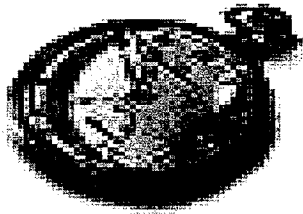


**PHMC Status Reporting
for Mission Essential Year 2000 Projects
Revision 0**

March 31, 1998



**APPROVED FOR
PUBLIC RELEASE**

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Document Title: PHMC Year 2000: Status Reporting for Mission
Essential Year 2000 Projects, Volume 3

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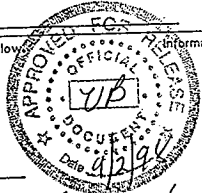
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K. If Additional Comments, Please Attach Separate Sheet

Jennifer Curtis per telcom 8/13/98 said no "legal" review signature is needed to approve this document.

Revision #	Description	Date Revised
0	1) Exception reports are required for <u>only</u> DOE HQ reported projects, 2) Minor wording clean up, 3) changed status report from an Excel spreadsheet to a web-based, 4) updated the non-mission essential and mission essential definition.	March 31, 1998

PHMC Status Reporting for Mission Essential Year 2000 Projects



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PHMC Status Reporting for Mission Essential Year 2000 Projects



1.0 Purpose

The PHMC Year 2000 status reporting process is designed to encompass the reporting requirements of the Office of Management and Budget (OMB), DOE HQ, RL and the PHMC for mission essential Year 2000 projects.

2.0 Scope

Status reporting is required for all Year 2000 projects. The Year 2000 project list will be maintained current as Year 2000 projects are modified, added or deleted. Reporting is required until a Year 2000 project has completed compliance assurance. Some projects will be identified as DOE HQ reportable. These are projects determined to be the most critical and due the attention of DOE HQ.

3.0 Milestones

The milestones established by OMB and DOE HQ are the driving forces behind the activities and associated dates. (Compliance Assurance is a PHMC requirement).

Renovation	09/15/98
Validation	02/15/99
Compliance Certification	02/15/99
Implementation	03/31/99
Contingency Plan	03/15/99
Compliance Assurance	07/31/99

4.0 Responsibilities

4.1 Year 2000 Project Office

The Year 2000 Project Office establishes the reporting process; provides directions, instructions and guidance to the major subcontractors; integrates the information; updates the DOE HQ Mission Essential Status Database; maintains the PHMC Year 2000 Database, reports PHMC Performance Agreement (SID 1.2.1) progress to RL.

4.2 PHMC Major Subcontractor Company

The PHMC major subcontractors provide status reports, schedules, and exception reports as required in these instructions for the Year 2000 projects they own.

4.3 Fluor Daniel Hanford (FDH)

The FDH Chief Information Office (CIO) provides status reports, schedules, and exception reports for the FDH identified Year 2000 projects.

PHMC Status Reporting for Mission Essential Year 2000 Projects



5.0 Reporting Requirements

All Year 2000 projects are required to complete the Status Report. Year 2000 projects designated as critical are also required to submit a schedule.

5.1 Year 2000 Project Status Report

The following matrix illustrates the required (✓) information for all Year 2000 projects. The Year 2000 Project Disposition determines the reporting requirements for the various Year 2000 activities. Attachment 2 illustrates the Status Report and provides instructions for completing. Note: Year 2000 projects with replace dispositions report status for 1) Assessment and Contingency Plan for the current system, and 2) the remaining status activities for the new system.

Status Report Requirements								
DOE HQ Dates		06/15/98	09/15/98	02/15/99	02/15/99	03/31/99	03/15/99	07/31/99
Year 2000 Project Disposition	STATUS ACTIVITY							
	Assessment	Test Plan	Renovation	Validation	Compliance Certification	Implementation	Contingency Plan	Compliance Assurance
Deactivate	✓				✓			✓
Replace	✓	✓	✓**	✓**	✓	✓**	*	✓
Repair	✓	✓	✓**	✓**	✓	✓**	*	✓
Indicated Compliant	✓				✓			✓
Contingency Plan	✓				✓		✓	✓
* Required if validation date not complete by 02/15/99 ** Exception Report required if milestone not met								

5.2 Year 2000 Project Schedule

Any Year 2000 project identified as DOE HQ Database must provide detailed schedules in addition to the Status Report. Schedules are to be provided in Primavera Project Manager 2.0 in the format indicated in Attachment 4.

PHMC Status Reporting for Mission Essential Year 2000 Projects



5.3 Year 2000 Project Exception Report

Any designated to be reported to DOE HQ Year 2000 project that reports an estimated or actual date for renovation, validation or implementation that will not meet the DOE HQ established due date (Section 3.0), must prepare a Year 2000 Project Exception Report. (Attachment 5).

6.0 Reporting Process

6.1 Year 2000 Project Status Report

Status reporting is performed as follows:

- a. **Authorized Persons:** Status Reporting updates can only be performed by persons identified by the company Year 2000 points of contact. These persons will only have access to the Year 2000 projects identified with their company.
- b. **Login Screen:** Enter the last 7 digits of your Hanford ID (HID). Only persons who have been authorized to perform data entry will be allowed access to update records.
- c. **Project Selection:** A listing of the Year 2000 projects authorized for the HID entered will be displayed. Select a project.
- d. **Status Report Form:** The status report form is presented for the selected Year 2000 project. The top part of the form presents project identification information. This information cannot be changed. Any changes to this information must be provided to Vic Forney and authorized by the company Year 2000 Point of Contact. An e:mail link is provided for this. The bottom of the form highlights in **RED** the required data entry fields for the project disposition (refer to the Status Reporting Guidelines for specifics). Enter all required fields. Update the record.
- e. **Valid Data Entries:** Dates: x/x/xx or xx/xx/xx may be entered. Percentages: x% or xx% or x.xx% or 0.
- f. **Valid Data Updates/Data Violations:** After the record is updated, a screen is displayed indicating the correct the incorrect data entries. For incorrect data, return to the status report form and complete as directed. Update the record again.
- g. **Return to the Project List:** After the data validation, select the return to project list button to select another project.

6.2 Year 2000 Project Schedule

The following process will be used for preparing schedules for Year 2000 projects reported to DOE HQ:

- a. Prepare a schedule for each Year 2000 project. Note: Not all projects will require reporting of all activities (Section 5.1).
- b. Provide schedule(s) to Doug Broz, Year 2000 Project Office.
- c. All questions should be directed to: Doug Broz, Year 2000 Project Office, 376-6936.

PHMC Status Reporting for Mission Essential Year 2000 Projects



6.3 Year 2000 Project Exception Report

- a. Identify which DOE HQ reported Year 2000 project dates do not meet the required milestone due dates for renovation, validation and implementation.
- b. Complete an Exception Report form for each Year 2000 project.
- c. Send report(s) electronically to Doug Broz, Year 2000 Project Office.
- d. All questions should be directed to: Doug Broz, Year 2000 Project Office, 376-6936.

7.0 FY 1998 Performance Agreement

The DOE RL Year 2000 FY 1998 Performance Agreement (SID 1.2.1) will be measured using the status provided in the PHMC Year 2000 Status Reporting for Mission Essential Projects. The performance measure, expectations, incentive fee and measure guidelines are described below.

7.1 Performance Measure

The FY 1998 performance measure is to eliminate Year 2000 associated computer related problems that if left unresolved would have an adverse impact on the Hanford mission.

7.2 Performance Expectation

Date	Activity	Performance Expectation	Increased Performance
ASSESSMENT			
09-30-98	• Infrastructure	100%	-
09-30-98	• Equipment	100%	-
09-30-98	• Applications	80%	100%
RENOVATION			
09-30-98	• Infrastructure Year 2000 Projects	70%	80%
09-30-98	• Equipment Year 2000 Projects	70%	80%
09-30-98	• Application Year 2000 Projects	30%	40%

7.3 Measurement Guidelines

Percent completion is calculated by dividing the number of Year 2000 projects **100% completed** by the total number of Year 2000 projects (e.g., # of 100% Assessments Completed / Total # Projects).

PHMC Status Reporting for Mission Essential Year 2000 Projects



8.0 Reporting Calendar

Monthly reporting is required until a Year 2000 project has completed compliance assurance. Note that for the months where DOE HQ reporting is required (***bold/italic below***), a tighter reporting cycle is required.

	<u>Call for Data</u>	<u>MSC Submits Report</u>	<u>HQ/PHMC Reports</u>
	<i>March 02/19/1998</i>	<i>02/27/1998</i>	<i>03/05/1998</i>
April	03/30/1998	04/17/1998	04/24/1998
<i>May</i>	<i>04/27/1998</i>	<i>05/11/1998</i>	<i>05/15/1998</i>
June	05/25/1998	06/12/1998	06/19/1998
July	06/29/1998	07/17/1998	07/24/1998
	<i>August 07/27/1998</i>	<i>08/10/1998</i>	<i>08/14/1998</i>
September	08/24/1998	09/11/1998	09/18/1998
October	09/28/1998	10/16/1998	10/23/1998
<i>November</i>	<i>10/26/1998</i>	<i>11/09/1998</i>	<i>11/13/1998</i>
December	11/23/1998	12/11/1998	12/18/1998
January	12/28/1998	01/15/1999	01/22/1999
<i>February</i>	<i>01/25/1999</i>	<i>02/08/1999</i>	<i>02/12/1999</i>
March	02/22/1999	03/12/1999	03/19/1999
April	03/29/1999	04/16/1999	04/23/1999
<i>May</i>	<i>04/26/1999</i>	<i>05/10/1999</i>	<i>05/14/1999</i>
June	05/31/1999	06/18/1999	06/25/1999
July	06/28/1999	07/16/1999	07/23/1999
	<i>August 07/26/1999</i>	<i>08/09/1999</i>	<i>08/13/1999</i>
September	08/30/1999	09/17/1999	09/24/1999
October	09/27/1999	10/15/1999	10/23/1999
<i>November</i>	<i>10/25/1999</i>	<i>11/08/1999</i>	<i>11/12/1999</i>
December	11/29/1999	12/17/1999	12/24/1999

PHMC Status Reporting for Mission Essential Year 2000 Projects



Attachment 1 - Definitions

- Assessment** Phase 2 of the FDH Year 2000 Project is to assess the Year 2000 project. Preliminary tests will be performed on the system, equipment or infrastructure to determine its response to the applicable date changes. From this information: methods of correcting the malfunctions are reviewed; the schedule and cost for each method are developed; a cost/benefit study is performed; a correction method recommendation is given to the system owner; interfaces are redefined and owners contacted; a Year 2000 project plan is developed. (This equates to the DOE HQ assessment terminology and milestone date of 01/15/1997.)
- Compliance Assurance** Phase 6 of the FDH Year 2000 Project is the oversight by FDH of the Major Subcontractors (MSC) work. This effort will be performed on a graded approach as determined by the risk identified in the Impact Identification Phase, and as modified in the Assessment and Renovation Phases. The extent of compliance assurance will be determined by the associated FDH Project Director. (There is no comparable phrase in the DOE HQ terminology or milestones.)
- Compliance Certification** A letter of compliance certification signed by a major subcontractor company officer able to accept liability for the major subcontractor company.
- Contingency Plan** A contingency plan is a backup approach prepared because: 1.) a Year 2000 project that will not meet the DOE HQ milestones, thus they will not be compliant in time for sufficient operation to assure functionality, or 2.) the costs to repair or replace, and the risks (cost/benefit), do not warrant continued expenditures. The Contingency Plan addresses what will be done with a Year 2000 project, how it will be operated or renovated, and how business practices will be changed to accommodate noncompliance, in order to avoid the unsatisfactory year 2000 date problems now that the original plan is no longer viable. These plans could be prepared at any point in the Year 2000 Project phases. (This equates to the DOE HQ Contingency Plans due March 15, 1999 for those Year 2000 projects that did not successfully complete the Validation completion date of 2-15-99.)
- Deactivate** A system that is taken out of service and is not replaced. The business function it supported is no longer required or another method of gathering and using the data was determined. Any system that is deactivated and is replaced by another system should be identified as a replace and tracked accordingly. (There is no comparable terminology in the DOE HQ milestones.)

PHMC Status Reporting for Mission Essential Year 2000 Projects



Implementation

Phase 5, Renovation, that migrates a renovated Year 2000 project into production which may result in new issues requiring resolution. Implementation involves user training and documentation updates as needed.

Indicated Compliant A system, equipment or infrastructure component identified in the Impact Identification phase and, by current knowledge, thought to be compliant. Testing may not necessarily have been done to prove this. Those systems, equipment and infrastructure components indicated compliant will require Compliance Certification by a major subcontractor company official. FDH will perform Compliance Assurance based upon the risk and the Project Director's direction. (There is no comparable terminology in DOE HQ milestones.)

Mission Essential

Mission essential Year 2000 projects are the focus of the FDH Year 2000 Project. An operational scientific or administrative system, item of equipment, or component that processes date information requiring year 2000 compliance is also deemed mission essential if its failure results in: (1) injury to personnel, (2) damage to property (public or private), or (3) cessation, or delays of performance of the focus of the FDH Year 2000 Project. Year 2000 compliance for non-mission essential inventory items are conducted at the owner's discretion. The expanded definition below (also defined by DOE HQ) is part of the inventory survey to facilitate further identification of mission essential: *(Mission essential can be one or more of the following whose loss or interruption would have an adverse effect on the: National security of the United States or Department of Energy programs; Safe operation of nuclear or hazardous waste facilities; Control and accountability of nuclear materials; Control of nuclear facilities and nuclear weapons access; Safeguards and security programs, including protection of classified information and restricted data; DOE-RL/PHMC ability to meet mission without incurring large financial losses; Protection of health and safety of the public, DOE and DOE contractor employees and the protection of the environment (i.e., monitoring radiation levels, maintenance of record(s) of personnel exposures to hazardous materials, etc.); Protection of DOE-RL/PHMC interests: property, land, buildings, equipment, and research and development; Compliance with federal regulatory requirements and data that must be regularly reported to Congress and/or other federal agencies; Mobilization, protection, and distribution of the nation's resources in order to promote national defense; Protection of the privacy of individuals on whom the Department of Energy keeps records, including security clearance documentation for DOE and DOE contractor personnel; Availability and protection of records essential to the preservation of the legal rights and interests of individual citizens and their Government; Contracts that call for acquisition, management, or use of computing resources; Operational readiness for military effort and civil defense activities during a national emergency.)*

Non-Mission Essential

Those applications, equipment or infrastructure components that are not mission essential. They may be eliminated or maintained at the discretion of the owner. If they are maintained, it is the owner's responsibility to assess and renovate the system for compliance with Year 2000 problems and to obtain any funding necessary for these efforts.

PHMC Status Reporting for Mission Essential Year 2000 Projects



Renovation	Phase 3, Renovation, when the actual deactivation, replacement, repair is performed or contingency plan is prepared. This includes: test plans; testing; configuration management and documentation in accordance with the Hanford Policies and Procedures (HPP); verification and validation. A senior official of the major subcontractor company signs the Compliance Certification Form stating that the system is Year 2000 compliant. (This equates to the DOE HQ Renovation 9-15-98 /Validation 2-15-99 /Implementation 3-31-99.)
Repair	The actual changing of the code in a program to correct function errors caused by date changes. (DOE HQ uses this terminology the same way.)
Replace	A system whose functionality will be replaced in whole or in part by another method of gathering and using the data. For example, many systems are currently targeted for replacement by the HANDI 2000 enterprise resource planning initiative. The FDH Year 2000 Project is tracking the replacement of these systems because the system replacing it may not be implemented before a Year 2000 problem occurs in the existing system.
Risk Ranking	The ranking (1 to 5) against eight criteria (health and safety, environmental impact, security, regulatory compliance, financial integrity, cost impact, customer service delays, management interest) that also have a weighting factor (scale 1-5) This risk ranking, in conjunction with a mission essential determination, may be used to determine whether a system is critical mission essential.
Test Plan	This is the plan on how to conduct testing (not to be confused with the actual test procedure that has the test cases, expected results, and actual results). The plan identifies all the project features to be tested, the test administration and recording process, the general criteria for acceptance, whether "accepted with exceptions" is a permissible finding and under what conditions, the test responsibilities (staff), the test environment, discrepancy resolution process, sign off procedures. One element of the test plan is to describe the test phases to be followed: what is a unit test and who does it, what is a system test and who does it, what is an acceptance test and who does it.
Validation	Phase 4, Renovation, involves independent verification of the test results and variances as a control measure. Each test plan is run completely and successfully and the resultant documentation available for review.
Year 2000 Project	A logical group of Year 2000 related applications, infrastructure and equipment components which may be consolidated for purposes of operation or for Year 2000 central management and administration. Additional information on the process of projectizing can be found in the ' PHMC Year 2000 Projectization Guidelines '.

PHMC Status Reporting for Mission Essential Year 2000 Projects



A more comprehensive list of definitions is available on the Year 2000 webpage: <http://apsql02.rl.gov/y2k/index.html>

PHMC Status Reporting for Mission Essential Year 2000 Projects



Attachment 2 - Status Report

PHMC Year 2000 Project Status Report

Year 2000 Project Name: (1)

Date: (3)

Year 2000 Project Description: (2)

Disposition: (4)

	↘
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Replacement System: (5)

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- Deactivate
- Replace
- Repair
- Indicated Compliant
- Contingency Plan

Person Responsible for Status Report: (6)

HID: (7)

(8) STATUS ACTIVITY	(9) ESTIMATED COMPLETION DATE	ACTUAL COMPLETION (10)	
		% Complete	Actual Date
Assessment			
Test Plan			
Renovation			
Validation			
Compliance Certification			
Implementation			
Contingency Plan			
Compliance Assurance			

PHMC Status Reporting for Mission Essential Year 2000 Projects



Instructions:

- (1) Name as defined in the PHMC Year 2000 Database (Y2KAD) as a Year 2000 project. Year 2000 project coincide with the 'compliance project' defined in the PHMC Year 2000 Projectization Guidelines or defined by the major subcontractor. **This field is populated from the Y2KAD and is not editable.**
- (2) The description of the Year 2000 Project as defined in the Year 2000 Database (Y2KAD). **This field is populated from the Y2KAD and is not editable.**
- (3) Date information is reported and updated. **This field is populated from the Y2KAD and is not editable.**
- (4) Disposition is the Year 2000 renovation method selected for the Year 2000 Project. **This field is populated from the Y2KAD but it can be edited.**
- (5) The name of the new application replacing an existing application (e.g., FDS - existing; Handi 2000 Financial Module- new). **This field is populated from the Y2KAD and can be edited.**
- (6) **Enter** the name of the person who is responsible for the information provided in the report and can be contacted should questions arise.
- (7) **Enter** the Hanford Identification Number (HID) - Hxxxxxxx - of the person responsible for the Status Report. **This is required input for the Y2KAD.**
- (8) Status Activities (see Attachment 1 - Definitions).
- (9) Enter the estimated completion date (mm/dd/yyyy) for each Year 2000 status activity as required in Section 5.1. Note: Year 2000 projects with replace dispositions report status for 1) Assessment and Contingency Plan for the current system, and 2) the remaining status activities for the new system.
- (10) **Enter** the percent complete number (without the % and not a decimal - e.g. 50) and actual completion date (mm/dd/yyyy) for each Year 2000 status activity as required in Section 5.1. **Do not enter the % complete or actual complete date for compliance assurance - this will be filled in by Year 2000 Project Office.**
Note 1: Year 2000 projects with replace dispositions report status for 1) Assessment and Contingency Plan for the current system, and 2) the remaining status activities for the new system. Note 2: The Year 2000 Project Office has provided guidelines (Attachment 5) for calculating percent complete and provided only as recommendations.

PHMC Status Reporting for Mission Essential Year 2000 Projects



Attachment 3 - Year 2000 Project Exception Report

Report Date:

Year 2000 Project Name:

Person Responsible for Status Report:

HID:

Estimated Renovation Date:	Actual Renovation Date:
Description why the HQ established due date (09/15/98) cannot or will not be met:	
Indicate where the schedule could be accelerated with additional financial resources:	
Identify the estimated additional (delta) costs:	
Estimated Validation Date:	Actual Validation Date:
Description why the HQ established due date (02/15/99) cannot or will not be met:	
Indicate where the schedule could be accelerated with additional financial resources:	
Identify the estimated additional (delta) costs:	
Estimated Implementation Date:	Actual Implementation Date:
Description why the HQ established due date (03/31/99) cannot or will not be met:	
Indicate where the schedule could be accelerated with additional financial resources:	
Identify the estimated additional (delta) costs:	

PHMC Status Reporting for Mission Essential Year 2000 Projects



Attachment 4 - Critical Year 2000 Project Sample Schedule
(contact Angie Ensunsa with questions 372-0534)

PHMC Status Reporting for Mission Essential Year 2000 Projects



Attachment 5 - Percent Complete Guidelines

Percent Complete Metric Recommendations	
ASSESSMENT	
Year 2000 Handbook Task Description (Section #)	% Weight When Completed
Assessment Planning (2.1 -2.3)	10%
Problem Analysis and Renovation Techniques (2.4 - 2.5)	70%
Renovation Plan (2.6)	100%
TEST PLAN	
Test Plan (3.1)	100%
RENOVATION	
Year 2000 Handbook Task Description	% Weight When Completed
Modify (3.2)	40%
Run Test (3.3 - 3.4)	100%
VALIDATION	
Validation and Verification Document (2.9)	40%
Validate (3.5)	100%
COMPLIANCE CERTIFICATION	
Certification Letter (2.8)	100%
IMPLEMENTATION	
Implement (3.7)	80%
Documentation (3.8)	100%
CONTINGENCY PLAN	
Contingency Plan (2.7)	100%
COMPLIANCE ASSURANCE	
Review projectization, assessment, test plan (4.1 - 4.3)	30%
Review renovation results, implementation plan (4.4 - 4.5)	80%
Compliance Sign off (4.6)	100%

PHMC Status Reporting for Mission Essential Year 2000 Projects

