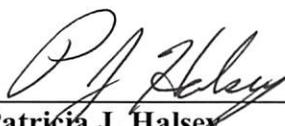


Department of Energy
Oak Ridge Office of Environmental Management
Procedure

INTEGRATED PLANNING, ACCOUNTABILITY AND BUDGETING
SYSTEM INFORMATION SYSTEM: MILESTONE MODULE

OREM-PC-IP-07
Revision 1

Prepared:  9/10/14
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EM Environmental Management

safety ✦ performance ✦ cleanup ✦ closure

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Revision Log

Revision	Description of the Revision	Issue Date
0	Initial Issue.	On File
1	Update to ensure procedure complies with OREM Quality Assurance Implementation Plan (OREM-OM-PL-04). Update to new procedure numbering system EM-1.10 to OREM-PC-IP-07.	12/31/14

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List of Acronyms

B	Site Narrative Milestone Category
BCP	Baseline Change Proposal
COB	Close of Business
DOE	Department of Energy
EA	Enforceable Agreement
EM	Environmental Management
FFA	Federal Facility Agreement
FPD	Federal Project Director
FY	Fiscal Year
HQ	Headquarters
IC	Integrating Contractor
IPABS	Integrated Planning, Accountability and Budgeting System – Information System
OREM	Oak Ridge Office of Environmental Management
PBMD	Planning and Baseline Management Division
PBS	Project Baseline Summary
PEA	Preliminary Enforceable Agreement
PFPD	Portfolio Federal Project Director
PK	Project Key Milestone Category
QA	Quality Assurance
QL	Quality Level
RC	Regulatory/Compliance Milestone Category
STP	Site Treatment Plan

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1.0 PURPOSE

The purpose of this procedure is to ensure that project Regulatory/Compliance (RC), Site Narrative (B), and Project Key (PK) milestones for the Oak Ridge Office of Environmental Management (OREM) Program are properly tracked and reported in the Integrated Planning, Accountability and Budgeting System – Information System (IPABS).

2.0 SCOPE

This procedure applies to all OREM Sub-Project Baseline Summary (PBS) projects that have RC, B or PK milestones.

3.0 REFERENCES AND DEFINITIONS

3.1 Use References

- Federal Facility Agreement (FFA) Appendix E and Appendix J.
http://www.ucor.com/ettp_ffa.html (under APPENDICES link)
- Site Treatment Plan (STP) Transuranic and Table 3.4 milestones
http://www.ucor.com/ettp_ffa.html (under STP milestones link)
- OREM-QA-IP-05, *Quality Records*.
- OREM-QA-IP-03-F-01, *QL-1 OREM Work Activity List*

3.2 Source References

None

3.3 Forms Prescribed

None

3.4 Definitions

None

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4.0 RESPONSIBILITIES

4.1 OREM Portfolio Federal Project Directors (PFPD)

- 4.1.1 The PFPD has overall responsibility to ensure that accurate milestone information is reported in IPABS for their projects.

4.2 Planning and Baseline Management Division (PBMD) IPABS Milestone Lead

- 4.2.1 The OREM PBMD IPABS Milestone Lead (Lead) is responsible for reviewing the monthly milestone data and variance narratives provided by the PBMD Project Analysts and approving or submitting the IPABS milestone updates to the Department of Energy (DOE) Headquarters (HQ).

4.3 PBMD Project Analysts

- 4.3.1 The PBMD Project Analysts are responsible for reviewing the monthly OREM contractor reported milestone data and variance narratives, getting approval of the responsible Project Manager and Federal Project Director (FPD), and then notifying the PBMD Lead of readiness for review, approval and submittal to HQ.
- 4.3.2 Responsible for identifying, modifying, and seeking FPD approval of up to five key sub-PBS site narrative (B) milestones for the budget formulation period (Fiscal Year {FY}+2 through FY+6) by September 30 annually for inclusion in IPABS.
- 4.3.3 Responsible for identifying and seeking FPD approval of PK sub-PBS lifecycle milestones.
- 4.3.4 Responsible for keeping the IPABS milestones [RC {Enforceable Agreement (EA) and Preliminary EAs (PEAs)}, B, and PK] updated including; approved baselines dates, contractor forecast dates, and actual dates.

4.4 Integrating Contractor (IC)

- 4.4.1 Responsible for updating project EA and PEA compliance milestone dates in IPABS once approved by the Regulatory Party(s).
- 4.4.2 Responsible for maintaining the milestone data spreadsheet and submitting it to the DOE contractors monthly for their update.
- 4.4.3 Responsible for providing contractors updated milestone spreadsheets to the appropriate PBMD Project Analyst(s) for their review and approval with the FPD(s) and Project Manager(s).
- 4.4.4 Responsible for updating IPABS with the contractor reported milestone data,

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variance narratives, and making any corrections identified by the PBMD Analysts.

- 4.4.5 Responsible for completing the IPABS Monthly Milestone Status Report and distributing to the PBMD Lead and Analysts.

4.5 Project Contractor

- 4.5.1 Responsible for establishing baseline milestone dates, tracking performance, and providing the IC with an updated monthly milestone data spreadsheet and variance explanations.

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5.0 PROCEDURES

5.1 Milestone Submittal and Maintenance Process

- 5.1.1 Milestone Spreadsheets to Contractors: Beginning the 12th business day of each reporting month, the IC will send the Environmental Management (EM) contractors the milestone data spreadsheet with all milestone data pulled from IPABS for their projects.
- 5.1.2 Contractor Milestone Updates
 - 5.1.2.1 The contractors shall update and return the milestone data spreadsheets to the IC by Close of Business (COB) on the 17th business day of the reporting month.
 - 5.1.2.2 The contractor will provide a copy of any approved Baseline Change Proposal (BCP) that will change an approved baseline date for project milestones.
 - 5.1.2.3 In the event that the due date falls on a holiday, the responsible contractor is required to submit the milestone data spreadsheet no later than COB on the last DOE business day prior to the holiday. The IC will contact the responsible contractor if the milestone data spreadsheet is not returned by the due date.
- 5.1.3 Data Validation and Input
 - 5.1.3.1 Upon receiving the milestone data spreadsheet from the responsible contractors, the IC will check for any change to the baseline dates for project milestones and update the forecast and actual dates as necessary. Changes to the EA baseline dates will not be entered into IPABS. Changes to baseline dates for project milestones not supported by a BCP will not be entered into IPABS. The IC will input the milestone data and variance narrative data into IPABS no later than noon on the last business day of the reporting month.
 - 5.1.3.2 The PBMD Lead will provide the IC approved EA/PEA milestone changes to be incorporated into IPABS.
- 5.1.4 Submittal to Analysts
 - 5.1.4.1 Following the validation and input of contractor milestone data spreadsheet into IPABS, the IC will notify and provide the PBMD Project Analysts with the milestone data spreadsheet, no later than COB the first business day of the month following the reporting month.

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5.1.5 Analysts Submittals

5.1.5.1 The analysts will review the milestone data spreadsheets for the project with the appropriate OREM Project Manager and FPD by COB on the Tuesday before the second Friday of the month following the reporting month and provide the IC with any changes to the milestone data.

5.1.6 Final Data Validation and Input

5.1.6.1 The IC will make any corrections needed to the reporting month milestone data into IPABS by COB on the Thursday before the second Friday of the following month. The IC will notify the PBMD Lead that the updates to milestone data have been entered into IPABS and are available for review and approval/submittal.

5.1.7 Milestone Reports and Approvals

5.1.7.1 The PBMD Lead will review and submit all reporting month milestone data changes made in IPABS for HQ approval by COB on the second Friday of the following month.

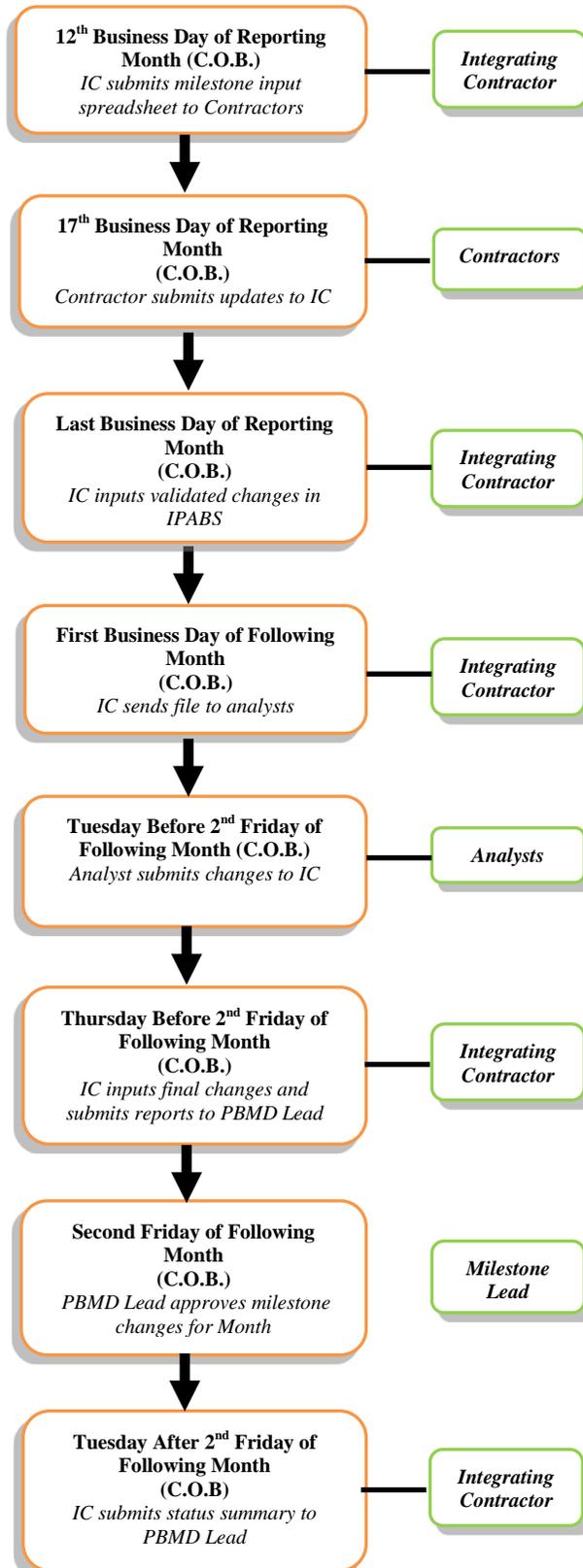
5.1.7.2 The IC will provide to the PBMD Lead and Project Analysts the Monthly Milestone Status Report by COB on the Tuesday following the second Friday.

5.2 Changing Milestone Data

5.2.1 Requirements/Process

5.2.1.1 The contractors and analysts will have the ability to update the Forecast Date, Actual Date, Explanation of Variance, and Notes columns of the monthly milestone data spreadsheets.

5.3 Process Map



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6.0 RECORDS

The following Records are generated during the performance of this procedure:

Record Description (section)	Record Type (QL-1, QL-2, N/A)*	Form Number (if applicable)	Record Owner
None			

- * Quality Assurance (QA) records for Quality Level-1 (QL-1) activities shall be processed and submitted per OREM-QA-IP-05, *Quality Records*. OREM-QA-IP-03-F-01, *QL-1 OREM Work Activity List*, contains a listing of OREM QL-1 Activities.

Non QA records and QL-2 Activities Records shall be processed as a Federal Record and submitted following the Office of Science Management System Description Records Management System procedures.

7.0 ATTACHMENTS

None