

# IT Project Intake Process with Decision Points

Action Required

**Investigating**

- Information submitted via the IT Project Request Form is reviewed.
- Requestor contacted to learn more and to confirm sponsor, IT priority, and requested timeline.
- Sponsor contacted to confirm they are aware and supportive of the request.

**Initial Review/Approval**

- **First decision point for the director(s)** (**Yes** = Agree to explore next steps. **No** = More information needed, request is not supported or put on hold).
- Information in the project card is confirmed based on the requestor and is tentative.
- Director(s) will be notified through a @callout in the comments of the project in ClickUp. Active requests for review can be found on the [Requests Dashboard](#).
- Director(s) should respond whether they support moving forward with more exploration, share their feedback, and identify potential staff/team involved.

**Gathering Requirements**

- Vendor contacted to request terms, SPR, Information Security, IT requirements, and vendor questionnaire (if applicable).
- Meeting scheduled with vendor and identified IT staff/team to learn more and gather IT requirement.
- Project Complexity determined (rubric used)

**Reviewing Requirements**

- Terms and Information Security requirements reviewed and negotiated and SPR signed (if applicable).
- Meeting scheduled with vendor and identified IT staff/team to review/negotiate requirements, scope, timeline, etc.
- Project complexity rubric is applied (Low, Moderate, or High complexity)

Action Required

**Final Review/Approval**

- **Second decision point for the director(s)**
- **Yes** – Accept as requested = Commit to project. Director(s) appoints project lead/manager.
- **Yes** – With changes/recommendations = Requestor agrees to changes/recommendations, then commit to project. Director(s) appoints project lead/manager.
- **No** – More information/changes needed to accept = Goes back to requestor for follow-up discussion, and then comes back to director for decision.
- **No** – Request is not supported = Request is cancelled, and the reasons are communicated to the requestor.

**Committed**

- Assigned Project Lead/Manager completes project plan (team, scope, communication needs, change management needs, deliverables, etc.).
- Project lead/manager becomes responsible for updating the task card when things change/update start/end dates, Project Phase
- Task Card moves from the Request list to the Committed Work list.

➔ Committed Work List