Contents

- What is a change request?
- Process for making a change request
- Change request evaluation process
- Tips for successful change request preparation
- FAQ
Several changes might occur after a project is labelled and during the whole project lifetime. Changes in a project needs to be reported via a Change Request (CR)

A CR is a formal way of proposing and communicating changes in a labelled project, such as:

• New partners / withdrawing partners
• Revised planned effort figures as a result of national funding decision
• Changes in the work package (WP) content
• New project start / end dates

A Change Request is the only official way to communicate any changes in the project to the ITEA Office and a guarantee that they are processed.
Change Request
An online process

- The CR form is entered fully online:
  - Data (e.g. effort, partners, WP leaders,…) can be changed via the Community website by the Project leader (PL) and the WP leaders. Partners can only update their own data.
  - As soon as all checks are successful, a button “Start Change Request” will appear. This will lead you to a new page where additional information needs to be filled in (e.g. reason, impact, solution).
  - If the FPP is adapted, you need to upload the new FPP Annex (not the merged file) under Management tab (Management ->Project management).
  - Once all checks in the CR checklist are successful you can submit the CR.

- The CR process can be initiated and submitted only by a (proxy) PL
- Make sure to adapt the FPP in line with changes indicated on the CR form
- The evaluation of the submitted CR will only be done by an ITEA Programme coordinator or ITEA Steering Group (STG) reviewers depending on the scale of changes.
- Public Authorities are informed about the receipt and approval of a CR and have access to the CR
Change Request
Steps to follow

CR submission consists of 3 parallel processes

- Update online project data
  - Update project key data (PL*)
  - Update online partner data (Tech contact**)
  - Edit planned effort (PL + Tech contact)
  - Update the project action list (PL)

- Start online Change Request (PL)
  - Provide input for the online CR field
  - Use preview to check the CR document

- Update FPP Annex (PL)
  - Upload the updated FPP under management tab

CR Submitted

PL*: Project leader
Tech contact**: Technical contact of a partner organisation
**Change Request**

**Update online project data**

Online project data (on the ITEA portal) which will be merged to the FPP should be updated to reflect the changes in the project

- PL should update the project key data (start & end date) and WP information.
- Each technical contact is responsible to update their organisation information (Role in the project, Effort etc.)
- PL should be aware of the rationale behind effort changes of partners
- PL must update the Project action list under management tab if there were any mandatory actions due by this change request.
Change Request
Start online Change Request

- Online CR can be initiated by Clicking “Start change request”-button on the right bottom of the project page
- This “Start change request”-button is hidden if there are any red flags under the Project checklist.

Eg:
Once you start a CR, you will see the online CR page with a full list of fields you need to fill in to submit the CR.

- You can either scroll down and provide all input here (1)
- Or, use the Wizard mode to provide the input step by step (2)
- This CR page is intended to collect information to generate a CR document from the ITEA portal
Online CR page consists of four sections (described in more detail in the following slides):

1) CR information,
2) Reasons, impact and solution of changes,
3) General information, and
4) Feedback to the previous STG evaluation
(1) CR information:
Check if the project start & end dates have been updated correctly. Indicate the total number of milestones and deliverables in the project after this CR

<table>
<thead>
<tr>
<th></th>
<th>Before Change Request</th>
<th>After Change Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start date</td>
<td>01-02-2016</td>
<td>01-02-2016</td>
</tr>
<tr>
<td>End date</td>
<td>31-12-2020</td>
<td>31-12-2020</td>
</tr>
<tr>
<td>Effort [F]</td>
<td>17.00</td>
<td>19.00</td>
</tr>
<tr>
<td>Costs [€]</td>
<td>900.00</td>
<td>900.00</td>
</tr>
<tr>
<td>Number of partners</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Amount of milestones</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Amount of deliverables</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Delay (+) or advance (-) in months on the end date</td>
<td>27</td>
<td>0</td>
</tr>
</tbody>
</table>
(2) Reasons, impact and solution of changes:

- 2.1 National funding related changes: if project partner’s costs and effort have been updated to reflect the national funding decision, click the country and provide the relevant information.

- Countries with the changes in costs and effort are red flagged, which is also visible under the Checklist on the right side of the CR page. To submit the CR, input for the red flagged countries must be provided.

- For project changes that are irrelevant with national funding, create a non funding related change under 2.2 for each item.
(3) General information: provide a summary of the changes in this CR and the general impact of them to the project.

(4) Feedback to the previous STG evaluation: if there is any feedback to the previous STG evaluation which is too long to be included to the “Project action list”-comment section, provide a longer textual feedback here.
In case the CR includes dramatic changes in the consortium (more than 40% reduction in total project effort), additional fields will appear on the CR page to ask the new ambition and innovation of the project.

3. Extra questions (required for major Change Request)

3.1. What is the new ambition for the project?

⚠️ Please provide this information. The information is required before submission of the Change Request

3.2. Where will be the new innovation?

⚠️ Please provide this information. The information is required before submission of the Change Request

3.3. What could be the new impact on the market?

⚠️ Please provide this information. The information is required before submission of the Change Request

3.4. Why does the consortium remain legitimate to be able to reach the new ambition?

⚠️ Please provide this information. The information is required before submission of the Change Request
If you use the Wizard mode, you can provide input to the CR page step by step with an extra guiding text.

Click the blue “Back to overview”-button if you wish you to go back to the CR page overview.
You can leave the CR page without submitting it as ITEA systems keeps all the input you provided. You can come back to the CR page later and keep editing it until submission.
Once all checklists in the CR are handled, you can submit the CR

Use Preview-function to check the auto generated CR document

Click “Submit Change Request” if you are ready to submit
After Clicking the submit button, you are going to be directed to the page where you can select the updated FPP.
If the changes in the project have an impact on the FPP, the FPP Annex must be updated and uploaded under the management tab of the project webpage. (In case you did not need to update the FPP Annex, you can upload the previous version again.)

Please note that you need to update unmerged FPP Annex. This new FPP annex will be merged with updated online project data by the ITEA Office after the CR submission.
Once the CR is submitted you will see the below message
Change Request
CR evaluation process

CR (+updated FPP) submitted by PL

CR processed by Office & PAs informed

Programme coordinator or STG reviewers evaluation

CR accepted

Office informs PL, PAs and ITEA bodies

CR rejection

CR updated by PL

CR-process takes max. 4 weeks
Change Request
Tips for the successful CR preparation

- Take into account the feedback from the STG reviewers from the previous evaluation(s)
- Make sure that the online information (online CR page, updated project information) and the updated FPP Annex are consistent
FAQ

- When is the right time to submit a CR?
  - Answer: right time to submit a CR is as changes have occurred in the project that require making a CR, but the project is not expecting more changes soon.

- A partner left the project, but it does not appear under the deactivated partners’ table
  - Answer: If some partner has worked for the project (i.e. it has costs and effort from the past years), it cannot be deactivated even if it has left the project

- Why can’t I update the costs?
  - Answer: only the ITEA Office can change costs of the past years, so in case it is necessary, pls contact ITEA Office
Thanks for your attention!