



NCDIT Enterprise Project Management Office Phoenix Project Management System

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

1.0 SCOPE

This document assists with entering field-level information into the Weekly Status screen in the EPMO Phoenix Project Management System. The purpose of entering this information is for the Project Manager to provide the State with enough information to relay operational and financial accountability to both the sponsoring agency and the State.

This status is required on a weekly basis once the project's Business Case has been approved and will continue until the project is complete.

2.0 COMMON

- The Project Manager (PM) and Project Management Advisor (PMA) are responsible for all data entry and ensuring the project's status is completely represented in Phoenix.
- 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 Weekly Status 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 PROJECT WEEKLY STATUS

A status report is typically due each week; however, your PMA may advise differently based on project complexity and context. A status, once initially saved, will be open for PM or PMA edits for up to seven (7) calendar days at which point it will be locked from further edits; the seven-day cycle commences with the first save initiated by either the PM or PMA. This will allow additional time to either make qualifications or corrections to submitted information. The Weekly Status is separated into three components: PM updates, PMA updates, and system produced project cost data to date.

3.1 General

The Project Manager shall supply the following.

PM Assessment Date	A project status may be initiated by either PM or PMA; this is the date the project status is initially saved. Both the PM and PMA have up to seven calendar days to edit the status, at which time it will be locked. The date will remain the same as the original save date. This field is not editable and is system populated when the status is saved.
--------------------	---



NCDIT Enterprise Project Management Office Phoenix Project Management System

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

3.2 PM Assessment

PM Assess

This is a generalized and somewhat subjective self-assessed RYG health indicator of the overall state of the project since the last Weekly Status. Assessments change over time and this indicator is meant to change with the project's context.

PMs are expected to be honest about this assessment and provide additional rationale in the Root Cause section. All projects are known to have risk, roadblock, and success cycles, but a successive string of non-changing 'Green' assessments with schedule or cost fluctuations may indicate the project is being misrepresented.

Use the following rubric as a guide to determine a Red, Yellow, or Green selection. Always select the higher impact color if any individual area assessment crosses a threshold. For example, most areas are Green but cost is significantly over budget; therefore, the overall selection to be made is Red.

Area	Red	Yellow	Green
Scope	Major unapproved scope changes; unclear requirements; deliverables not defined.	Some scope ambiguity; small changes emerging; partially defined deliverables.	Fully defined and approved scope; controlled change process; deliverables clearly aligned to objectives.
Schedule	Significant delays; missed milestones; no recovery plan; timeline unstable.	Minor delays with recovery options; some milestone shifts; schedule requires monitoring.	On track; milestones met; risks managed proactively; reliable and updated schedule.
Cost	Significantly over budget; poor tracking; no rationale or corrective plans.	Slight variances; occasional tracking gaps; cost risks identified but not resolved.	On budget; clear forecasting; strong financial controls; early communication of adjustments.

Gray should only be selected while in the Business Concept phase and the project has not been fully developed for a Business Case decision point evaluation.

Accomplishments this Period

This period is inclusive of the time of performance from the most previously saved Weekly Status up to the point of drafting the current status. This should not be an exhaustive list of accomplishments from the beginning of the project.

Accomplishments are ideally linked to milestone events and deliverables the project was expected to have completed, or any incremental value realized by stakeholders.

Consider creating a concise list of achievements vs. long narratives.

This field is editable and is limited to 4000 characters.

Plans for Next Period

This period is the time of performance for the forthcoming status, yet to be completed. It is a type of forecast that also should be linked to milestone events and deliverables the project is expected to complete, or of any future incremental value to be realized by stakeholders.

Consider creating a concise list of achievements vs. long narratives.

This field is editable and is limited to 4000 characters.



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

3.3 Root Cause Analysis & CAP

Root Cause Category The cause category is a generalized array of effects causing a disruption or undue influence on project activity. The outcome of these effects is generally why a Yellow or Red assessment is made.

Multiple selections may be made, with a brief rationale to be provided in the Root Cause Explanation field.

Category	Example
Planning	• The project lacks a realistic, detailed plan or roadmap. • Key activities, dependencies, or milestones are undefined or unclear. • Misalignment from not including all required stakeholders. • The project is reacting rather than being proactively managed.
Resource	• The project lacks the required staffing or skill sets to execute work. • Key team members are over-allocated, unavailable, or reassigned. • Vendor or internal resources are delayed in onboarding. • Capacity constraints prevent critical tasks from progressing.
Cost	• Actual spend exceeds the approved budget. • Forecasts indicate future overruns without corrective action. • Financial tracking or reporting is incomplete or inaccurate. • Changes in scope or delays are driving unexpected cost increases.
Requirements	• Requirements are unclear, unapproved, or still evolving. • Stakeholders disagree on what is needed or expected. • Requirements documentation is incomplete or insufficiently detailed. • Rework is occurring due to earlier requirements being misunderstood.
Scope	• Significant changes are emerging outside the approved scope. • Deliverables or features are expanding without evaluation or approval. • Misalignment exists among project scope and organizational priorities. • Scope is not properly controlled, leading to schedule or cost impacts.
Process	• Governance steps are unclear, delayed, or inconsistently applied. • Project processes are not being followed causing inefficiency. • Slow approvals or unclear workflows are creating bottlenecks. • Quality checks or stage gates are missed or poorly executed.
Vendor	• Vendor performance is below expectations. • Contract issues, turnover, or slow response times impact progress. • Vendor deliverables are incomplete or repeatedly require rework. • Communication gaps are causing delays.
Stakeholder	• Stakeholders are not engaged or responsive and decisions are needed. • Conflict or misalignment among stakeholders is slowing progress. • Required approvals are delayed or withheld. • Stakeholders are providing inconsistent direction or late changes.

Root Cause Explanation For each Root Cause Category selected, offer a brief explanation why it was chosen.



NCDIT Enterprise Project Management Office Phoenix Project Management System

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

This field is editable and is limited to 400 characters.

Corrective Action Plan A structured set of actions designed to identify, address, and resolve the root cause(s) behind a problem, risk, negative performance, or non-compliant finding. It ensures the issue is not only fixed in the short term but ideally prevents recurrence in the future.

This field is editable and is limited to 4000 characters.

The Project Management Advisor shall review and provide the following. Project Managers are not able to edit PMA fields.

PMA Assessment Date A project status may be initiated by either PM or PMA; this is the date the project status is initially saved. Both the PM and PMA have up to seven calendar days to edit the status, at which time it will be locked. The date will remain the same as the original save date.
This field is not editable and is system populated when the status is saved.

3.4 PMA Assessment

PMA Assess This is a generalized and somewhat subjective RYG health indicator of the overall PMA-observed state of the project since the last Weekly Status. Assessments change over time and this indicator is meant to change with the project's context.

PMA Assessment Your PMA will provide an honest assessment regarding the observed state of the project and provide feedback on the (PM) self-assessed indicator, to include if the Root Cause selections, explanations, and corrective action are appropriate, or need further investigation. This is intended to restore the project to a 'Green' state.

SCIO Attention If the state of the project requires escalation requiring SCIO attention, this field will be set to 'Yes' by the PMA.

- Yes – the project requires SCIO attention.
- No – the project does not require SCIO attention.

Generally, any project with SCIO attention set to 'Yes' indicates the most severe form of governance and oversight is needed to correct the project back to a satisfactory state. This does not mean the SCIO will intervene and provide direction; rather, the project status is elevated to a state-wide EPMO IT project portfolio briefing to the SCIO to ensure appropriate focus is given when situations do not improve.

3.5 Project Cost to Date

The following project cost data are automatically captured and supplied to the Weekly Status. This information may not be edited or altered. Data is updated each Saturday morning.

YTD Agency Personnel The total fiscal year-to-date agency personnel costs associated with internal staff who spend time working on the project. This should be a fully burdened amount to include salaries, benefits, and any applicable overhead or labor allocation rates.

YTD External Personnel The total fiscal year-to-date non-agency personnel costs brought in to deliver the project, such as contractors, consultants, vendors, or professional services firms. These expenses are usually billed hourly, daily, or as fixed fee engagements.

YTD DIT Services The total fiscal year-to-date expenses for DIT services. This includes all billed elements, both service and staffing. Billable categories and rates are provided at: [Current Service Rates | NCDIT](#).



NCDIT Enterprise Project Management Office
Phoenix Project Management System

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

YTD Hardware / Infrastructure	The total fiscal year-to-date costs for all procured physical technology and supporting infrastructure needed to implement the project. This includes servers, storage, networking equipment, user devices, cabling, data center hosting, and related installation or setup costs.
YTD Software / SaaS	The total fiscal year-to-date costs for software required to implement the project, including one-time licenses, subscription-based SaaS products, cloud platform fees associated with software elements of the project.
YTD Other	The total year-to-date costs for project expenses that do not fit into the defined budget groups above. This may include travel, training, supplies, or miscellaneous purchases necessary for project delivery
YTD Total	The year-to-date sum for the above categories.

LTD Agency Personnel	Same as for YTD fields but reflect a life-to-date amount from project inception.
LTD External Personnel	
LTD DIT Services	
LTD Hardware / Infrastructure	
LTD Software / SaaS	
LTD Other	
LTD Total	

4.0 CONTACT EPMO

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