

Appendix O: Project Off Hold Checklist

The following checklist is to be used by *Project Managers* when requesting a project to be taken off hold. Refer to the appropriate sections of the *Project Management (PM) Handbook* for *Project Planning* details. The checklist should be completed prior to submitting the project for *Assurance & Compliance* review. The checklist can be created from the *Project Off Hold Checklist* template and saving it as a separate document.

Done (✓)	Step	Project Planning Task	Section Page #
	1	Review <i>PM</i> handbook, <i>Section 2: Planning</i> .	2.1–2.31
	2	Review/revise <i>Scope & Approach / ROI Analysis</i> .	2.3–2.4
	3	Negotiate any new resources with <i>Resource Manager</i> . Assign resources (staff), add participants, and determine resource availability.	2.21–2.24
	4	From the Collaboration tab, Documents link, attach revised <i>Scope & Approach</i> and <i>ROI Analysis</i> to <i>PM</i> folder.	2.14–2.15
	5	From <i>Clarity Open Workbench</i> , refine the <i>Work Breakdown Structure (WBS)</i> . Modify tasks and milestones.	2.15–2.20
	6	Verify dependencies.	2.19–2.20
	7	Review resource assignments & ETC.	2.25–26
	8	Review/revise <i>Contingency</i> , <i>Scope</i> , and <i>PM</i> .	2.26–2.29
	9	<i>Autoschedule</i> the project using the anticipated future start date.	5.2–5.5
	10	Troubleshoot, refine the schedule and review resource load.	5.6
	11	Run the <i>Resource Utilization</i> report for the project. Resolve any resource over commitment.	10.8–10.9
	12	Perform a final review of the project with the <i>Clarity Open Workbench Assurance & Compliance Views</i> .	5.7
	13	New Development/Enhancement projects, ensure Revised Total Estimate does not exceed <i>Master Plan</i> Allocation.	
	14	Create a <i>Project Change Request</i> in <i>Clarity</i> , obtain signature from <i>Project Sponsor</i> .	4.11–4.12
	14	Review <i>Scope & Approach</i> , <i>ROI</i> , and task plan with <i>Supervisor</i> and the <i>Division Manager</i> .	5.7
	15	Submit an email to <i>Project Management Office (PMO)</i> for <i>Assurance & Compliance</i> review and approval. Note: The final project must be submitted to <i>PMO</i> by 5:00 pm on Wednesday in order to be on the agenda for the following Wednesday's <i>Project Approval Meeting</i> .	5.7–8
	16	Obtain project approval (<i>Steering Committee</i>).	5.7–8