USER GUIDE

(SMART)

SNPLMA's Web-Based Quarterly Reporting Database

Version 13 – January 2026

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ACCESSING THE "SMART" APPLICATION

Microsoft Edge is the preferred browser for all SNPLMA-related tasks. Google Chrome is acceptable but may occasionally have display issues. While the data will still be present, formatting may not align perfectly, which could affect readability.

Currently, there are two methods of user authentication for accessing SMART. Both methods require your email address for verification. Thus, it is crucial that SNPLMA has your exact email address linked to your SMART account.

1) **DOI Users – Active Directory Federation Services (AFDS):** This method is used if you are logged in through the Department of The Interior (DOI) network. Your login credentials will be authenticated using the ADFS system, which connects to the DOI network.

2) **Non-DOI Users – Login.gov:** If you are not on the DOI network, SMART will utilize login.gov for user authentication. This must be a work email address in order for access to be granted.

If you are teleworking, ensure you are connected to your network via VPN to use ADFS. This connection is necessary for authentication to succeed when you are working remotely.

SMART should be accessed through the SNPLMA Website located here: [SNPLMA | Bureau of Land Management (blm.gov)]

Once you successfully log in to SMART, you will generally be directed to the Main Screen automatically. Below are the details of what to expect upon logging in and a brief overview of the main screen's layout.

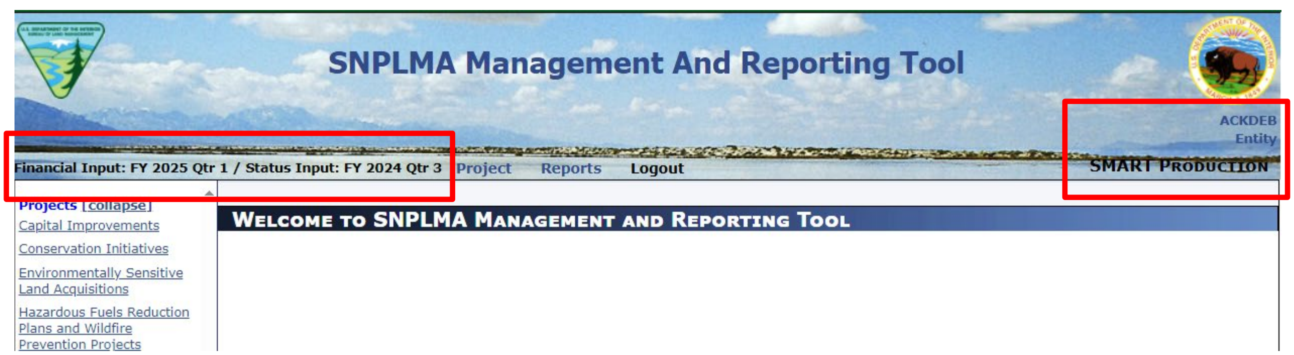
If you have been assigned multiple roles or belong to several distribution groups within the SMART system, you will be presented with a role selection screen upon logging in. This feature allows you to select the appropriate role that fits your current responsibilities, ensuring access to the necessary functions and data relevant to your tasks (e.g., Sysadmin, Program Manager, Entity, Program Manager (Read Only) role, etc.).

Account Selection

User Name	Role Type	Distribution Code	Email	Entity Contact	Actions
ACKD			dackerman@blm.gov	No	Select
ACKDEB			dackerman@blm.gov	Yes	Select
ACKREADE			dackerman@blm.gov	Yes	Select
DACKERMAN			dackerman@blm.gov	No	Select
DEBSNAP			dackerman@blm.gov	No	Select
PMDMA			dackerman@blm.gov	No	Select

SMART Main Screen

Upon successful login to the SMART system, the first screen you will encounter is the Welcome Screen.



At the top of every screen within the SMART system, you will find a user-friendly information display that provides key details relevant to your current session. This information is essential for keeping you informed about your user ID, role, and the specific reporting period you are working on.

In this example, you are entering your financial needs for FY2025 Q1 (October, November, December) and entering your quarterly status updates for work accomplished in FY2024 Q3.

BROWSER RECOMMENDATION

The recommended browser to use MS Edge with Google Chrome as a secondary browser choice.

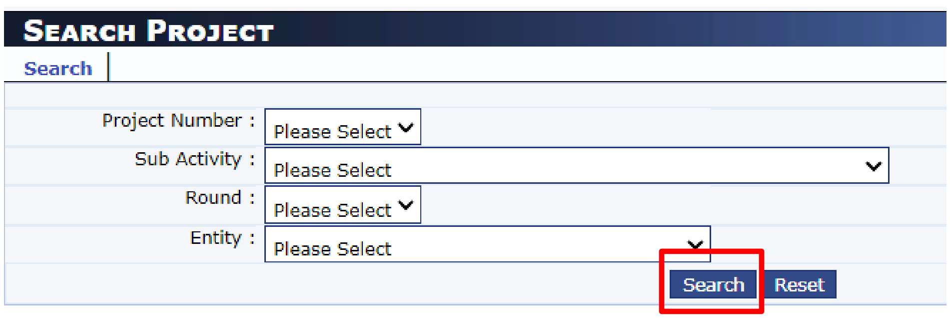
The SMART application will automatically “time-out” after 15 minutes of inactivity. This will require you to login again. This is a DOI security requirement and cannot be changed. It is essential to save your work frequently. Even if you are actively typing, the system may not recognize it as activity. For instance,if you step away from the screen while entering your Annual Accomplishment, you may find that your data has been lost when you return. To avoid losing your progress, make it a habit to click the SAVE button regularly. Rememeber that simply typing doesn’t count as activity in the system, so frequest saving is crucial to protect your work.

LOCATING YOUR PROJECTS

There are two ways to access your active projects, with the first method being the most recommended for efficiency.

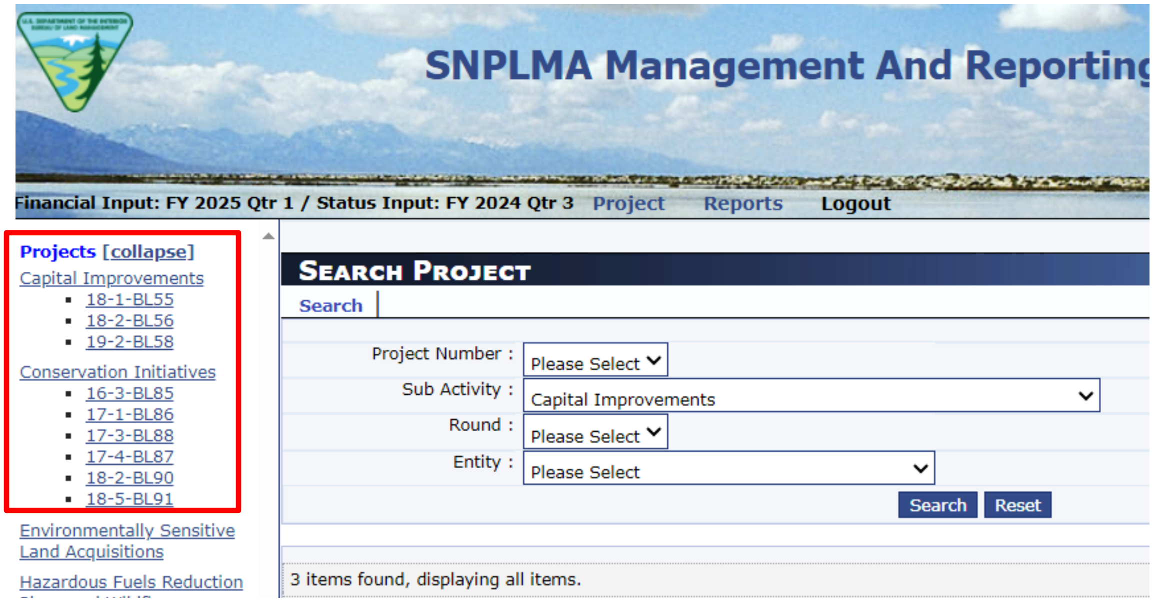
<u>Method 1 (Recommended) – Project Search:</u> Click on the “Project” link located in the top menu bar. Once you access the "Project" link in the top menu bar and choose to perform a search, you can simply click on the "Search" button without making any additional selections. This will provide you with a complete list of all your active projects. This feature allows you to search for your projects using various selection criteria, making it easier to narrow down your search results effectively.

- Clicking on **“Search.”** Making no additional selections will give you a complete list of all your Active Projects.



- Clicking on the desired Sub Activity, Round, etc. This will narrow the list of active projects being shown within the category (those not yet closed or terminated). The screen shot below shows the active BLM projects for the Capital Improvements category. Categories with many active projects may require use of the scroll bar to see all projects.

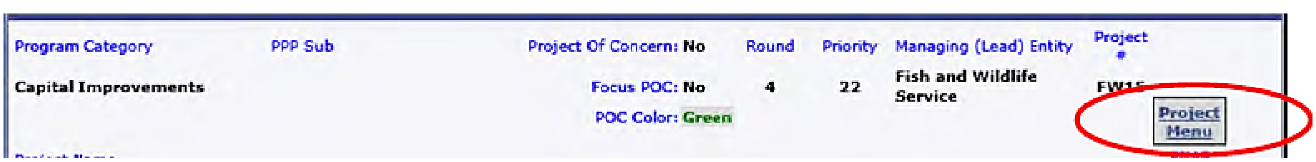
<u>Method 2 Dropdown List Search:</u> Select the desired project from the category dropdown list on the left side of the Welcome Screen. By using this method, once a project is selected you will be taken directly to the project menu.



ACCESSING PROJECT MENU SELECTIONS

Once you have located the project you wish to update, the next step is to access the Project Menu, where you can make changes and updates.

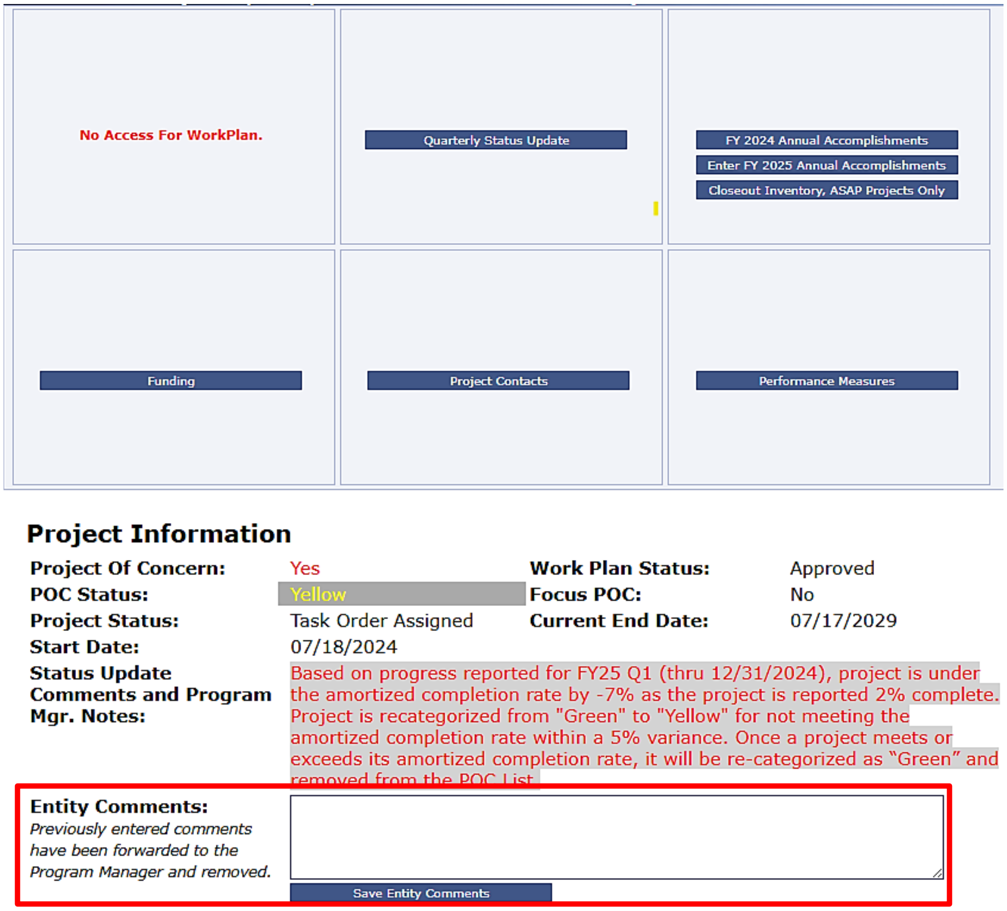
➢ To make changes, click on the **"Project Menu"** box located to the right of the Project #.



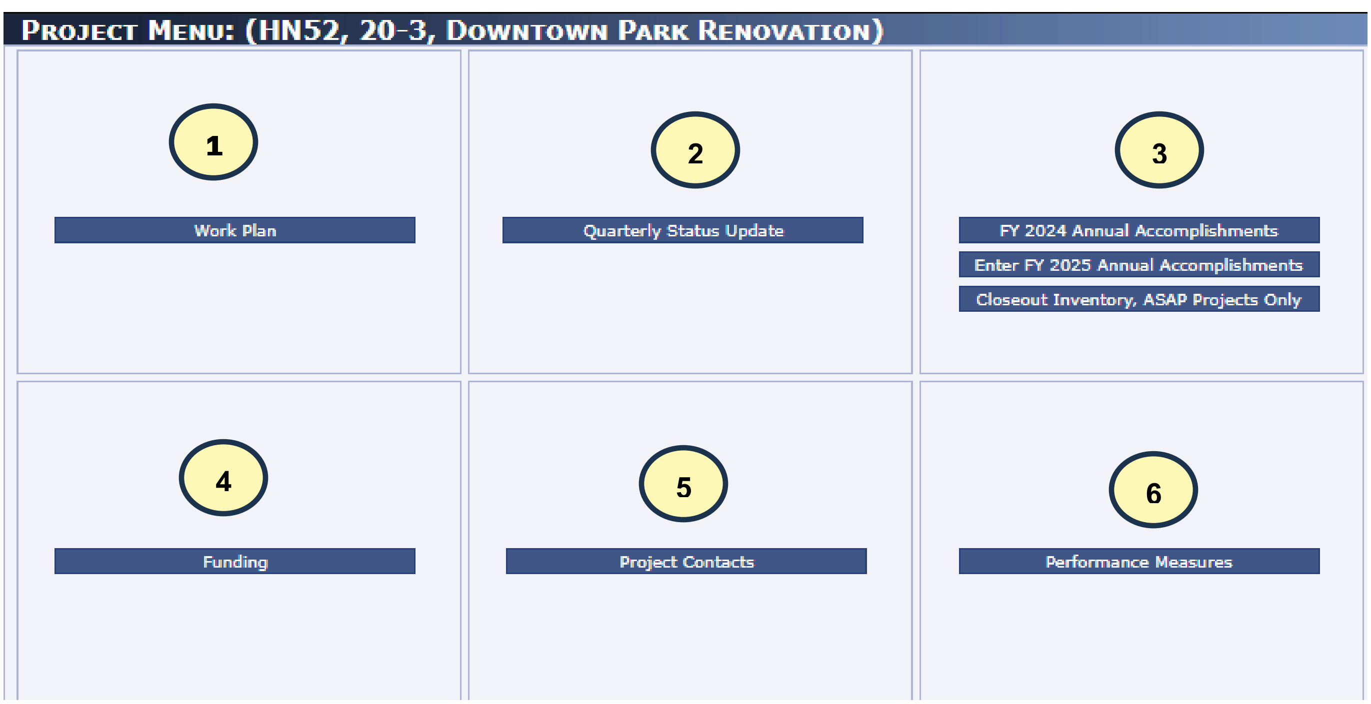
The Project Menu screen that will be displayed when SMART is open looks like this. The sample below is for a Capital Improvements Project Round 17-1.

The Entity Comments box provides project managers with a convenient way to share any additional information about the project that isn't included in the quarterly status update. This feature allows you to communicate important details directly within the system, eliminating the need to send a separate email to the SNPLMA Program Manager.

When you enter comments in this box, the information is automatically sent to the System Administrator, who will then forward it to the SNPLMA Program Manager.



The Project Menu screen offers six menu boxes accessible to Entity users.



From top left to right, the menu boxes are:

1) **Work Plan:** The Work Plan menu box is only available when a new workplan is required for a new project or if a project modification was approved.

2) **Quarterly Status Update:** This option allows you to enter all quarterly status information: overall percent complete, percent completion by deliverable, actual start and end dates for deliverables, and narrative status comments.

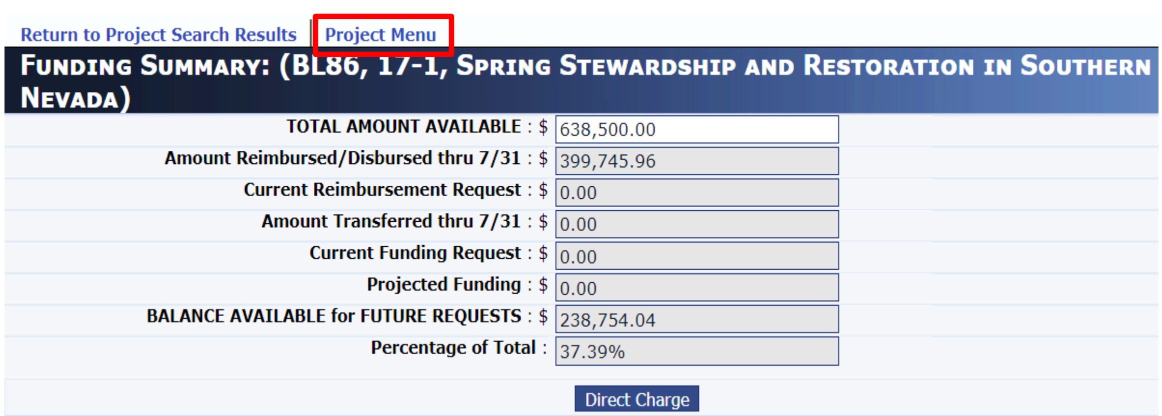
3) **Annual Accomplishments:** This menu box has three selections. The top selection is to display the previous year's annual accomplishment for reference only and cannot be edited unless it was never entered. The second selection is for entering the current fiscal year's annual accomplishments. The third selection is for ASAP projects only to enter the projects inventory.

4) **Funding Processes:** This menu box allows you to enter the current funding needs for your projects and to report the amount of committed/obligated/expended dollars. It is important to note that this is not required for projects funded through ASAP. Regardless of whether SMART is open or not, you can view your current "Funding Summary" here.

5) **Project Contacts:** This menu box allows you to verify or update project contact information. Please confirm each quarter that this information (names, email addresses, phone numbers) are correct. This choice is available any time, whether SMART is open or not. Note: You can only designate one Project Manager; if you need to enter a new Project Manager, remember to delete the previous one first.

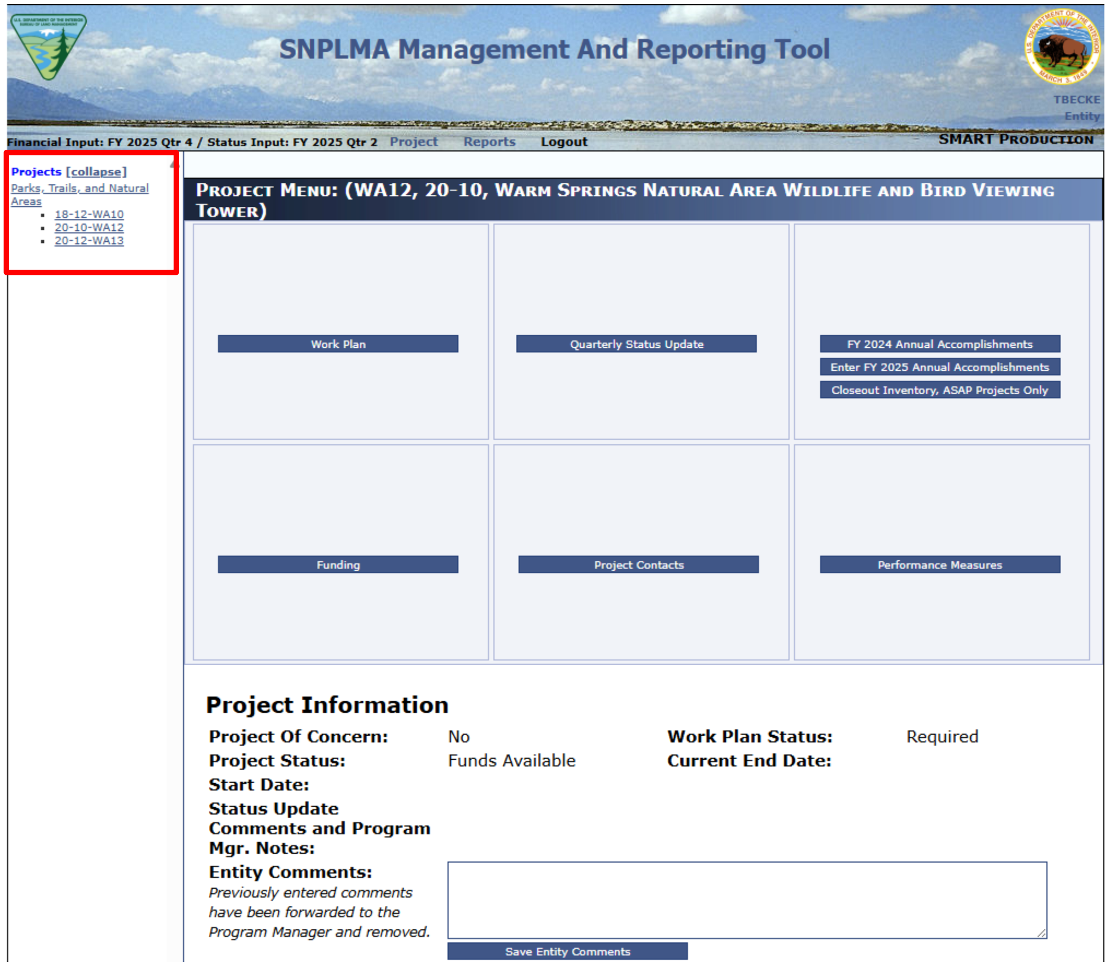
6) **Performance Measures:** This is where the project Performance Measures are entered when closing a project. There is also a checkbox labeled "Final Overall Accomplishment" to indicate that the information entered is the overall project accomplishments required upon project closeout.

Navigating the Project Menu Screen: In the example below, the "Funding Processes" menu box has been accessed. To return to the Project Menu Screen, click the blue "Project Menu" selection above the title bar.

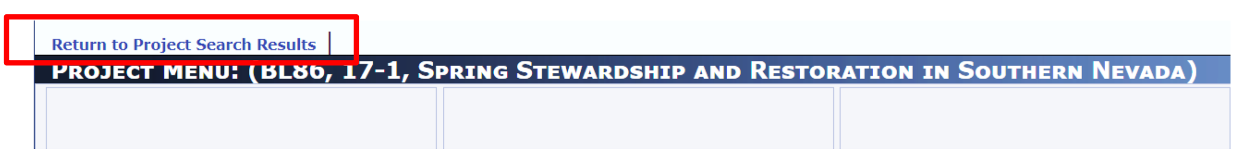


If the Project Menu Screen was accessed using the Method 1 – Project Search then you can click **"Return to Project Search Results"** to view the previous selected parameters and select another project.

Whereas if you used the project menu listed on left to make your project selection, keep in mind that you will be taken back to the project menu of the project that was originally selected. The link "Return to Project Search Results" is unavailable.



➢ Click on **"Return to Search Results"** above the title row on the Project Menu Screen. This will return you to your original search results (see below) based on the parameters that had been previously entered.



The user can now select another project to update from the original search by selecting "Project Menu" or locate a new project by entering new search parameters.

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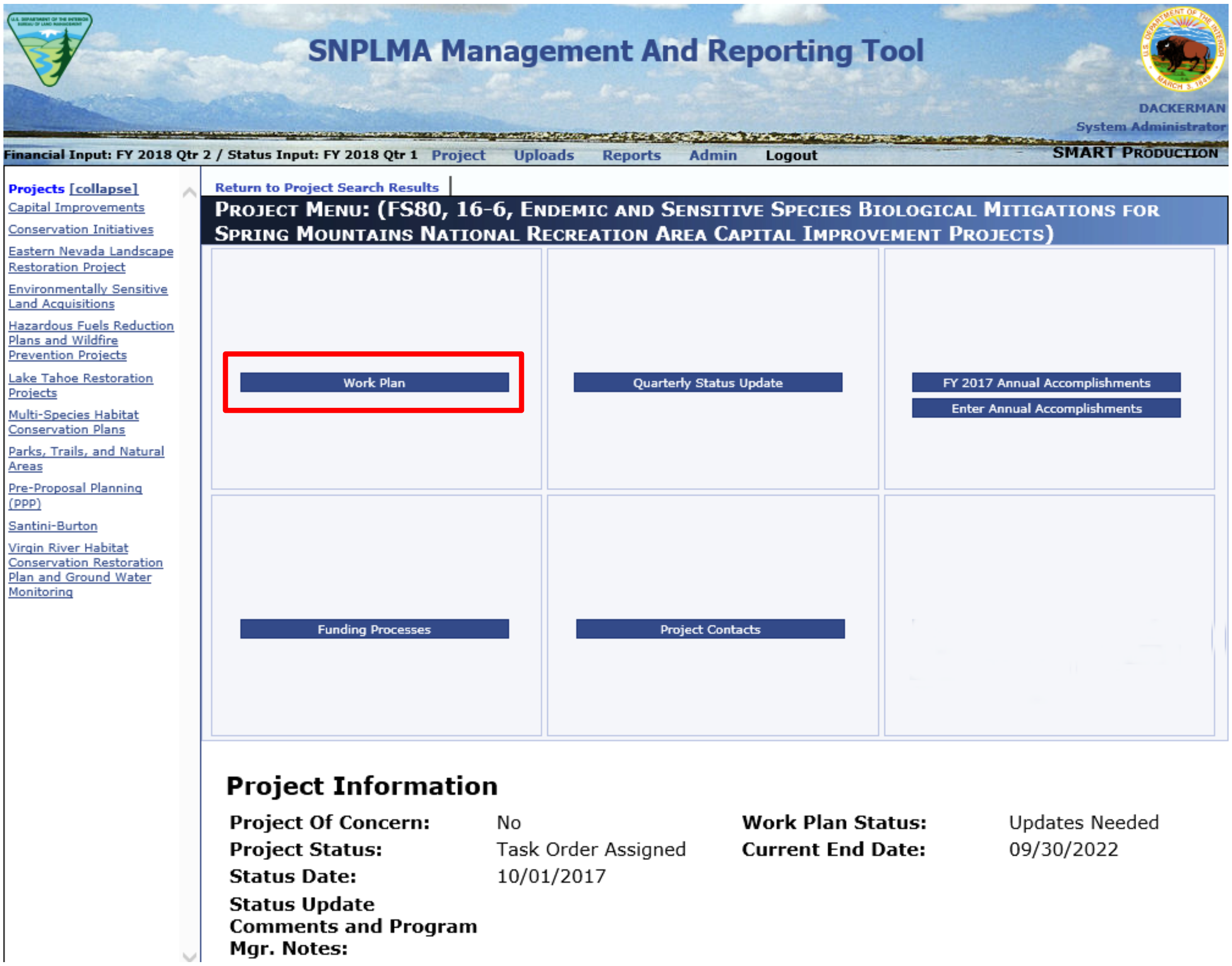
STEP 1: CREATING A WORKPLAN FOR NEW PROJECTS

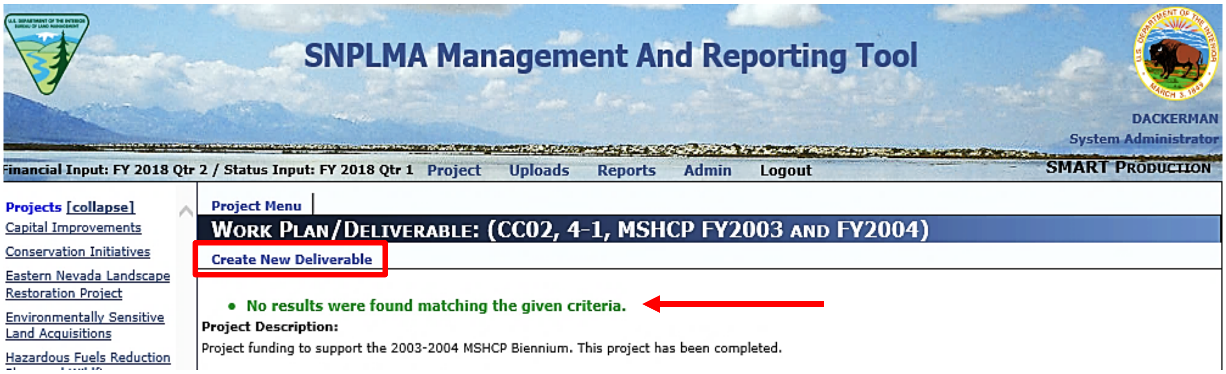
To create a work plan for a new project, first, locate the specific project that requires a work plan.

- Next click on **"Project Menu"** then on the **"Work Plan"** menu box.



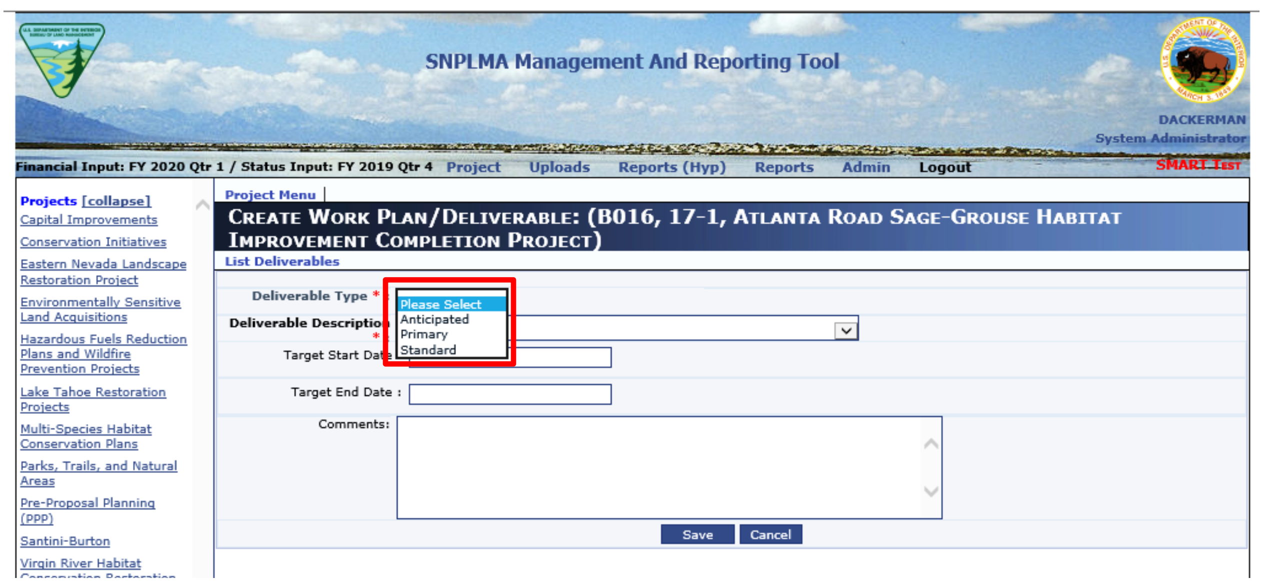
The following screen displays with the message that "No results were found" because no deliverables, tasks, or subtasks have yet been entered for the specific project you are viewing.

➢ Click on **"Create New Deliverable**."

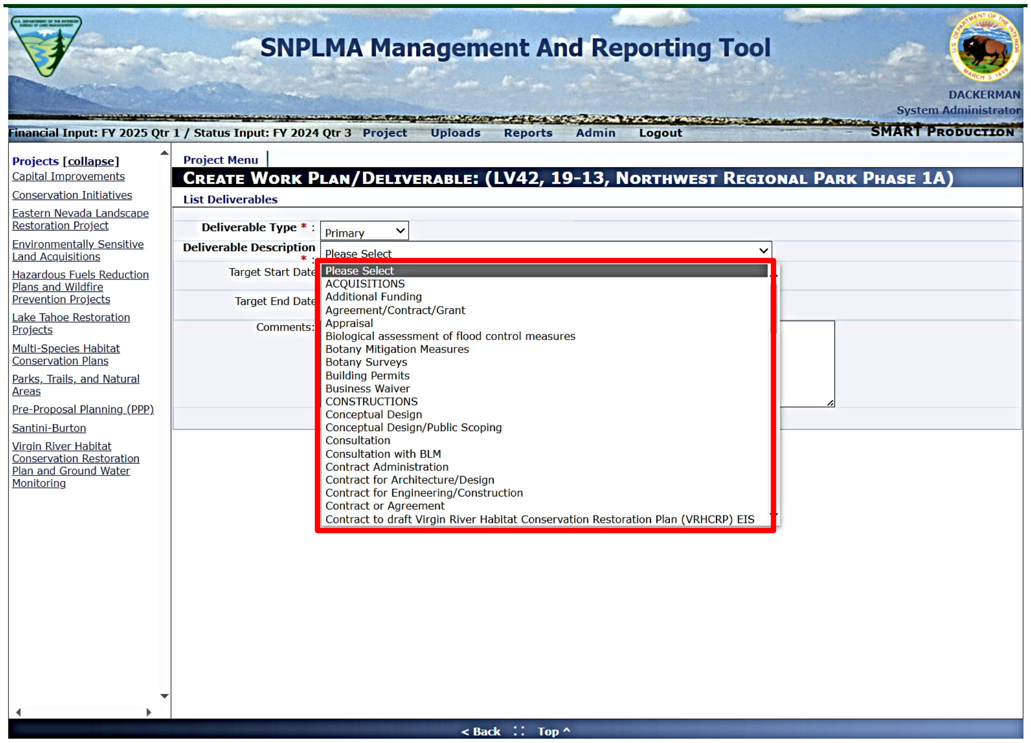


Per the Implementation Agreement, Work Plan project deliverables should be identified as primary/anticipated/standard. This is a required field and is listed as the first criterion when you are entering or updating information in the Work Plan. Any changes made to older Work Plans now necessitate this classification to ensure consistency and compliance with current requirements.

➢ Select your Deliverable type from the drop-down.



➢ Select a deliverable from the drop-down menu for **"Deliverable Description."**

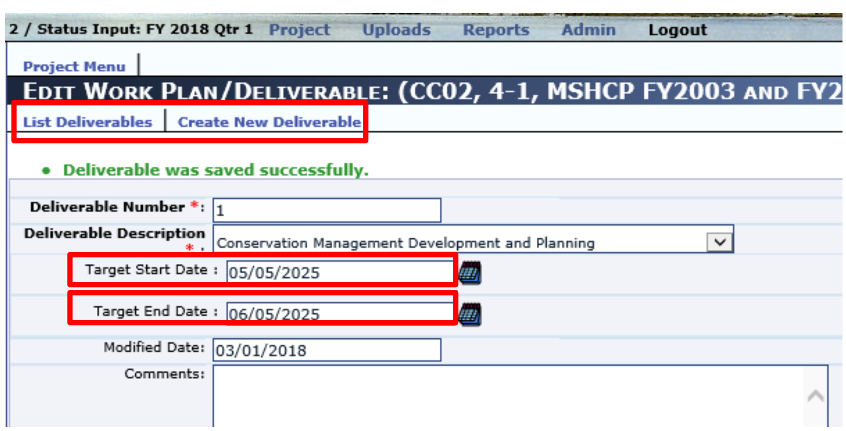


➢ Enter the Target Start/ End Dates; Comments if needed.

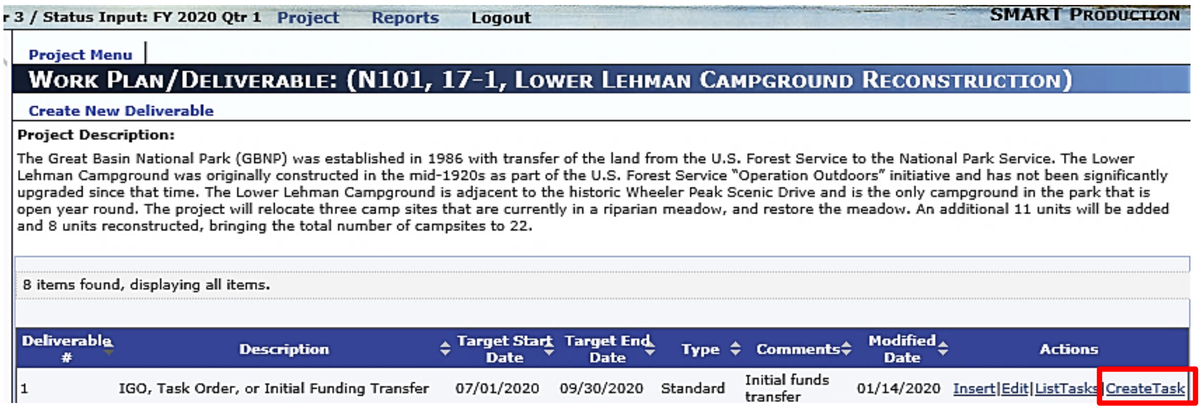
➢ Click **"Save."** A message will be displayed that the deliverable has been saved successfully, and the date modified will display.

➢ Click on **"List Deliverables"** to enter tasks or subtasks for the deliverable.

➢ Click on **"Create New Deliverable"** to enter the next deliverable.



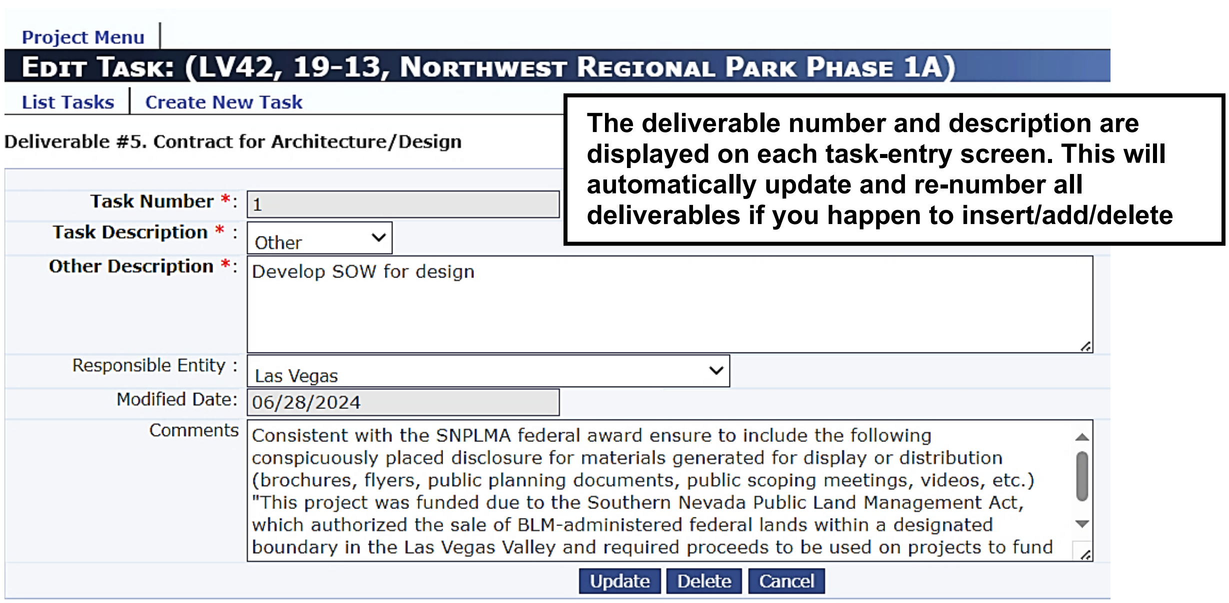
➢ Click **"Create Tasks."**



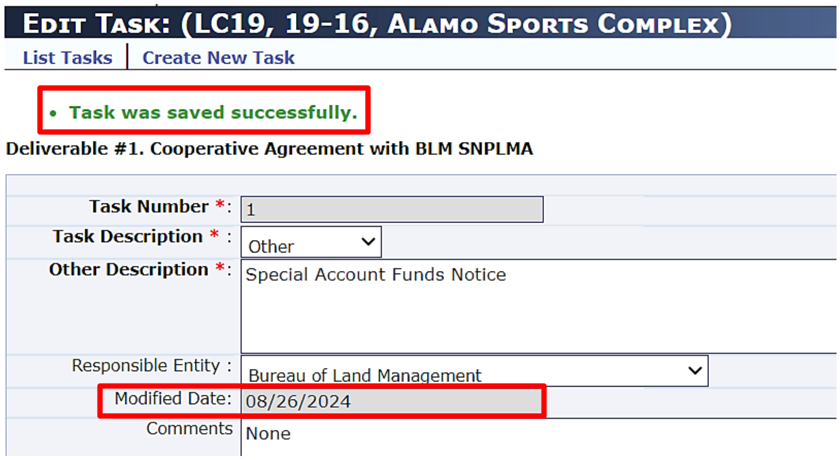
➢ Enter the task description and any comments.

➢ Select the Responsible Entity.

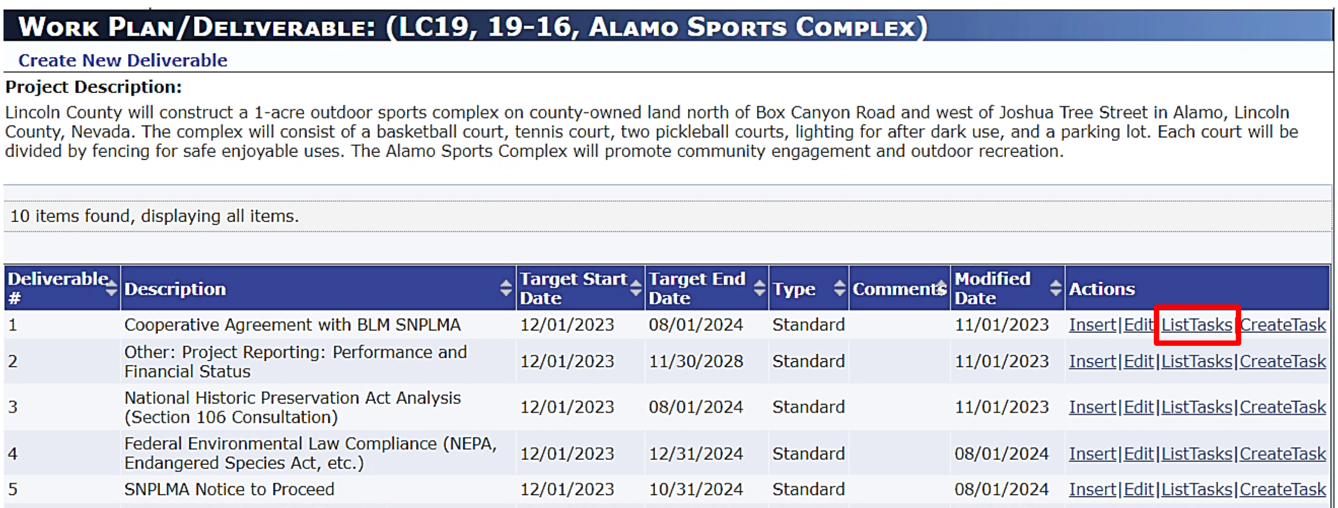
➢ Click **"Save."**



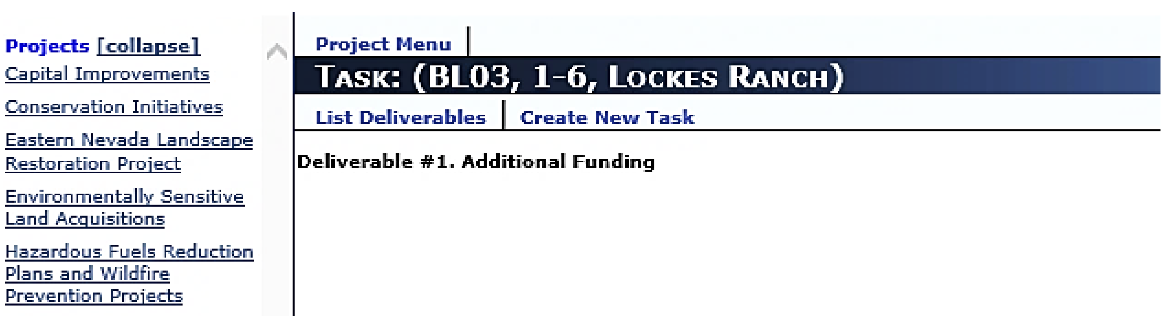
A message will be displayed that the task has been saved, and the date modified will display. Review your entry. If you need to make a change in the description or comments, do so and then click update. When you are satisfied with the task entry, you can move on to entering subtasks for this task or enter a new task for the displayed deliverable.



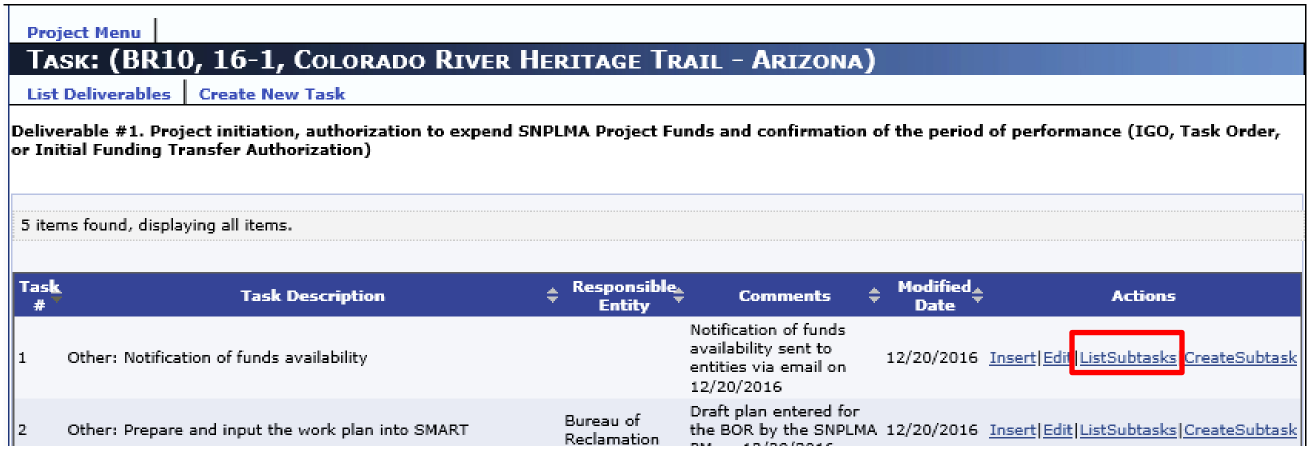
➢ Click on **“List Tasks”** to enter subtasks or to create an additional new task for the deliverable.



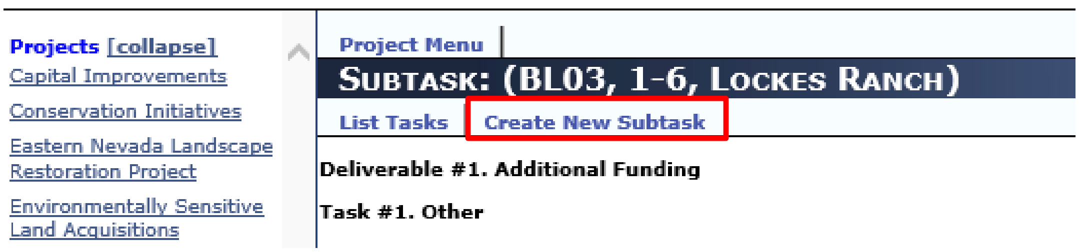
➢ After clicking on **“List Tasks”** if you get this screen you will need to enter your task.



➢ Otherwise, you will see something like this and here you will click on **"List Subtasks."**



➢ Click on **"Create New Subtask."**

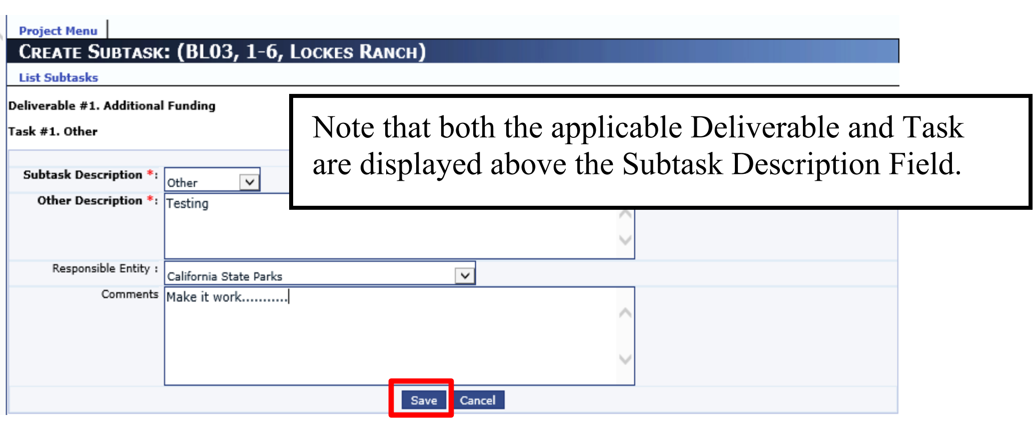


This screen will show you all the tasks, this sample only has one and you can see what the Deliverable is and the Task #.

➢ Enter the subtask description and any comments.

➢ Select the Responsible Entity.

➢ Click "Save."



After entering a subtask and clicking the "Save" button, you will see a message confirming that the subtask has been saved successfully. This notification indicates that your entry was recorded without issues. You can then review the saved subtask, make any necessary edits, and click "Update" to apply your changes.

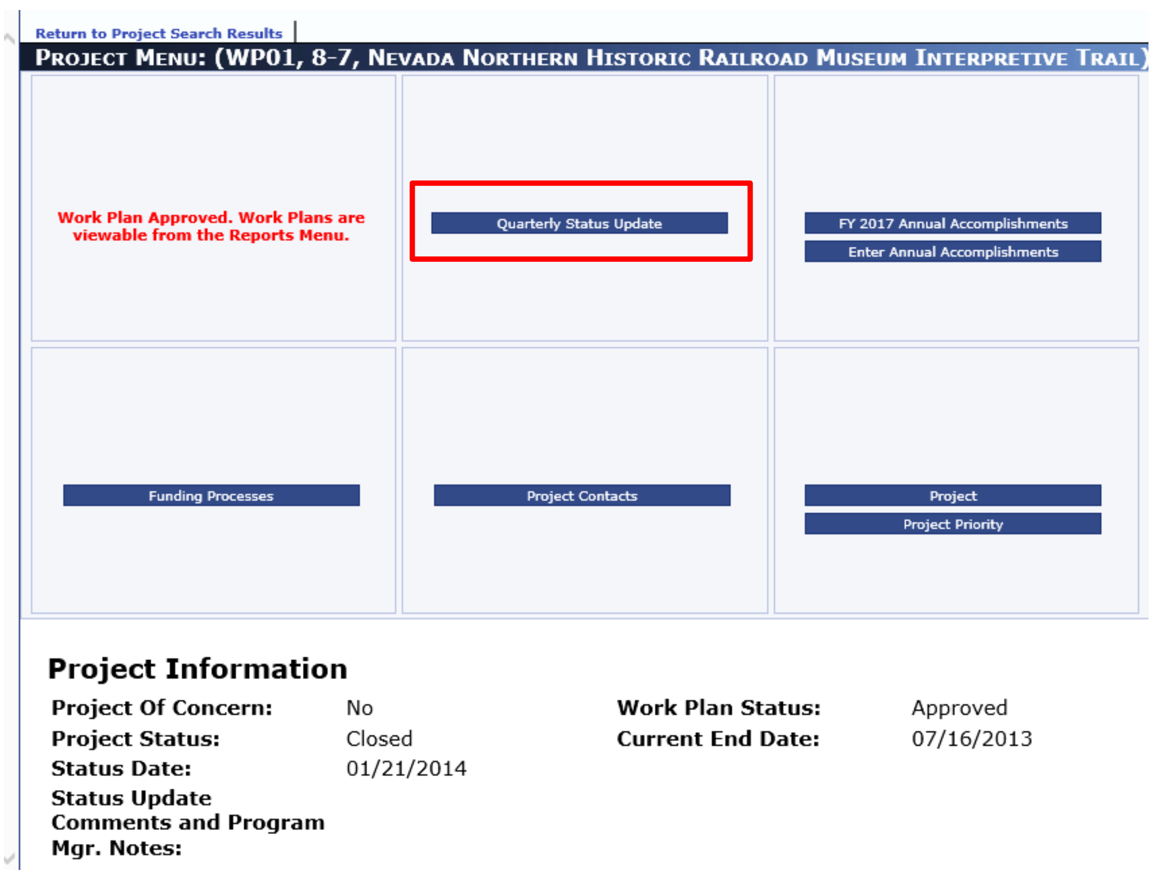
Once you have finalized the subtask information, you can proceed to enter additional subtasks, tasks, or deliverables as needed.

- To enter a new deliverable, you will need to exit the subtask screen. To do this, click **"List Subtasks"** first, then click **"List Tasks,"** and finally click **"List Deliverables."** This sequence of actions will navigate you back to the **"Create New Deliverable"** screen, where you will see the project description displayed.

STEP 2: UPDATING QUARTERLY STATUS

- Click on the **"Project Menu"** box of the project to be updated.

- To access the project deliverables, click on the **"Quarterly Status Update"** menu box. As you prepare your report, it's important to remember that you should only report on deliverables with a Target Start Date passed and deliverables not reported at 100% complete. If the deliverable is reported at 100% or the Target Start Date has not passed, then no quarterly status report is needed. This focus ensures that your quarterly updates reflect only the progress and status of relevant deliverables, making your reporting more accurate and meaningful.



When you access the Quarterly Status Update, you will be able to see the following information:

- **Overall Project Complete Percentage:** This percentage reflects how much of the entire project is complete, allowing you to assess progress at a glance.

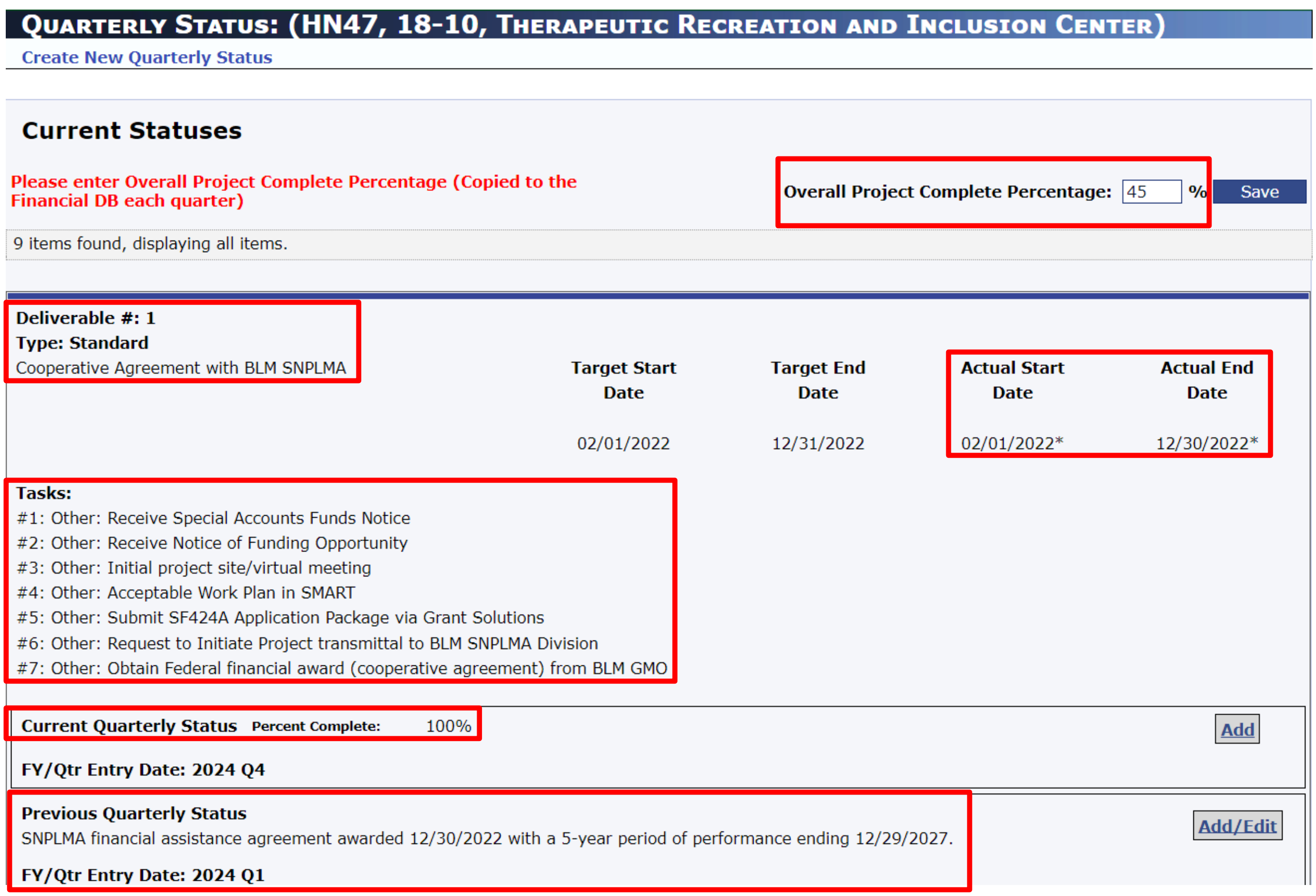
- **Deliverable Type:** this indiciates the category of each deliverable providing context for its classification.

- **List of tasks for the Deliverable**: Here, you can view the specific tasks associated with the deliverable helping to understand what work is required or in progress.

- **Previous Quarter's status Comments and Percent Complete:** If updates were previously entered, you will see the status comments from the last quarter along with the percent complete metric.

- **Actual Start and End Dates:** If any actual start and end dates have been entered, these will be displayed as well, giving you a clear timeline for the deliverable.

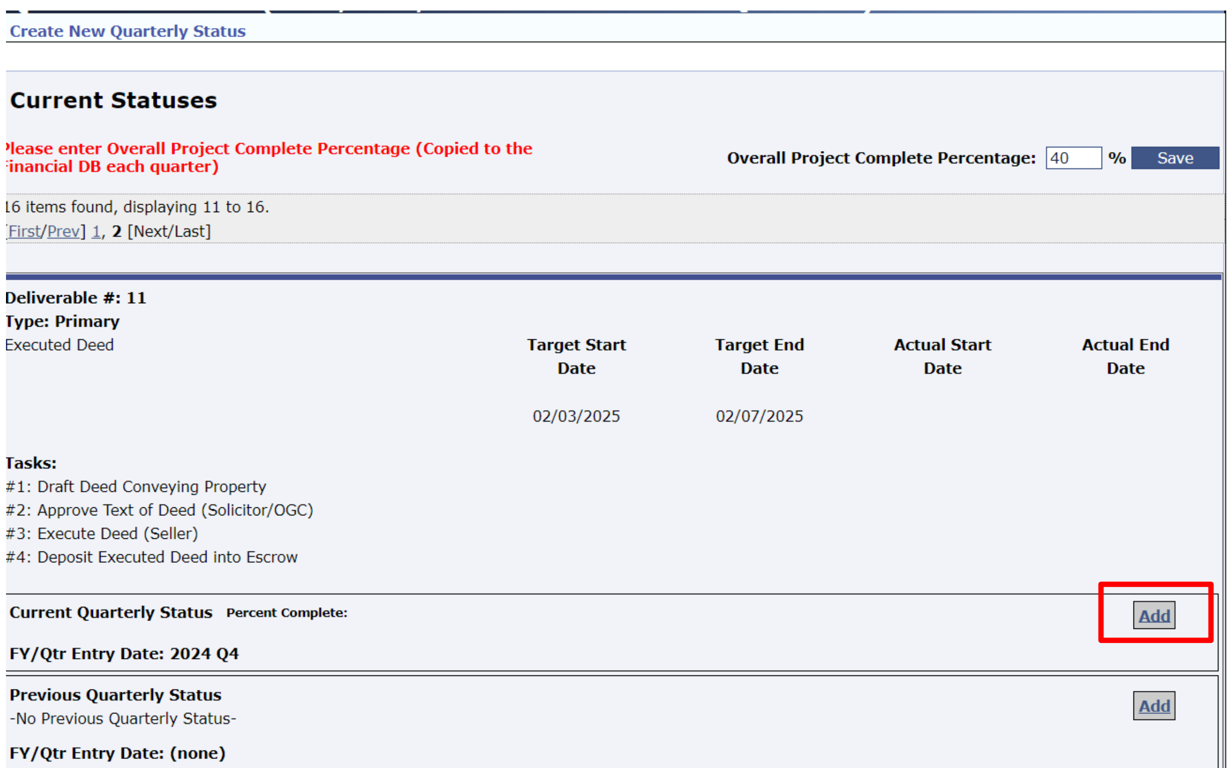
If there are more deliverables than can fit on a single page, you will find additional deliverables available on subsequent pages, ensuring that you have access to all relevant information for your reporting needs.

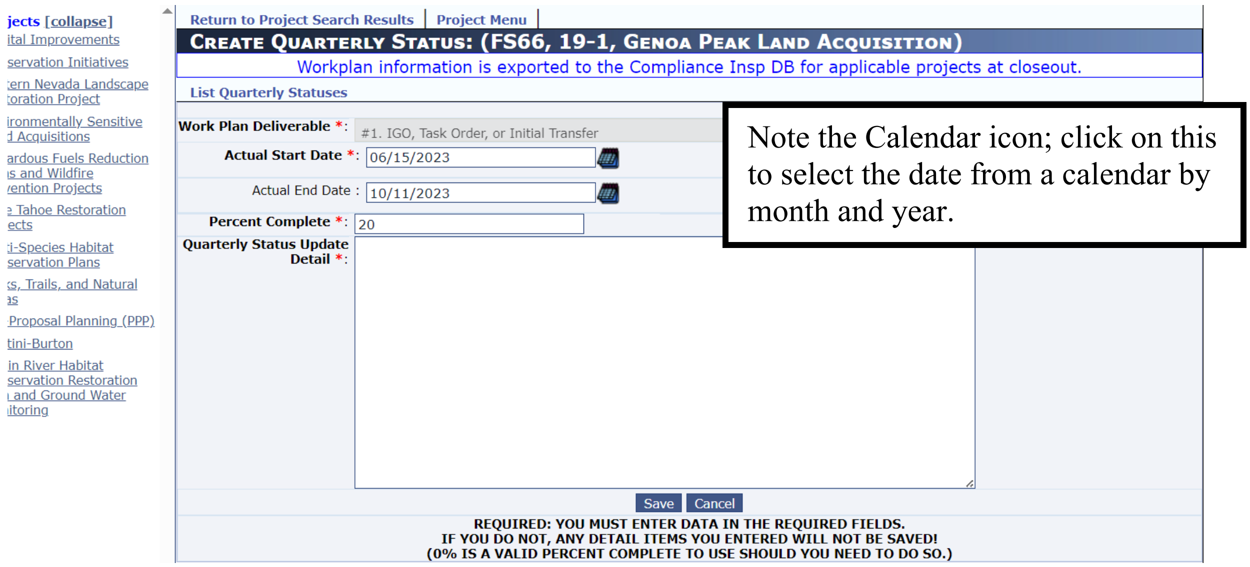


➢ To navigate through the list of deliverables, you can click on the **"[First/Prev]"** or **"[Next/Last]"** page number options.

➢ To update the status of the desired deliverable, click the **"Add"** button.

Actual Start Date and Percent Complete are required to enter/update the status of a deliverable. You cannot enter an "Actual Start Date" that is in the future; the date must be today or a date that has already passed.

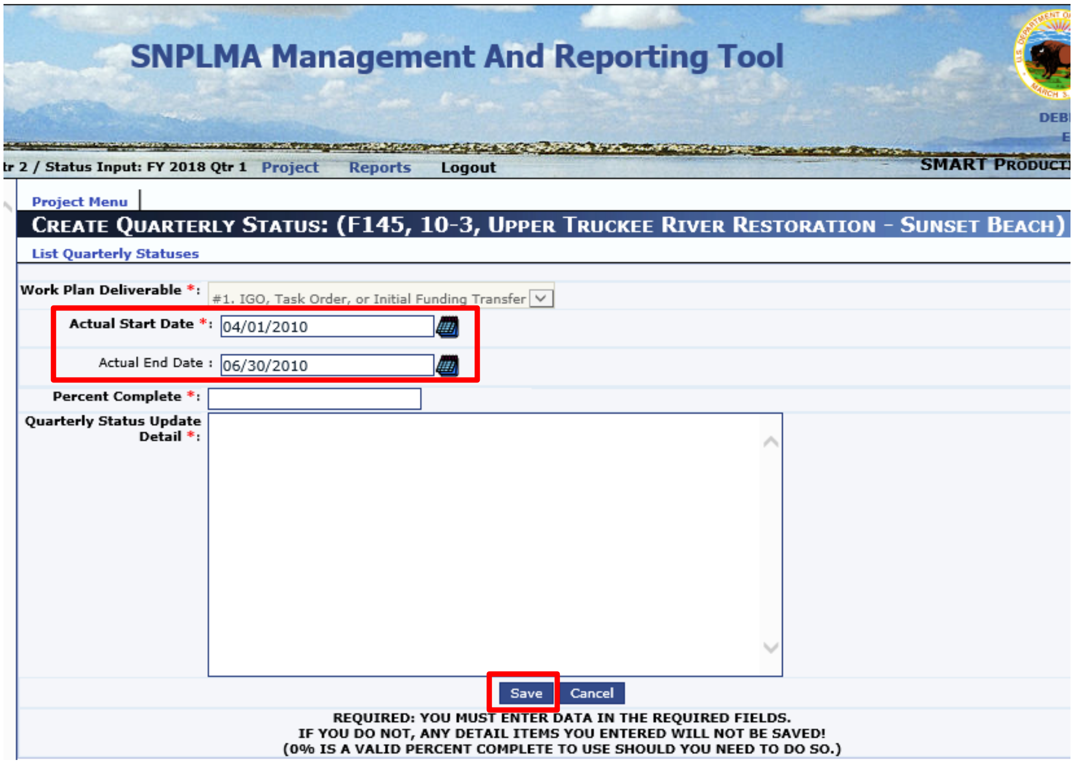




It is crucial to enter only “ACTUAL” Start and End Dates in the designated buckets for Actual Start Date and Actual End Date. Estimates or guesses regarding these dates are not acceptable, as an actual date must be a date that has already occurred. Remember that an actual date cannot be in the future—only dates that have come to pass are valid.

Additionally, please note that a Percent Complete value of 0% is also valid and can be used. If you find yourself needing to update or change any of this information, SNPLMA Program Managers have the ability to make those adjustments. Be sure to reach out to them for any necessary changes or clarifications.

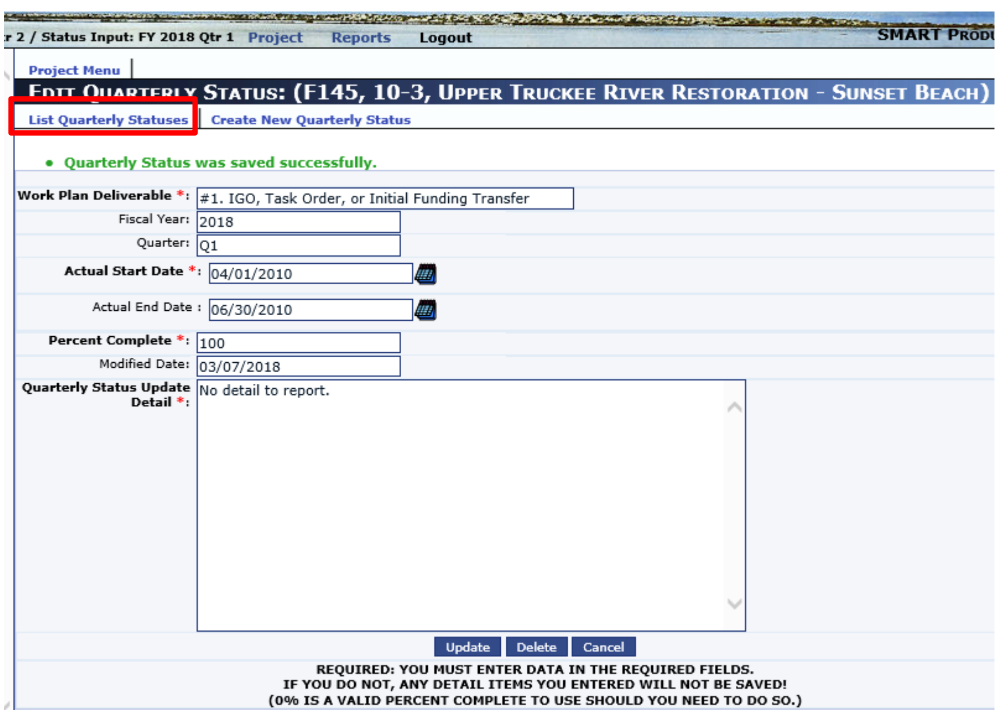
- **Enter the Actual Start Date:** Input the date when the deliverable actually began.
- **Enter the Percent Complete:** Input the percentage of completion as a whole number (e.g., 5, 25, 50, 75, 97). Do not include a percent sign, as the system is set up to recognize whole numbers only.
- **Enter the Actual End Date:** This field should only be filled in if the deliverable is 100 percent complete. If the deliverable is not yet fully complete, leave this field blank.
- **Enter the Narrative Description of the Project Status:** Write a detailed status update that includes information on the work completed, any issues currently being addressed, and the status of their resolution. This narrative proivdes important context and insights into the project’s progress.



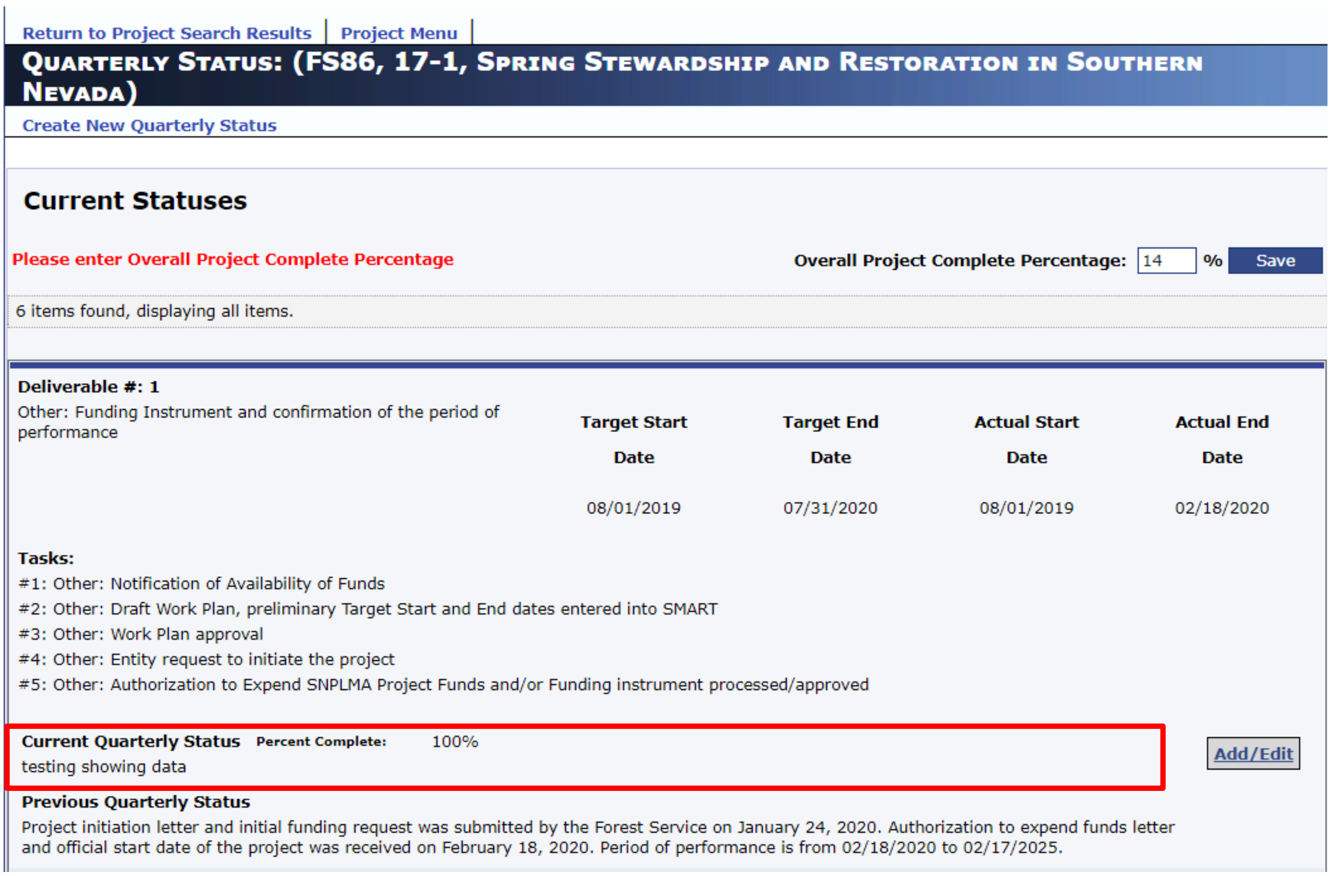
- Click **"Save"** when done entering current status information.

After you have completed your entry and clicked **"Save,"** you will see a message confirming that the **"Quarterly Status was saved successfully."** It is highly recommended that you review the entry at this point to ensure that all information is correct before proceeding to update the next deliverable.

- To return to the list of deliverables, click on **"List Quarterly Statuses."**



The updated information will now be reflected under the deliverable(s) that have been updated. You will notice that instead of the "Add" button, an "Add/Edit" button appears in its place. This change indicates that the deliverable has been updated successfully and provides you an option to edit the entry if further adjustments are needed.



Repeat this process for each deliverable that has been started and <u>not</u> reported at 100% for the project until all required updates are complete.

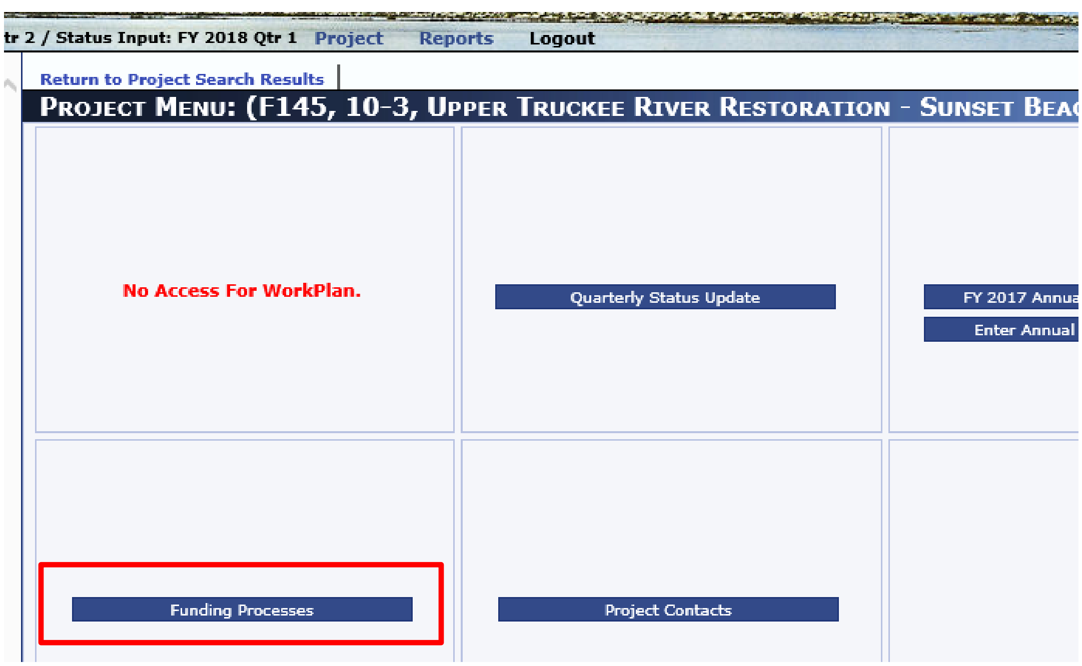
STEP 3: FUNDING REQUESTS

- To return to the Project Menu screen, click on **"Project Menu."**

- Click on the **"Funding Processes"** menu box.

Note: Funding requests can be edited until SMART closes. After you save your funding request, entity users will see an "Update" button. This allows you to make changes or add additional information as needed. Once you've made the desired edits, remember to click the "Update" button to save those changes.

However, keep in mind that if the SNPLMA Program Manager has already "Approved" your request, you will not be able to make any changes, even if SMART is still open.

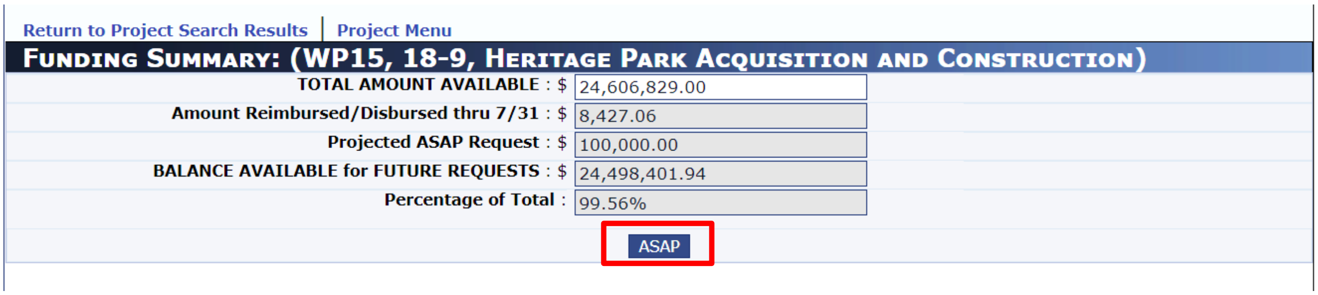


When you navigate to the next screen, keep in mind that the button you see will indicate the financial instrument through which your agency or entity receives SNPLMA funding. This could be one of several options, such as Reimbursement, Direct Charge, ASAP, or Transfer.

ASAP Funding Requests

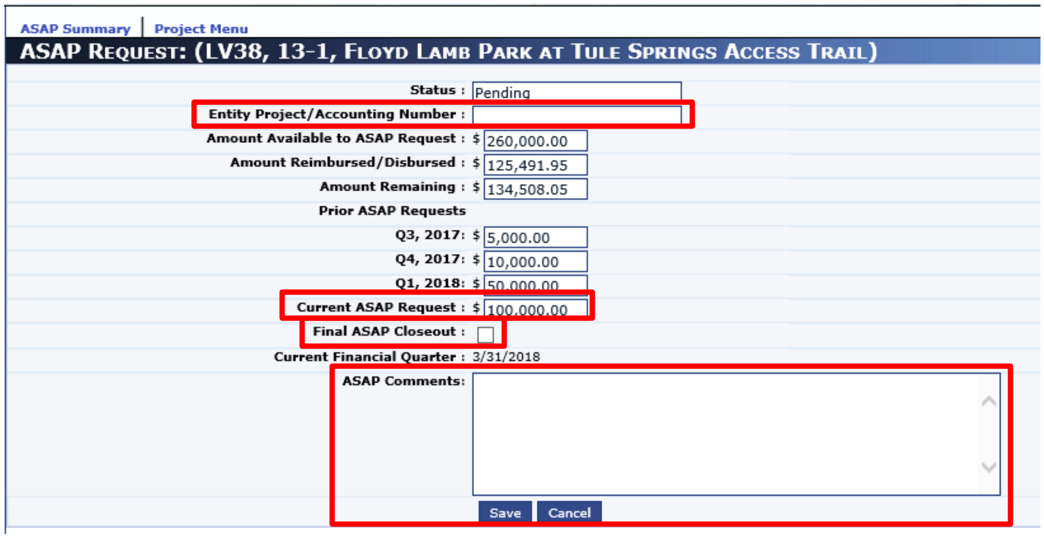
The first screen you will encounter is the "Funding Summary" page. It is important to note that no entries are made on this page; rather, it serves as a snapshot of your current funding status.

- ➢ To proceed to the funding request page, click on the **ASAP** button.



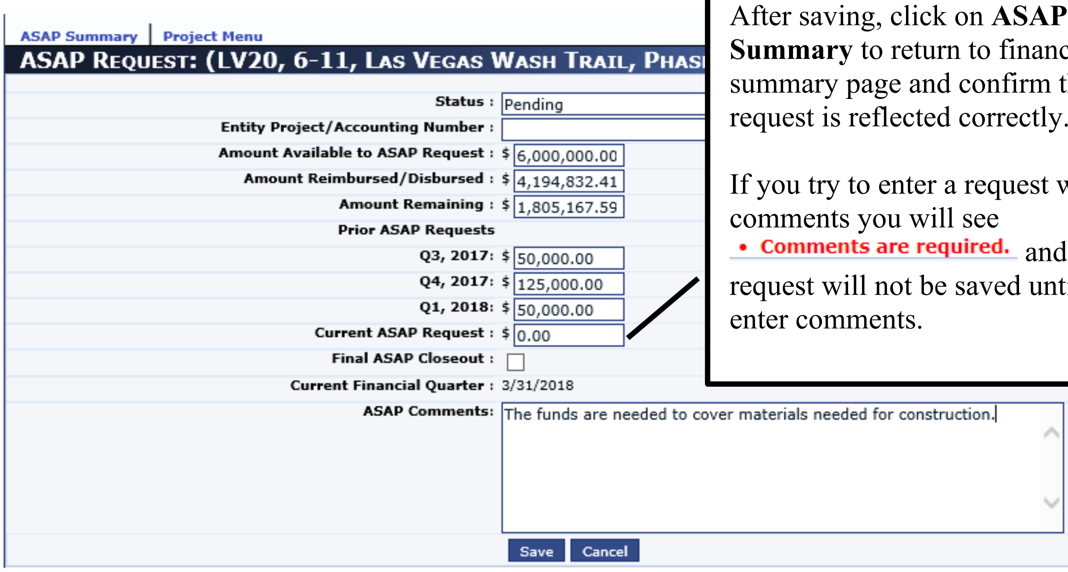
On the ASAP fund request page, users can enter information into four specific fields:

- **Entity Project/Accounting Number** – Completing this field is optional. You may include this number if it helps you track your project or funding, but it is not required.
- **Current ASAP Request** – This field is where you enter the anticipated amount you are requesting for the upcoming quarter. This figure should reflect the funds you expect to need to support your project activities during that period.
- **Final ASAP Closeout** – Click this box when submitting your last funding request. Not necessarily always at closeout.
- **ASAP Comments –** This field is used to explain or justify the Current ASAP request amount (i.e., purpose of funds that will be drawn down).



In the example below, the "Current ASAP Request" is $0.00 (entered without symbols or commas) and the purpose of the request to purchase materials has been entered in "ASAP Comments."

- After entering the request amount, justification comments, and any other relevant information in the necessary fields, be sure to click the **"Save"** button.



After saving, click on **ASAP Summary** to return to financial summary page and confirm that the request is reflected correctly.

If you try to enter a request without comments you will see • Comments are required. and your request will not be saved until you enter comments.

After clicking "save," a message in green text that reads **"Financial Request was saved successfully"** in the upper left portion of the screen will appear.

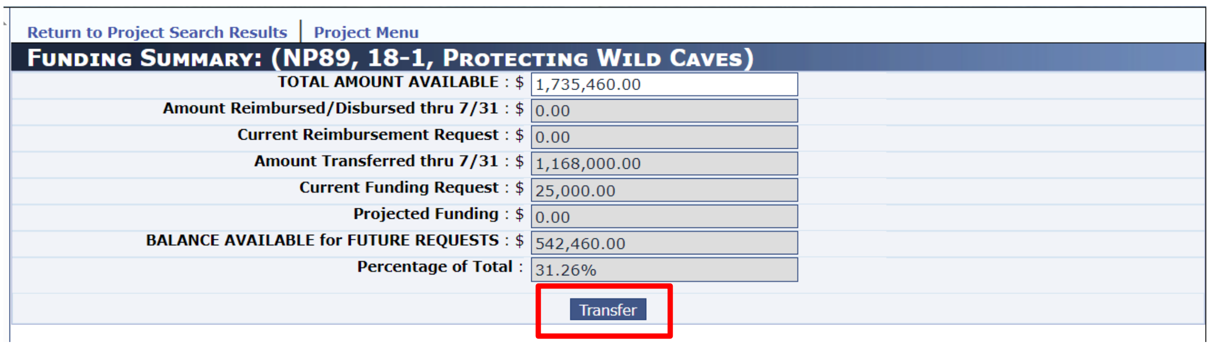
- Next click **"ASAP Summary"** to return to the financial summary page. Review the fund summary page to ensure the amount requested is accurately reflected. Additionally, check that the "Balance Available for Future Requests" has been recalculated to reflect a reduction equal to the amount requested.

Transfer Funding Requests

Each funding request method is fundamentally similar, with only slight variations in the process. The screen shot below illustrates the Financial Summary page for a project funded by 1151 Direct Transfer.

On this page, no entries are made on this page.

> ➢ To proceed with entering a funding request using a transfer method, click on the **"Transfer"** button. This will take you to the funding request page where you can enter the necessary details for your funding request related to the transfer.



Note: In the funding request section, you may see fields for "Current Reimbursement Request," "Current Direct Charge," and "Current Transfer Request." The appropriate text displayed will correspond to the type of funding instrument for the selected project.

For example, in this NP89 scenario, direct transfer is the sole method of funding for many Federal projects. In some cases, older projects may have initially been funded with reimbursement and later transitioned to direct transfer. If you encounter a situation where more than one funding method button appears, make sure to select only the current funding method relevant to your project. This will help ensure that your funding request is processed correctly and aligns with the project's current funding structure.

On the Transfer fund request page, entities can enter information in five specific fields:

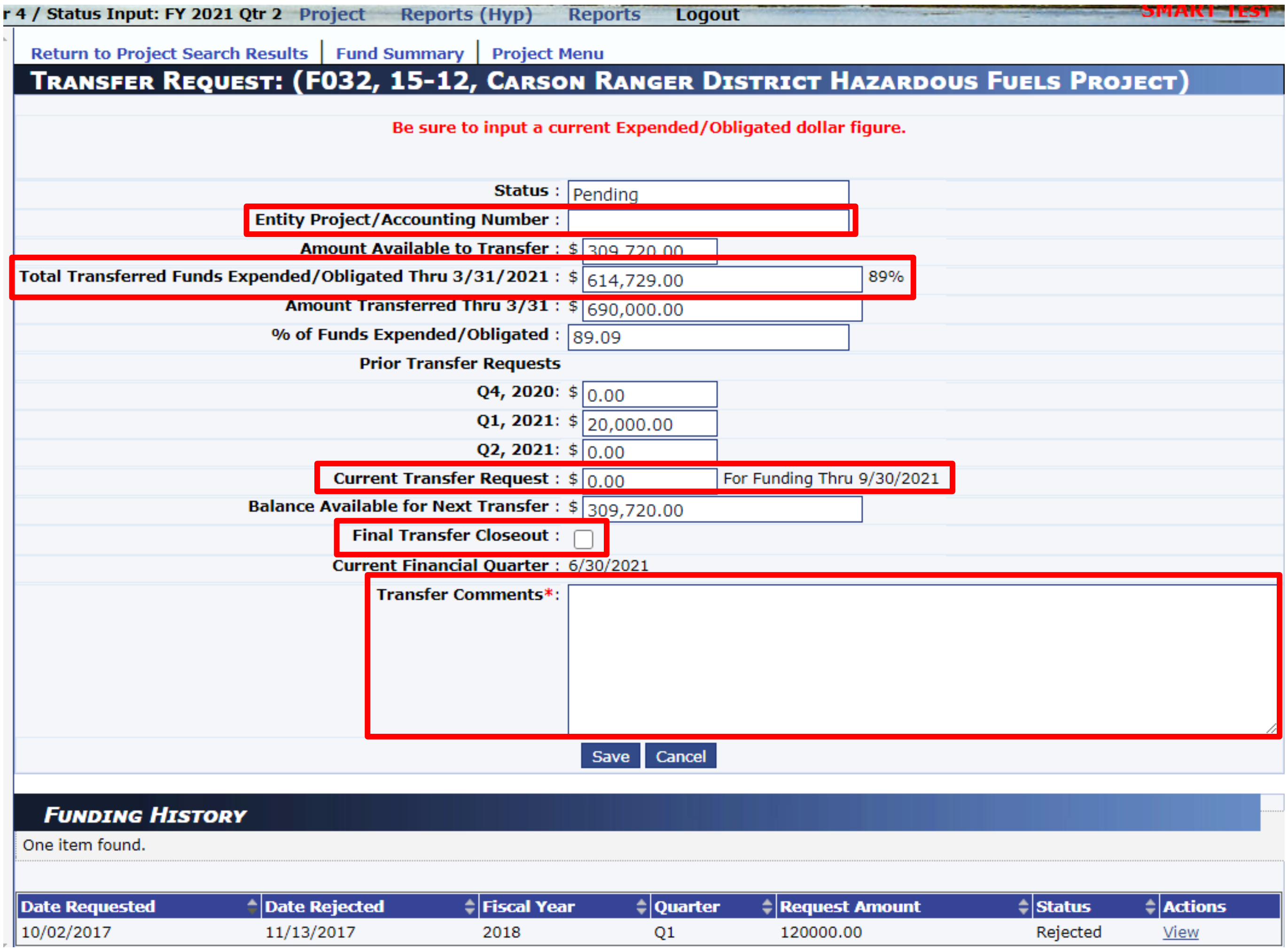
- **Entity Project/Accounting Number** – Completing this field is optional. While you can include this number for your own tracking purposes, it is not mandatory for the funding request.

- **Total Transferred Funds Expended/Obligated Thru …** – This information is required. Input the total amount of project funds that have been committed/obligated/expended through the specific date annotated. A more current figure can be used if it is available, at a minimum, we require the amount recorded as of the end of the previous quarter. The figure is essential for checking compliance with the "95% Rule," which ensures that funds are being utilized appropriately. Moreover, this number will be taken into consideration when approving your current request.

- **Current Transfer Request** – In this field, you will enter the amount you are currently requesting for the upcoming quarter. This amount will be reflected on the financial summary page once submitted.

- **Final Transfer Closeout** – Click this box when making your last funding request. Not necessarily always at closeout.

- **Transfer Comments** – This field is mandatory if you have entered an amount in the Current Transfer Request box. Use this space to explain or justify the requested amount, detailing why the funds are needed for the upcoming quarter as opposed to a later time (e.g., specific projects or expenses that require immediate funding). Additionally, this comments section can also be used to explain or justify the remaining available funds from previous quarter(s), regardless of whether you are requesting new funds.



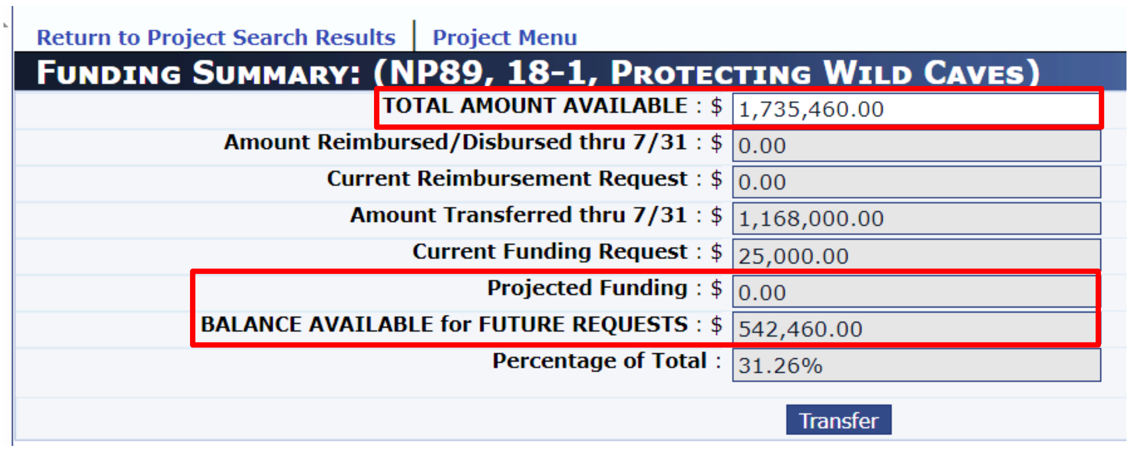
- **Funding History Section:** This area here will give you a history of what has occurred with your funding requests (Approval/Rejections).

  ➢ After entering the required information, click **"Save."**

A message will appear stating that **"Financial Request was saved successfully."** Additionally, the "% of Funds Expended/Obligated" will be automatically calculated based on the amount entered under "Total Transferred Funds Expended/Obligated Thru #/##/####."

  ➢ To return to the financial summary page, click on **"Fund Summary."**

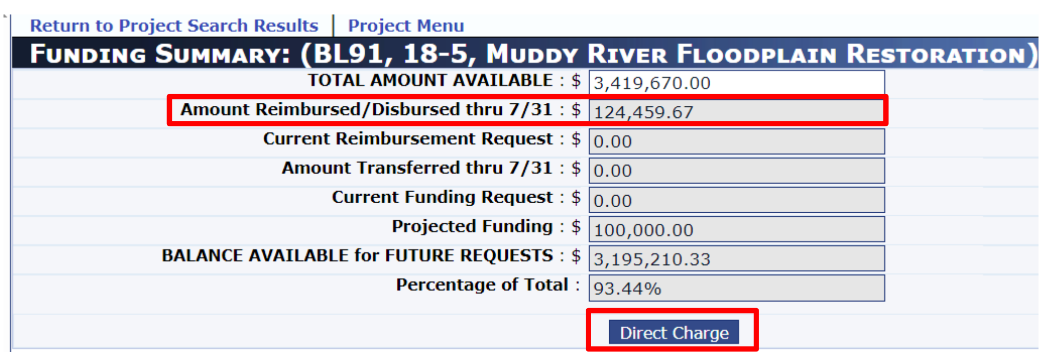
It is highly recommended that entities review the Financial Summary page after submitting a funding request. This review will allow you to ensure that the amount you requested is accurately reflected. Additionally, check that the "Balance Available for Future Requests" reflects a reduction that includes both the previous transfers and the new request.



Direct Charge Funding Request

For BLM projects, funding is now provided through Direct Charge. The Direct Charge Financial Summary page contains the same fields as those found in projects funded by Transfer. Similar to other financial instruments, no entries are made on this page.

- To access the fund request page, click the **"Direct Charge"** button.



For projects funded by Direct Charge, the amount will be displayed as "Amount Reimbursed/Disbursed through ##/##/####." This figure indicates the total amount that has been paid out and does not include any amounts that are obligated on contracts or agreements but have not yet been paid, which are referred to as unliquidated obligations.

Entities can enter information in five fields on the Direct Charge fund request page:

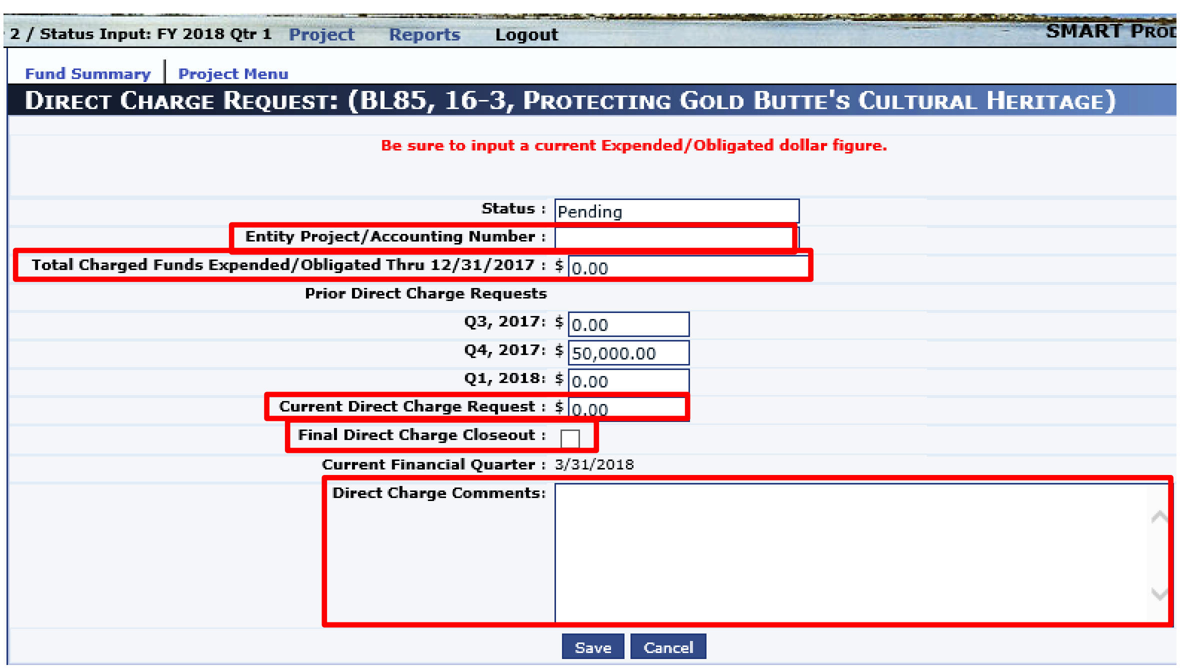
- **Entity Project/Accounting Number** – Completing this field is optional. While you can include this number for your own tracking purposes, it is not mandatory for the funding request.

- **Total Charged Funds Expended/Obligated Thru ##/##/#### -** This information is required. Input the total amount of project funds that have been committed/obligated/expended through the specific date annotated. A more current figure can be used if it is available, at a minimum, we require the amount recorded as of the end of the previous quarter.

- **Current Direct Charge Request** – Although it is not required to enter the funding request, providing this information is beneficial as it aids the SNPLMA Division in evaluating your funding request more effectively. If this data is available, you should enter it to support your application. Once submitted, this amount will be reflected on the financial summary page, contributing to a comprehensive overview of your project's financial status.

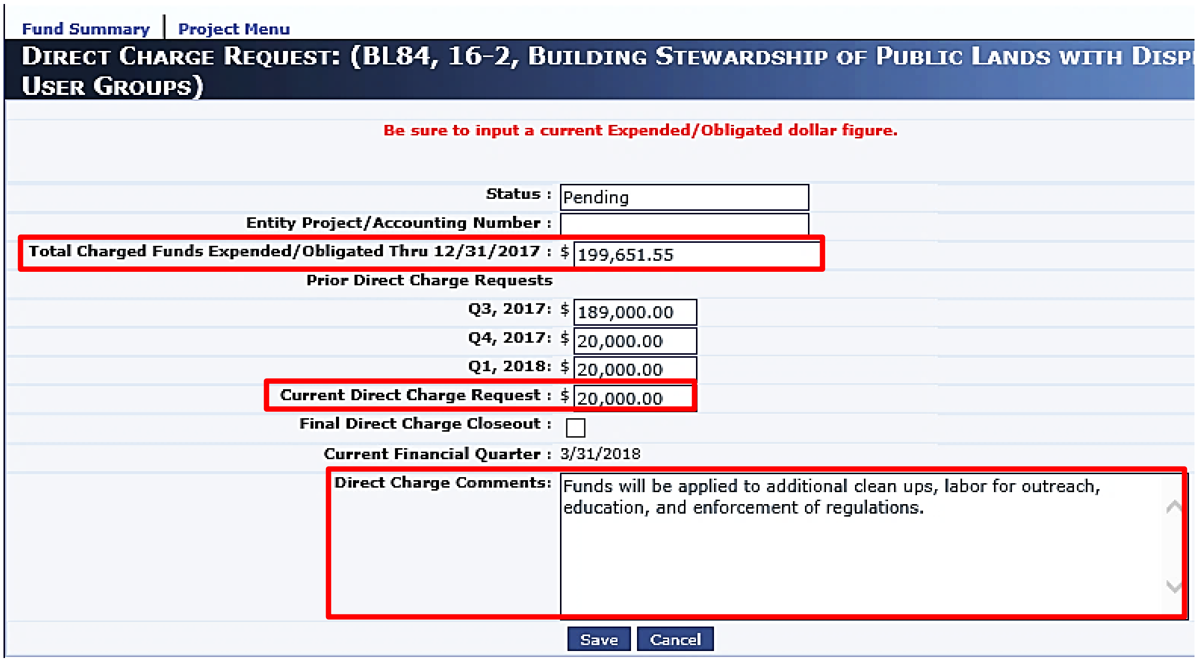
- **Final Direct Charge Closeout** – Click this box when making your last funding request. Not necessarily always at closeout.

- **Direct Charge Comments –** This field is mandatory if you have entered an amount in the Current Transfer Request box. Use this space to explain or justify the requested amount, detailing why the funds are needed for the upcoming quarter as opposed to a later time (e.g., specific projects or expenses that require immediate funding).



In this example, $199,651.55 has been entered as "Total Charged Funds Expended/Obligated." This figure includes amounts obligated on contracts/agreements but not yet paid, also known as unliquidated obligations.

Additionally, a current direct charge request of $20,000 is entered, along with an explanation or justification for why these funds will be needed during this quarter.



- After you have entered the necessary information, including the total charged funds expended/obligated, the current direct charge request amount, and the explanation or justification for the funding, click the **"Save"** button.

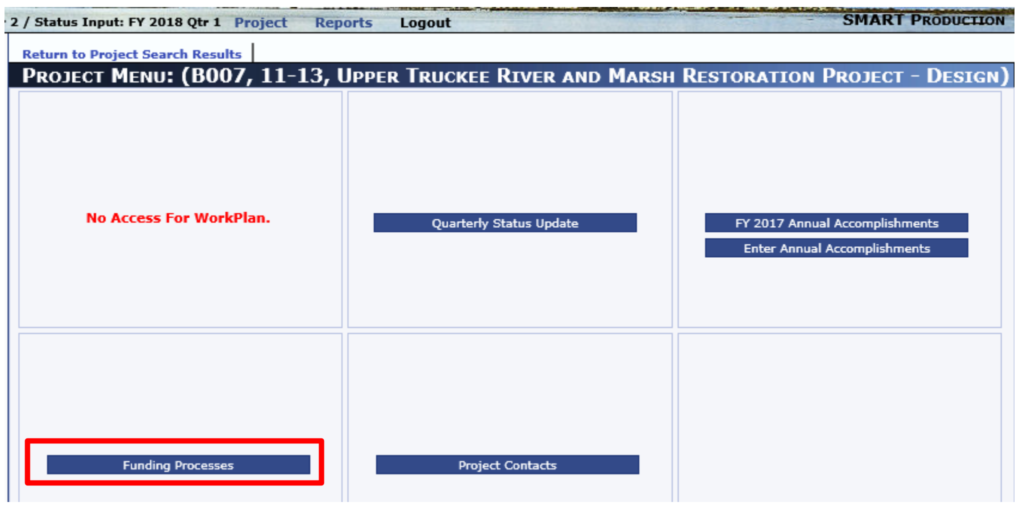
After clicking "Save," you will see a message in green text that reads **"Financial Request was saved successfully"** in the upper left portion of the screen.

➢ To return to the Financial Summary page, click "**Fund Summary.**"

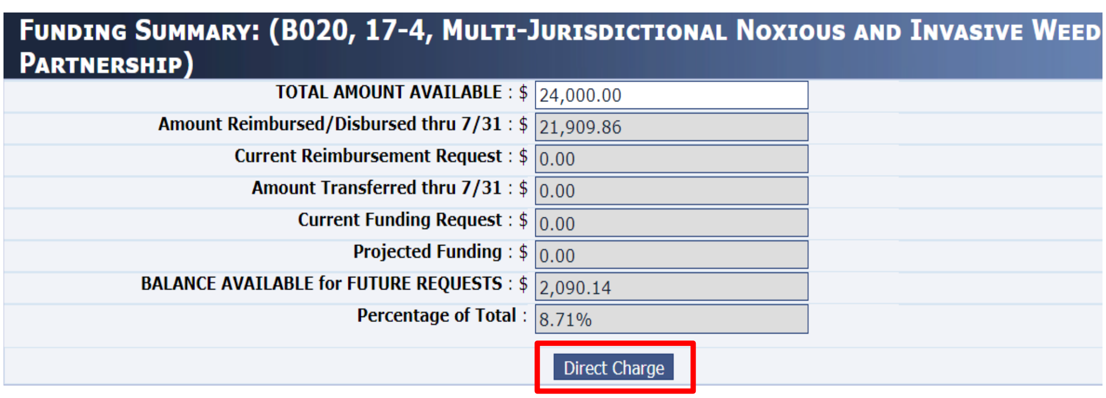
It is highly recommended that entities review the Financial Summary page following the submission of their funding request. This review will help ensure that the amount you requested is accurately reflected and that the **"Balance Available for Future Requests"** has been recalculated to show a reduction equivalent to the amount you requested.

<u>Reimbursement Funding Requests</u>

➢ To proceed with managing your funding details, click on the **"Funding Processes"** menu box from the Project Menu Screen.



➢ Next, click on the **"Reimbursement"** button within the Funding Processes menu. This will take you to the specific page dedicated to managing reimbursement requests for your project



Entities can enter information in five fields on the Reimbursement fund request page:

- **Entity Project/Accounting Number** – This field is optional. You can include this number for your own tracking purposes, but it is not required for the funding request.

- **Total Reimbursed Funds Expended/Obligated Thru …** This information is required. Input the total amount of project funds that have been committed/obligated/expended through the specific date annotated. A more current figure can be used if it is available, at a minimum, we require the amount recorded as of the end of the previous quarter.

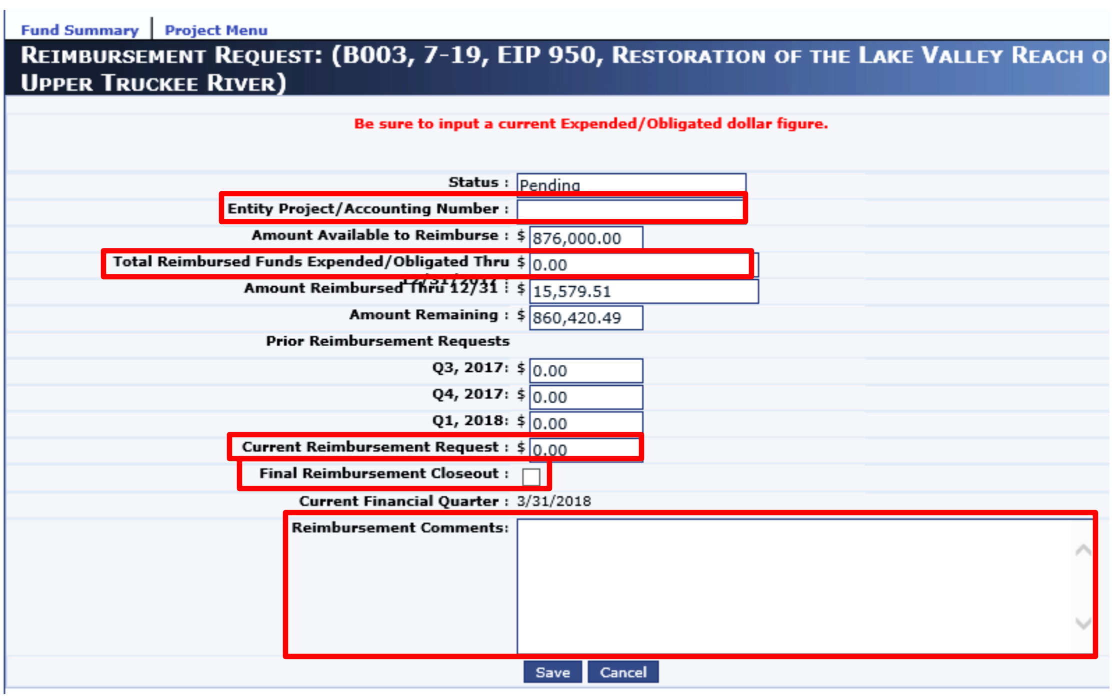
- **Current Reimbursement Request** – In this field, you will specify the amount you are requesting for reimbursement. This amount will be reflected on the financial summary page once you save or update your request.

- **Final Reimbursement Closeout** – Click this box when making your last funding request. Not necessarily always at closeout.

- **Reimbursement Comments** – This field is mandatory if you have entered an amount in the Current Reimbursement Request box. Use this space to explain or justify the requested amount, detailing why the funds are needed for the upcoming quarter as opposed to a later time (e.g., specific projects or expenses that require immediate funding).

  ➢ Make the appropriate entries, then click **"Save"** or **"Update."**

(The screen print below shows "update" because it was edited during final testing of the application.)

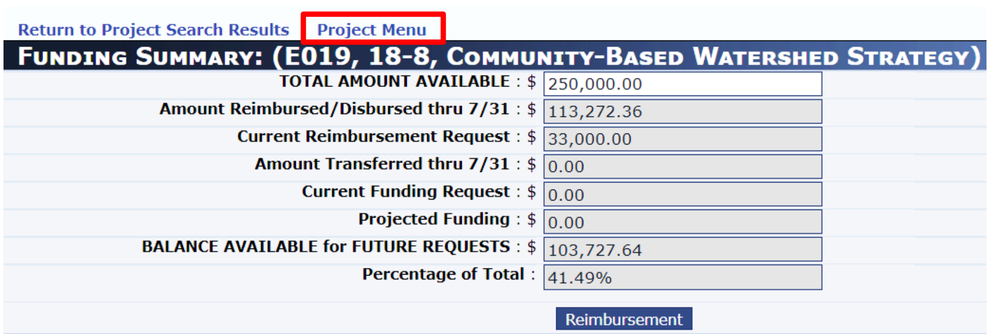


After you click "Save," a message in green text will appear in the upper left portion of the screen that says **"Financial Request was saved successfully."** This confirmation indicates that your reimbursement request has been successfully recorded in the system.

➢ To return to the Financial Summary page, click on the **“Fund Summary”** option.

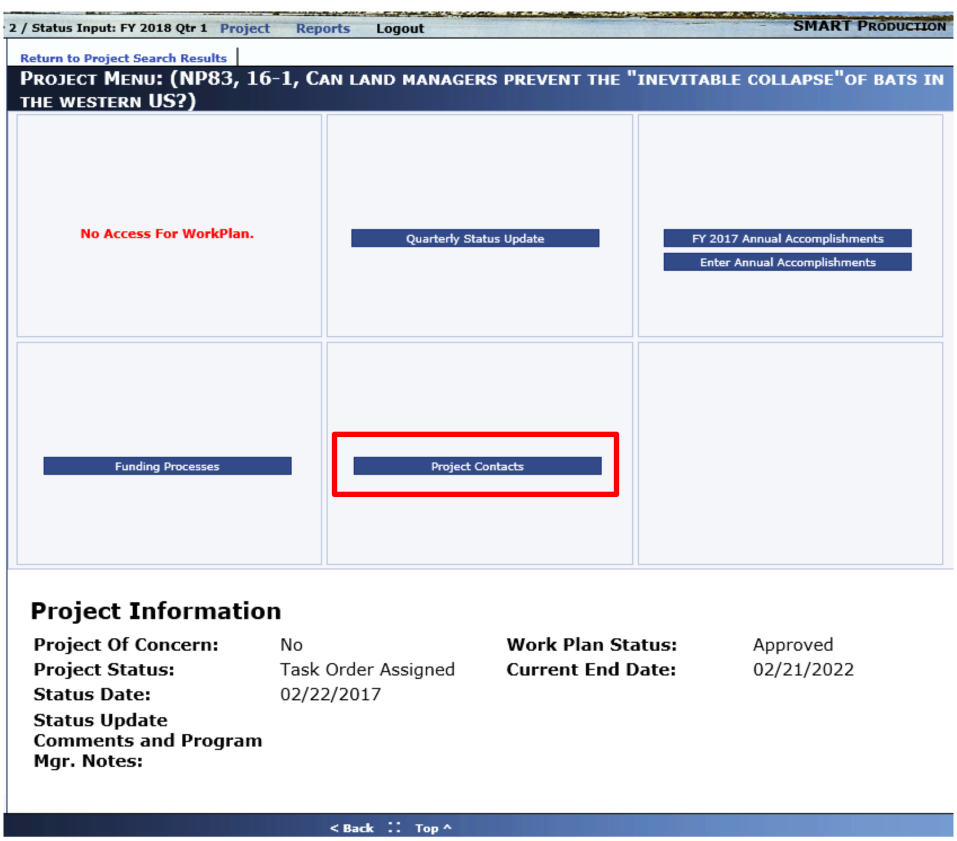
It is recommended that Entities review the Financial Summary page to ensure the amount requested is reflected and that the “Balance Available for Future Requests” has been recalculated reflecting a reduction equal to the amount requested to confirm the data entered is reflected correctly on the Financial Summary page.

➢ Click on the **“Project Menu”** option to move to the next step in the quarterly update process.



STEP 4: CONTACTS

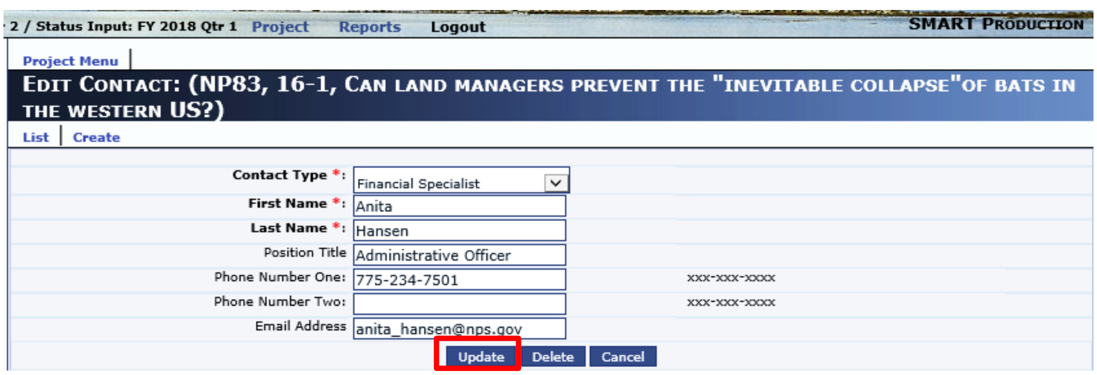
➢ Click the **“Project Contacts”** menu box.



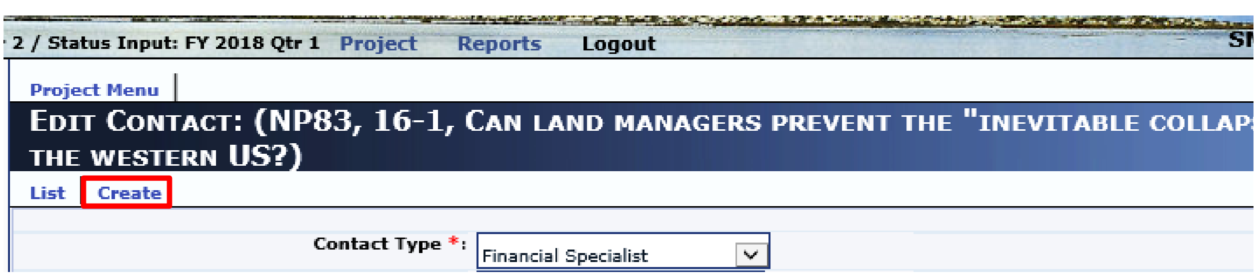
- To ensure that your project's contact information is accurate, review all details, including phone numbers, email addresses, and any other relevant information.

  If you notice any inaccuracies or need to make updates, click the **"Edit"** button. This will allow you to modify the contact information as needed. After making the necessary changes, be sure to save the updates to ensure that all contact details remain current and accurate for project management purposes.

- Click **"Update"** when changes are complete.



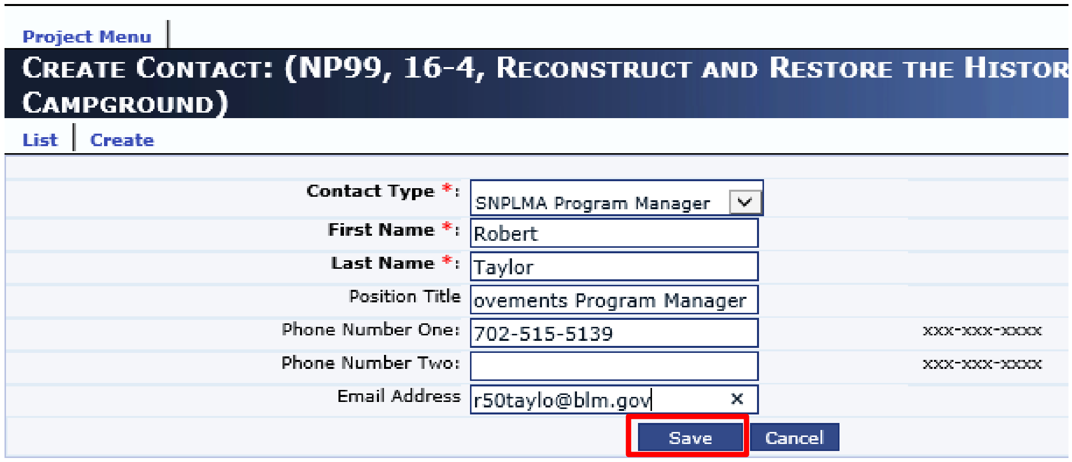
- To add a new contact, click the **"Create"** button.



There can be only one contact designated as the "Project Manager." If a Project Manager has already been assigned, the designation will not appear as an option in the drop-down menu when selecting the Contact Type. You will have to "Delete" the existing Project Manager". The other available choices for Contact Type include Financial Specialist, SNAP, Other, and SNPLMA Program Manager.

In the example below, Robert Taylor is entered as the Program Manager.

- Once you have finished entering the information for the new contact, click the **"Save"** button. After doing so, a message will appear in green text confirming that the **"Contact was saved successfully."**

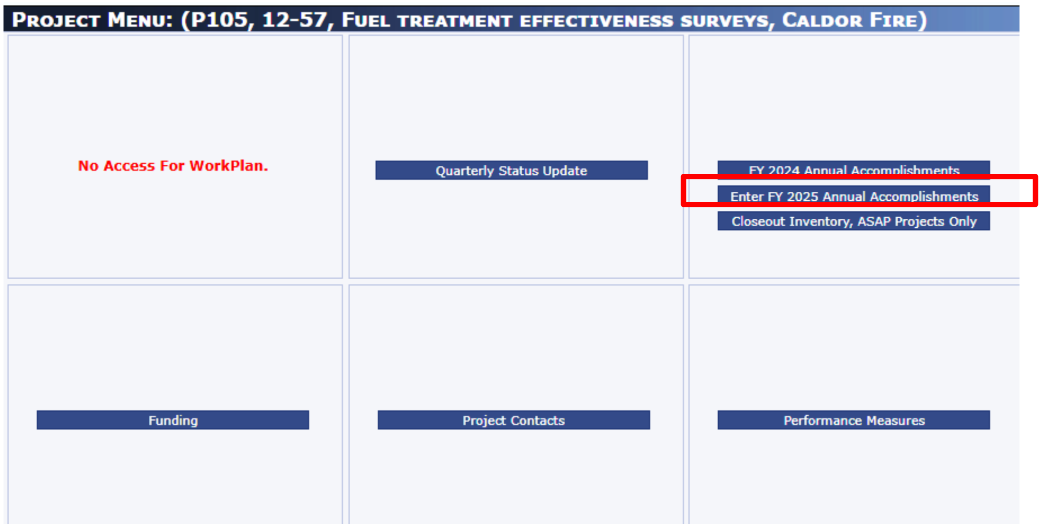


- To view the updated list of all contacts, click on the "List" button. This action will display the revised list of contacts associated with your project, reflecting any new additions or changes you have made.

STEP 5: ANNUAL ACCOMPLISHMENTS

Partners must enter annual accomplishments at two key points: first, during the first quarterly report of a new fiscal year for the previous fiscal year, and second, at the project's closeout.

- To proceed with entering annual accomplishments, return to the Project Menu. Then, click on **"Enter Annual Accomplishments."**



In the first quarter of the new fiscal year, you will need to describe the overall project accomplishments, progress, and milestones achieved during the prior fiscal year. Double check with your Program Manager on specific requirements and any information needs.

Please Note: The target audience for this report includes the public and Congress. This reporting is distinct from the individual deliverable accomplishments reported to SNPLMA, as your Quarterly Status Updates are the primary tool for monitoring those deliverables. The Annual Accomplishments you enter here will be published on the SNPLMA website for public viewing and included in the SNPLMA Annual Report to Congress.

For **Project Closeout**, you will need to summarize the overall project accomplishments from the beginning through to completion. Lastly, if this is the final time you will be reporting and your project is going to be closed, be sure to click the checkbox for **"Final Overall Accomplishment."** This indicates that you are providing the last report for the project, ensuring all relevant accomplishments are documented properly.

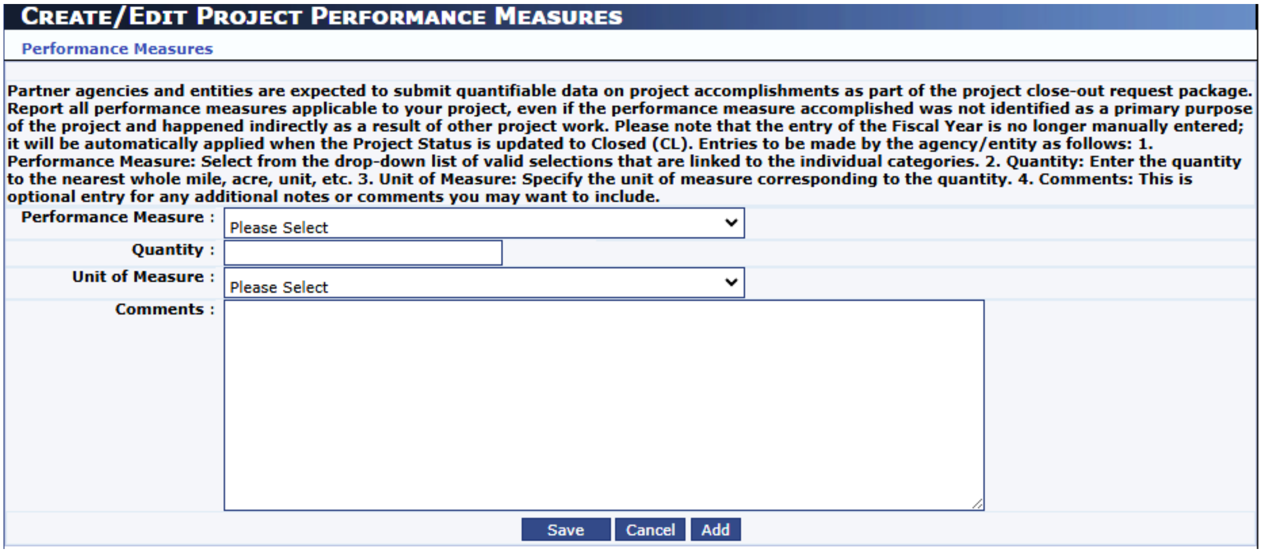
- Once you have completed entering your Annual Accomplishments, click the **"Save"** button.

STEP 6: Performance Measures

Performance Measure can now be entered separately and do not need to be included within your Annual Accomplishments Narrative. This change provides a clearer distinction between general accomplishments and specific performance metrics.

You will be entering each performance measure one at a time. You will find that the choices available for selection are customized to your SNPLMA project category. This tailored approach ensures that the performance measures align closely with the goals and objectives specific to your project.

- Once you select the **"Performance Measures"** button from the project menu screen. A new screen will appear and click the **"Add"** button. under the Deliverable list on the Annual Accomplishments page when you are ready to enter your Performance Measures.



CREATE/EDIT PROJECT PERFORMANCE MEASURES

Performance Measures

Partner agencies and entities are expected to submit quantifiable data on project accomplishments as part of the project close-out request package. Report all performance measures applicable to your project, even if the performance measure accomplished was not identified as a primary purpose of the project and happened indirectly as a result of other project work. Please note that the entry of the Fiscal Year is no longer manually entered; it will be automatically applied when the Project Status is updated to Closed (CL). Entries to be made by the agency/entity as follows: 1. Performance Measure: Select from the drop-down list of valid selections that are linked to the individual categories. 2. Quantity: Enter the quantity to the nearest whole mile, acre, unit, etc. 3. Unit of Measure: Specify the unit of measure corresponding to the quantity. 4. Comments: This is optional entry for any additional notes or comments you may want to include.

Performance Measure : Please Select

Quantity :

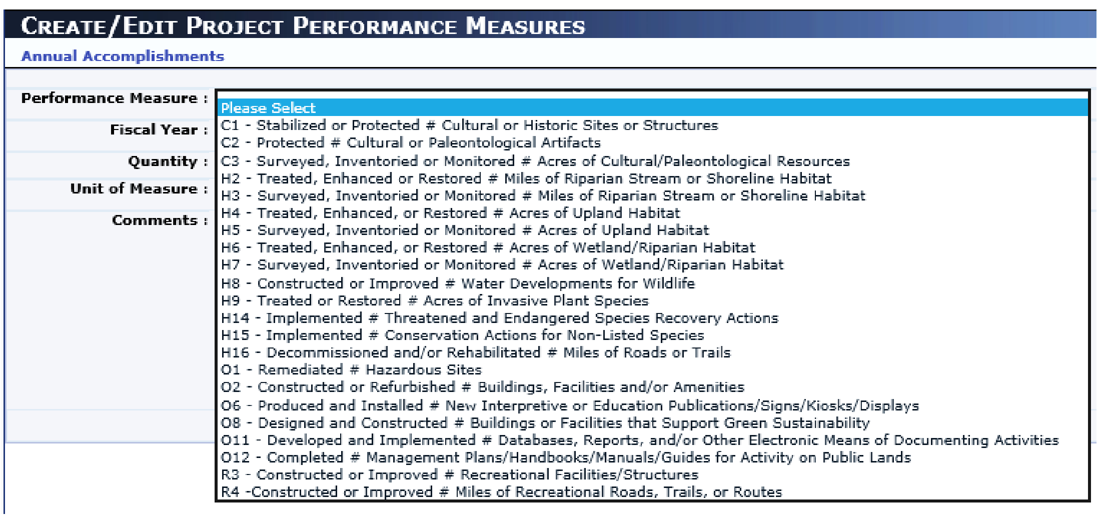
Unit of Measure : Please Select

Comments :

Save Cancel Add

- The first drop-down menu you encounter will contain your list of valid performance measures. These measures are specifically tailored to your program and reflect the metrics that are relevant for assessing your project's outcomes.

- Do not enter duplicate PMs; instead, combine any relevant data into a single entry to avoid confusion and ensure clarity in reporting.



CREATE/EDIT PROJECT PERFORMANCE MEASURES

Annual Accomplishments

Performance Measure :

Fiscal Year :

Quantity :

Unit of Measure :

Comments :

Please Select
C1 - Stabilized or Protected # Cultural or Historic Sites or Structures
C2 - Protected # Cultural or Paleontological Artifacts
C3 - Surveyed, Inventoried or Monitored # Acres of Cultural/Paleontological Resources
H2 - Treated, Enhanced or Restored # Miles of Riparian Stream or Shoreline Habitat
H3 - Surveyed, Inventoried or Monitored # Miles of Riparian Stream or Shoreline Habitat
H4 - Treated, Enhanced, or Restored # Acres of Upland Habitat
H5 - Surveyed, Inventoried or Monitored # Acres of Upland Habitat
H6 - Treated, Enhanced, or Restored # Acres of Wetland/Riparian Habitat
H7 - Surveyed, Inventoried or Monitored # Acres of Wetland/Riparian Habitat
H8 - Constructed or Improved # Water Developments for Wildlife
H9 - Treated or Restored # Acres of Invasive Plant Species
H14 - Implemented # Threatened and Endangered Species Recovery Actions
H15 - Implemented # Conservation Actions for Non-Listed Species
H16 - Decommissioned and/or Rehabilitated # Miles of Roads or Trails
O1 - Remediated # Hazardous Sites
O2 - Constructed or Refurbished # Buildings, Facilities and/or Amenities
O6 - Produced and Installed # New Interpretive or Education Publications/Signs/Kiosks/Displays
O8 - Designed and Constructed # Buildings or Facilities that Support Green Sustainability
O11 - Developed and Implemented # Databases, Reports, and/or Other Electronic Means of Documenting Activities
O12 - Completed # Management Plans/Handbooks/Manuals/Guides for Activity on Public Lands
R3 - Constructed or Improved # Recreational Facilities/Structures
R4 -Constructed or Improved # Miles of Recreational Roads, Trails, or Routes

- After selecting the appropriate Performance Measure from the first drop-down, the next step is to enter the **"Quantity"** associated with that performance measure in the designated box. This quantity represents the numerical value related to the performance indicator you selected.

- Following this, you will encounter a second drop-down menu that contains your list of valid **"Units of Measure."** Here, you can select the unit that corresponds to the quantity you entered.

You may notice that there is no "Delete" button available for removing entries. If you make a mistake while entering your Performance Measures, please contact your Program Manager to inform them of the error. They will be able to assist you in addressing the issue.

It's important to note that this entry in SMART is designed solely for gathering data. The information you provide will be exported to the SNPLMA Financial Database, where it can be utilized for reporting purposes. Additionally, there is a report you should run once you enter your Performance Measures; be sure to save this report to your files for your records

- Once you have finished entering your Performance Measure, click the **"Save"** button to record your entry. After saving, if you need to enter another Performance Measure, click the **"Add"** button to proceed with the next entry.

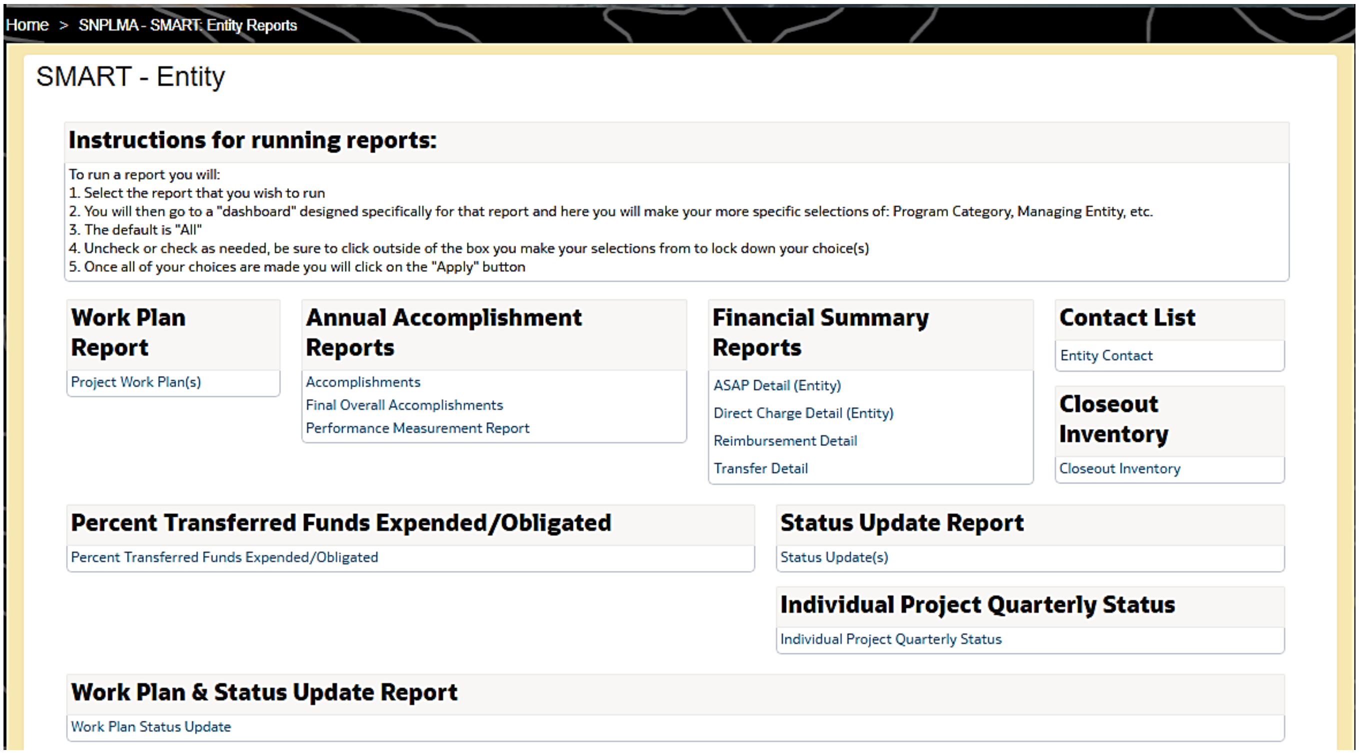
- If you wish to exit this screen and return to the previous menu, you can back out by clicking on **"Annual Accomplishments."** This will take you back to the Annual Accomplishments page, allowing you to review your entries or perform other related tasks as needed. Make sure to confirm that all information is accurate and saved before leaving the screen.

Step 7: ACCESSING REPORTS

You can run reports at any time, and it is not necessary for SMART to be open while generating them. Additionally, you have the ability to run reports on all of your projects, not just the currently active ones. This flexibility allows you to gather comprehensive data and insights across your entire project portfolio, making it easier to track progress, manage funding, and evaluate performance.

- To access the Report menu, click on **"Reports"** from any page within the application. Reports will open in a new window, ensuring that closing the report does not close SMART.

At the top of the screen, you will find new instructions designed to assist you in navigating the application. Additionally, I will outline some of the quirks of using this new application to enhance your experience.

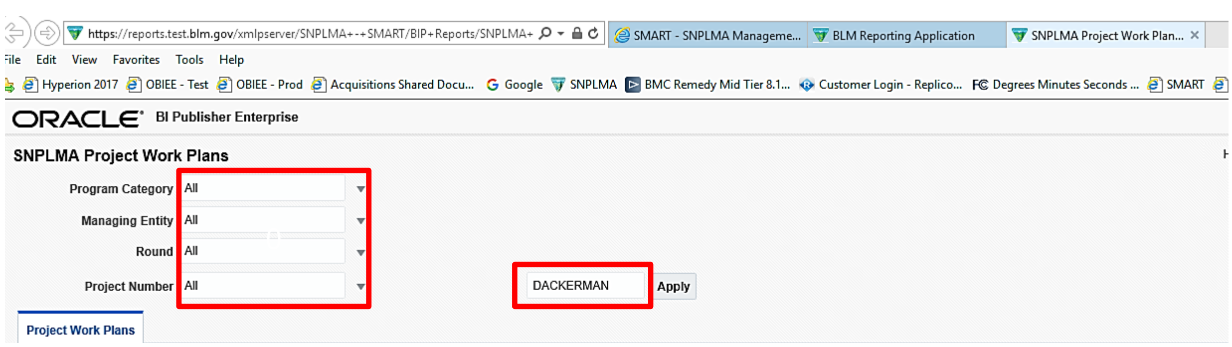


➢ The first step is to select your report. When you select a report, it will open in a new tab.

For example, you will see the "Dashboard" for the Project Work Plan(s) Report displayed.

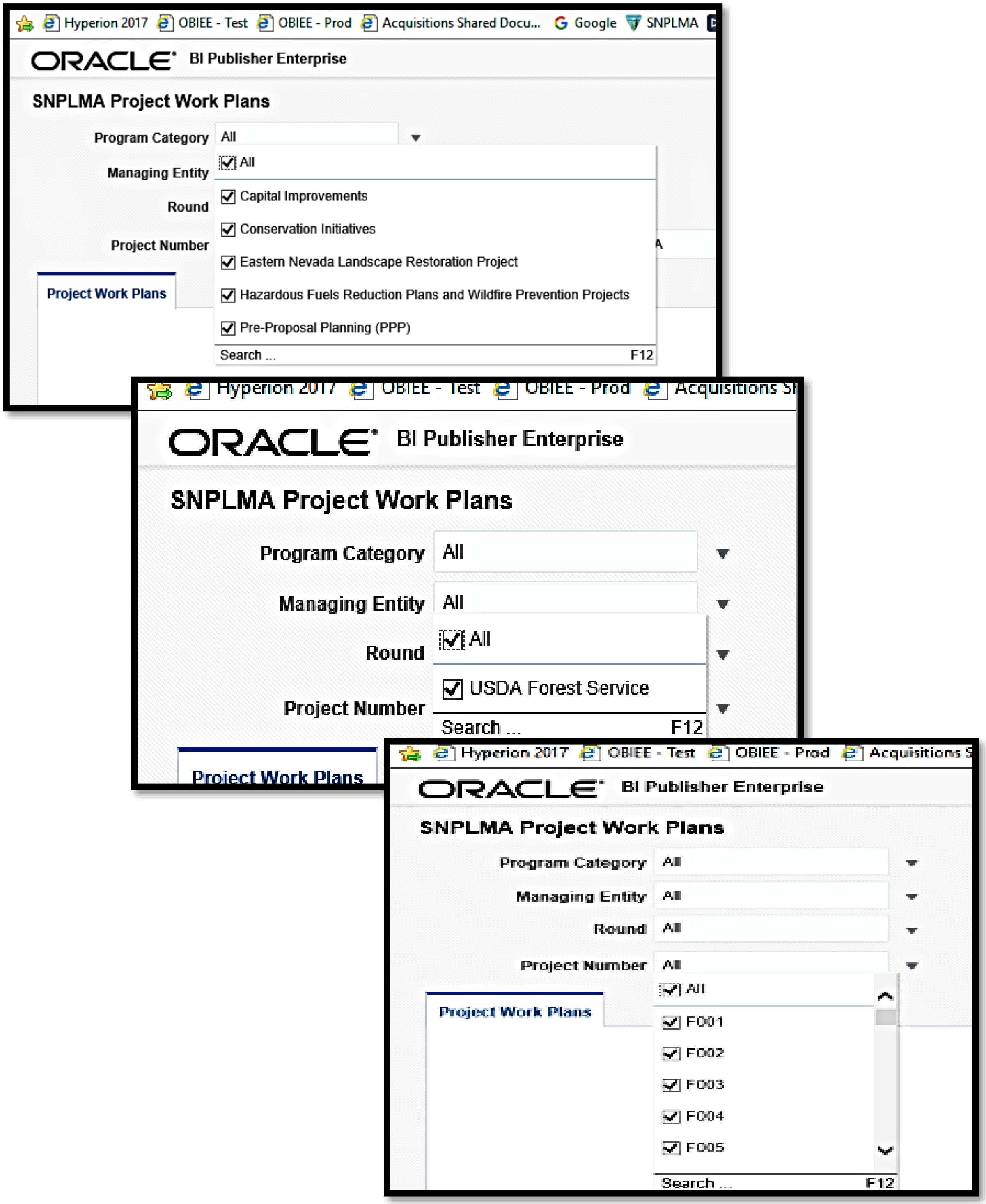
➢ Please note that the default parameters are set to "All." It is crucial to customize your parameter selection before running any reports. Attempting to run a report with the default "All" setting may cause issues or result in overwhelming amounts of data that can be difficult to manage.

➢ Additionally, on the dashboard, you can see your login name displayed. This feature helps confirm that you are operating within your account and can assist in maintaining secure access througout your session. Be sure to check that your parameters are correctly set before proceeding with any report generation to ensure accurate and relevant results.



The drop-down menus for selecting parameters will only display the options that you are authorized to view. This means that you will only see projects and data relevant to your permissions, ensuring that you can only access information you are authorized to see.

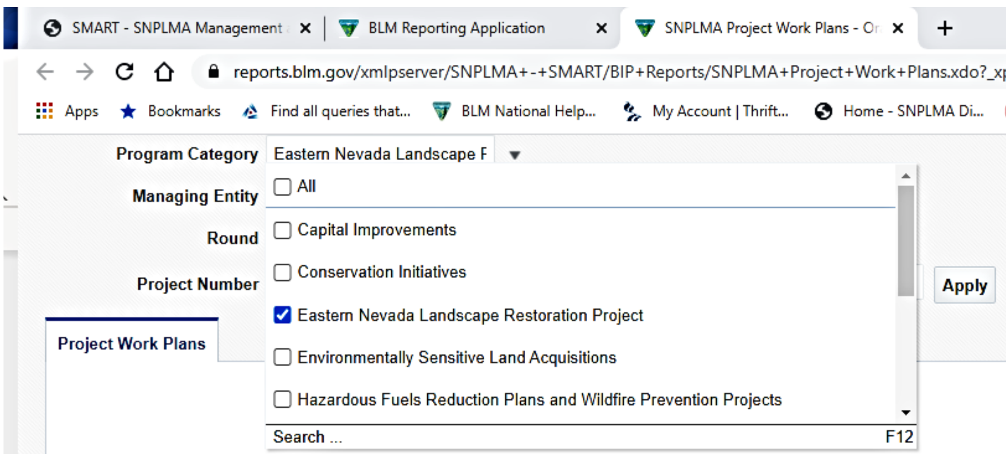
- Please remember to uncheck the **“All”** option before running your report. It is advisable to select only the specific project for which you need information. This targeted approach helps ensure that the report generated contains only relevant data, making it easier to analyze and interpret.



Making your selections in the reporting interface can be a bit tricky at times.

Once you make your initial selection, such as choosing **ENLRP**, be sure to "click" anywhere on the screen to lock in that choice. This step is important, as it confirms your selection and allows the system to register it properly.

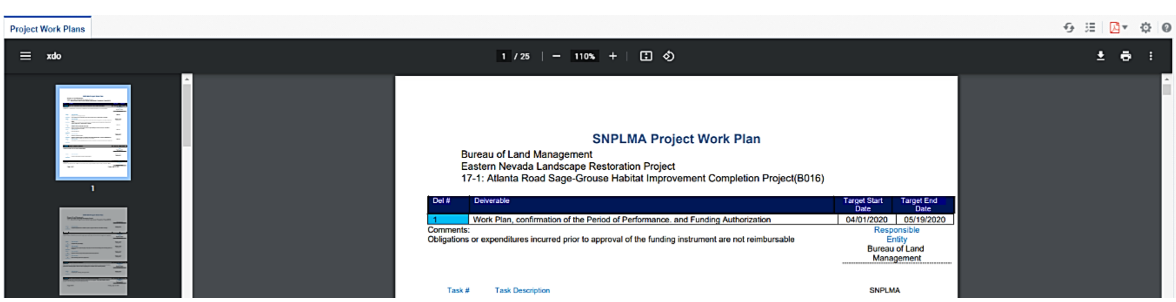
Please note that you should avoid clicking on the "Apply" button at this stage, as doing so will immediately run the report based on your current selections. Instead, ensure your choice is locked in by clicking away, allowing you to make any further adjustments to your parameters or selections before finalizing and running the report. This process helps prevent any mistakes and ensures that you have everything set up correctly before generating your report.



After making a selection from the dropdown menus, be sure to **"click"** somewhere on your desktop or another area outside the dropdown to lock in your choice. Do <u>not</u> click on "Apply" yet. Repeat this process for all of your selections, ensuring that each choice is confirmed before proceeding.

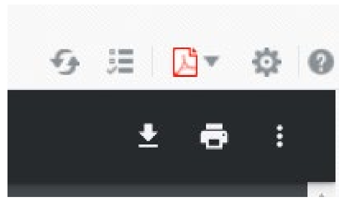
Once you have made all of your selections and are satisfied with them, you can then click on **"Apply."**

Upon clicking "Apply," you will see a confirmation or loading message, indicating that the report is being generated based on your selected parameters. This transition confirms that the system is processing your request. From there, you can review the report that is generated, ensuring it meets your needs and contains the relevant information for your project.



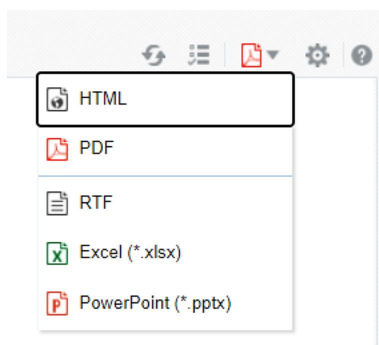
You can scroll through all the pages of the report you just generated. However, you will likely want to print and/or save the report for your records or future reference.

On the right side of the report, you will see options or icons that allow you to perform these actions easily.



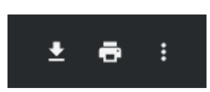
Clicking on the PDF Icon at the very top will allow you to select the document format you wish to use for your report.

Typically, you may have options such as PDF, Excel, or Word formats, depending on what the application supports. Selecting your preferred format will enable you to download or generate the report in that specific type.



Using options from this menu will only change how the report is displayed on your screen and will not affect the underlying data or report itself.

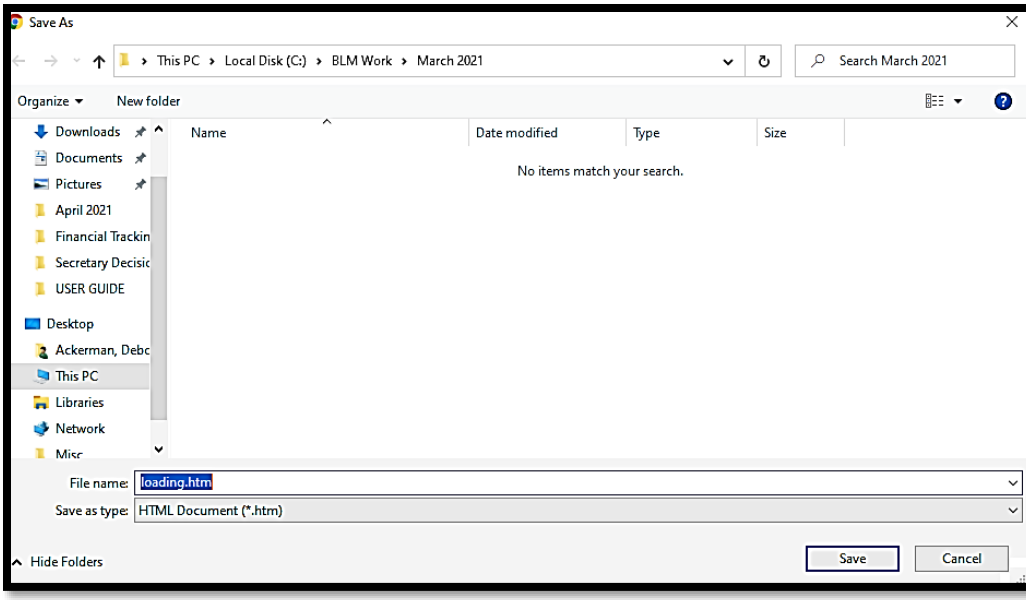
It is recommended that you avoid modifying these display settings, as they might not provide any added value or clarity to your report. Instead, focusing on saving or printing the report in its current format will likely be more beneficial



It is recommended that you click on the download or printer icon to proceed with saving or printing the report. These options will allow you to export the report in a format that best meets your needs.

By clicking the download icon, you can save the report to your device in a desired format, such as PDF or Excel, making it easy to access later or share with others.

If you are viewing the PDF as shown above, you can click on the “download” symbol  to save the PDF file to your device. This action allows you to store the report in a location of your choice for easy access and reference in the future.



If you want to physically print the report, click on the printer icon  . This will open the more familiar Print Dialog Box where you can adjust your printing preferences.

In the Print Dialog Box, you can select your desired printer, choose the number of copies, and adjust other settings such as page orientation and paper size. Once you have configured these settings to your satisfaction, click the “Print” button to send the report to your printer.

SUMMARY

The first step in the process should be completed for all new projects. For each project that is not marked as either closed or terminated, you should repeat steps two through six.

- If you encounter any problems, issues, and errors, please report them by email to the System Administrator, Tara Beck at tbeck@blm.gov. If the issue cannot be resolved by the System Administrator, a remedy ticket will be submitted to the Network Operations Center (NOC) for further assistance.

- As always, for assistance with any SNPLMA questions or reporting requirements, you may reach out to your Program Manager. They are available to help you navigate any concerns or inquires related to your projects.