AGENCY TECHNICAL REVIEW DOCUMENT TEMPLATES

PCoP Webinar Series

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FRM-PCX

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US Army Corps of Engineers

Inter-Active Survey

How many of you are certified ATR Reviewers?

Yes

Not Yet

Objectives

❑ Brief Overview of Roles & Responsibilities
❑ Brief Overview of the Types of ATR
❑ Brief Overview of the Documents of ATR
❑ Working Templates for ATR Documentation

❑ What is an ATR Lead?

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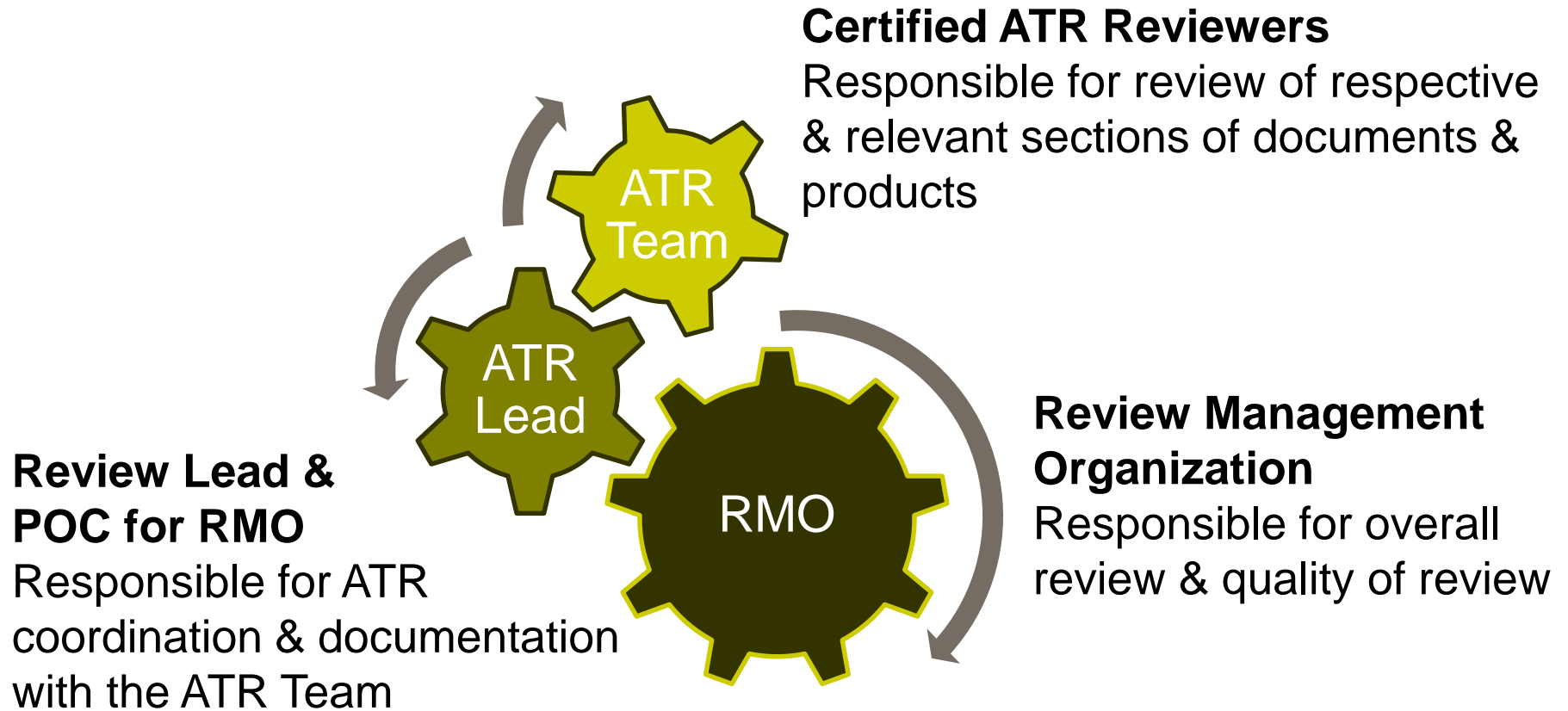**U.S. ARMY**

AGENCY TECHNICAL REVIEW

Roles & Responsibilities

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AGENCY TECHNICAL REVIEW
REVIEW ROLES & RESPONSIBILITIES

Certified ATR Reviewers
Responsible for review of respective & relevant sections of documents & products

Review Management Organization
Responsible for overall review & quality of review

Review Lead & POC for RMO
Responsible for ATR coordination & documentation with the ATR Team

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Inter-Active Survey

How many of you have been on an ATR Team?

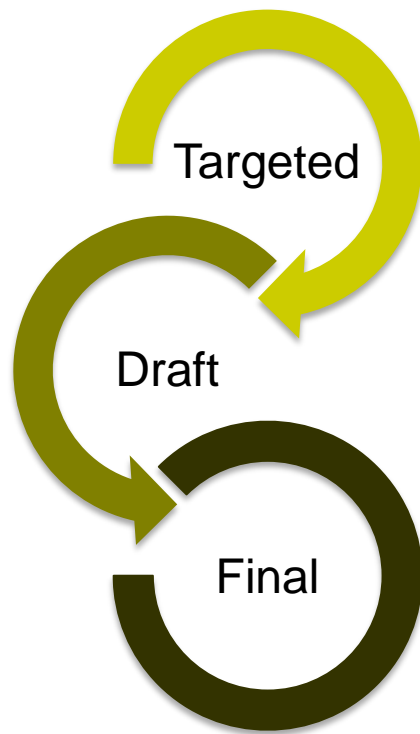Yes

Not Yet

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AGENCY TECHNICAL REVIEW

Types of ATR

3 TYPES OF AGENCY TECHNICAL REVIEW

Targeted (Product) - A limited ATR of specific interim documents or products (Optional – As Needed Basis)

Draft (Report) - A complete ATR of a Draft Decision Document (Required)

Final (Report) - An ATR of a Final Decision Document. Complete or a specific review as determined by ATR Lead & RMO (Required)

Targeted

Draft

Final
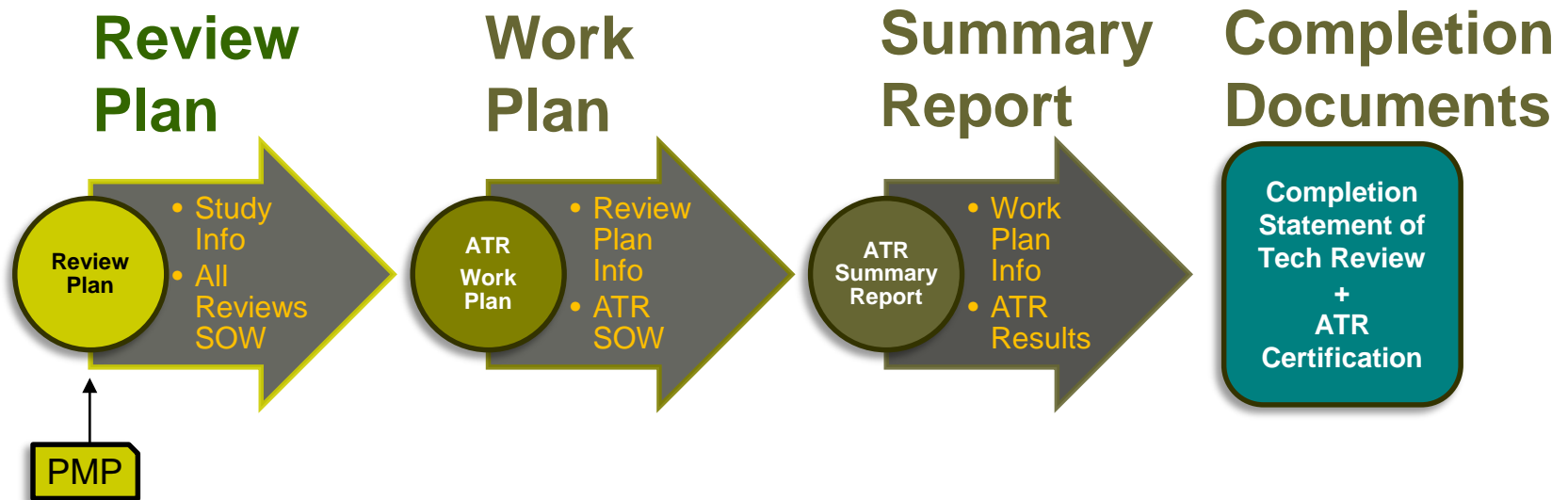
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AGENCY TECHNICAL REVIEW

Documents & Documentation

ATR DOCUMENTATION PURPOSE, USE, & FLOW

Review Plan

Review Plan
- Study Info
- All Reviews SOW

PMP

Work Plan

ATR Work Plan
- Review Plan Info
- ATR SOW

Summary Report

ATR Summary Report
- Work Plan Info
- ATR Results

Completion Documents

Completion Statement of Tech Review
+
ATR Certification

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AGENCY TECHNICAL REVIEW

Working Templates for ATR Documents

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AGENCY TECHNICAL REVIEW
DOCUMENT TEMPLATES

**Agency Technical Review
Work Plan**
[Date of Work Plan]

For Review of:
[Title of Study]
**[Title of Principal Product(s) to be
Reviewed]**
[Date of Product(s)]
[Home District]

Review Management Organization:
[RMO Office Title]

ATR Work Plan Template, Version 2.0 (01 October 2017)

How to use this template: Black text is standard text that should be applicable to most work plans. It may be modified to meet the needs of a specific review, subject to concurrence by the RMO. Bracketed [blue text] indicates where review specific information should be entered and generally what type of information should be entered. Upon completion of an ATR Work Plan, **all blue text (and this text box) should be deleted from the work plan and replaced, as applicable, with review specific text and information.**

For best use of this template, refer to the **ATR Template Documents Primer**

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**Agency Technical Review
Summary Report**
[Date of Summary Report]

For Review Of:
[Title of Study]
[Title of Principal Product(s) Reviewed]
[Date of Product(s)]
[Home District]

Review Management Organization:
[RMO Office Title]

ATR Summary Report Template, Version 2.0 (Aug 2017)

How to use this template: Black text should not be modified without coordination with the RMO; it is standard report text that should be applicable to most review reports. Bracketed [blue text] indicates where review specific information should be entered and generally includes an explanation of what information should be entered. Upon completion of an ATR Summary Report, **all blue text (and this text box) shall be deleted from the report and replaced, as applicable, with review specific text.**

To best use this template, refer to the **ATR Template Documents Primer**

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The ATR Work Plan and Summary Report Templates
are designed <u>to support </u>the RMO and ATR Lead.

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AGENCY TECHNICAL REVIEW
WORK PLAN TEMPLATE

**Agency Technical Review
Work Plan**
[Date of Work Plan]

For Review of:
[Title of Study]
**[Title of Principal Product(s) to be
Reviewed]**
[Date of Product(s)]
[Home District]

Review Management Organization:
[RMO Office Title]

ATR Work Plan Template, Version 2.0 (01 October 2017)

How to use this template: Black text is standard text that should be
applicable to most work plans. It may be modified to meet the needs of a
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an ATR Work Plan, **all blue text (and this text box) should be
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review specific text and information.**

For best use of this template, refer to the **ATR Template Documents Primer**

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The Work Plan may be considered
the ATR Scope of Work and Action Plan.

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AGENCY TECHNICAL REVIEW
SUMMARY REPORT TEMPLATE

The Summary Report is the final step and product of an agency technical review.

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COMPLETION OF
AGENCY TECHNICAL REVIEW

Completion Statement of Technical Review

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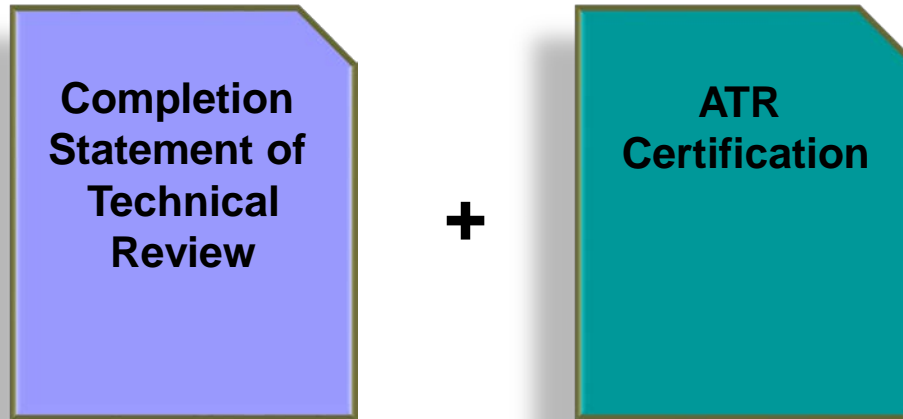
ATR Certification

Completion of ATR is recognized with a completion statement and certification

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COMPLETION STATEMENT OF TECHNICAL REVIEW

Completion Statement of Technical Review

The <u>Completion Statement of Technical Review</u> is accompanied by the Summary Report that presents a summation of the review and identified critical issues.   The Statement represents the agreement of a satisfactory completion of the ATR effort by the RMO, ATR Lead, and PDT Lead.

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AGENCY TECHNICAL REVIEW CERTIFICATION

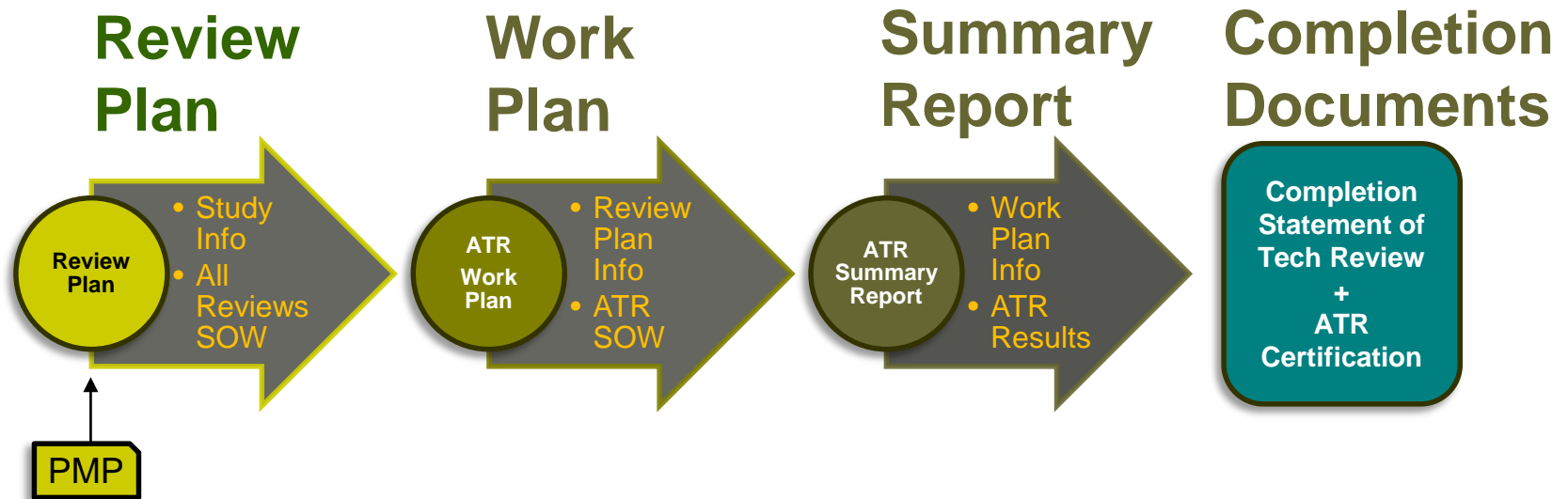**ATR Certification**

The <u>Certification of Agency Technical Review</u> along with a Completion Statement of Technical Review is required for all "Draft" products that are forwarded to the Vertical Team/HQ for policy review, and is required for all "Final" products.

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ATR DOCUMENTATION PURPOSE, USE, & FLOW

Review Plan

- Study Info
- All Reviews SOW

(Review Plan)

← PMP

Work Plan

- Review Plan Info
- ATR SOW

(ATR Work Plan)

Summary Report

- Work Plan Info
- ATR Results

(ATR Summary Report)

Completion Documents

Completion Statement of Tech Review + ATR Certification

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AGENCY TECHNICAL REVIEW

ATR Leads

Inter-Active Survey

Do You Have ATR Lead Experience?

Yes

Not Yet

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"What we really need in an ATR Lead is someone who has super powers…"

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ATR Lead

What Makes an ATR Lead?
What Are Some of Their Responsibilities?

ATR Lead
Optimal Qualifications

- Ideally, but not necessarily, is a NTS, RTS, and/or WRCP
- Known entity to the RMO as a lead from other reviews or has performed well on a review team
- ATR Certified with one or more CoP(s) & Mission Areas
- Experienced in performing review on other related studies
- Experienced as being part of a study team and/or lead for a similar study
- Able to work with virtual teams and process
- General understanding of other study disciplines responsibilities & contributions to the decision document process
- Excellent communication, organizational & leadership skills
- Plugged into relevant and latest guidance and policy discussions & updates
- Sturdy & Resilient
- Proactively available and interested
- Super powers as available

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ATR Lead
Some General Responsibilities

- Is a representative of the RMO, but also considered part of the PDT
- Responsible for the ATR process and quality control
- A life cycle review commitment is desired for continuity on complex studies
- ATR Team identification, recruiting, and coordination
- <u>Work Plan</u> coordination & development
- Charge questions development & coordination
- Continuous communication and tracking during review
- DrChecks monitoring
- DQC review assessment and coordination w/ ATR Team
- ATR comments review & screening
- Assist in comment resolution & elevation as needed
- <u>Summary Report</u> coordination & development
- Coordinates the Statement of Completion
- ATR representation and report out at study milestones as required

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Interested in Becoming an ATR Lead?

The RMO's are always looking to add to the ATR Lead Cadre!

Be proactive and contact a PCX!

Questions?

Please type questions in the chat box.
We will answer as many as time allows.

This webinar will be posted to the Planning Community Toolbox:
http://www.corpsplanning.us

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