



## How to Create a Milestone Plan in PRISM

Use these procedures to create a milestone plan to track recipient financial assistance reports. A milestone plan must be established to track interim and final federal financial reports (SF 425) and interim and final performance reports. The milestone plan must be associated with the **grant (grant or cooperative agreement award) not the purchase requisition**.

If interim financial reporting requirements are being met by an SF-270 Request for Advance or Reimbursement or an SF 271 Outlay Report and Request for Reimbursement for Construction Programs, it is not necessary to create interim financial milestone plans.

Please review [516 FW 1, Financial Reporting for Grant and Cooperative Agreement Awards](#) and [516 FW 2, Performance Reporting for Grant and Cooperative Agreement Awards](#) to determine the reporting requirements for your awards.

### Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

1. Log into FBMS using your active directory user ID and password.



## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

2. The FBMS Welcome screen is displayed.

3. Click on the Acquisition/Financial Assistance tab.

4. Click on the Contract/FA Management System.



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

5. The PRISM welcome screen is displayed.

**PRISM™**  
Welcome Debbie Unbehagen

Quick Open:  **Go**      Create Document:  **Go**

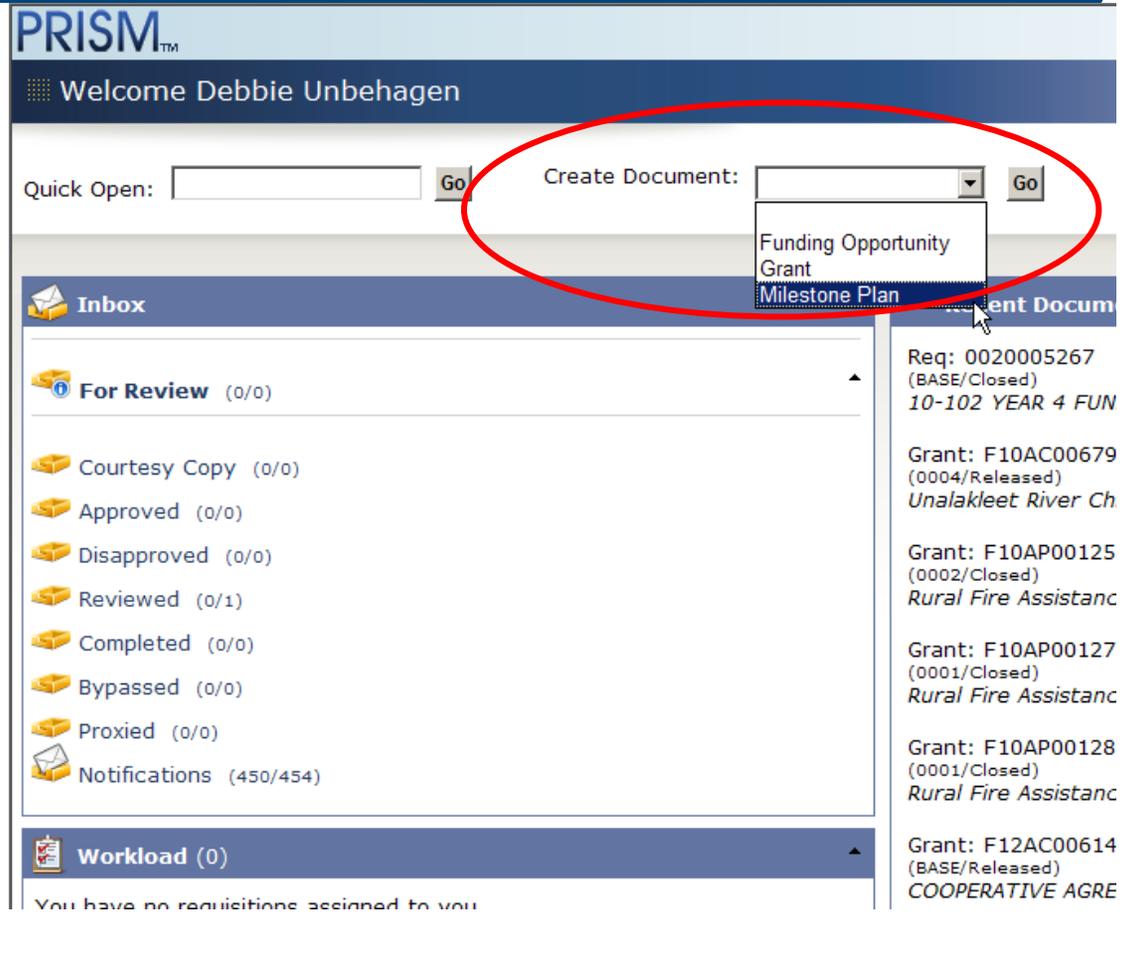
Inbox	Recent Documents
<b>For Review</b> (0/0)	Req: 0020005267 (BASE/Closed) <i>10-102 YEAR 4 FUNDING</i>
Courtesy Copy (0/0)	Grant: F10AC00679 (0004/Released) <i>Unalakleet River Chinook Salmon Ase</i>
Approved (0/0)	Grant: F10AP00125 (0002/Closed) <i>Rural Fire Assistance</i>
Disapproved (0/0)	Grant: F10AP00127 (0001/Closed) <i>Rural Fire Assistance</i>
Reviewed (0/1)	Grant: F10AP00128 (0001/Closed) <i>Rural Fire Assistance</i>
Completed (0/0)	Grant: F12AC00614 (BASE/Released) <i>COOPERATIVE AGREEMENT BOWENS C</i>
Bypassed (0/0)	
Proxied (0/0)	
Notifications (450/454)	

**Workload** (0)

### Creating a Milestone Plan in PRISM

6. Click on dropdown arrow next to Create Document and select Milestone Plan, then Click Go.

Role: FA\_AGO, FA\_GSP



**PRISM™**

Welcome Debbie Unbehagen

Quick Open:   Create Document:

**Funding Opportunity**  
**Grant**  
**Milestone Plan**

**Inbox**

**For Review** (0/0)

- Courtesy Copy (0/0)
- Approved (0/0)
- Disapproved (0/0)
- Reviewed (0/1)
- Completed (0/0)
- Bypassed (0/0)
- Proxied (0/0)
- Notifications (450/454)

**Workload** (0)

You have no requisitions assigned to you

Req: 0020005267  
(BASE/Closed)  
10-102 YEAR 4 FUN

Grant: F10AC00679  
(0004/Released)  
Unalakleet River Ch

Grant: F10AP00125  
(0002/Closed)  
Rural Fire Assistanc

Grant: F10AP00127  
(0001/Closed)  
Rural Fire Assistanc

Grant: F10AP00128  
(0001/Closed)  
Rural Fire Assistanc

Grant: F12AC00614  
(BASE/Released)  
COOPERATIVE AGRE



### Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

7. The Document Create, Milestone Plan screen is displayed.

The screenshot shows a web form titled 'Document Create'. The form has a blue header bar with a question mark icon. Below the header, the form is divided into sections. The first section is 'Document type', where a text box contains 'Milestone Plan' and is circled in red. The second section is 'Milestone Plan Name', with an empty text box. The third section is 'Milestone Template', with an empty text box and a small icon to its right. The fourth section is 'Milestone Plan Date', which includes a 'Start Date' dropdown menu and an empty text box with a calendar icon. At the bottom right of the form, there are two buttons: 'Continue' and 'Cancel'.

**Creating a Milestone Plan in PRISM**

Role: FA\_AGO, FA\_GSP

8. Under the Milestone Plan name field, enter your FBMS award number.

Example F09AP00376

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Document Create

**Document Type**

Milestone Plan

**Milestone Plan Name**

F09AP00376

**Milestone Template**

...

**Milestone Plan Date**

Start Date  

9. You must select a Milestone Template.

Click on the  Selection List button.

**Milestone Template**







**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

10. The Milestone Template Search screen is displayed.

The Search Criteria defaults to Site and the Site Code default to the site to which you are assigned

Display Hide Search Criteria Cancel ?

**Milestone Template Selection**

**No matches found.**

### Search Criteria

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**Site**  
 **Public**

---

**Search**  
Template Name

**For**

---

**Site**

**Include Documents from:**

---

**Max Results**

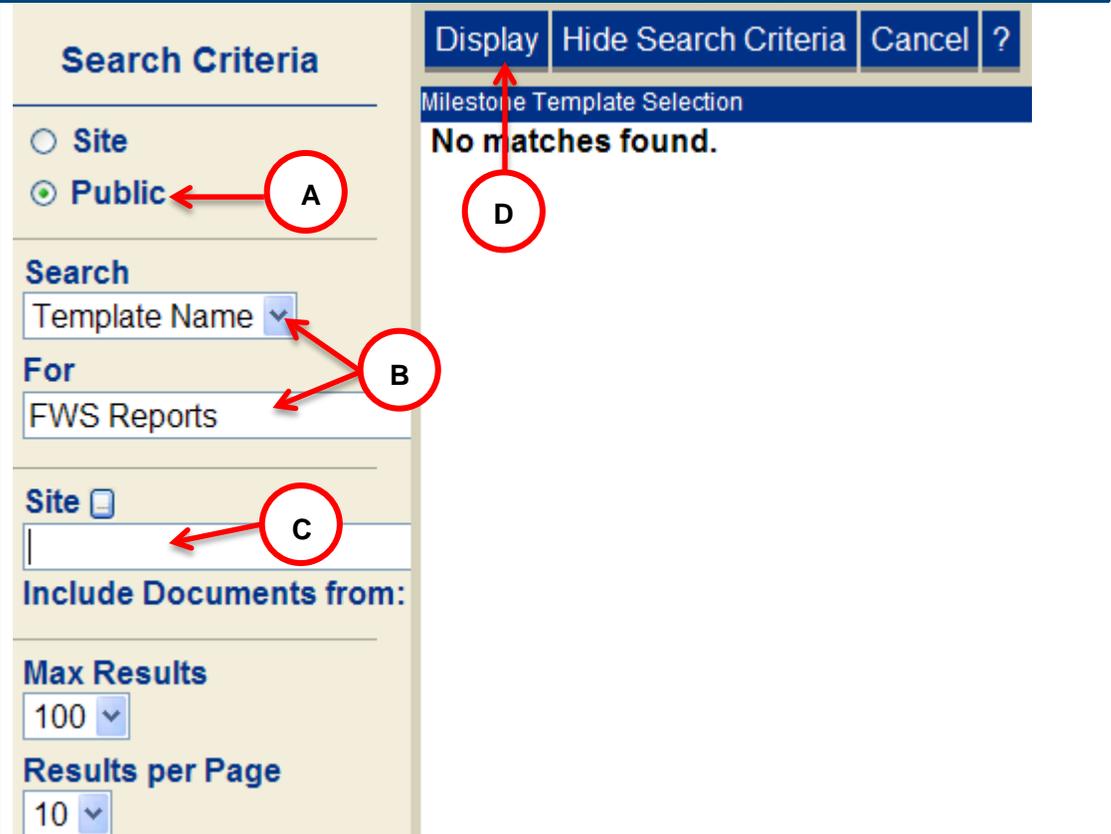
**Results per Page**

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

### 11. Enter Search Criteria.

- A. Select Public.
- B. Under Template Name in the For field enter FWS Reports.
- C. Remove Site Code.
- D. Click on .



**Search Criteria**

Site  
 **Public**

**Search**  
Template Name

**For**  
FWS Reports

**Site**

**Include Documents from:**

**Max Results**  
100

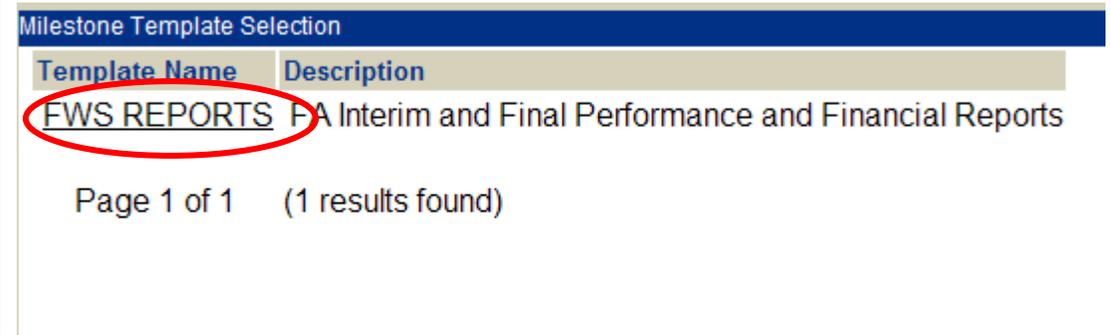
**Results per Page**  
10

**Display** Hide Search Criteria Cancel ?

Milestone Template Selection  
**No matches found.**

### 12. The Milestone template Selection screen is displayed.

Select the link for FWS Reports.



Template Name	Description
<b>FWS REPORTS</b>	FA Interim and Final Performance and Financial Reports

Page 1 of 1 (1 results found)



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

13. The Document Create screen is displayed.

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Document Create

**Document Type**

**Milestone Plan Name**

**Milestone Template**  
 ...

**Milestone Plan Date**

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

### 14. Select Start Date for the Milestone Plan Date.

The Start Date is used to calculate the reporting due dates.

Federal Financial Reports and Performance Reports are required no more frequently than quarterly and no less frequently than annually.

For awards longer than one year interim reports are required.

For information on reporting requirements see [516 FW 1, Financial Reporting for Grant and Cooperative Agreement Awards](#) and [516 FW 2, Performance Reporting for Grant and Cooperative Agreement Awards](#).

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Document Create

**Document Type**  
Milestone Plan

**Milestone Plan Name**  
F09AP00376

**Milestone Template**  
FWS REPORTS

**Milestone Plan Date**  
Start Date

Continue Car



**Creating a Milestone Plan in PRISM**

**Role: FA\_AGO, FA\_GSP**

15. How to determine the Start Date to be entered in the field.

The milestone plan will be based on your first report due date.

Depending on your program or award you may require quarterly, semi-annual or annual reporting.

Example:

The period of performance is 8/1/09 to 8/1/12. This requires two annual interim FFRs and Performance Reports and one final FFR and performance report.

<b>Table 1-2: Schedule for Annual Interim Financial Reports</b>		
<b>Award Performance Start Date</b>	<b>Annual Interim Report End Date</b>	<b>Annual Interim Report Due Date (90 days after report end date)</b>
January 1	December 31	March 31
January 2- March 31	March 31	June 29
April 1	March 31	June 29
April 2- June 30	June 30	September 28
July 1	June 30	September 28
July 2- September 30	September 30	December 29
October 1	September 30	December 29
October 2 – December 31	December 31	March 31

**Creating a Milestone Plan in PRISM**

Role: FA\_AGO, FA\_GSP

16. Find the Period of Performance start date of the award in the appropriate table listed in 516 FW 1 or 516 FW 2. This is the range of dates.

Example:

The award period of performance is 8/1/2009 to 8/1/2012.

Use the Schedule for Annual Interim Financial Reports.

Find the start date in the range of dates in column one. Then select the Annual Interim Report End Date in column two.

The Interim Report End date is the date you will enter in PRISM in the Start Date field.

If you have a one year award you will enter the period of performance end date in the PRISM Start Date field.

**Table 1 2: Schedule for Annual Interim Financial Reports**

Award Performance Start Date	Annual Interim Report End Date	Annual Interim Report Due Date (90 days after report end date)
January 1	December 31	March 31
January 2- March 31	March 31	June 29
April 1	March 31	June 29
April 2- June 30	June 30	September 28
July 1	June 30	September 28
July 2- September 30	September 30	December 29
October 1	September 30	December 29
October 2 – December 31	December 31	March 31

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

17. Enter the Start date calculated in the step above.

Enter date in field using format MM/DD/YYYY or use the  calendar button to select the date.

Click



Document Create

**Document Type**  
Milestone Plan

**Milestone Plan Name**  
F09AP00376

**Milestone Template**  
FWS REPORTS

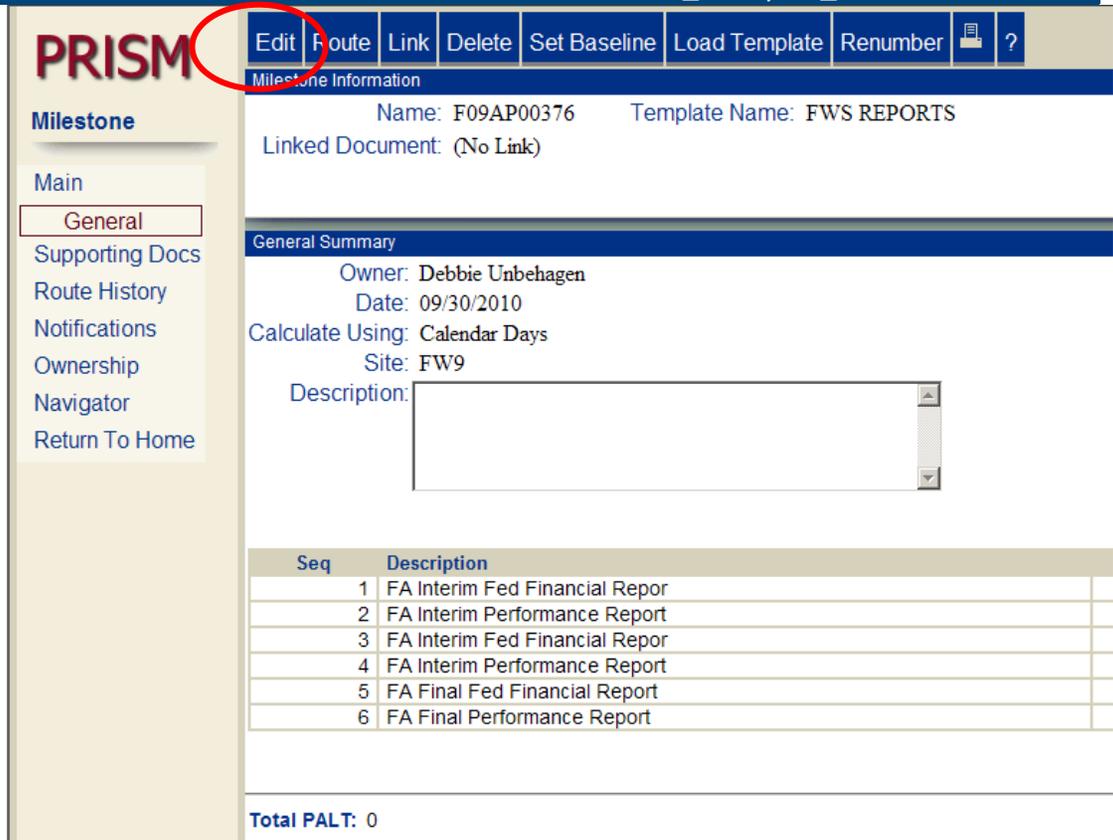
**Milestone Plan Date**  
Start Date 09/30/2010 

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

18. The General screen is displayed.

Click  on the top menu bar.



The PRISM application interface displays the 'General' screen for a milestone plan. The top menu bar includes buttons for 'Edit', 'Route', 'Link', 'Delete', 'Set Baseline', 'Load Template', 'Renumber', and a help icon. The 'Edit' button is circled in red. The left sidebar contains a 'Main' menu with options: 'General' (highlighted), 'Supporting Docs', 'Route History', 'Notifications', 'Ownership', 'Navigator', and 'Return To Home'. The main content area shows 'Milestone Information' with fields for 'Name: F09AP00376', 'Template Name: FWS REPORTS', and 'Linked Document: (No Link)'. Below this is a 'General Summary' section with fields for 'Owner: Debbie Unbehagen', 'Date: 09/30/2010', 'Calculate Using: Calendar Days', and 'Site: FW9'. A 'Description' text area is present. At the bottom, a table lists the milestone items:

Seq	Description
1	FA Interim Fed Financial Repor
2	FA Interim Performance Report
3	FA Interim Fed Financial Repor
4	FA Interim Performance Report
5	FA Final Fed Financial Report
6	FA Final Performance Report

Total PALT: 0



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

19. The Milestone Information screen is displayed.

The screen is divided into three sections.

- A. Milestone Information
- B. Milestone Detail
- C. Milestone Steps

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Milestone Information A

Name: F09AP00376    Template Name: FWS REPORTS  
 Linked Document: (No Link)

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Milestone Detail B

Name: F09AP00376  
 Date:   Start Date    Award Date    End Date  
 Calculate Using:    Working Days    Calendar Days  
 Description:

---

Milestone Steps C

Select	Seq	Sub Step	Description	PALT
<input checked="" type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	<input type="text"/>
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	<input type="text"/>
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	<input type="text"/>
<input type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report	<input type="text"/>
<input type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	<input type="text"/>
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report	<input type="text"/>

Total PALT: 0

20. Verify Milestone Information. This cannot be edited.

Milestone Information

Name: F09AP00376    Template Name: FWS REPORTS  
 Linked Document: (No Link)

**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

21. Under Milestone Detail be sure your report end date is in the date field.

Select Start Date.

Select Calendar Days.

A description may be added.

**Milestone Detail**

Name: F09AP00376

Date:   Start Date  Award Date  End Date

Calculate Using:  Working Days  Calendar Days

Description:

22. Under Milestone Steps the template establishes steps for two interim reports and a final report.

The steps can be used as interim quarterly, semi-annual or annual. You will always have at least a final financial and a final performance report.

Additional steps can be added or deleted from the template.

**Milestone Steps**

Select	Seq	Sub Step	Description
<input checked="" type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor
<input type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report
<input type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report

23. Use the following buttons to insert additional steps or delete steps as needed according to the period of performance of your award.

Add insert a step.

Delete a step.

**Milestone Steps**

**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

24. To delete a step, highlight the step and select the delete step button.



Milestone Steps					
Select	Seq	Sub Step	Description	PALT	Project
<input type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	0	
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	0	
<input checked="" type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report	0	
<input type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	0	
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report	0	

25. PRISM will display the message “Are you sure you want to delete the Milestone Plan step?”

Select  .

**Are you sure you want to delete the Milestone Plan step?**

26. The Milestone Steps screen is displayed and shows one less Interim Performance Report step.

This confirms the step was deleted.

Milestone Steps					
Select	Seq	Sub Step	Description	PALT	Project
<input checked="" type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	0	05
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	05
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	0	05
<input type="radio"/>	4	FA Final Fed Financial Report	FA Final Fed Financial Report	0	05
<input type="radio"/>	5	FA Final Performance Report	FA Final Performance Report	0	05



**Creating a Milestone Plan in PRISM**

Role: FA\_AGO, FA\_GSP

27. To insert a step, highlight the milestone step below where

you want the new step added and select the  insert step button. This will insert the new step above the highlighted step.

Select	Seq	Sub Step	Description	PALT	Projec
<input type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	0	0
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	0
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	0	0
<input checked="" type="radio"/>	4	FA Final Fed Financial Report	FA Final Fed Financial Report	0	0
<input type="radio"/>	5	FA Final Performance Report	FA Final Performance Report	0	0

28. The Add Milestone Steps screen is displayed.

The Search defaults to Code and the Site to which you are assigned.

**Add Milestone Steps**

Search:  For:

Site:  ...  Include Steps from:  Include Public Steps:  Max

Code	Description	Site	PALT	Modifiable	Show in Li
AWARD_DATE	Award Date		5	Yes	Yes

29. Select Description from the dropdown arrow.

**Add Milestone Steps**

Search:  For:

Site:  ...  Include Steps from:  Include Public Steps:

Code	Description	Site	PALT	Modifiable	Show
AWARD_DATE	Award Date		5	Yes	Yes



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

30. In the For field enter FA%.

Remove the Site code.

Click  .

Add Milestone Steps

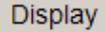
Search:  For:   

Site:  ... Include Steps from:  Include Public Steps:  Max Results:  Results p

Code	Description	Site	PALT	Modifiable	Show in List	Field Name
<u>AWARD_DATE</u>	Award Date		5	Yes	Yes	Award Date
<u>AWD_APPRVD</u>	Award Approved			Yes	Yes	Award Approved Date

31. The Add Milestone Steps screen is displayed with a list of all FA steps that can be added.

Add Milestone Steps

Search:  For:   

Site:  ... Include Steps from:  Include Public Steps:

Code	Description	Site	PALT	Modifiable	Show in Li
<u>GRANT_FSR</u>	FA Federal Financial Report		90	Yes	Yes
<u>GRANT_FFR</u>	FA Final Fed Financial Report		0	Yes	Yes
<u>GRANT_FPR</u>	FA Final Performance Report		0	Yes	Yes
<u>GRANT_IFR</u>	FA Interim Fed Financial Repor		0	Yes	Yes
<u>GRANT_IPR</u>	FA Interim Performance Report		0	Yes	Yes
<u>GRANT_PR</u>	FA Performance Report		90	Yes	Yes
<u>GRANT_REP</u>	FA Report		0	Yes	Yes

Page 1 of 1 (7 results found)



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

32. Select the link for the step to be added.

Use only codes:

Grant\_FFR  
 Grant\_PPR  
 Grant\_IFR  
 Grant\_IPR

**Add Milestone Steps**

Search:  For:

Site:  ...  Include Steps from:  Include Public Steps:  Max Resu

Code	Description	Site	PALT	Modifiable	Show in List	Field N
<a href="#">GRANT_FSR</a>	FA Federal Financial Report		90	Yes	Yes	
<a href="#">GRANT_FFR</a>	FA Final Fed Financial Report		0	Yes	Yes	
<a href="#">GRANT_FPR</a>	FA Final Performance Report		0	Yes	Yes	
<a href="#">GRANT_IFR</a>	FA Interim Fed Financial Repor		0	Yes	Yes	
<a href="#">GRANT_IPR</a>	FA Interim Performance Report		0	Yes	Yes	
<a href="#">GRANT_PR</a>	FA Performance Report		90	Yes	Yes	
<a href="#">GRANT_REP</a>	FA Report		0	Yes	Yes	

Page 1 of 1 (7 results found)

33. After selecting the link, the new step is added above the step that was highlighted.

**Milestone Steps**

Select	Seq	Sub Step	Description	PALT	Proje
<input type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	<input type="text" value="0"/>	
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	<input type="text" value="0"/>	
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	<input type="text" value="0"/>	
<input checked="" type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report	<input type="text" value="0"/>	
<input type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	<input type="text" value="0"/>	
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report	<input type="text" value="0"/>	



**Creating a Milestone Plan in PRISM**

Role: FA\_AGO, FA\_GSP

34. Enter the PALT for the milestone steps based on the report due dates.

When two reports are due at the same time the PALT for the second report will be zero.

Example of Annual Reports:

First Annual Interim Report is due 90 days after report end date. Enter 90 days.

The Interim Federal Financial Report has a PALT of 90 days. Since the Interim Performance Report is due at the same time the PALT is entered as zero.

Second Annual Interim Report is due one year after First Annual Interim Report. Enter 365 days.

Final Report is due 90 days after period of performance end date. Calculate the number of days required and enter the PALT.

For one year awards enter 90 in the PALT for the final report.

Select	Seq	Sub Step	Description	PALT	Projected Date
<input type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	90	09/30/20
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	09/30/20
<input type="radio"/>	3	FA Interim Fed Financial Report	FA Interim Fed Financial Report	365	09/30/20
<input type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report	0	09/30/20
<input checked="" type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	306	09/30/20
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report	0	09/30/20

Select	Seq	Sub Step	Description	PALT	Projected Date
<input type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Report	90	09/30/2
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	09/30/2
<input type="radio"/>	3	FA Interim Fed Financial Report	FA Interim Fed Financial Report	365	09/30/2
<input type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report	0	09/30/2
<input checked="" type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	306	09/30/2
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report	0	09/30/2

35. Click the  calculate button to calculate the report due dates based on the PALT.

**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

36. Verify the report due dates are calculated correctly by PRISM.  
  
 If the dates are not correct make changes to the PALT as needed.

Select	Seq	Sub Step	Description	PALT	Projected Date
<input checked="" type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	90	12/29/2010
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	12/29/2010
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	365	12/29/2011
<input type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report	0	12/29/2011
<input type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	306	10/30/2012
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report	0	10/30/2012

**Due dates must comply with:**

[516 FW 1, Financial Reporting for Grant and Cooperative Agreement Awards](#)

[516 FW 2, Performance Reporting for Grant and Cooperative Agreement Awards.](#)

37. Enter the responsible party user ID.  
  
 Search for the user ID by using the selection list button



Selected Step: 1 - FA Interim Fed Fina

**Responsible Party**

<input type="text"/>	<input type="button" value="..."/>	
<input type="text"/>	<input type="button" value="..."/>	
<input type="text"/>	<input type="button" value="..."/>	
<input type="text"/>	<input type="button" value="..."/>	
<input type="text"/>	<input type="button" value="..."/>	
<input type="text"/>	<input type="button" value="..."/>	



**Creating a Milestone Plan in PRISM** **Role: FA\_AGO, FA\_GSP**

38. The User Selection screen is displayed.

The search criterion defaults to User ID and the Site code to which you are assigned.

User Selection

Search: User ID For: [ ] [Display] [Cancel]

Site: FW9 [ ] Include Related Sites:  Max Results: 100 Results per Page: 10

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer	Project Officer	Buyer
AHUDSON1	Alice		Hudson	FW9	703-358-1721					Y
AMUELLER	Andrew		Mueller	FW9	703-358-1807					
ASALO	Ashley		Salo	FW9						Y
BAHURUON	Barry		Ahuruonye	FW9						Y
BBOHNSAC	Brian		Bohnsack	FW9	703-358-7890					Y
BGREGOR2	BARRY		GREGORY	FW9	703-358-3588		N	N	N	Y
BOLSON3	Bryttava		Olson	FW9	703-358-2484		N	N	N	Y
BZACHARY	Bridget		Zachary	FW9						Y
CKUCZAK	Christy		Vigfusson	FW9	703-358-1748	703-358-1705				Y
CTODD	Cecilia		Todd	FW9	703-358-2055					Y

[Next] Page 1 of 5 (45 results found)

39. Use the dropdown arrow to select Last Name.

User Selection

Search: User ID For: [ ] [Display] [Cancel]

Site: FW9 [ ] Include Related Sites:  Max Results: 100 Results per Page: 10

User ID  
 First Name  
 Last Name  
 Phone  
 Fax  
 GrantsSpecialist  
 Requisitioner  
 Contract Officer  
 Project Officer  
 Buyer

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer	Project Officer	Buyer
AHUDSON1	Alice		Hudson	FW9	703-358-1721					Y
AMUELLER	Andrew		Mueller	FW9	703-358-1807					
ASALO	Ashley		Salo	FW9						Y
BAHURUON	Barry		Ahuruonye	FW9						Y
BBOHNSAC	Brian		Bohnsack	FW9	703-358-7890					Y
BGREGOR2	BARRY		GREGORY	FW9	703-358-3588		N	N	N	Y
BOLSON3	Bryttava		Olson	FW9	703-358-2484		N	N	N	Y
BZACHARY	Bridget		Zachary	FW9						Y
CKUCZAK	Christy		Vigfusson	FW9	703-358-1748	703-358-1705				Y
CTODD	Cecilia		Todd	FW9	703-358-2055					Y

[Next] Page 1 of 5 (45 results found)



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

40. In the For field enter the last name of the user responsible for monitoring this report.

Remove the site code and click [Display](#).

User Selection

Search: Last Name For: vriens [Display](#) [Cancel](#)

Site:  Include Related Sites:  Max Results: 100 Results per Page

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer
<a href="#">AHUDSON1</a>	Alice		Hudson	FW9	703-358-1721			
<a href="#">AMUELLER</a>	Andrew		Mueller	FW9	703-358-1807			
<a href="#">ASALO</a>	Ashley		Salo	FW9				
<a href="#">BAHURUON</a>	Barry		Ahuruonye	FW9				
<a href="#">BBOHNSAC</a>	Brian		Bohnsack	FW9	703-358-7890			
<a href="#">BGREGOR2</a>	BARRY		GREGORY	FW9	703-358-3588		N	N
<a href="#">BOLSON3</a>	Bryttava		Olson	FW9	703-358-2484		N	N
<a href="#">BZACHARY</a>	Bridget		Zachary	FW9				
<a href="#">CKUCZAK</a>	Christy		Vigfusson	FW9	703-358-1748	703-358-1705		
<a href="#">CTODD</a>	Cecilia		Todd	FW9	703-358-2055			

[Next](#) Page 1 of 5 (45 results found)

41. Click the User ID link for the user you want to add as the Responsible Party.

User Selection

Search: Last Name For: vriens [Display](#) [Cancel](#)

Site:  Include Related Sites:  Max Results: 100 Results per Page: 10

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer	Project Officer
<a href="#">TVRIENS1</a>	Tracey		Vriens	FW8	916-414-6525		N	N	N

Page 1 of 1 (1 results found)



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

42. The Milestone Step screen is displayed.

The Responsible Party is selected.

Select	Seq	Sub Step	Description	PALT	Projected Date	Responsible Party
<input checked="" type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	90	09/28/2010	TVRIENS1
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	09/28/2010	
<input type="radio"/>	3	FA Final Fed Financial Report	FA Final Fed Financial Report	365	09/28/2011	
<input type="radio"/>	4	FA Final Performance Report	FA Final Performance Report	0	09/28/2011	

43. Select the Responsible Party for the remaining steps.

If the Responsible Party is the same for all steps the field can be copied from the first step and pasted into the remaining steps.

Selected Step: 1 - F			
	PALT	Projected Date	Responsible Party
Financial Repor	90	12/29/2010	TVRIENS1
rmance Report	0	12/29/2010	TVRIENS1
Financial Repor	365	12/29/2011	TVRIENS1
rmance Report	0	12/29/2011	TVRIENS1
Financial Report	306	10/30/2012	TVRIENS1
rmance Report	0	10/30/2012	TVRIENS1

44. Notifications can be created to notify internal and external parties of a due date for each milestone step.

To create a notification for a milestone step select  next to the step

Selected Step: 1 - FA Interim Fe			
	PALT	Projected Date	Responsible Party
Financial Repor	90	12/29/2010	TVRIENS1 
rmance Report	0	12/29/2010	TVRIENS1 
Financial Repor	365	12/29/2011	TVRIENS1 
rmance Report	0	12/29/2011	TVRIENS1 
Financial Report	306	10/30/2012	TVRIENS1 
rmance Report	0	10/30/2012	TVRIENS1 

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

45. The Notification Detail screen is displayed.

There are 3 types of notifications that can be selected.

All 3 can be assigned to each step if desired.

- Reminder of Action
- Notification of Completed Action
- Notification of Missed Due Date

**Notification Detail**

Type of Notification:    
  
Party to Notify:   
 

User ID:   
Name:

Number of Calendar Days in Advance:

---

**Message**

Reminder of Action

Due Date: To be Determined

Document Owner:

**Creating a Milestone Plan in PRISM**

Role: FA\_AGO, FA\_GSP

46. Select the Type of Notification.

**Notification Detail**

Type of Notification: **Reminder of Action**

Party to Notify: User

User ID:

Name:

Number of Calendar Days in Advance:

---

**Message**

Reminder of Action

Due Date: To be Determined

Document Owner:

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

### 47. Select the Party to Notify.

This can be a user within PRISM or an External party such as a recipient.

When selecting User the system will email a notice to user's email associated with the ID in the system.

When selecting External a field is displayed to enter the external party's email address.

#### Notification Detail

Type of Notification:

Party to Notify:

User ID:

Name:

Number of Calendar Days in Advance:

#### Message

Reminder of Action

Due Date: To be Determined

Document Owner:



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

48. When selecting user and clicking on the selection list button  the User Selection screen is displayed.

The Search Criteria defaults to User ID and the Site defaults to the site code to which you are assigned.

User Selection

Search: User ID For:

Site: FW8  Include Related Sites:  Max Results: 100 Results per Page

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer
<a href="#">BMILLER3</a>	Becky		Miller	FW8	916-978-6185		N	N
<a href="#">BPROSE</a>	Bart		Prose	FW8	916-978-6152		N	N
<a href="#">JCUTLER2</a>	Justin		Cutler	FW8	916-414-6457		N	N
<a href="#">JWRIGHT5</a>	JILL		WRIGHT	FW8	916-978-6182		N	N
<a href="#">LMARIN1</a>	Lorena		Marin	FW8	916-978-6162		N	N
<a href="#">SBORING</a>	SUSAN		BORING	FW8	916-414-6507		N	N
<a href="#">SDETWILE</a>	SUSAN		DETWILER	FW8	916-414-6509		N	N
<a href="#">TVRIENS1</a>	Tracey		Vriens	FW8	916-414-6525		N	N

Page 1 of 1 (8 results found)

49. Use the dropdown to select Last Name.

Enter the user's last name in the For field and remove the site code.

Click  .

User Selection

Search: User ID For:

Site: FV  Include Related Sites:  Max Results: 100 Results per Page

**User ID**

- User ID
- First Name
- Last Name
- Phone
- Fax
- GrantsSpecialist
- Requisitioner
- Contract Officer
- Project Officer
- Buyer

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer
<a href="#">BMILLER3</a>	Becky		Miller	FW8	916-978-6185		N	N
<a href="#">BPROSE</a>	Bart		Prose	FW8	916-978-6152		N	N
<a href="#">JCUTLER2</a>	Justin		Cutler	FW8	916-414-6457		N	N
<a href="#">JWRIGHT5</a>	JILL		WRIGHT	FW8	916-978-6182		N	N
<a href="#">LMARIN1</a>	Lorena		Marin	FW8	916-978-6162		N	N
<a href="#">SBORING</a>	SUSAN		BORING	FW8	916-414-6507		N	N
<a href="#">SDETWILE</a>	SUSAN		DETWILER	FW8	916-414-6509		N	N
<a href="#">TVRIENS1</a>	Tracey		Vriens	FW8	916-414-6525		N	N

Page 1 of 1 (8 results found)



**Creating a Milestone Plan in PRISM**

Role: FA\_AGO, FA\_GSP

50. Click the link for the User ID.

User Selection

Search: Last Name For: vriens

Site:  ... Include Related Sites:  Max Results: 100 Results per Page

User ID	First Name	Middle	Last Name	Site	Phone	Fax	Requisitioner	Contract Officer
<a href="#">TVRIENS1</a>	Tracey		Vriens	FW8	916-414-6525		N	N

Page 1 of 1 (1 results found)

### Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

51. Enter the Number of Calendar Days in Advance that you want the notification to be sent.

Enter the text of the email message in the text box.

Click  .

#### Notification Detail

Type of Notification:

Party to Notify:

User ID:

Name: Tracey Vriens

Number of Calendar Days in Advance:

#### Message

Reminder of Action

Due Date: To be Determined

Document Owner:

This is to notify Tracy of a milestone plan coming due in 15 days.

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

52. After selecting **Generate** the text box will automatically append the Milestone Description, Milestone Step, Document Number and Responsible Party to the text that was entered.

Click **Submit**.

You may edit the text as needed. This is the text that will be included in the email message to the internal or external user.

### Notification Detail

Type of Notification:

Party to Notify:

User ID:

Name: Tracey Vriens

Number of Calendar

Days in Advance:

### Message

Reminder of Action

Due Date: To be Determined

Document Owner:

**Generate**

Milestone Description: Award Description  
Milestone Step Description: FA Federal Financial Report  
Document Number: F09AP00376  
Responsible Party: Tracey Vriens

This is to notify Tracy of a milestone plan coming due in 15 days.

**Submit** **Cancel**

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

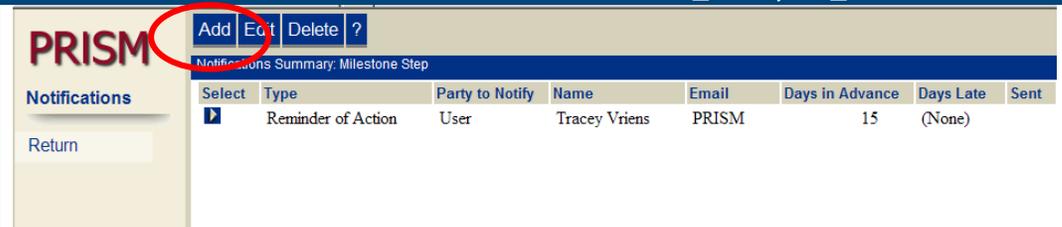
53. The Notifications Summary: Milestone Step screen is displayed.

To add additional notifications for this milestone step

select .

You may want to add another Reminder of Action to an external party to provide your recipient with a notification of an upcoming report due date.

You will want to add a Notification of Missed Due Date for your recipient per [516 FW 1, Financial Reporting for Grant and Cooperative Agreement Awards](#) and [516 FW 2, Performance Reporting for Grant and Cooperative Agreement Awards](#).



Select	Type	Party to Notify	Name	Email	Days in Advance	Days Late	Sent
<input type="checkbox"/>	Reminder of Action	User	Tracey Vriens	PRISM	15	(None)	

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

54. After selecting Add the Notification Detail screen is displayed.

Select the Type of Notification to add.

Select the Party to Notify.

If this is an external party enter a valid email address.

Enter the Number of Calendar Days.

Enter the text of the email.

Click Generate.

The Milestone Step information is displayed in the text box.

Click .

### Notification Detail

Type of Notification:

Party to Notify:

Name:

Email:

Number of Calendar

Days Late:

### Message

Notification of Missed Due Date

Due Date: To be Determined

Document Owner:

Milestone Description: Award Description  
Milestone Step Description: FA Federal Financial Report  
Document Number: F09AP00376  
Responsible Party: Alice Smith

Your Annual Interim FFR is now past due. Please submit this report.



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

55. The Notifications Summary Milestone Step screen is displayed. There are two notifications added for milestone step 1.

Select	Type	Party to Notify	Name	Email	Days in Advance	Days Late	Sent
<input checked="" type="checkbox"/>	Notification of Missed Due Date	External	Alice Smith	alice.smith@ca.gov	(None)	2	
<input type="checkbox"/>	Reminder of Action	User	Tracey Vriens	PRISM	15	(None)	

56. Once you have completed adding notifications to Milestone Step 1 select **Return**.

Select	Type	Party to Notify	Name	Email	Days in A
<input checked="" type="checkbox"/>	Notification of Missed Due Date	External	Alice Smith	alice.smith@ca.gov	(N
<input type="checkbox"/>	Reminder of Action	User	Tracey Vriens	PRISM	

57. The Milestone Plan screen is displayed.  
  
 You will continue to add notifications to the remaining Milestone Steps.

**Milestone Information**  
 Name: F09AP00376    Template Name: FWS REPORTS  
 Linked Document: (No Link)

**Milestone Detail**  
 Name: F09AP00376  
 Date: 09/30/2010    Start Date    Award Date    End Date  
 Calculate Using: Working Days    Calendar Days  
 Description: Award Description

Select	Seq	Sub Step	Description	PALT	Projected Date	Responsible Party
<input checked="" type="checkbox"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	90	12/29/2010	TVRIENS1
<input type="checkbox"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	12/29/2010	TVRIENS1
<input type="checkbox"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	365	12/29/2011	TVRIENS1
<input type="checkbox"/>	4	FA Interim Performance Report	FA Interim Performance Report	0	12/29/2011	TVRIENS1
<input type="checkbox"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	306	10/30/2012	TVRIENS1
<input type="checkbox"/>	6	FA Final Performance Report	FA Final Performance Report	0	10/30/2012	TVRIENS1

Total PALT: 761



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

58. Once the Responsible Party and the Notifications are entered for all Milestone Steps click .

The  button is at the bottom of the screen.

**Milestone Information**  
 Name: F09AP00376    Template Name: FWS REPORTS  
 Linked Document: (No Link)

---

**Milestone Detail**  
 Name: F09AP00376  
 Date: 09/30/2010     Start Date     Award Date     End Date  
 Calculate Using:     Working Days     Calendar Days  
 Description:

---

Select	Seq	Sub Step	Description	PALT	Projected Date	Responsible Party	Selected
<input checked="" type="radio"/>	1	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	90	12/29/2010	TVRIENS1	
<input type="radio"/>	2	FA Interim Performance Report	FA Interim Performance Report	0	12/29/2010	TVRIENS1	
<input type="radio"/>	3	FA Interim Fed Financial Repor	FA Interim Fed Financial Repor	365	12/29/2011	TVRIENS1	
<input type="radio"/>	4	FA Interim Performance Report	FA Interim Performance Report	0	12/29/2011	TVRIENS1	
<input type="radio"/>	5	FA Final Fed Financial Report	FA Final Fed Financial Report	306	10/30/2012	TVRIENS1	
<input type="radio"/>	6	FA Final Performance Report	FA Final Performance Report	0	10/30/2012	TVRIENS1	

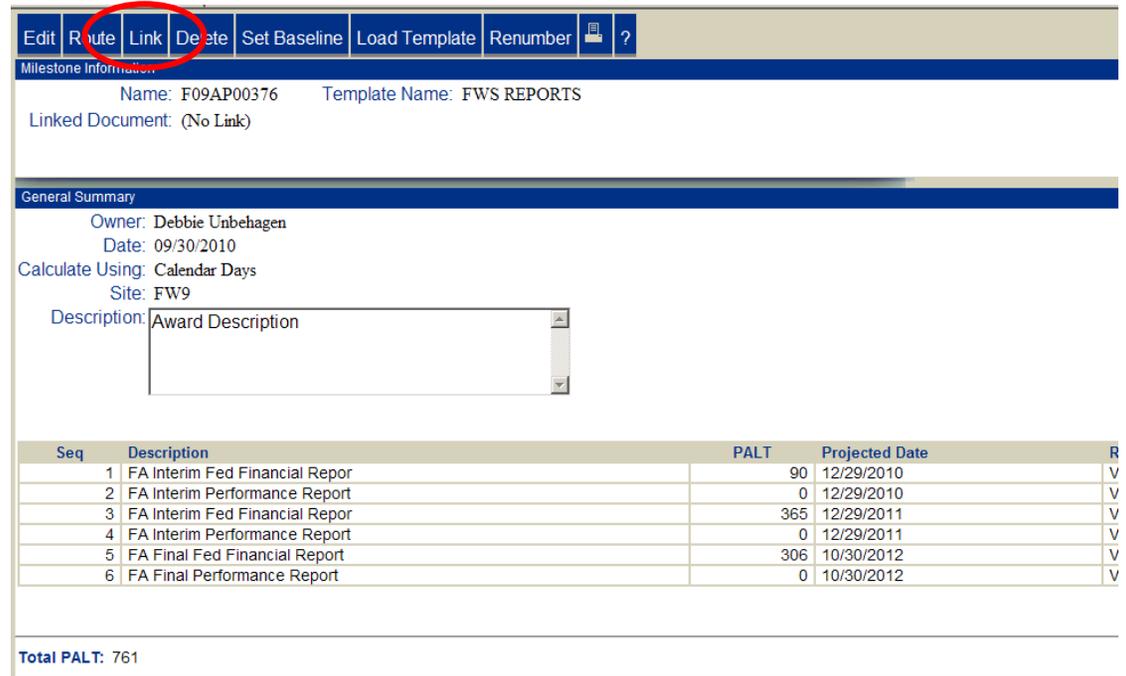
**Total PALT:** 761

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

59. You must now link the Milestone Plan to your award.

Click the  button.



Milestone Information

Name: F09AP00376    Template Name: FWS REPORTS  
Linked Document: (No Link)

General Summary

Owner: Debbie Unbehagen  
Date: 09/30/2010  
Calculate Using: Calendar Days  
Site: FW9  
Description: Award Description

Seq	Description	PALT	Projected Date	R
1	FA Interim Fed Financial Repor	90	12/29/2010	V
2	FA Interim Performance Report	0	12/29/2010	V
3	FA Interim Fed Financial Report	365	12/29/2011	V
4	FA Interim Performance Report	0	12/29/2011	V
5	FA Final Fed Financial Report	306	10/30/2012	V
6	FA Final Performance Report	0	10/30/2012	V

Total PALT: 761

60. The Link Document screen is displayed.

You will see that your Milestone Plan has No Link.

You must link your Milestone Plan to an award.

Financial Assistance will NEVER link the Milestone Plan to a Requisition.



Link Document

Link Options:  No Link  Requisition  Award    Contract

Submit    Cancel

### Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

61. For Link Options, select Award and use the dropdown to select Grant. This is used for both Grants and Cooperative Agreements.

Link Document

Link Options:  No Link  Requisition  Award

Link To:

Award Number:

Modification Number:

- Contract
- Contract
- Purchase Order
- Delivery / Task Order
- BPA Setup
- BPA Call
- Purchase Card Order
- IAA
- MIPR
- Grant
- Section 845 OT Delivery / Task Order

62. Search for the award to be linked or enter the award number in the Award Number field.

You will always link your Milestone Plan to the base award. Never include Modification numbers.

Link Document

Link Options:  No Link  Requisition  Award

Link To:

Award Number:

Modification Number:

Grant

Submit Cancel

63. Click the selection list button  to search for the award to be linked.

Link Document

Link Options:  No Link  Requisition  Award

Link To:

Award Number:

Modification Number:

Grant

Submit Cancel



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

64. The search screen is displayed and defaults the Search Criteria to My Documents and the Site to which you are assigned.

[Display](#) [Hide Search Criteria](#) [Cancel](#) [?](#)

**Search Criteria**

**My Documents**  
 **Assigned to Me**  
 **All**

---

**Search**  
Grant Number

**For**

---

**Site**   
FW9

**Include Related Sites:**

---

**Max Results**

**Results per Page**

**Award Selection**

Grant Number	Status	Status Date	Version	Award Date	Site	Recip
<a href="#">F12AC00234</a>	Released	03/22/2012	BASE	03/22/2012	FW9	EAR
<a href="#">F12AF70273</a>	Released	06/14/2012	0001	06/14/2012	FW9	NAT

Page 1 of 1 (2 results found)



### Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

65. Change the search criteria to All, remove the site code and enter your award number in the For field.

Click  .

**Search Criteria**

My Documents  
 Assigned to Me  
 All

**Search**  
Grant Number

**For**

**Site**

**Include Related Sites:**

**Max Results**

**Results per Page**

**Display** | **Hide Search Criteria** | **Cancel** | **?**

**Award Selection**

Grant Number	Status	Status Date	Version	Award Date
<a href="#">F09AP00376</a>	Released	11/01/2011	BASE	09/30/2011
<a href="#">F09AP00376</a>	In Progress	07/25/2012	0001	07/25/2012

Page 1 of 1 (2 results found)



### Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

66. Select the link for the base award.

Search Criteria

- My Documents
- Assigned to Me
- All

Search

Grant Number

For

f09ap00376

Site

Include Related Sites:

Max Results

100

Results per Page

10

Display Hide Search Criteria Cancel ?

Award Selection

Grant Number	Status	Status Date	Version	Award Date
F09AP00376	Released	11/01/2011	BASE	09/30/2011
F09AP00376	In Progress	07/25/2012	0001	07/25/2012

Page 1 of 1 (2 results found)

67. The Link document screen is displayed. The Award Number is now populated in the Award Number field.

Click .

Link Document

Link Options:  No Link  Requisition  Award

Link To:

Award Number:

Modification Number:



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

68. The Milestone Plan is now linked to an award.

Edit	Route	Link	Delete	Set Baseline	Load Template	Renumber	?
<b>Milestone Information</b>							
Name: F09AP00376				Template Name: FWS REPORTS			
Linked Document: F09AP00376							
<b>General Summary</b>							
Owner: Debbie Unbehagen							
Date: 09/30/2010							
Calculate Using: Calendar Days							
Site: FWS							
Description: <input type="text" value="Award Description"/>							
Seq	Description	PALT	Projected Date	Responsible Party			
1	FA Interim Fed Financial Repor	90	12/29/2010	Vriens, Tracey			
2	FA Interim Performance Report	0	12/29/2010	Vriens, Tracey			
3	FA Interim Fed Financial Repor	365	12/29/2011	Vriens, Tracey			
4	FA Interim Performance Report	0	12/29/2011	Vriens, Tracey			
5	FA Final Fed Financial Report	306	10/30/2012	Vriens, Tracey			
6	FA Final Performance Report	0	10/30/2012	Vriens, Tracey			
<b>Total PALT: 761</b>							

## Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

69. Select

Setting the Baseline starts the clock and PRISM will start to track the progress toward the Milestone Plan.

### Milestone Information

Name: F09AP00376    Template Name: FWS REPORTS  
Linked Document: F09AP00376

### General Summary

Owner: Debbie Unbehagen  
Date: 09/30/2010  
Calculate Using: Calendar Days  
Site: FW8

Description:

Seq	Description	PALT	Projected Date
1	FA Interim Fed Financial Repor	90	12/29/2010
2	FA Interim Performance Report	0	12/29/2010
3	FA Interim Fed Financial Repor	365	12/29/2011
4	FA Interim Performance Report	0	12/29/2011
5	FA Final Fed Financial Report	306	10/30/2012
6	FA Final Performance Report	0	10/30/2012

Total PALT: 761

70. PRISM displays the message, "Are you sure you want to Set the Baseline for the Milestone Plan?"

Select

**Are you sure you want to Set Baseline for the Milestone  
F09AP00376 ?**



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

71. The Milestone Information screen is displayed.

Edit	Route	Delete	Clear Baseline	Renumber		?
<b>Milestone Information</b>						
Name: F09AP00376			Template Name: FWS REPORTS			
Linked Document: F09AP00376						
<b>General Summary</b>						
Owner: Debbie Unbehagen						
Date: 09/30/2010						
Calculate Using: Calendar Days						
Site: FW8						
Description: <input style="width: 90%;" type="text" value="Award Description"/>						
Seq	Description	Linked Document	Linked Version	Projected Date	Actual Date	Original Date
1	FA Interim Fed Financial Repor			12/29/2010	(None)	12/29/2010
2	FA Interim Performance Report			12/29/2010	(None)	12/29/2010
3	FA Interim Fed Financial Report			12/29/2011	(None)	12/29/2011
4	FA Interim Performance Report			12/29/2011	(None)	12/29/2011
5	FA Final Fed Financial Report			10/30/2012	(None)	10/30/2012
6	FA Final Performance Report			10/30/2012	(None)	10/30/2012



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

72. Select  .

**Milestone Information**  
 Name: F09AP00376    Template Name: FWS REPORTS  
 Linked Document: F09AP00376

**General Summary**  
 Owner: Debbie Unbehagen  
 Date: 09/30/2010  
 Calculate Using: Calendar Days  
 Site: FWS  
 Description: Award Description

Seq	Description	Linked Document	Linked Version	Projected Date	Actual Date	Original Date	Days Suspend
1	FA Interim Fed Financial Repor			12/29/2010	(None)	12/29/2010	(None)
2	FA Interim Performance Report			12/29/2010	(None)	12/29/2010	(None)
3	FA Interim Fed Financial Repor			12/29/2011	(None)	12/29/2011	(None)
4	FA Interim Performance Report			12/29/2011	(None)	12/29/2011	(None)
5	FA Final Fed Financial Report			10/30/2012	(None)	10/30/2012	(None)
6	FA Final Performance Report			10/30/2012	(None)	10/30/2012	(None)

73. The Milestone Information screen is displayed.

Verify all projected dates are correct. Adjust the dates if needed.

**Select the Lock** for all Milestone Steps. This will prevent the PALT from changing when you enter received dates

**Milestone Information**  
 Name: F09AP00376    Template Name: FWS REPORTS  
 Linked Document: F09AP00376

**Milestone Steps**      

Seq	Description	Linked Document	Linked Version	Projected Date	Lock	Actual Date	Original Date	Days Suspended	PALT	Actu PAI
1	FA Interim Fed Financial Repor			12/29/2010	<input checked="" type="checkbox"/>		12/29/2010		90	
2	FA Interim Performance Report			12/29/2010	<input checked="" type="checkbox"/>		12/29/2010		0	
3	FA Interim Fed Financial Repor			12/29/2011	<input checked="" type="checkbox"/>		12/29/2011		365	
4	FA Interim Performance Report			12/29/2011	<input checked="" type="checkbox"/>		12/29/2011		0	
5	FA Final Fed Financial Report			10/30/2012	<input checked="" type="checkbox"/>		10/30/2012		306	
6	FA Final Performance Report			10/30/2012	<input checked="" type="checkbox"/>		10/30/2012		0	



**Creating a Milestone Plan in PRISM** Role: FA\_AGO, FA\_GSP

74. The Milestone Information screen is displayed. All steps are locked.

Click 

Seq	Description	Linked Document	Linked Version	Projected Date	Lock	Actual Date	Original Date	Days Suspended	PALT	Actual PALT	Difference
1	FA Interim Fed Financial Repor			12/29/2010	<input checked="" type="checkbox"/>		12/29/2010		90		0
2	FA Interim Performance Report			12/29/2010	<input checked="" type="checkbox"/>		12/29/2010		0		0
3	FA Interim Fed Financial Repor			12/29/2011	<input checked="" type="checkbox"/>		12/29/2011		365		0
4	FA Interim Performance Report			12/29/2011	<input checked="" type="checkbox"/>		12/29/2011		0		0
5	FA Final Fed Financial Report			10/30/2012	<input checked="" type="checkbox"/>		10/30/2012		306		0
6	FA Final Performance Report			10/30/2012	<input checked="" type="checkbox"/>		10/30/2012		0		0

Total PALT: 761    Sum of the Difference between PALT and Actual PALT: 0

75. The General screen is displayed.

Click 

**PRISM**
Edit Route Delete Clear Baseline Renumber ?

**Milestone Information**

Name: F09AP00376    Template Name: FWS REPORTS

Linked Document: F09AP00376

**General Summary**

Owner: Debbie Unbehagen

Date: 09/30/2010

Calculate Using: Calendar Days

Site: FW8

Description: Award Description

Seq	Description	Linked Document	Linked Version	Project
1	FA Interim Fed Financial Repor			12/29/2010
2	FA Interim Performance Report			12/29/2010



### Creating a Milestone Plan in PRISM

Role: FA\_AGO, FA\_GSP

76. You are returned to the PRISM welcome screen.

You have completed creating a milestone plan for your award.

**PRISM™**  
Welcome Debbie Unbehagen

Quick Open:  **Go**      Create Document:  **Go**

Inbox	Recent Documents
<b>For Review</b> (0/0)	Req: 0020005267 (BASE/Closed) <i>10-102 YEAR 4 FUNDING</i>
Courtesy Copy (0/0)	Grant: F10AC00679 (0004/Released) <i>Unalakleet River Chinook Salmon Assessment</i>
Approved (0/0)	Grant: F10AP00125 (0002/Closed) <i>Rural Fire Assistance</i>
Disapproved (0/0)	Grant: F10AP00127 (0001/Closed) <i>Rural Fire Assistance</i>
Reviewed (0/1)	Grant: F10AP00128 (0001/Closed) <i>Rural Fire Assistance</i>
Completed (0/0)	Grant: F12AC00614 (BASE/Released) <i>COOPERATIVE AGREEMENT BOWENS CREEK CR</i>
Bypassed (0/0)	
Proxied (0/0)	
Notifications (450/454)	

**Workload** (0)