User Guide AM-06: Reporting Status of Funded Projects updated 12-01-16

Overview

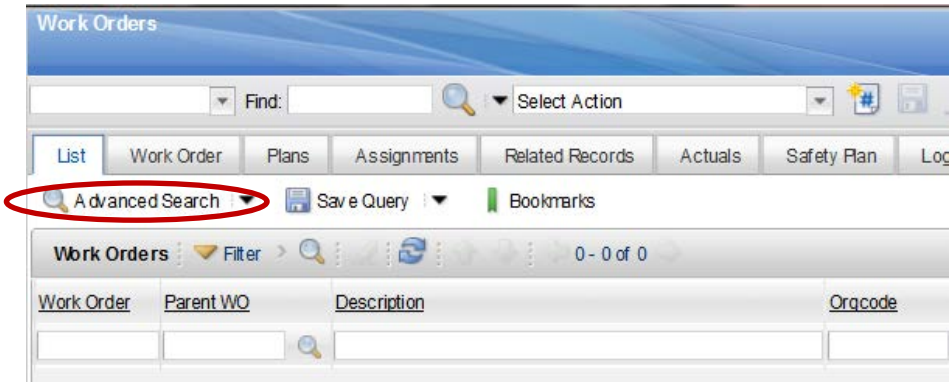
No later than November 15 each year, Regional Asset Management Coordinators (AMCs) are required to report the status of funded projects in the current year and previous five years of the Deferred Maintenance (DM) Five Year Plan, as well as the status any funded capital improvement projects during that same period. At the end of each calendar year, the Headquarters Facilities and Equipment Branch submits to the Department a report that shows the status in SAMMS of all regions' projects over the required reporting period. (See User Guide HQ-03 "Accomplishment Status Reporting for DM and Construction FYP Projects.")

There are nine (9) possible values for a work order's Project Status field; the following table lists each of the codes and its definition.

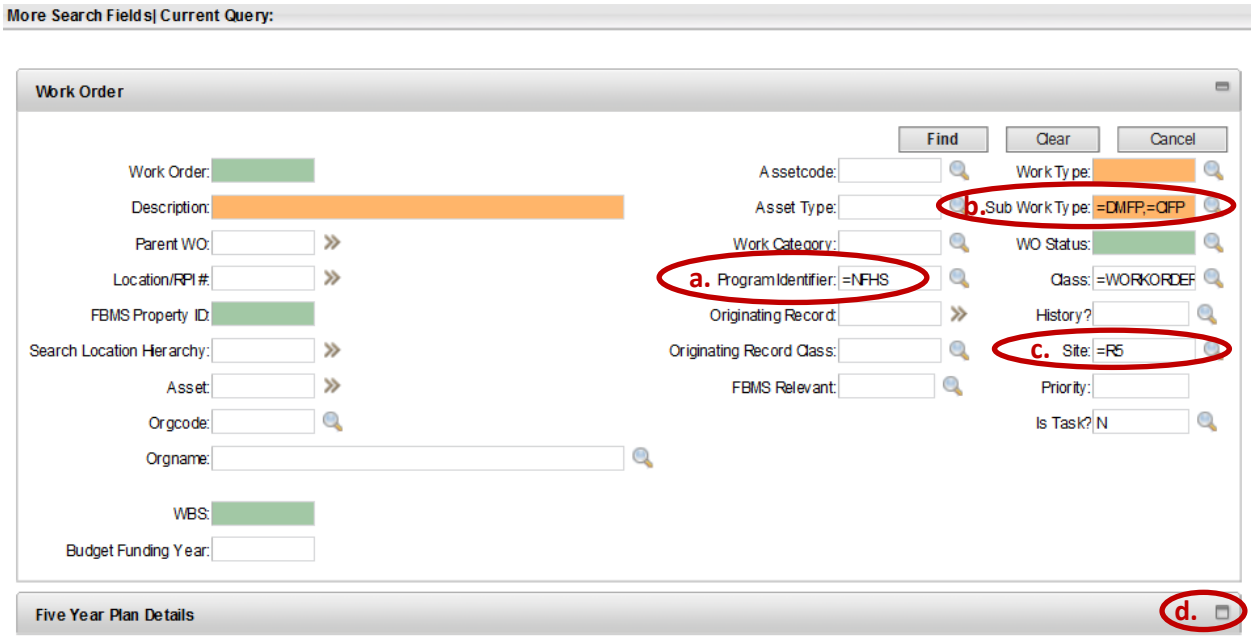
Project Status	
CODE	**DEFINITION**
CA	Construction contract awarded. (Use only if on-site construction has not begun.)
CS	On-site construction started (either by contract, force account, or grant).
D	Project work deferred to out-year for funding. (**NARRATIVE REQUIRED**)
DL	Project delayed due to disputes, changes to the project resulting from unforeseen site conditions or concealed conditions in existing structures. (**NARRATIVE REQUIRED**)
N	Project no longer needs to be accomplished (**NARRATIVE REQUIRED**)
NO	Project did not receive appropriations.
PC	Project Complete. (Use if all project work is complete, regardless of whether final payment has been made. **Enter in Narrative field the MM/YY that on-site work was completed**.)
PD	Project planning and engineering design in progress.
SC	On-site construction is "Substantially Complete." (Use if only small punch list items require completion, with no safety implications significant enough to prevent occupancy.)

Instructions

1. Log into SAMMS. From the Welcome page, select **Go to > Work Orders > Work Orders.**
2. The "Work Orders" screen appears. Open to the "List" tab. Click on **Advance Search**.



3. The "More Search Fields|Current Query" pop-up screen appears.

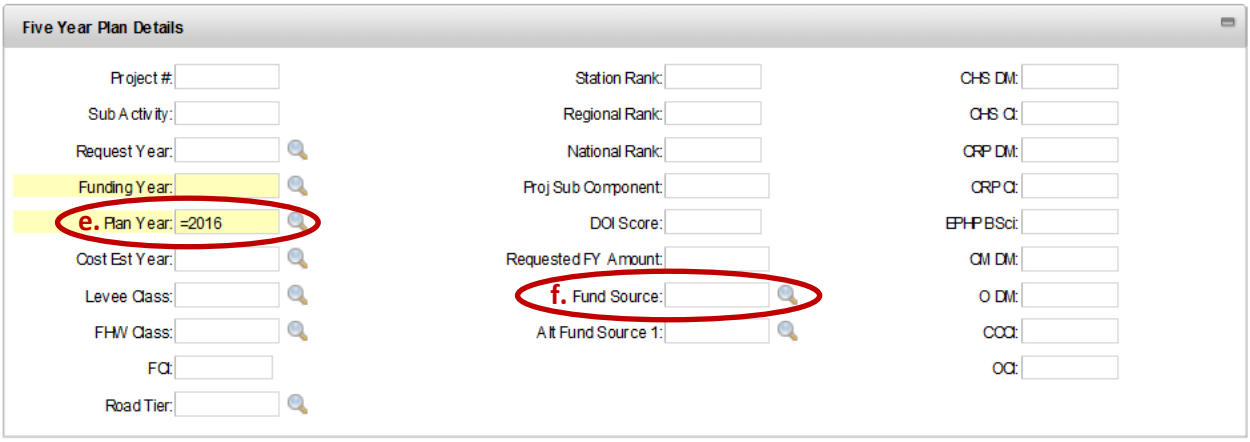


a. Enter your program in the field labeled "Program Identifier." (Example: **=NFHS**)

b. Enter sub-work type in the field labeled "Sub Work Type." (Example: **=DMFP,=CIFP**)

c. Enter your region in the field labeled "Site." (Example: **=R5**)

d. Click on the icon to the far right of the "Five Year Plan Details" header. More search fields will be revealed.



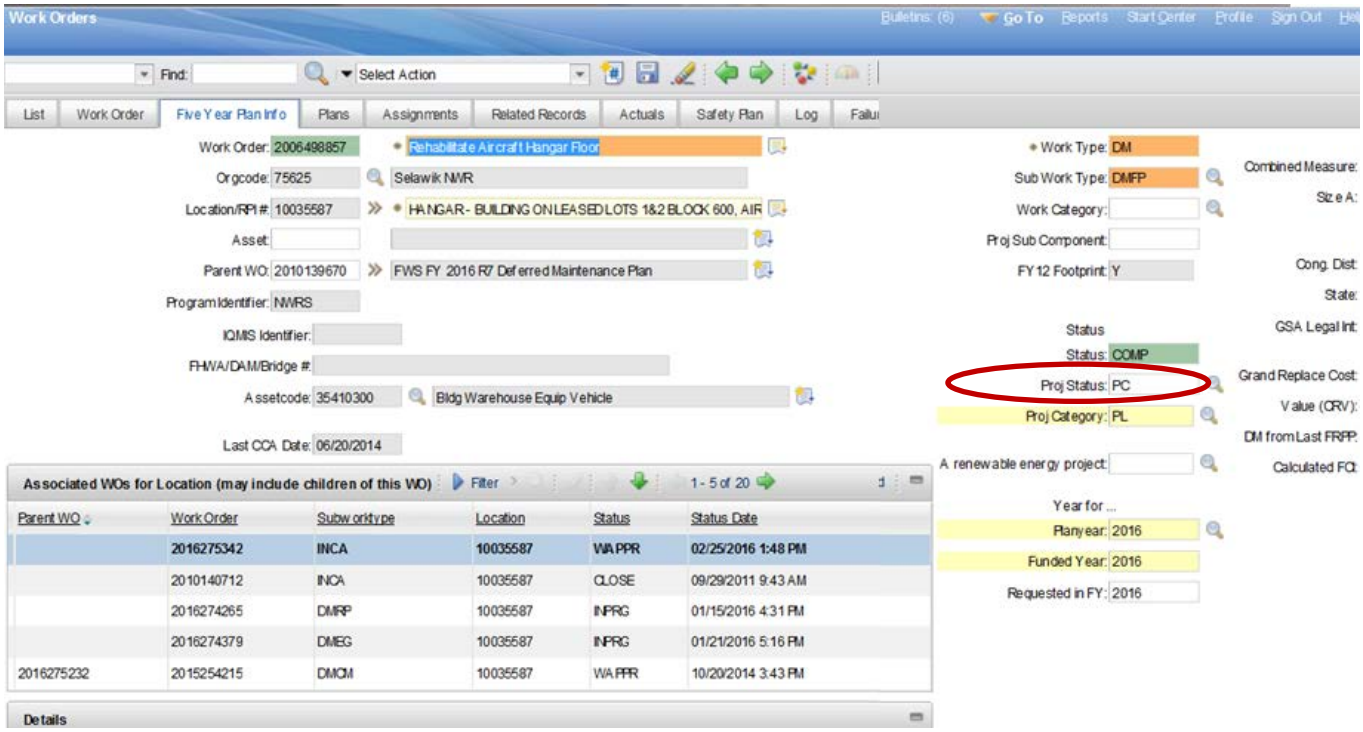
e. You will need to search for six consecutive years. It is recommended that you search for one year at a time, due to limited sorting ability from the List view, where your query results are displayed. Enter a value (example: **=2016**) in the field labeled "Plan Year."

f. You may also wish to narrow your search by entering a value in the "Fund Source" field (example: **=RESOURCE** or **=CONSTRUCT**).

g. Click **Find**.

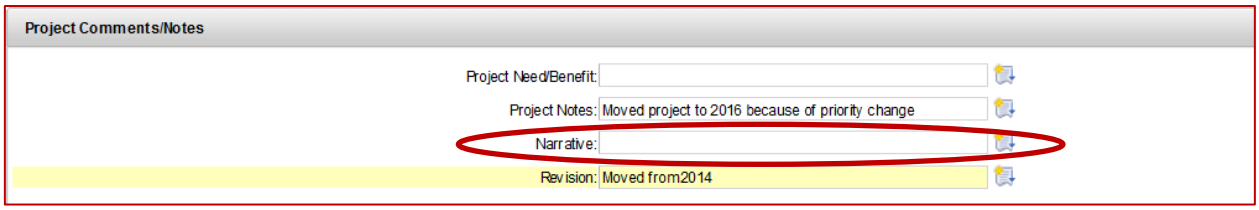
4. The pop-up search fields screen disappears. You are returned to the Work Orders "List" tab, which contains the records that meet your search criteria.

5. Click on a work order number. The record will open to its "Work Order" screen. Click on the record's "Five Year Plan Info" tab. In the upper right corner (you may need to scroll to the right to see it) is a collection of fields. One is labeled "Proj Status" (see below).

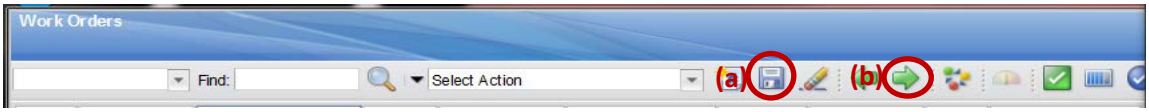


6. Enter the code in the "Proj Status" field that corresponds to the status of the selected project.

7. If the project status is "D" (funding deferred to an out year), "DL" (project delayed), or "N" (project no longer required), you must also document the details in the Narrative field at the bottom of this page. (See below.) For status codes "PC" and "SC," enter the date (MM/YY) that on-site work was completed. Entering additional information on project status (e.g., scheduled completion date) is optional.



8. When you have completed the entries for the work order, click (a) the "Save" icon and then (b) the green arrow pointing to the right. This will bring up the next work order on your list of work orders. The work order will already be open to the Five Year Plan tab.



9. If the project status that you enter for a work order is "PC" (Project Complete):

   a. Enter the date the project was completed (MM/YY) in the "Narrative" field of the work order's Five Year Plan tab.

   b. Change the status of the parent work order and its child work orders to COMP (complete). The SAMMS/FBMS interface will change the status of FBMS work order(s) to TECO (Technically Complete).

   c. If the project involves the construction of a new asset (this includes replacement projects), confirm that the following steps have occurred for the resulting AUC (Asset Under Construction):

      i. financial documentation has been submitted,

      ii. the asset's status in FBMS has been changed to Active, and

      iii. the asset's status in SAMMS has been changed to Operating.

   d. If the project involves a disposal (which also includes replacement projects), confirm that a "Certificate of Unserviceable Real Property" form was completed and emailed to the headquarters disposal coordinator at rp_disposal_requests@fws.gov.

   e. When all contracts are closed, confirm that all costs have been captured on child work orders, and then:

      i. Email the national coordinator requesting that the DMFP or CIFP parent work order status be changed to CLOSE.

      ii. Log into FMBS and close any FBMS-relevant work orders for the project. Go to **Property > Real Property > Real Estate Tools > Change Order**. The FBMS work order number is "F" followed by its SAMMS number. Find the FBMS work order, open it, and click the Complete (Business) button.