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| --- | --- | --- | --- | --- | --- |
| Project ID: |  | Project Name: |  | Project Manager: |  |
| Review Date: |  | PMO Reviewer: |  | Gate 1 Approved: |  |

**Purpose:** The purpose of this checklist is to provide a list of key deliverables and activities that need to be considered and/or completed before proceeding to the planning phase.

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| --- | --- | --- | --- |
| **Category** | **Question** | **Response Y / N** | **PMO Review Notes/Comments/Recommendations****Provide where Response is “N”** |
| Intake | Did this project come through Intake, was it approved? |  |  |
| Have the appropriate milestones/schedule been selected for the project? |  |  |
| Sponsorship | Have the sponsor and project director been identified? |  |  |
| Has the funding source been confirmed? |  |  |
| Project Documentation | Has the project kick-off meeting been conducted?Ensure security and privacy subject matter experts are included in the kick-off meeting.  |  |  |
| Have the risks identified by the project team been documented in the risk list? |  |  |
| Have the high-level Business and Functional Requirements been documented? |  |  |
| Is there supporting project documentation stored in the project repository (I.e.: minutes, status reports, presentations)? |  |  |
| Lessons Learned (LL) | Ensure any lessons learned for this phase have been captured in the project LL log in SharePoint if required.  |  |  |
| Governance | Has a Project Steering Committee been identified that will approve/reject changes to scope, schedule and cost? |  |  |
| Resources | Have the required resources for the project been identified? |  |  |
| Privacy and Security | Has the security team been contacted to ensure there are no privacy or security issues to be considered by the project? Has the evidence been stored in the project site? |  |  |
| Accessibility | Have AODA requirements been considered, or identified as applicable? Has the evidence of AODA consideration been stored in the project site? |  |  |
| PCI Compliance | Have any PCI requirements been considered, or identified as applicable? Has the evidence of PCI consideration been stored in the project site? |  |  |
| Non-compliances | Before proceeding to the next PM phase, the following issues/concerns need to be addressed: |  |  |