



EVM 262 Card
EVMS Guidelines
 (Revised March 2018)

GL #	EIA #	EVM-262 Short Title
1	2.1.a	Define the WBS
2	2.1.b	Define Program Organizational Structure
3	2.1.c	Integrate Subsidiary Management Processes
4	2.1.d	Identify Overhead Management
5	2.1.e	Integrate WBS/OBS to Create Control Accounts
6	2.2.a	Scheduling Work
7	2.2.b	Identify Products & Milestones for Progress Assessment
8	2.2.c	Establish the PMB
9	2.2.d	Authorize and Budget by cost elements
10	2.2.e	Determine Discrete Work & Objective Measures
11	2.2.f	Sum WP/PP budgets to the Control Account
12	2.2.g	Level of Effort planning and Control
13	2.2.h	Establish overhead budgets
14	2.2.i	Identify Management Reserve and Undistributed Budget
15	2.2.j	Reconcile to target costs
16	2.3.a	Record direct costs
17	2.3.b	Summarize direct costs by WBS elements
18	2.3.c	Summarize direct costs by organizational structure elements
19	2.3.d	Record/allocate indirect costs
20	2.3.e	Identify unit and lot costs
21	2.3.f	Track and report material costs/quantities
22	2.4.a	Calculate Schedule Variance & Cost Variance
23	2.4.b	Analyze significant variances
24	2.4.c	Analyze indirect Cost Variance
25	2.4.d	Summarize Performance Data & variances for management reporting
26	2.4.e	Implement corrective actions
27	2.4.f	Maintain Estimate At Completion
28	2.5.a	Incorporate changes in a timely manner
29	2.5.b	Maintain Baseline and Reconcile Budgets
30	2.5.c	Control retroactive changes
31	2.5.d	Prevent unauthorized revisions
32	2.5.e	Document PMB changes



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GL #	EIA #	EVM-262 Short Title	Organization	Scheduling	Work / Budget Authorization	Accounting	Indirect Management	Managerial Analysis	Change Incorporation	Material Management	Subcontract Management
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Organization

1 #	2.1.a	Define the WBS	Key Process								
2	2.1.b	Define Program Organizational Structure	Key Process								Cross Process
3 #	2.1.c	Integrate Subsidiary Management Processes	Key Process								
4	2.1.d	Identify Overhead Management					Key Process				
5	2.1.e	Integrate WBS/OBS to create Control Accounts	Key Process								

Planning Scheduling and Budgeting

6 #	2.2.a	Scheduling Work		Key Process							
7 #	2.2.b	ID Products & MS for progress assessment		Key Process							
8 #	2.2.c	Establish the PMB			Key Process		Key Process				
9 #	2.2.d	Authorize & Budget by cost elements	Cross Process		Key Process				Cross Process	Cross Process	
10 #	2.2.e	Determine discrete work & objective measures	Cross Process		Key Process				Cross Process	Cross Process	
11	2.2.f	Sum WP/PP budgets to control account			Key Process						
12 #	2.2.g	Level of Effort planning & control			Key Process				Cross Process	Cross Process	
13	2.2.h	Establish overhead budgets					Key Process				
14	2.2.i	Identify MR and UB			Key Process						
15	2.2.j	Reconcile to target costs			Key Process						

Accounting Considerations

16 #	2.3.a	Record direct costs				Key Process					Cross Process
17	2.3.b	Summarize direct costs by WBS elements				Key Process					
18	2.3.c	Summarize direct costs by OBS elements				Key Process					
19	2.3.d	Record/allocate indirect costs					Key Process				
20	2.3.e	Identify unit & lot costs				Key Process					
21 #	2.3.f	Track & report material cost/quantities								Key Process	

Analysis and Management Reporting

22	2.4.a	Calculate SV & CV	Cross Process		Cross Process	Key Process		Key Process		Cross Process	Cross Process
23 #	2.4.b	Analyze significant variances		Cross Process				Key Process		Cross Process	Cross Process
24	2.4.c	Analyze indirect cost variances					Key Process				
25	2.4.d	Summarize perf data & vars for mgmt. reporting						Key Process			
26 #	2.4.e	Implement corrective actions	Cross Process					Key Process			
27 #	2.4.f	Maintain EAC	Cross Process				Key Process	Key Process		Cross Process	Cross Process

Revisions and Data Maintenance

28 #	2.5.a	Incorporate changes in a timely manner							Key Process		
29	2.5.b	Maintain baseline & Reconcile budgets							Key Process		
30 #	2.5.c	Control retroactive changes				Key Process			Key Process		
31	2.5.d	Prevent unauthorized revisions							Key Process		
32 #	2.5.e	Document PMB changes							Key Process		

High-Risk Guidelines identified in DFARS 252.234-7002

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Organization

1 #	2.1.a	Define the WBS	Key Process								
2	2.1.b	Define Program Organizational Structure	Key Process								Cross Process
3 #	2.1.c	Integrate Subsidiary Management Processes	Key Process								
4	2.1.d	Identify Overhead Management					Key Process				
5	2.1.e	Integrate WBS/OBS to create control accounts	Key Process								

Planning Scheduling and Budgeting

6 #	2.2.a	Scheduling Work		Key Process							
7 #	2.2.b	ID Products & MS for progress assessment		Key Process							
8 #	2.2.c	Establish the PMB			Key Process		Key Process				
9 #	2.2.d	Authorize & Budget by cost elements	Cross Process		Key Process				Cross Process	Cross Process	
10 #	2.2.e	Determine discrete work & objective measures	Cross Process		Key Process				Cross Process	Cross Process	
11	2.2.f	Sum WP/PP budgets to control account			Key Process						
12 #	2.2.g	Level of Effort planning & control			Key Process				Cross Process	Cross Process	
13	2.2.h	Establish overhead budgets					Key Process				
14	2.2.i	Identify MR and UB			Key Process						
15	2.2.j	Reconcile to target costs			Key Process						

Accounting Considerations

16 #	2.3.a	Record direct costs				Key Process					Cross Process
17	2.3.b	Summarize direct costs by WBS				Key Process					
18	2.3.c	Summarize direct costs by OBS				Key Process					
19	2.3.d	Record/allocate indirect costs					Key Process				
20	2.3.e	Identify unit & lot costs as needed				Key Process					
21 #	2.3.f	Track & report material \$ / #								Key Process	

Analysis and Management Reporting

22	2.4.a	Calculate SV & CV	Cross Process		Cross Process	Key Process		Key Process		Cross Process	Cross Process
23 #	2.4.b	Analyze significant variances		Cross Process				Key Process		Cross Process	Cross Process
24	2.4.c	Analyze indirect cost variances					Key Process				
25	2.4.d	Summarize perf data & vars for mgmt. reporting						Key Process			
26 #	2.4.e	Implement corrective actions	Cross Process					Key Process			
27 #	2.4.f	Maintain EAC	Cross Process				Key Process	Key Process		Cross Process	Cross Process

Revisions and Data Maintenance

28 #	2.5.a	Incorporate changes in a timely manner							Key Process		
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