


Change Request

***Please support our commitment to sustainability and do not print
this document unless it is absolutely necessary to do so.***

Purpose and Use	
Purpose	The purpose of this form is to document the request, evaluation, disposition, and implementation of project change requests.
General Instructions	<ul style="list-style-type: none"> This form is designed to be completed in order, from the first step (submission) to the last step (implementation). This form has been designed using Word Forms, so it must be protected (with or without a password) to function as expected. Users are free to customize the form: add fields, delete fields, translate the content into another language, or modify the terminology to match project usage.
Data Entry	Data entry fields are shaded gray (like this cell). Use your TAB key to move to the next field. If you click outside of an entry field, Word will move the cursor to the next available field.
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1. Submission <i>(*starred fields are required)</i>			
1.1 Overview			
*Project Name		User Reference #	
*Submitted by		*Date Submitted	
*Phone		*Email	
*Priority	<input type="checkbox"/> Necessary to achieve expected benefits	<input type="checkbox"/> Significant value-add	
	<input type="checkbox"/> Nice-to-have	<input type="checkbox"/> Not sure	
1.2 Details			
*Description of Change			
*Reason for Change			
*Impact of Rejection			
*Alternatives Considered			
Additional Comments			
Date Constraints <i>(describe)</i>			
Supporting Documents			

2. Request Screening				
Change Request #		# Assigned by		Date Assigned
2.1 Level 1				
Recommendation	<input type="checkbox"/> Continue	<input type="checkbox"/> Reject	<input type="checkbox"/> Defer	
Decision by				Date
Reason				
2.2 Level 2				
Evaluator				Date Assigned

3. Expected Impacts		
Add or delete detail rows as needed. If there are no impacts for a given topic, place an X in the gray box.		
3.1 Benefits and Dis-Benefits		<i>Check if no impacts identified</i>
Describe the benefit or dis-benefit. Place an <i>X</i> under <i>New?</i> if this item was not included in the business case. Estimate the value as a range. Estimate incremental values for previously identified items. Show the value of dis-benefits as a negative number.		
Description	New?	Estimated Value
3.2 Success Criteria		<i>Check if no impacts identified</i>
Criteria	Description of Impact	
3.3 Sustainability		<i>Check if no impacts identified</i>
P5 Element Number and Name	Description of Impact	
3.4 Product-Scope and Quality		<i>Check if no impacts identified</i>
Description of Feature or Function	Description of Impact	
3.5 Cost		<i>Check if no impacts identified</i>
Describe a deliverable or activity. Place an <i>X</i> under <i>New?</i> if this item is not currently in the project plan. Estimate the cost as a range. Estimate incremental costs for previously identified items. Show the value of any cost reductions as a negative number.		
Description	New?	Estimated Cost

3. Expected Impacts				
3.5 Schedule		Check if no impacts identified		
Estimate the schedule impact as a range and enter that range in the appropriate column.				
Description of Deliverable or Activity		Delay?	Acceleration?	
3.6 Risks		Check if no risks identified		
Cause	Effect	Probability	Impact	R-A-G
3.7 Already Completed Work		Check if no impacts identified		
Description of Deliverable or Activity		Description of Impact		
3.8 Contracted Work		Check if no impacts identified		
Contractor	Description of Impact			

4. Alternatives Considered	
Description	Reason for Rejection
Reject request	
Defer request	

5. Disposition (*starred fields are required)			
Decision	<input type="checkbox"/> Approved	<input type="checkbox"/> Rejected	<input type="checkbox"/> Deferred
Decision by			Date
Reason			

6. Implementation			
Assigned to		Date Assigned	
Comments			

9999 Version Control			
Version	Date Approved	Approved by	Summary of Changes
1.0	October 2014	W.R. Duncan	<ul style="list-style-type: none"> Initial release
2.0	December 2019	W.R. Duncan	<ul style="list-style-type: none"> Added sustainability impacts Added dis-benefits Redesigned to conform to latest PM Partners forms design guidance