

## OPPM Monthly Cost & Schedule Data Update Instructions

1. Log in to Oracle Primavera Portfolio Management (OPPM; <https://pmt.hhs.gov/prosight/>).
  - If you've forgotten your password, or if it's expired, contact your OIS/EASG/DITIM investment analyst or OIS/EASG/DITG EVM analyst to get it reset.
2. In the top-center, "Item" drop-down box, select your project's title from **section 2** (CMS Projects Portfolio) of the list.
3. In the top-left, "Form" drop-down box, select **Form 6.02.03** (Project Exhibit 300b Worksheet). (You will **not** see this option displayed if you did **not** select a **project** from **section 2** in the previous step.)

[The left tab (Instructions) of Form 6.02.03 displays a list of URLs. To the right of "Instructions for Completing New Forms," clicking on the URL brings up a Word Document. In that documents' §5.2.5 (Filling Out the Exhibit 300b Project Execution Data: Process Overview), Step 3 (Update Monthly Data on Form 6.02.03), on pages 17-20 are instructions; excerpts are:

["Form 6.02.03 must be updated monthly as it is the source of project data for Major investments reporting to the Federal IT Dashboard. This form is also the monthly reporting mechanism for all IT investments that must comply with the HHS Performance Baseline Management Policy. The Monthly Updates table of the Project Activities must be updated each month. Project Risks should be updated periodically; Project Information should be adjusted as necessary."

[Each month, "enter actual start and end dates as applicable, projected and actual costs as available, and planned and actual percent complete for child activities only."]

4. Select the right tab (Project Data), and scroll down to Section 3 (Table B.2 - Project Activities) to enter the monthly updates. Note that you can "grab" the vertical line between column titles and slide it to the left to narrow the columns; after doing this, all the columns will display without needing to scroll left and right.
5. In the lower, "Monthly Updates (Projected and Actual data)," table, each month enter:
  - Total Costs Actual (from reports or invoices), cumulative, in millions (enter 6.075 for \$6,075,000)
  - Planned % Complete (from the baselined schedule), and
  - Actual % Complete (from the monthly Contract Performance Report or other report)Click on the **"Submit"** button in the upper-right of the page.

Also, if the Activity actually started or completed in the month you are reporting on, enter:

- Start Date Actual, or
- Completion Date Actual

**Submit.**

[ **NOTE** that OMB has recently changed the IT Dashboard submission rules to allow an activity's Actual Completion Date to be reported to the IT Dashboard without reporting Actual Total Costs. The final Actual Total Costs can be reported later, when all Actual Total Costs for the activity are known. This change will reduce the number of baseline change events, if investment managers wait to report the Actual Total Costs until they are reasonably certain the Actual Total Costs will not change. ]

And, there's a new "Send Actual Costs to Dashboard" column.

- For old, completed Activities for which you have received all invoices, this entry should be "Yes."
- For the time being, leave this **blank** for each current Activity; we're waiting to hear further on this.
- When a current Activity's work is done, wait until you are sure all costs are booked against the Activity before you enter "Yes" in this column.

If you change an entry, **Submit**.

The rest of the details are, as yet, unknown. We can't yet tell you where to view the EVM metrics calculated by the OPPM tool. We can't yet tell you how to know if a CAP (corrective action plan) is required. As we find out more information, we will distribute it.