifecycle, and once ≥ 6-months is reached, a CR is required. Once the CR is approved, these dates become the new Approved phase end dates.
[Workflow Stage] New Forecast End Date	
Calendar Days Count	A calculated field representing the difference in calendar days from the prior Approved End Date to the New Forecast End Date This field is not editable.



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3.3 Project Cost Impact

Approved Budget [Cost Category]	These fields are not editable and are populated from the Budget/Actuals screen amounts.
CR Amount [Cost Category]	Threshold: $\geq 5\%$ to the Total Project Budget (less Agency Personnel and O&M). The additional categoric amount required for implementation beyond either the approved Business Case or the prior CR. This amount should be substantiated in the project's budget and be easily communicated as line-itemed additional cost. If additional external personnel are needed, each role should be calculated based on their increased contribution. If additional acquisitions are necessary, they should be calculated based on their DIT, Hardware and Infrastructure, Software and SaaS, or Other type. A project's budget should always be maintained to demonstrate an original approved estimate, some representation of current and future spend, and any variance that must be accounted for and approved, due to an increase that may exceed previously authorized management reserves. If there is no change to a cost category from either the approved Business Case or the prior CR, enter a zero. These fields are editable and limited to 999,999,999. The Total CR Amount field is locked and sums all categories.
Revised Budget [Cost Category]	Revised Budget = Approved Budget + CR Amount. Once a CR is approved, this becomes the new Approved Budget amount. These are calculated fields and are not editable.

3.4 O&M Cost Impact

Operations and Maintenance cost estimates are required. It is possible for a completed project to have no O&M costs; however, this should be clearly noted and described in both the Financial Assessment Comments in the NCFS screen and as a Project Assumption in the Executive Summary screen.

Approved O&M [Cost Category]	These fields are not editable and are populated from the Budget/Actuals screen amounts.
CR Amount O&M [Cost Category]	Threshold: $\geq 5\%$ to the Total Project Budget (less Agency Personnel and O&M). The additional categoric amount required for O&M beyond either the approved Business Case or the prior CR. This amount should be substantiated in the project's budget and be easily communicated as line-itemed additional cost. If additional external personnel are needed, each role should be calculated based on their increased contribution. If additional acquisitions are necessary, they should be calculated based on their DIT, Hardware and Infrastructure, Software and SaaS, or Other type. A project's budget should always be maintained to demonstrate an original approved estimate, some representation of current and future spend, and any variance that must be accounted for, and approved, due to an increase that may exceed previously authorized management reserves. If there is no change to an O&M category from either the approved Business Case or the prior CR, enter a zero.



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These fields are editable and limited to 999,999,999.

The Total CR Amount field is locked and sums all categories.

Revised O&M [Cost Category]

Revised O&M Budget = Approved O&M Budget + CR O&M Amount.

Once a CR is approved, this becomes the new Approved O&M Amount.

These are calculated fields and are not editable.

3.5 Total Cost of Ownership

Approved

Approved = Total Approved Budget + Total Approved O&M Budget

CR Amount

CR Amount = Total CR Amount + Total O&M CR Amount

Revised

Revised = Total Revised Budget + Total Revised O&M Budget

3.6 Scope Change

High Level Overview & Solution
Description

Threshold: Any material change to the High Level Overview that shifts the scope from the original.

If the CR includes a Scope change, a revised summary that focuses on the new ideas, goals, or structure of the project is to be supplied without going into detailed explanations, technical specifics, or step-by-step processes. The overview should highlight the new essential points so that someone can quickly understand the general concept or direction of the project. Use the (latest) High Level Overview & Solution Description as the example to model the changed version to.

Once the CR is approved, this will become the new High Level Overview on the Executive Summary screen and will be locked from edit. It may only be modified with a subsequent CR that includes mention of Scope change.

This field is editable and limited to 4000 characters.

4.0 CONTACT EPMO

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