

# Kahua Quick Reference Guide

## Baseline Obligations

### Project Lifecycle Applicability



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The Baseline Obligation application is used to track project baseline obligations (or planned obligations). According to the Project Delivery Alert dated October 31, 2022, baseline obligations are required for:

- New Construction (BA51 Funding)
- Major Renovations and Alterations (BA55 funding) including Special Emphasis Programs
- Funding from the Bipartisan Infrastructure Law and Inflation Reduction Act (All BA Codes)

All initial awards and exercising of contract options are required to be reported and linked to a milestone in the project schedule. Routine change orders are not required to be reported.

### When to Add a Baseline Obligation

A Project Manager sets up a new Baseline Obligation in Kahua when they receive an email stating the Appropriation has been approved. The email is triggered by an approved Prospectus or Obligational Authority.

Valerie,  
Appropriation - Line Item: NNYBIL01 for Project 000000334 - NY - ROUSES POINT - OVERTON (CHAMPLAIN) LAND PORT OF ENTRY - IUA Paving has been approved for \$29,500,000.00, please proceed with creating the Project Budget.

**Note:** Please only create one planned obligation per award.

## Create a Baseline Obligation Record

This action is typically performed by the following roles: **GSA-Regional KPM, GSA-Regional Manager, GSA-Measures Manager, GSA-PM/COR, or EXT-PM.**

1. Open the appropriate project using Project Finder in the left navigation pane. The project name is now shown in the top blue bar.
2. Click on the App Launcher in the left navigation pane, and select **PM Forecast and Baseline Obligations.**
3. To create a new Baseline Obligation record, click **NEW BASELINE OBLIGATION** in the log toolbar.



### Details Section

4. The **Number** and **Date** auto-populates, but it can be changed if needed.
5. Enter the **Description.**
6. If necessary, enter any **Notes.**

### Dates and Workflow Section

7. The Dates and Workflow section will auto-populate as the record is work flowed.

**Note:** When the record is saved, the workflow status changes to **Draft**. When the record is sent to be baselined, the workflow status changes to **Baseline Requested**, and the Date Sent to Baseline field auto-populates. When the record is baselined, the workflow status changes to **Baselined**, and the Baseline Date field auto-populates. When the record is closed, the workflow status changed to **Obligated**, and the Date Closed field auto-populates.

### Items Section

8. In the **Items** section, click **Insert** to add a row.
  - a. The **Number** column auto-populates.
  - b. Select the **Funding Authority** from the drop-down list. This drop-down list references the Funding Authority application within the project.
  - c. Select the **ASID** from the drop-down list. This drop-down list is filtered based on the previously selected Funding Authority.

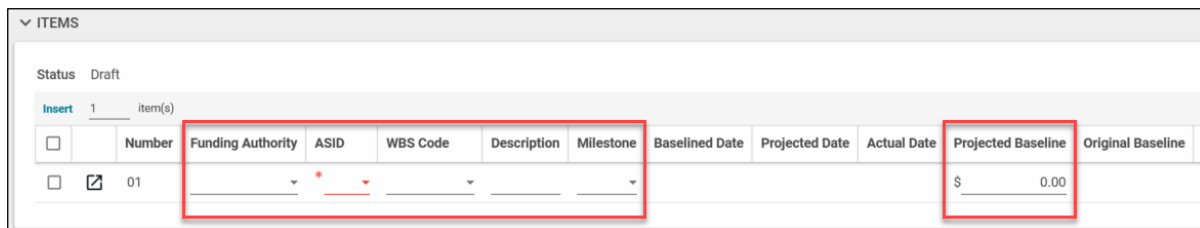
**Note:** If the **ASID** is not available in the drop-down list, you will need to add it to the **Funding** section of the **Project Details**. Refer to the [Editing a Project Quick Reference Guide](#) for instructions.

- d. Select the **WBS Code** from the drop-down list.
- e. The **Description** auto-fills when the WBS Code is selected, but it can be edited if necessary.
- f. Select a **Milestone** from the drop-down list. This drop-down list references the

Milestones app within the project.

**Note:** If the applicable Milestone does not appear in the dropdown list, open the Milestone in the **Milestones** app, and Edit it to check the box beside **Show in Baseline Obligation**.

- g. The **Baselined Date** auto-populates if the selected milestone has been baselined and has a Baseline End Date in the Milestones App.
- h. The **Projected Date** auto-populates if the selected milestone has an Estimated Completion Date in the Milestones App.
- i. The **Actual Date** auto-populates if the selected milestone has an Actual Completion Date in the Milestones App.
- j. Enter the **Projected Baseline** amount.
- k. The **Original Baseline** amount auto-populates when the Item is baselined by the Measures Manager.



Number	Funding Authority	ASID	WBS Code	Description	Milestone	Baselined Date	Projected Date	Actual Date	Projected Baseline	Original Baseline
01		*							\$ 0.00	

**Note:** Please reference the [Milestones Quick Reference Guide](#) for additional information about the Milestones App.

### Comments Section

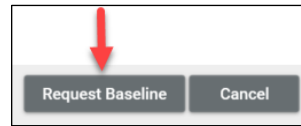
- 9. Enter clarifying details in the **New Comment** field.

### References Section

- 10. To add a document that does not exist within the project, click **Upload** and select the file. Multiple documents may be uploaded at one time.
- 11. To add a document that does exist within the project, click **Add Kahua Doc** and locate the file.
- 12. When complete, click the **Save / Close** button at the bottom of the window.

## Action Buttons

13. Click **Request Baseline** to send a request to the GSA Measures Manager to baseline the record. The workflow status changes to Baseline Requested, and the Date Sent to Baseline field auto-populates.



**Note:** If any changes need to be made before the record is baselined, the record can be **Recalled**.

## Baseline a Baseline Obligation Record

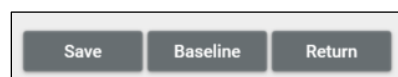
This action can be completed by the **GSA-Measures Manager**.

**Note:** Users in the GSA Measures Manager permission group receive a task notification and email to baseline the project's baseline obligation record.

1. Navigate to the **Tasks** app in the left navigation pane.
2. Click on the task for the Baseline Obligation record.
3. Review the information in the record and enter comments in the **Reviewer Comment** field.



4. To save the comment and return later to complete, click **Save**. The task will remain saved in the Tasks app.
5. If no further action is needed, click **Baseline** to baseline the record. The workflow status changes to Baselined and auto-populates with the Baseline Date.
6. If additional information is needed or changes need to be made to the record, click **Return**. The Baseline Obligation record returns the workflow status to Draft for edits.

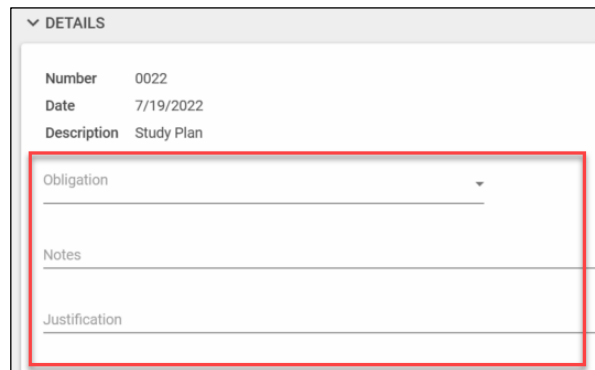


## Request a Re-Baseline

Typically completed by the following roles: **GSA-Regional KPM**, **GSA-Regional Manager**, **GSA-Measures Manager**, **GSA-PM/COR**, or **EXT-PM**.

**Note:** If a baseline obligation record has already been baselined, users can request for the record to be re-baselined by the GSA-Measures Manager.

1. Navigate to the appropriate project and open the **PM Forecast and Baseline Obligation** app from the App Launcher.
2. Click the **Baseline Obligation** record from the log.
3. Click **EDIT** in the log toolbar.
4. In the Details section, enter a **Justification**. If necessary, link an **Obligation** and enter any **Notes**.



5. When complete, click the **Save/Close** button at the bottom of the window.
6. Click **Request Re-Baseline** to send another task notification and email to the GSA-Measures Manager.

## Close a Baseline Obligation Record

This action is typically completed by the following roles: **GSA-Regional KPM, GSA-Regional Manager, GSA-Measures Manager, GSA-PM/COR, or EXT-PM.**

1. Navigate to the appropriate project and open the **PM Forecast and Baseline Obligation** app from the App Launcher.
2. Click the **Baseline Obligation** record from the log.
3. Click **Close** at the bottom of the window. The workflow status changes to Closed, and the Date Closed field auto-populates. If necessary, the record can be **Reopened**.

Once the Baseline Obligation is Closed, the status changes to Obligated, and the amount is removed from the Projected Baseline Obligation column of the Work Breakdown and will remain in the Original Baseline Obligation column.

**Note:** When financial integration with FMIS begins, the amount will be reflected in the Base Award/Obligation column of the Work Breakdown.



## Resources

For additional help with Kahua applications, you can access the Calendar for Instructor-led training, Self-paced videos and Quick Reference Guides (QRGs) from this link: [Training: Project Management tool | GSA](#)

## Related QRGs

[Editing a Project Milestones Work Breakdown](#)