ELECTRONIC PROCUREMENT

INFORMATION COLLECTION SYSTEM

Welcome to a new e_PICS experience!

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INTRODUCTION

GENERAL NOTICE

SUBJECT: Electronic Procurement Information Collection System (e-PICS)

REF: USAID General Notice entitled "Acquisition and Assistance Document Generation and Data Reporting for FY07" dated September 14, 2006

We are pleased to announce the deployment of ePICS!

This web-based reporting tool replaces the data gathering functions previously performed in ProDoc. ProDoc was the Agency's tool for document generation and data gathering and was decommissioned on September 30, 2006. ePICS is an interim tool designed to help us fulfill our reporting requirements, pending full implementation of the new automated systems, Global Acquisition System (GLAS) and Joint Assistance Management System (JAMS). This means that contracting staff, agreement officers, executive officers and others must now enter required data for all awards made this fiscal year that meet the following criteria. For contracts, FPDS-NG requires reporting of all actions where the Total Estimated Cost is expected to exceed the micro-purchase threshold of $3,000. For assistance instruments, FAADS requires reporting for all actions as there is no minimum threshold. Therefore, all awards and modifications made since October 1, 2006 that meet this stated criteria must now be entered into ePICS and should be completed by July 13, 2007. In addition, in order to comply with the new requirements of the Federal Funding Accountability & Transparency Act of 2006 (FFATA), award information for new awards and modifications must now be entered within 30 days of award.

Note: GLAS users will continue to enter their acquisition award data into GLAS instead of ePICS. Where GLAS is being used, users must still enter assistance awards in ePICS until such time that JAMS is deployed.

WASHINGTON
M/OAA/CAS/SUP will provide roles and access to ePICS to all M/OAA Contract Specialists and Contracting Officers. M/OAA/CAS/SUP will notify M/OAA users once roles and access are set in the system, via e-mail. There is no need to request access. Non-M/OAA personnel responsible for Acquisition & Assistance reporting will also be provided roles and access. Bureau Transition Coordinators (BTCs) should provide a listing of names and offices symbols for all potential users to Judy Britt at jbritt@usaid.gov. In addition, to assist Washington users with their entries into ePICS M/OAA/CAS/SUP will prepare NMS reports for each M/OAA Division and bureau for all relevant awards issued between October 1, 2006 and the issuance date of this notice. These reports will be distributed to the Division Chiefs and BTCs for further dissemination.

MISSIONS
With ePICS, Missions are given the authority to designate an on-site Domain Administrator for each Mission location. This will allow each Mission to manage their users. For instance, Missions will create, set roles, and disable their own users. In order to get started, Missions must provide the name of the chosen Domain Administrator and an alternate, to Sebrina Robinson at srobinson@usaid.gov.

Please provide these names as soon as possible and no later than June 22. Once the information is received, access will be provided to the Domain Administrators, and they can begin providing access to the rest of the staff at their locations.

USER SUPPORT

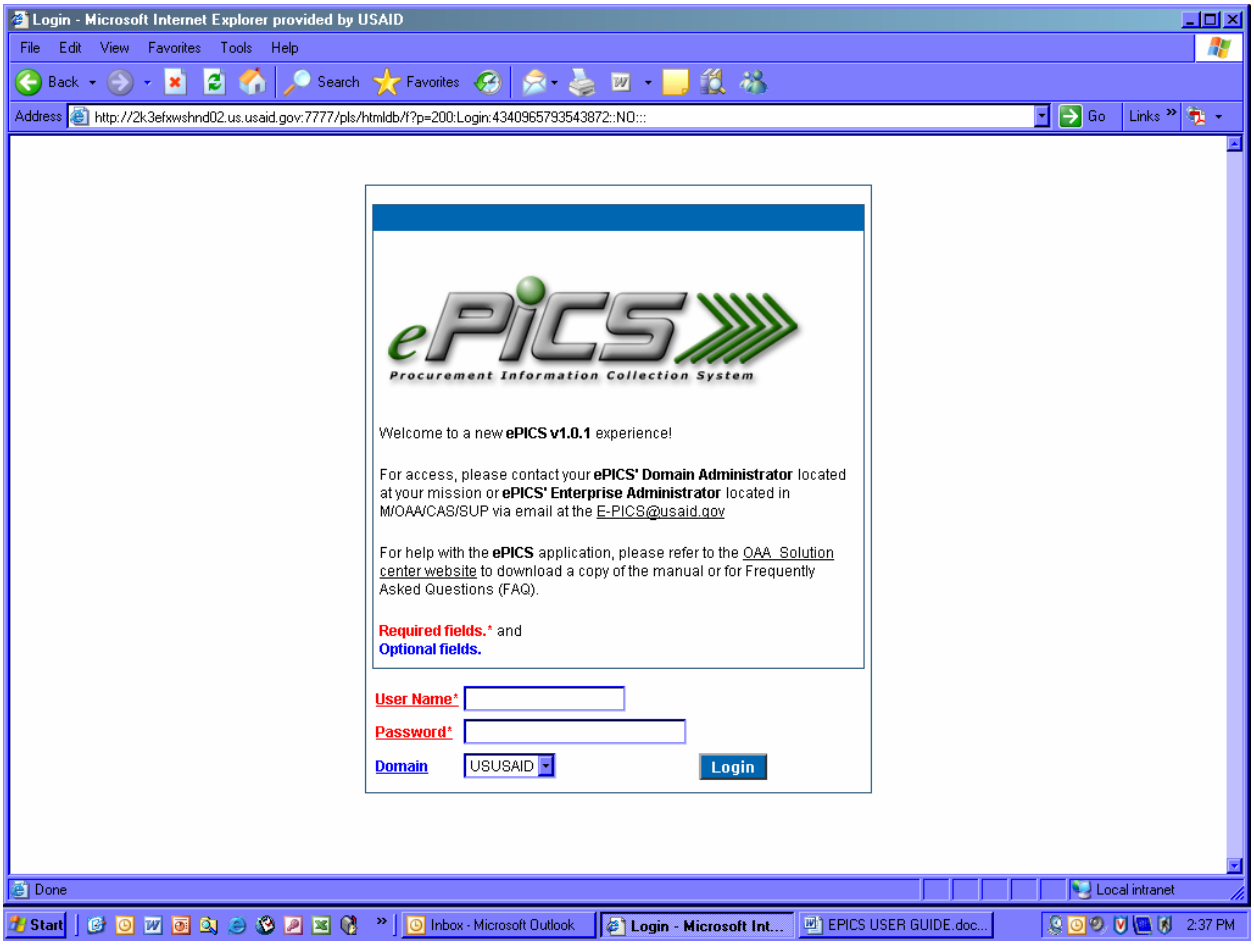
ePICS is a user-friendly system and we ask that you make use of the attached manuals and data entry tips. The manual has been divided into sections by the type of action being entered for easy of use. The Data Entry Tips is an abridged version of the manuals and intended to help with initial use by providing clarity on basic navigation, terms, and field definitions. These documents will also be posted on the OAA Solution Center website:
http://inside.usaid.gov/M/OAA/SolutionsCenter/egov/epics.html.

As with any new system, we expect many comments, concerns, and suggestions for improvement. A dedicated e-mail box has been set up to accommodate these responses. This e-mail box will also be used to field any requests for help with the application. Please send your messages to the E-PICS@usaid.gov mailbox.

Being a web-based application, ePICS may work better in some locations than others, depending on connectivity strengths and latency issues. Missions of particular concern include: Almaty, Antananarivo, Dar Es Salaam, Dhaka, Dili, Kabul, Kathmandu, Kigali, Lilongwe, and Yerevan. System administrators in these locations should send and e-mail to the E-PICS@usaid.gov mailbox to coordinate additional testing prior to the mission beginning to use ePICS.

ePICS can be found at: http://epics.us.usaid.gov:7777/pls/htmldb/f?p=777
Please bookmark this site.

I. GETTING STARTED



A. Logging into the Application

- **User Name:** User Name and password are the same as your network login

- **Domain:** Select your Domain. This is your country location. **For example**: USUSAID = United States. THUSAID = Thailand USAID. Contact your local administrator if not sure which is your PC Domain.

Example: USUSAID\jsmith *Domain drop down is optional.

B. Important System Tips

- Do not use the “X” to end the session. Do not use any of the internet browser tools, such as the “Back” button. Use the “Cancel” button inside the EPICS system.

- If the Phoenix system is down, a message will appear on all screens, regardless of whether your location is connected to Phoenix.

- Move your mouse over field headings to view **Help** screens.

- “%” is used as a wild card in search fields.

- Required fields are shown in red and have an ‘*’ next to them.

- The ‘Delete’ button only appears on the first tab. If clicked, it will delete the entire record.

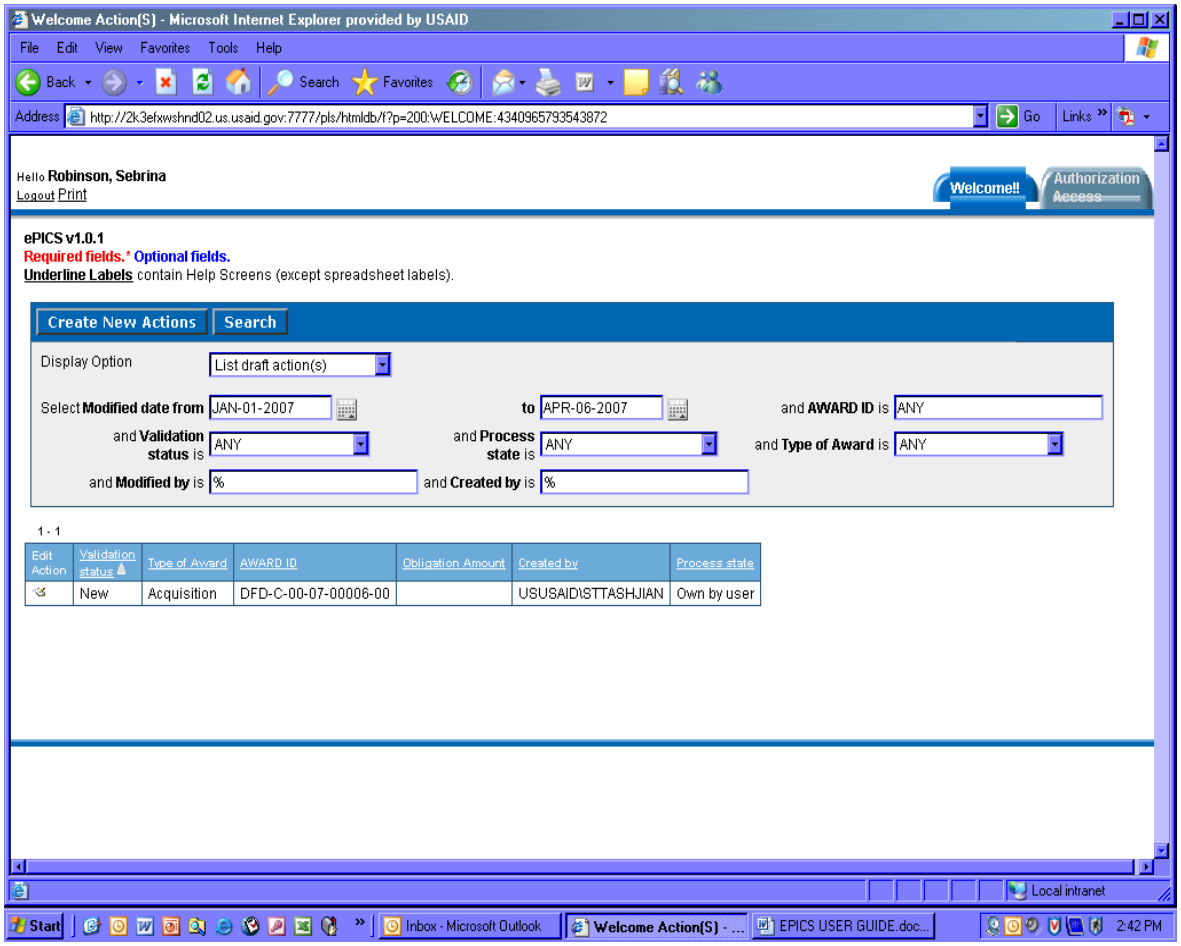
- You must click the ‘Save’ button on each screen to save your data. If you move between tabs without clicking the ‘Save’ button, your data will not be saved.

- Categories that have radio buttons suggest that only one option may be chosen. Categories with square boxes suggest that more than one option may be chosen.

- The “Log out” option is located under the user’s name, in the top left-hand corner of the screen.

- Please Note: Data does not copy over from the Base Award to Modifications. Therefore, when entering a Modification, base award information must be re-keyed.

II. WELCOME/OPENING SCREEN



In this screen you may **Enter a New Action, Search** for a previous action that is not shown in the table at the bottom of the screen, or **View and Export Actions** to an excel spreadsheet for printing.

Create New Action: E-PICS is used to capture data for all Acquisition and Assistance Award Types, including IAA and 632A/B. Click this button to begin enter of award information.

A. Searching - you can search for actions previously entered in several ways. You can search by:

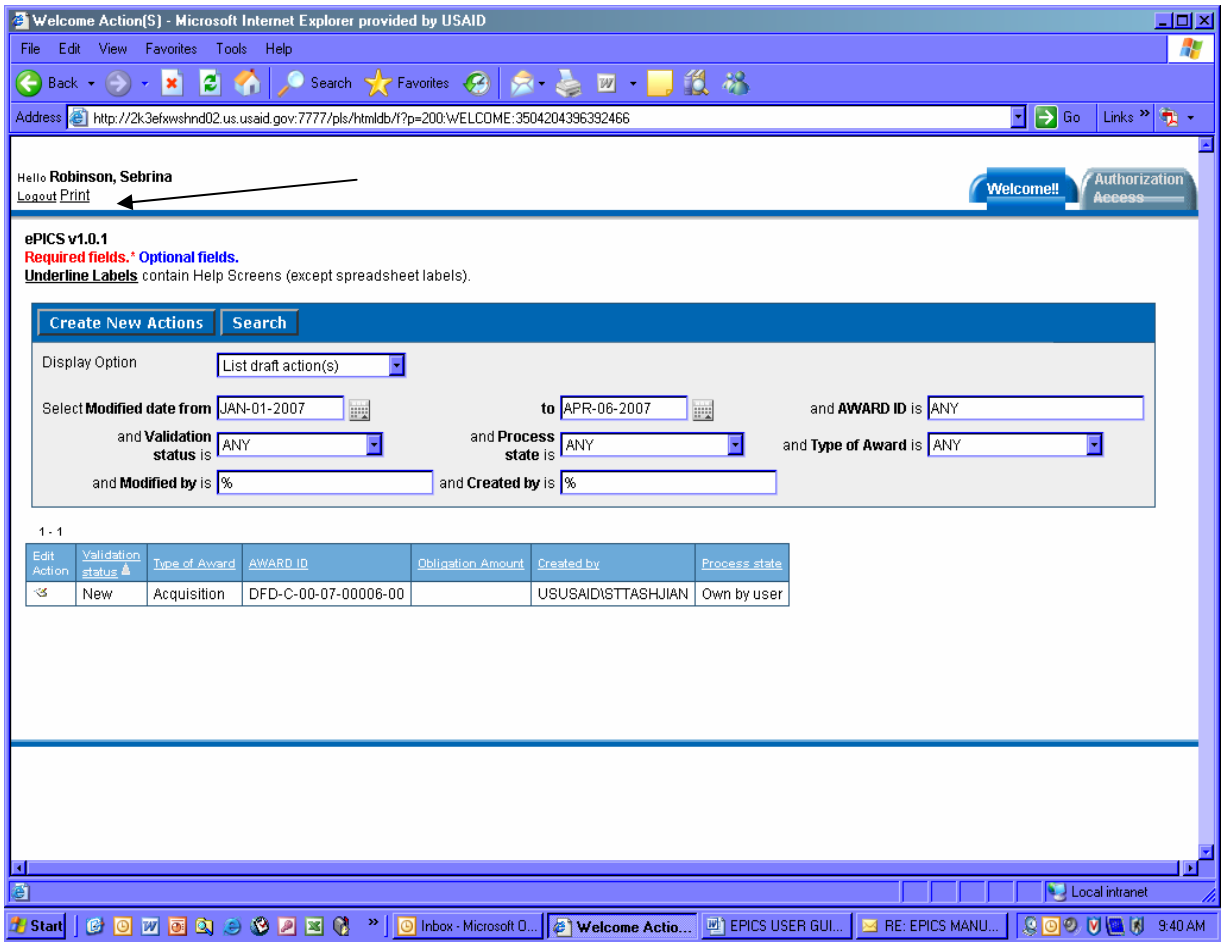
- Date Range
- Award ID
- Validation Status (Records that have Errors, Warnings, etc.)
- Process State (Records reported/not reported to FPDS-NG)
- Type of Award
- Modified By (Name of person who last modified the record)
- Created By (Name of person that originally entered the record)

The **"%"** is a wild card and can be used in the fields to broaden the search and assist when all information is not known.

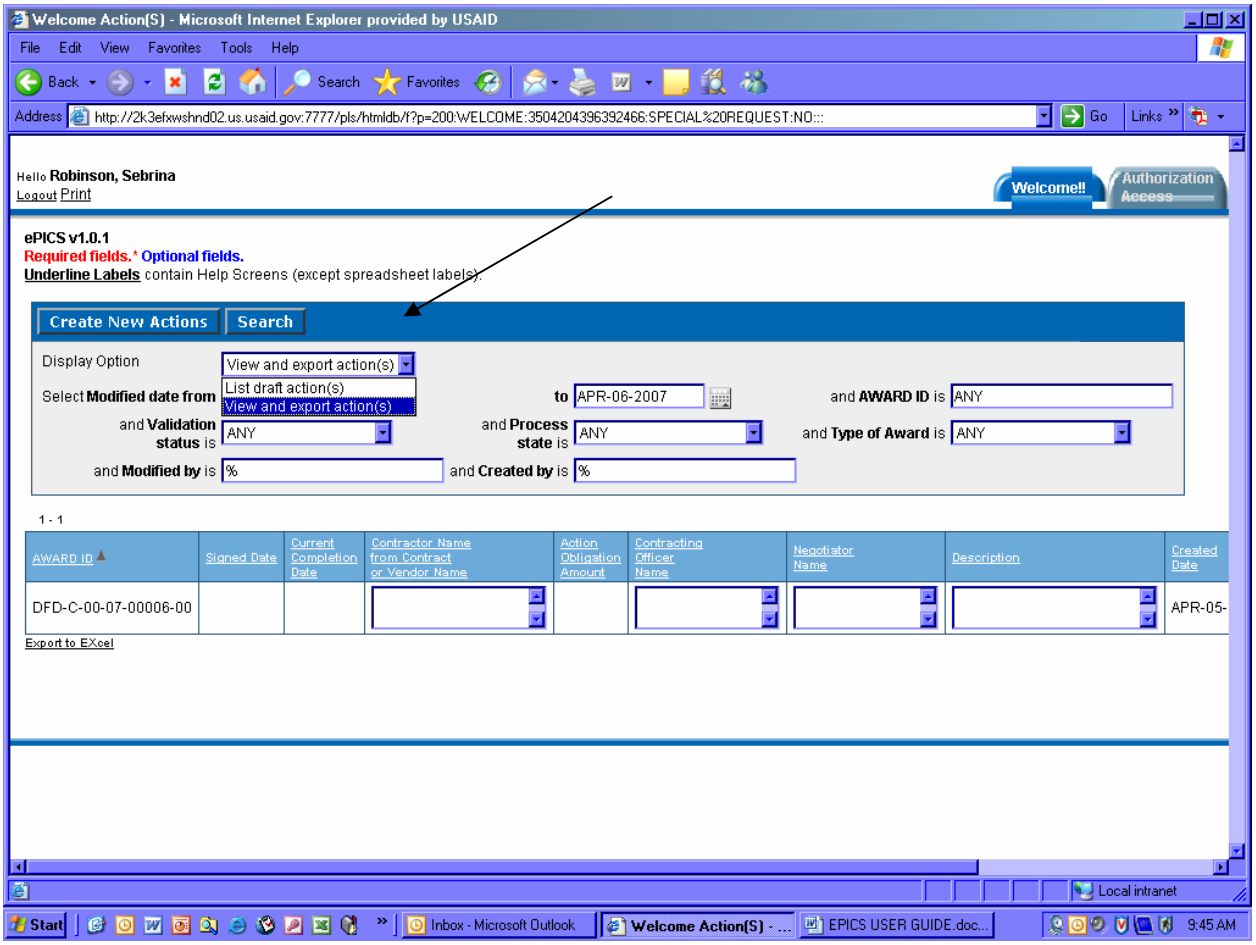
B. Printing a report

Users have <u>two</u> options for printing records entered into EPICS.

1. You may print each page as you enter the data, by clicking on the “Print” option found under the user’s name in the top left-hand corner of the screen.



2. You may print a summary report of the data (data dump) by exporting it into an Excel Spreadsheet. To do this, you must go to the “Welcome” screen. Choose “View and export actions” from the Display option drop down box. The “Export to Excel” link is now available below the data, at the bottom of the page.

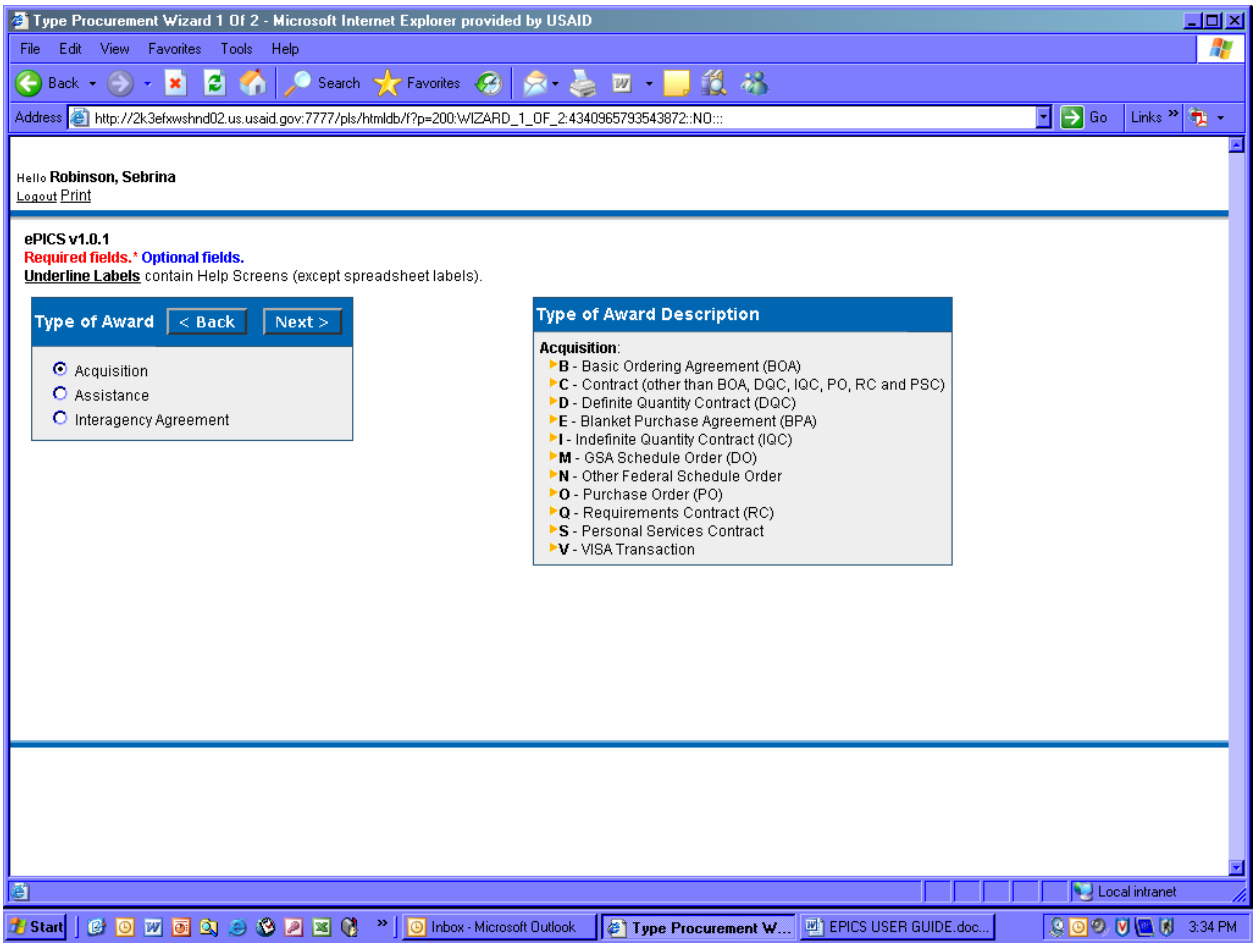

Welcome Action(S) - Microsoft Internet Explorer provided by USAID
File Edit View Favorites Tools Help
Back Search Favorites
Address http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:WELCOME:3504204396392466:SPECIAL%20REQUEST:NO:::
Go Links
Hello Robinson, Sebrina
Logout Print
Welcome!! Authorization Access
ePICS v1.0.1
Required fields.* Optional fields.
Underline Labels contain Help Screens (except spreadsheet labels).
Create New Actions Search
Display Option View and export action(s)
List draft action(s)
View and export action(s)
Select Modified date from
to APR-06-2007
and AWARD ID is ANY
and Validation status is ANY
and Process state is ANY
and Type of Award is ANY
and Modified by is %
and Created by is %
1 - 1
AWARD ID
Signed Date
Current Completion Date
Contractor Name from Contract or Vendor Name
Action Obligation Amount
Contracting Officer Name
Negotiator Name
Description
Created Date
DFD-C-00-07-00006-00
APR-05-
Export to EXcel
Local intranet
Start
Inbox - Microsoft Outlook
Welcome Action(S) - ...
EPICS USER GUIDE.doc...
9:45 AM

III. ENTERING A NEW ACTION

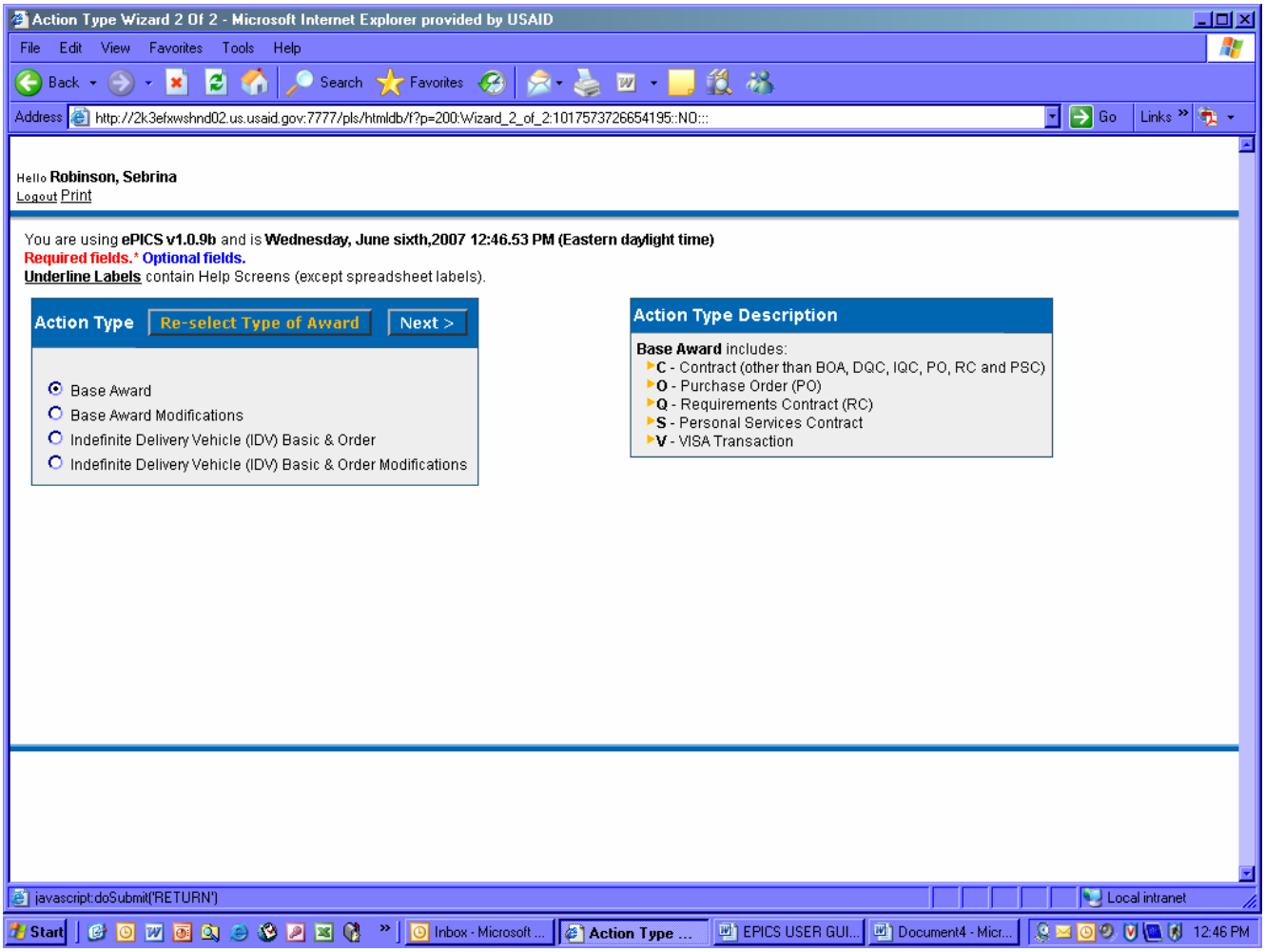
Select “Create New Actions” from the home screen.

A. ACQUISITION

Type of awards enter are described in the box to the right. Select “Acquisition” as the type of award and click, “Next” in you are entering data for any of these award types.



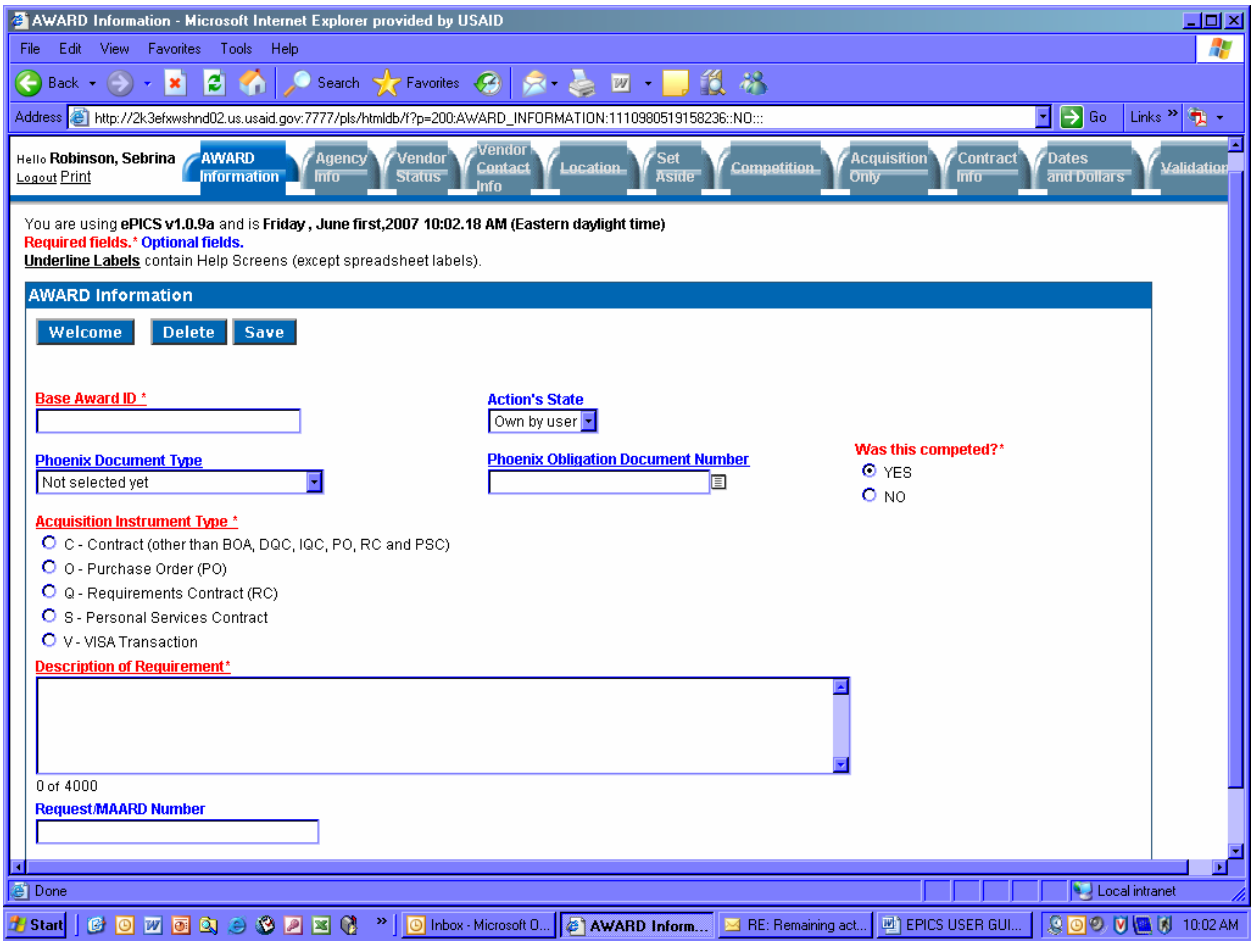
Select “Acquisition” as the type of award and click, “Next”.



Select the “Action Type” and then select ‘Next’.

Note: The type of award that you select will dictate which screens appear through out the process. If you would like to go back, click “Re-select Type of Award”.

AWARD INFORMATION TAB



Base Award ID-

- Enter the Award Number. Base Award- Enter the Award number and include a dash (-) and two zeros (00) at the end. (For example: 267-C-00-04-00454-**00**)
- Base Award Modification- Enter the Award number, with the modification number at the end. (For example: 267-C-00-04-00454-**01**)

IDVs Base Award ID-

- IDV- Enter the Award number. The two zeros following the letter will activate the IDV tab. (For example: 267-I-**00**-04-00454-00).
- IDV Modification- Enter the Award number, with the modification number at the end. (For example: 267-I-00-04-00454-**01**)

Phoenix Obligation Document Number-

This is the Document number in Phoenix. In Missions, it may be necessary for you to consult with the controller.

Phoenix Doc Types-
The Doc Types are codes from Phoenix. Although not required, using this field will make searching for the award number in Phoenix easier. ***Note:** You must make the correct Doc Type choice in order for Phoenix to find the correct document.

- For USAID/Washington, select codes: 1) Interfaced Acquisitions Delivery Order or 2) Interfaced Acquisitions Purchase Order

For Missions, select codes: 1) Uni Obligation; 2) Unilateral Obligation Contracts; or 3) Upward Adjustment

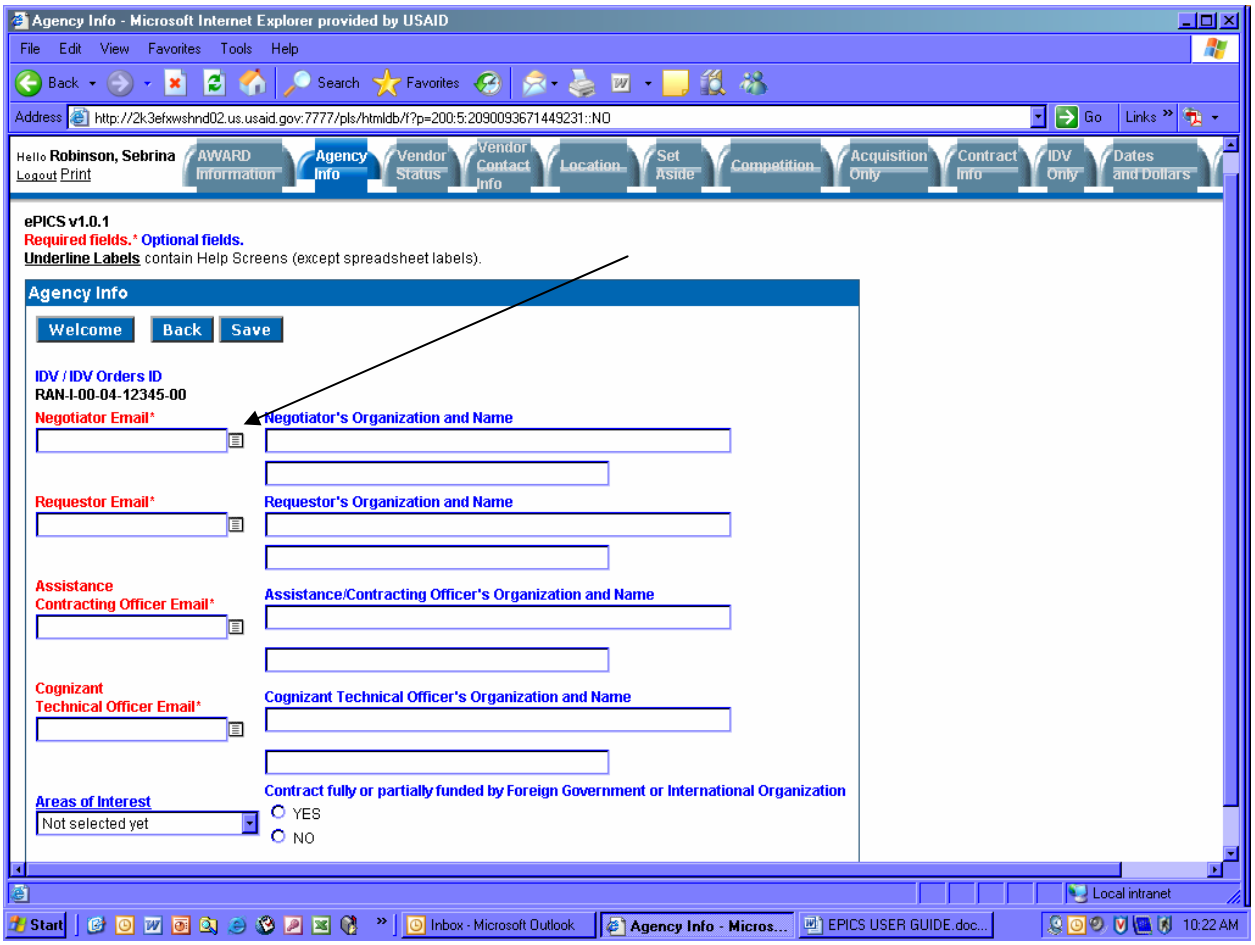
Acquisition Instrument Type-
This field is based on the Acquisition Instrument type.

Description of Requirement –
Enter a brief description of your award. For instance "Contractor shall provide Technical assistance in support of USAID credit programs". Minimum of 20 characters and maximum of 4000 characters may be entered in this field.

Request/MAARD Numbers-
Missions Only.

GSA Contract –
This field will only appear if you have chosen IDV as the Award type.

AGENCY INFORMATION TAB



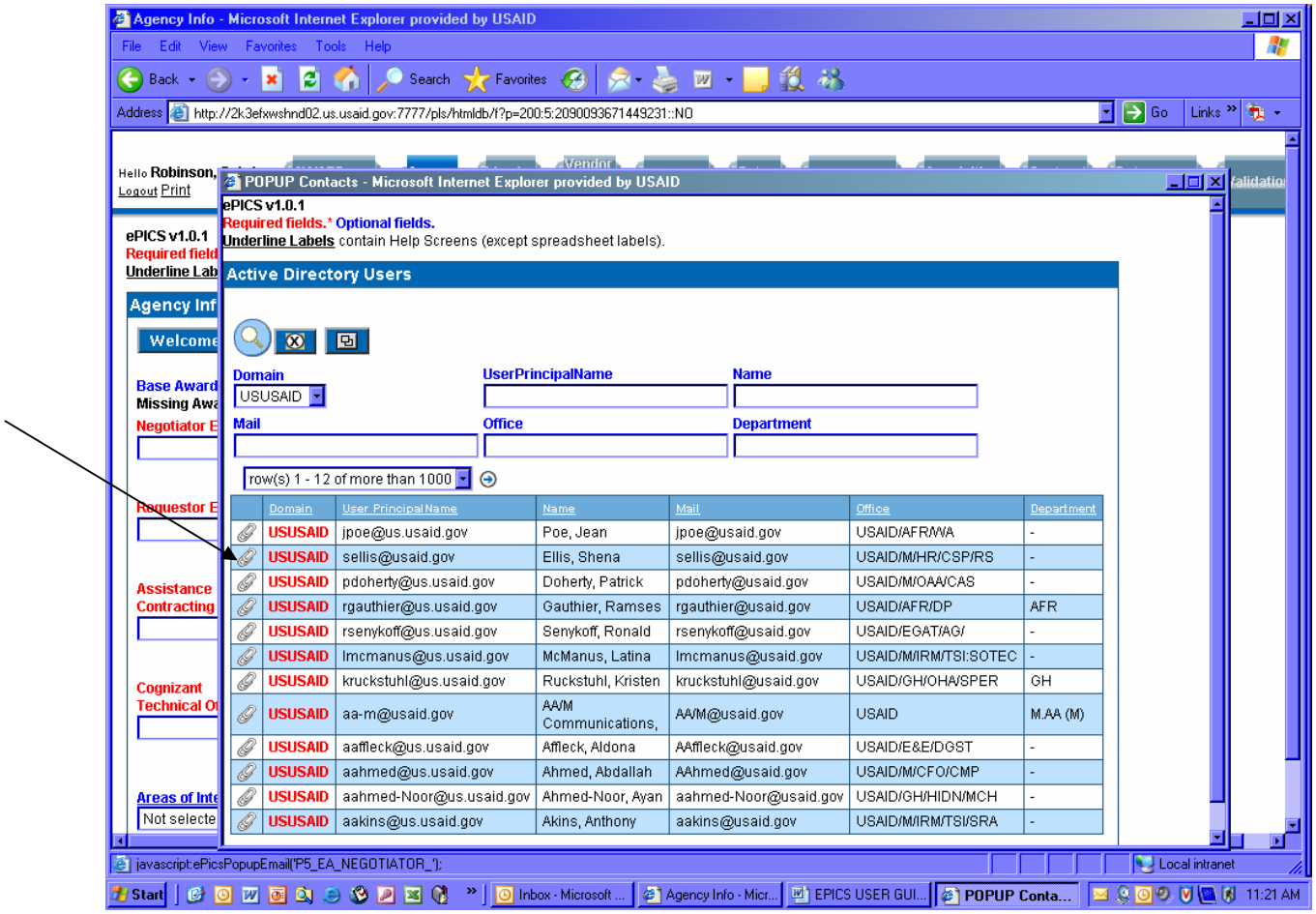
Negotiators Email-
Enter the Negotiator's email address or click on the small "look-up" button next to the field. The "look-up" window will access the directory of "All" the users connected to our intranet. Once you have chosen the person's name from the list, it will be populated in the appropriate fields.

Requestors Email-
Enter the Requestor's email address. (See additional comments under Negotiator Email.)

Assistance Contracting Officer Email-
Enter the Assistance or Contracting Officer's email address. (See additional comments under Negotiator Email.)

Cognizant Technical Officer Email-
Enter the Cognizant Technical Officer's email address. (See additional comments under Negotiator Email.)

Areas of Interest-
Select the area that best describes the purpose of the award. This field is used to assist with reporting.

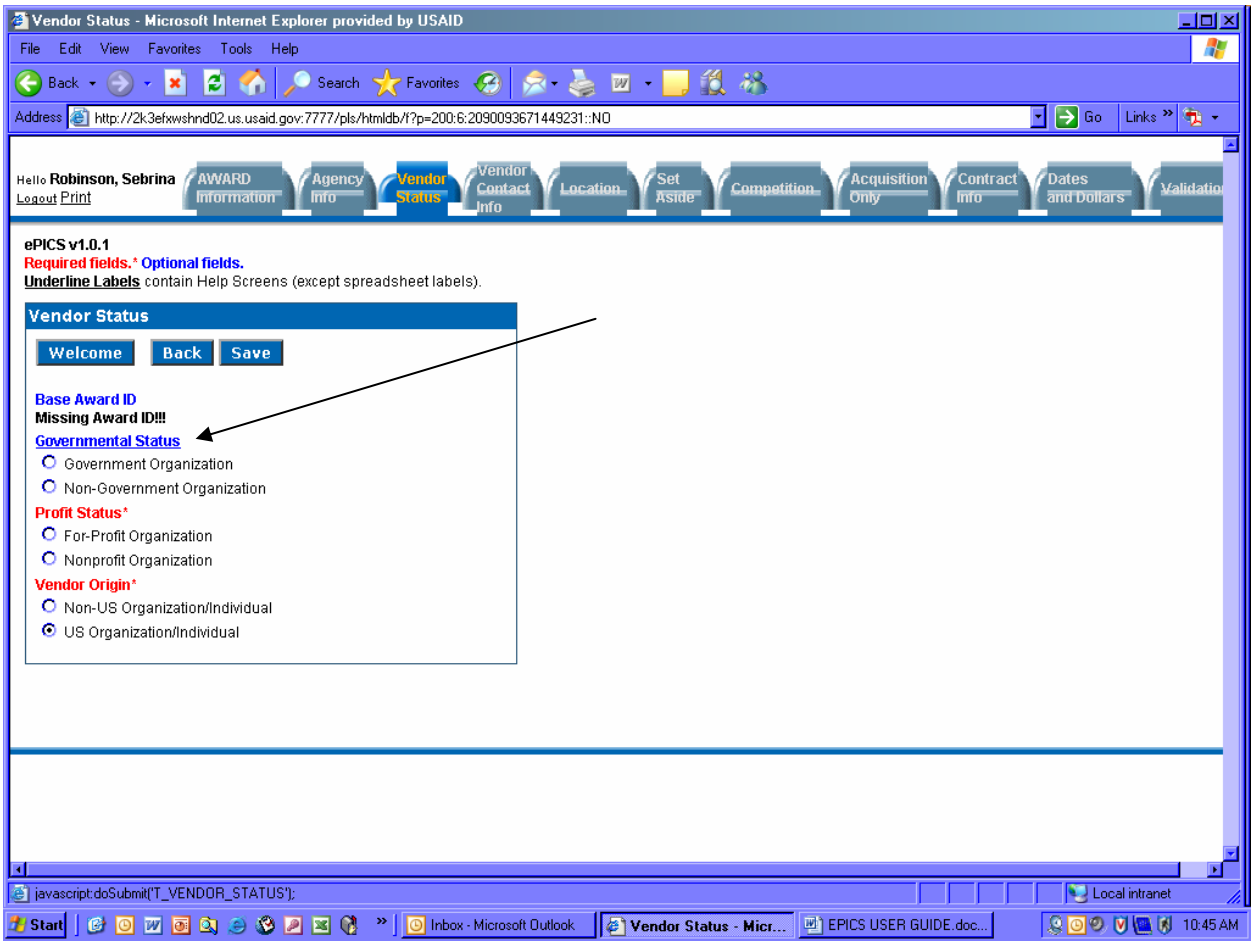


This screen appears when you click the "Look-up" button next to the Negotiator, Requestor, Assistance/Contracting Officer, or Cognizant Technical Officer fields.

You can search by Principal Name, Name, Email, Office, or Department. If you are unsure of spelling, etc., you may also include the wild card (%) in any of the fields. Once you have found the name, click on the 'paperclip' next to the person's name and the information will be populated in the appropriate fields.

Names can be sorted by user simply by clicking on the header of the "Name" column.

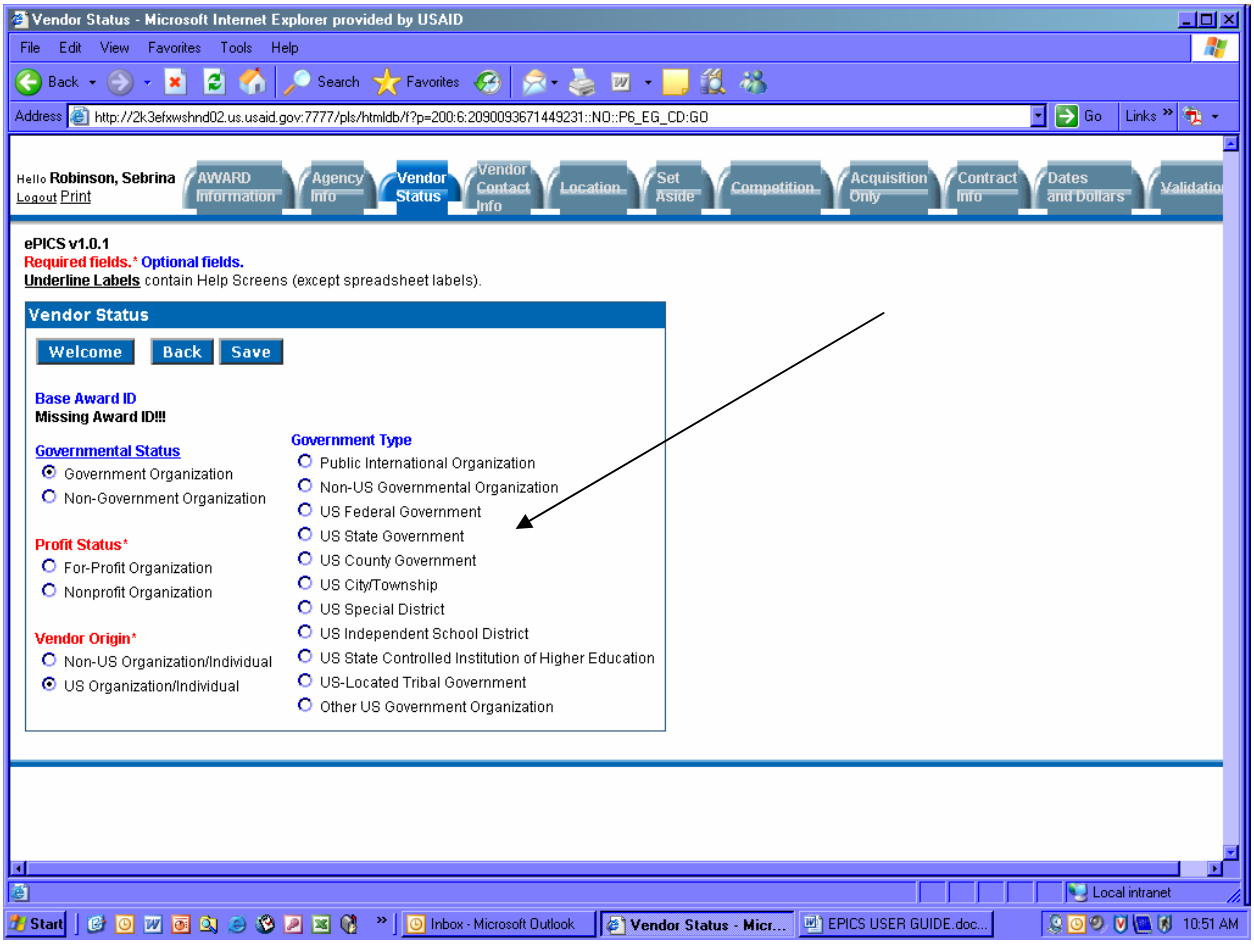
VENDOR STATUS TAB



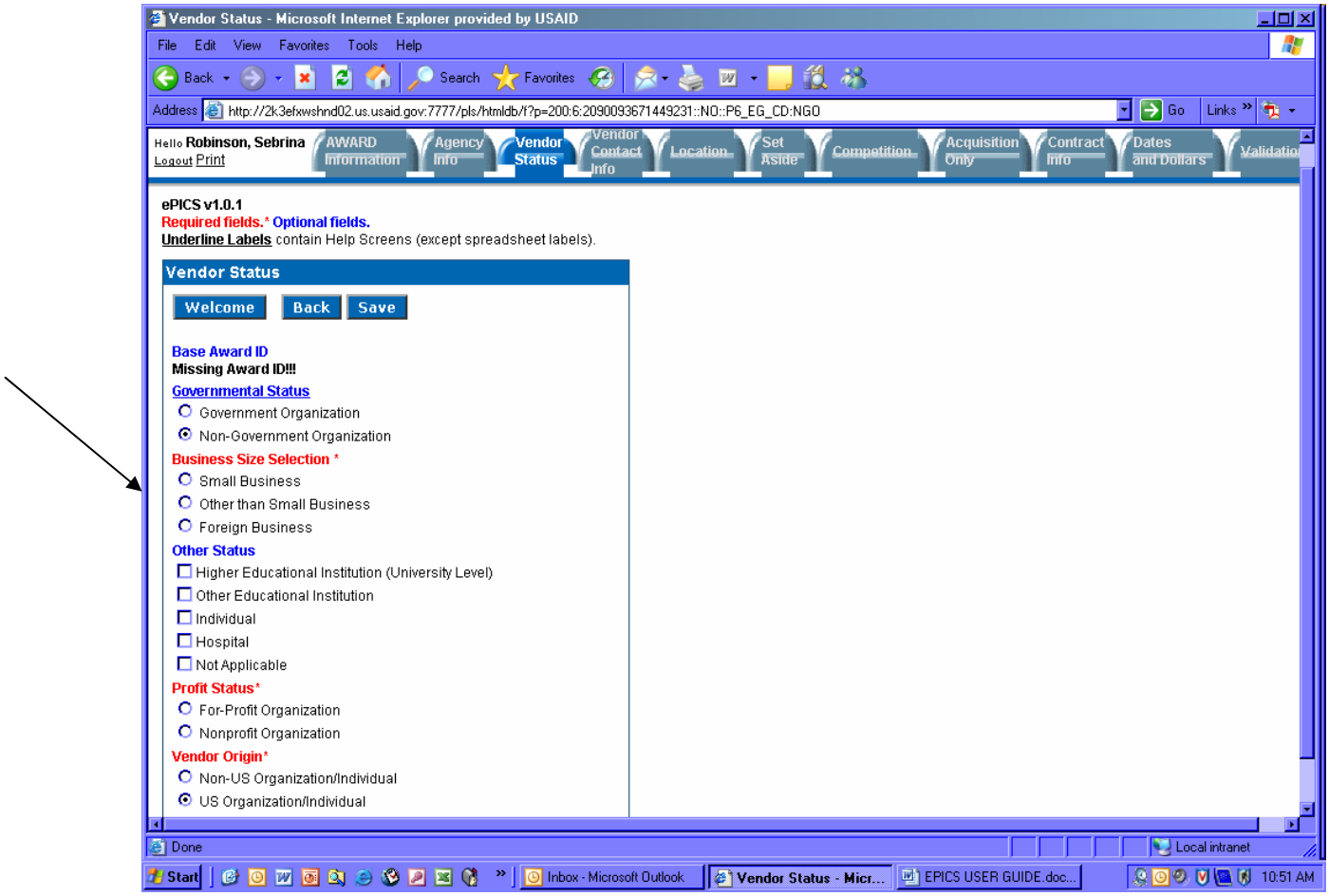
Make the appropriate selections regarding the Vendor.

The screen will change when you make your selection for **Governmental Status**. Based on which selection you make (Government Organization or Non-Government Organization), the system will provide you with additional options. (See below)

Government Organization

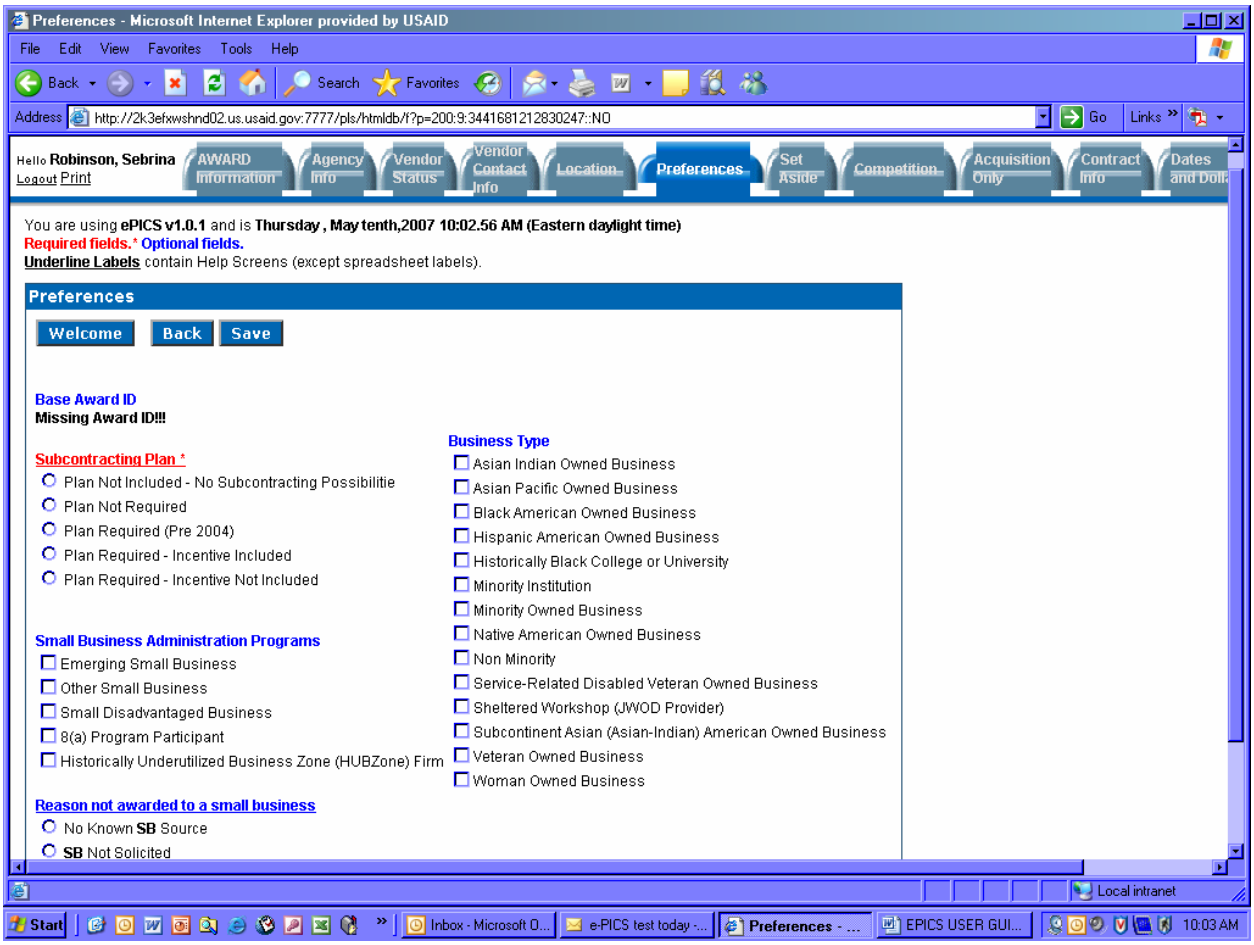


Non-Government Organization



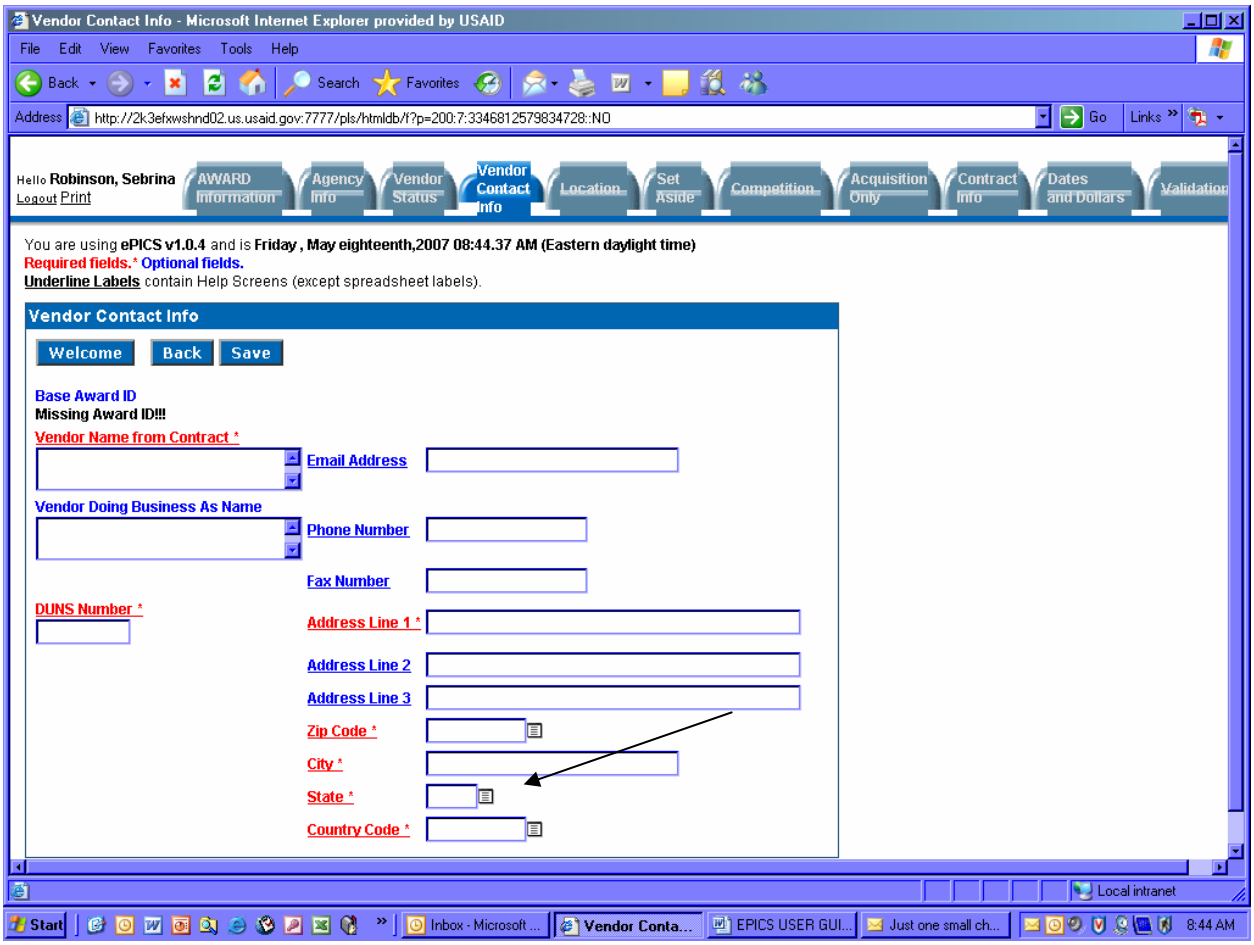
NOTE: When you choose "Small" or "Other than Small Business", a new tab will appear at the top of the screen. This tab is the "Preferences" tab. (See next page.)

PREFERENCES TAB



NOTE: This screen pertains to the U.S. Vendor. Radio buttons indicate that there is only one choice. Square boxes indicate that more than one choice can be made.

VENDOR CONTACT INFORMATION TAB



Vendor Name from Contract –
Enter the Vendor Name as it appears on the contract, and all other Vendor information. Look-up buttons are available for some fields.

DUNS Number –
All vendors doing business with the Federal Government must have a DUNS number. However, in addition to "vendor DUNS numbers" there are also Generic DUNS numbers that can be used under "specific" circumstances. At USAID, these numbers are to be used primarily for PSCs. Please ensure that you do not abuse "Generic DUNS number" usage and only use them in the instances specified. Please refer to AAPD 07-02.

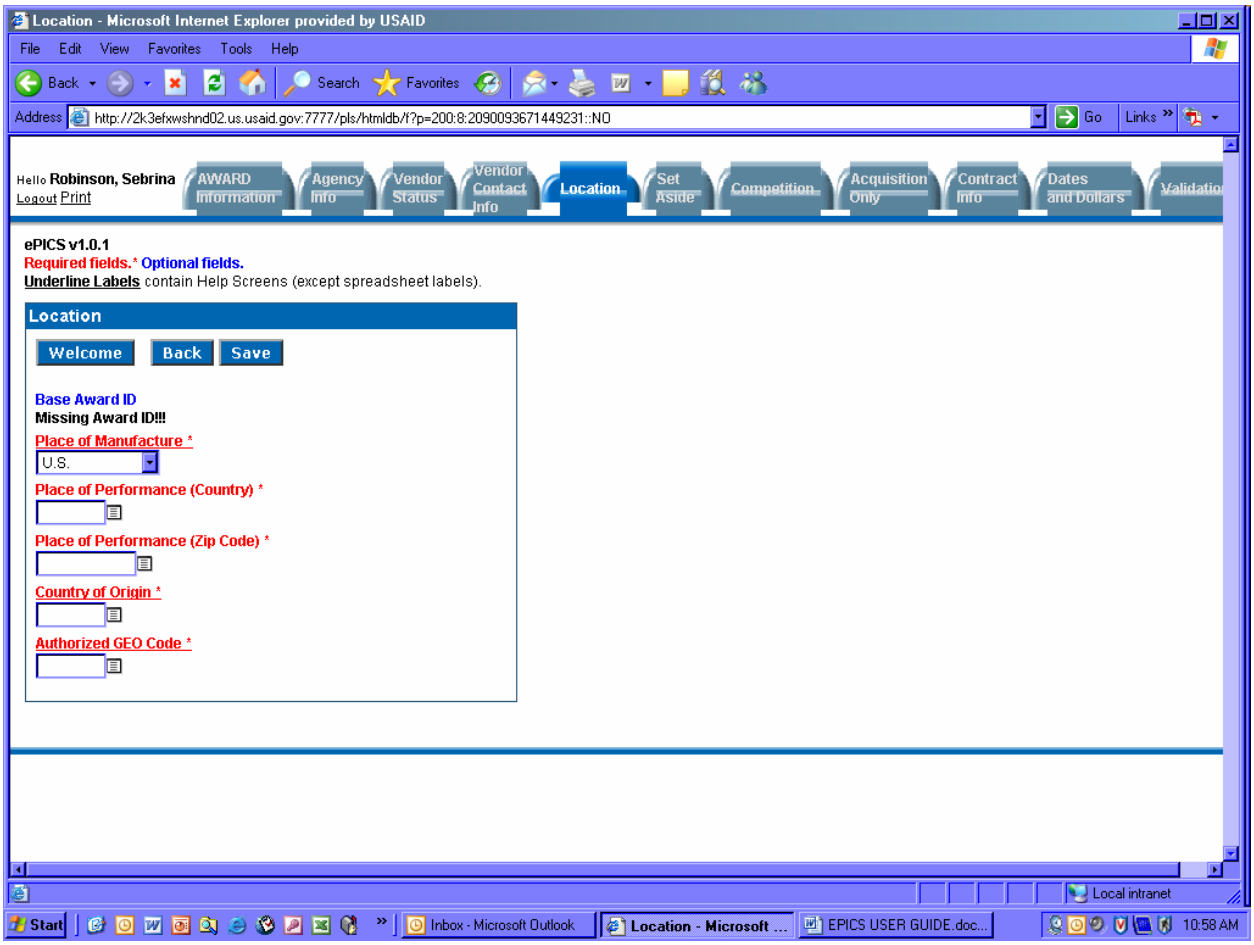
- **123456787 all individuals under US PSCs, FSN PSCs, TCN PSCs or Purchase Orders** will use a generic DUNS and are not required to register with CCR. The Agency has been granted permission temporarily to use a "general" DUNS number for reporting these entities. When issuing an award to an individual please enter/use this number for systems data entry.

- **79-023-8638 Domestic Contractor (Undisclosed)**
  Used to report procurement actions awarded to vendors located in the United States for

classified programs (where the action itself is classified) or other programs where identifying the vendor could cause harm to the mission or the vendor.

- **79-023-8851 Foreign Contractor (Undisclosed)**
  Used to report procurement actions awarded to vendors located outside the United States for classified programs (where the action itself is classified) or other programs where identifying the vendor could cause harm to the mission or the vendor.

LOCATION TAB



Place of Manufacture –
This field is used primarily to satisfy inquiries pertaining to the Buy America Act.

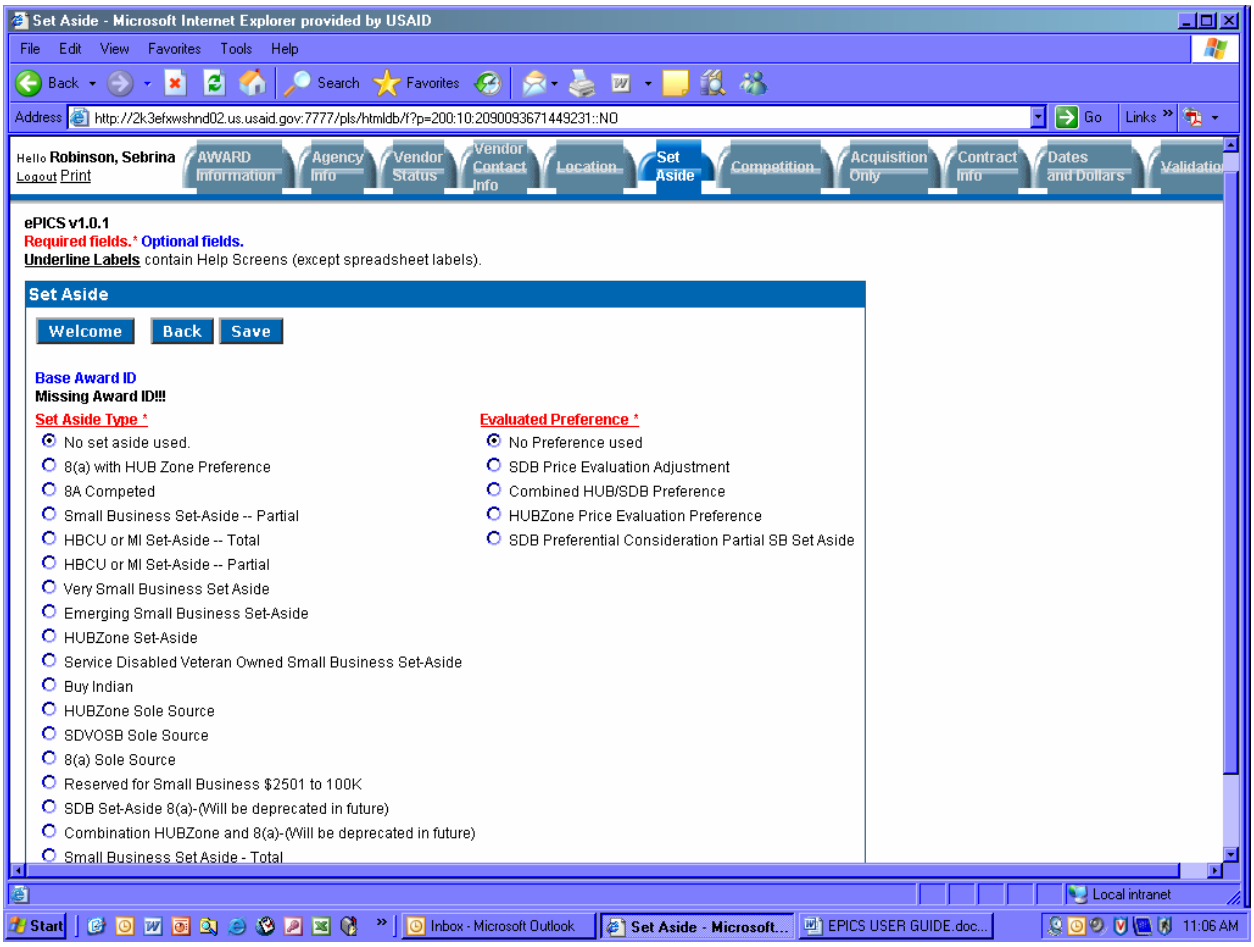
1) **US** = Product is manufactured in the U.S. or at least 50% of the cost of components are manufactured in the U.S. or qualifying countries;

2) **Foreign** = Manufactured outside of the U.S. or if manufactured in the U.S. at least 50% is manufactured outside of the U.S.;
3) **Not Applicable** = Use if Place of Manufacture does not apply such as Services or Construction.

Country of Origin –
Enter **US** if the product being procured is a domestic end product. If the product is not a domestic end product, enter the **FIPS 10 Country Code** or use the search button on the screen to find the appropriate country Code. This field provides information to support the Buy American Act, Trade Agreement Act, and Small Business Act.

Authorized GEO Code-
See ADS 310.1a, Source Origin Nationality. This section sets forth the sources for procurement, which are normally authorized for USAID-financed transactions. Each USAID obligating document shall specify a USAID Geographic Code that defines the eligible source for foreign exchange procurement.

SET ASIDE TAB



Set Aside Type-
This is the designator for type of set aside determined for the contract action. Report this code when you use any of the following set-asides to award a contract.

• **No set aside used** – The contract award was not a socio-economic program set-aside. For example:

Full and open competition, work performed overseas, and real property leasing.
• **Small Business Set-Aside – Total -** A small business set-aside (excluding Small Business Innovation Research (SBIR)) made pursuant to FAR 19.502-2..
• **8A Competed** – An 8(a) award pursuant to FAR 19.805-2.
• **Small Business Set-Aside – Partial -** A partial small business set aside made pursuant to FAR 19.502-3.
• **HBCU or MI Set-Aside – Total -** An award directed to a Historically Black College/University or Minority Institution, see DFARS 226.7003.
• **HBCU or MI Set-Aside – Partial -** Contract awards directed to Historically Black College/University of Minority Institution see DFARS 235.016.
• **Very Small Business Set Aside** – The acquisition is between $2,501 and $50,000 and was awarded to a very small business concern as a result of using set-aside procedures under the very small business pilot program set forth in FAR 19.9. NOTE: Verify if expired.
• **Emerging Small Business Set-Aside** – The action was an emerging small business reserve award (set-aside) within a designated industry group under the Small Business Competitiveness Demonstration Program, see FAR Subpart 19.10.
• **HUBZone Set-Aside** – The award was made to a HUBZone small business concern after being competed among only HUBZone small business concerns see FAR 19.1305.
• **Service Disabled Veteran Owned Small Business Set-Aside** – Contract awards exceeding the micro purchase threshold set-aside for competition restricted to service-disabled veteran-owned small business concerns, see FAR.19.1405.
• **Buy Indian** – If applicable, this code is authorized for use only by the Department of Interior and the Department of Health and Human Services (Indian Health Service).
• **HUBZone Sole Source** – If the award was made through noncompetitive procedures to a HUBZone small business concern under the authority of FAR 19.1306.
• **SDVOSB Sole Source** – Contract awards exceeding the micro purchase threshold, set-aside for non-competitive award to service-disabled veteran-owned small business concerns, see FAR 19.1406.
• **8(a) Sole Source** – Actions with the Small Business Administration pursuant to FAR 19.8, or directly with an 8(a) contractor pursuant to a memorandum of understanding between the SBA and the reporting agency, see FAR 19.811.
• **Reserved for Small Business $2500.01 to 100K** – The award exceeds the micro-purchase threshold but does not exceed the simplified acquisition threshold, see FAR 13.
• **SDB Set-Aside** – A small disadvantaged business award made under a competitive 8(a) preference program pursuant to FAR 19.800(d).
• **Combination HUBZone and 8(a)** – The award was a combination HUBZone set-aside and 8(a) award.
• **SDB, 8(a) with HUBZone – The primary preference program was 8(a) and priority is given to the 8(a) concern that was also a HUBZone small business concern, see FAR 19.800(d).**

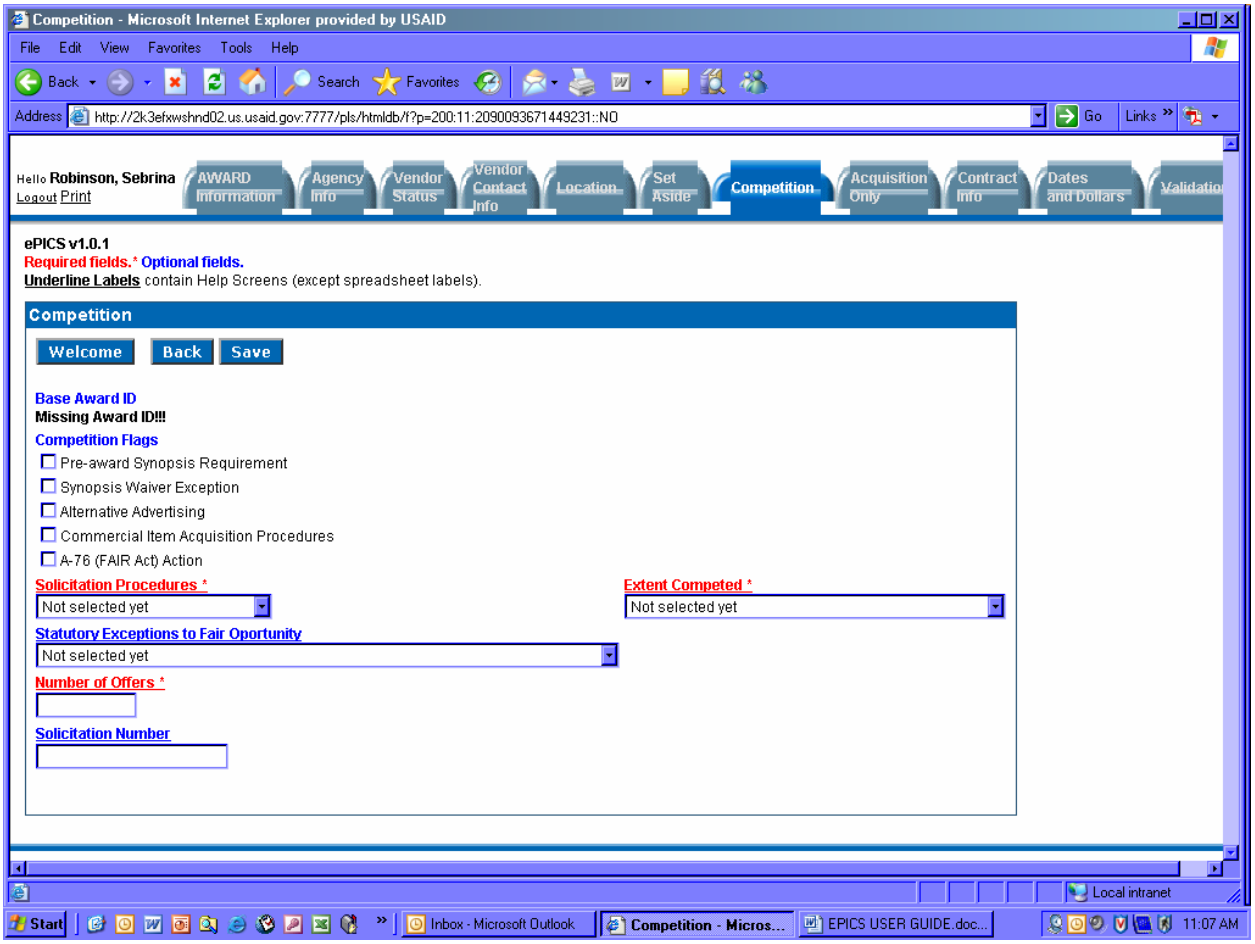
Evaluated Preference-
This is the designator for the type of preference determined for the contract action. Report a code from the drop down menu when a contract was made pursuant to the socio economic program price evaluation preferences, see FAR 19.11 and FAR 19.13.

• **No Preference used** – No evaluation preference was used in this action.
• **SDB Price Evaluation Adjustment** – An award made through full and open competition with award

to a small disadvantaged business as a result of the application of a price evaluation adjustment pursuant to FAR 19.11.

• **SDB Preferential Consideration Partial Set Aside** – The award was made through Full and Open Competition after Exclusion of Sources pursuant to FAR 6.2. Enter this code if the action was a partial set-aside for small business and Partial SB Set-Aside preferential consideration resulted in an award to an SDB.
• **HUBZone Price Evaluation Preference** – The award was made through full and open competition with award to a HUBZone small business concern as a result of the HUBZone price evaluation preference; see FAR 19.1307.
• **Combined HUB/SDB Preference** – The award was made through full and open competition after the application of both the HUBZone Price Evaluation Adjustment Preference, see FAR 19.13, and the Small Disadvantaged Business Price Evaluation Adjustment, see FAR 19.11.

COMPETITION TAB



Select the appropriate **Competition Flags.**

Solicitation Procedures-
This is the designator for the solicitation procedures available. Report this code for the type of solicitation procedure used.

• **Negotiated Proposal** –
Solicitation using negotiated procedures (RFP) other than simplified acquisition procedures (RFQ). (FAR 12, FAR, 13, FAR 15).
• **Sealed Bid** – Solicitation using seal bidding procedures (IFB). (FAR 14).
• **Two Step** – Solicitation that uses a combination of sealed bids and negotiated procedures. (FAR 6.102)
• **Simplified Acquisition** – A request for quotation (RFQ) is used to solicit. (FAR 12 and 13)
• **Architect Engineer** – An Architect Engineer action is solicited pursuant to FAR 6.102(d)(1).
• **Basic Research** – A Basic Research action is solicited pursuant to FAR 6.102(d)(2).
• **Alternative Sources** – The action resulted from the use of procedures that provide for full and open competition after exclusion of sources to reduce overall costs pursuant to FAR 6.202(a)(1), to have a facility available for national defense or industrial mobilization pursuant to FAR 6.202(a)(2), to establish or maintain an essential engineering, research, or development capability pursuant to FAR 6.202(a)(3), to ensure the continuous availability of a reliable source of supply for such property or service pursuant to FAR 6.202(a)(4), to satisfy projected needs for such product or service based on a history of high demand pursuant to FAR 6.202(a)(5), to satisfy a critical need for medical, safety, or emergency supplies pursuant to FAR 6.202(a)(6).
• **No solicitation procedure used** – No solicitation was used in this action.

Statutory Exceptions to Fair Opportunity-
This field is used to determine the extent of competition under a multiple award IDIQ contract in accordance with the Fair Opportunity Act. Report a code from the drop down menu when awarding a non-competitive task order or delivery order exceeding $2500.00 against an IDIQ contract.

• **Urgency** – The action was justified pursuant to FAR 16.505 (B)(2)(i).
• **Only One Source** - Other – The action was justified pursuant to FAR 16.505(B)(2)(ii).
• **Follow-on Delivery Order Following Competitive Initial Order Economy and Efficiency** – The action was justified pursuant to FAR 16.505 (B)(2)(iii).
• **Minimum Guarantee** – It was necessary to place an order to satisfy the minimum amount guaranteed to the contractor, see FAR 16.505(b)(2)(iv).

Extent Competed-
This is a code that represents the competitive nature of the contract. The drop-down lists the following:

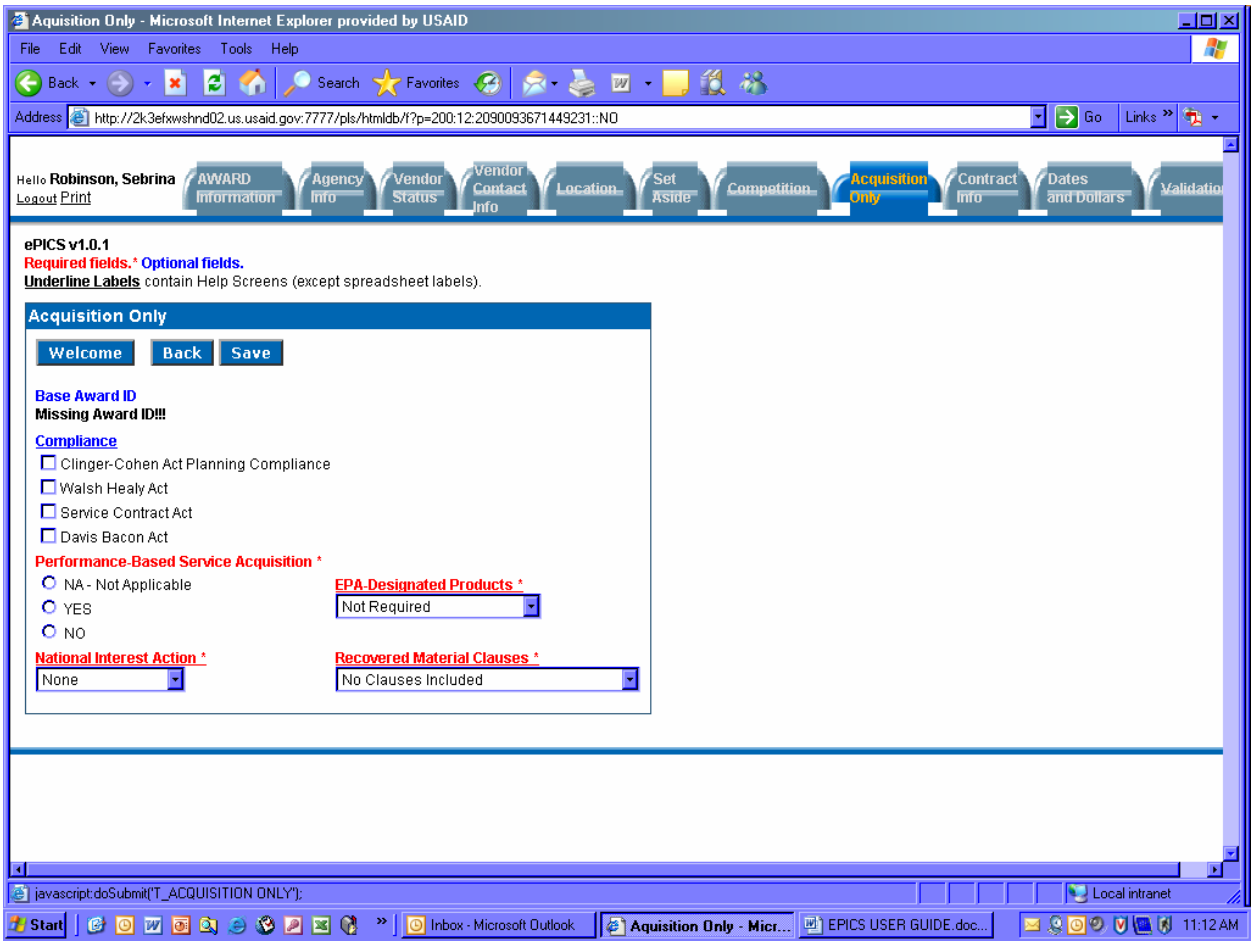
• **A Full and Open Competition** –
If the action resulted from an award pursuant to FAR 6.102(a) - Sealed Bid, FAR 6.102(b) – Competitive Proposal, FAR 6.102(c) - Combination, or Other competitive method that did not exclude sources of any type.
• **Not Available for Competition** – The contract is not available for competition.
• **Not Competed** - The contract is not competed.
• **Full and Open Competition after exclusion of sources** – Some sources are excluded before competition.
• **Follow On to Competed Action** – The action is a follow on to an existing competed contract. (FAR 6.302-1).

• **Competed under SAT –** The action is competed under the Simplified Acquisition Threshold (for civilian agency use only).
• **Not Competed under SAT –** The action is NOT competed under the Simplified Acquisition Threshold (for civilian agency use only).
• **Competitive Delivery Order –** Apply to Full and Open Competition pursuant to FAR 6.1 and only apply to Delivery Orders. Report this code if the IDV type is a Federal Schedule. Report this code when the Order delivery/task order award was made pursuant to a process that permitted each contract awardee a fair opportunity to be considered. See FAR 16.505(b)(1). Report this code if the action is for the award of a multiple award schedule or an order against a
multiple award schedule pursuant to FAR 6.102(d)(3), and the applicable provisions referenced therein. This option is available only on Delivery Orders.
• **Non-Competitive Delivery Order –** Competitive procedures are not used in awarding the delivery order for a reason not included above (when the action was non-competitive). This option is available only on Delivery Orders.

Number of Offers –
Enter the actual number of offers received. These are the actual offers/bids you received in response to the solicitation or number of multiple award contracts/schedules received for Delivery Orders.

Solicitation Number-
Please use the solicitation identifier used in FedBizops.

ACQUISITION ONLY TAB



COMPLIANCE

• Clinger-Cohen Act Planning Compliance
Check this box if the contracting agency or the funding agency is DOD and this procurement is for computer hardware or services. Select a value certified by the funding office as to whether the planning requirements at 42 USC 1422 and 42 USC 1423 are met. If the answer is yes, check the box. If the answer is no, leave the box blank.

• Walsh Healy Act
Check the box if the award is subject to the Walsh Healey Act and the Walsh Healy Act clause is included in the award. Otherwise, leave blank. (FAR 22.6).

• Service Contract Act
Check the box if the award is subject to the Service Contract Act and the Service Contract Act clause and wage determination or the collective bargaining agreement is included in the award. Otherwise, leave the box blank. (FAR 22.10).

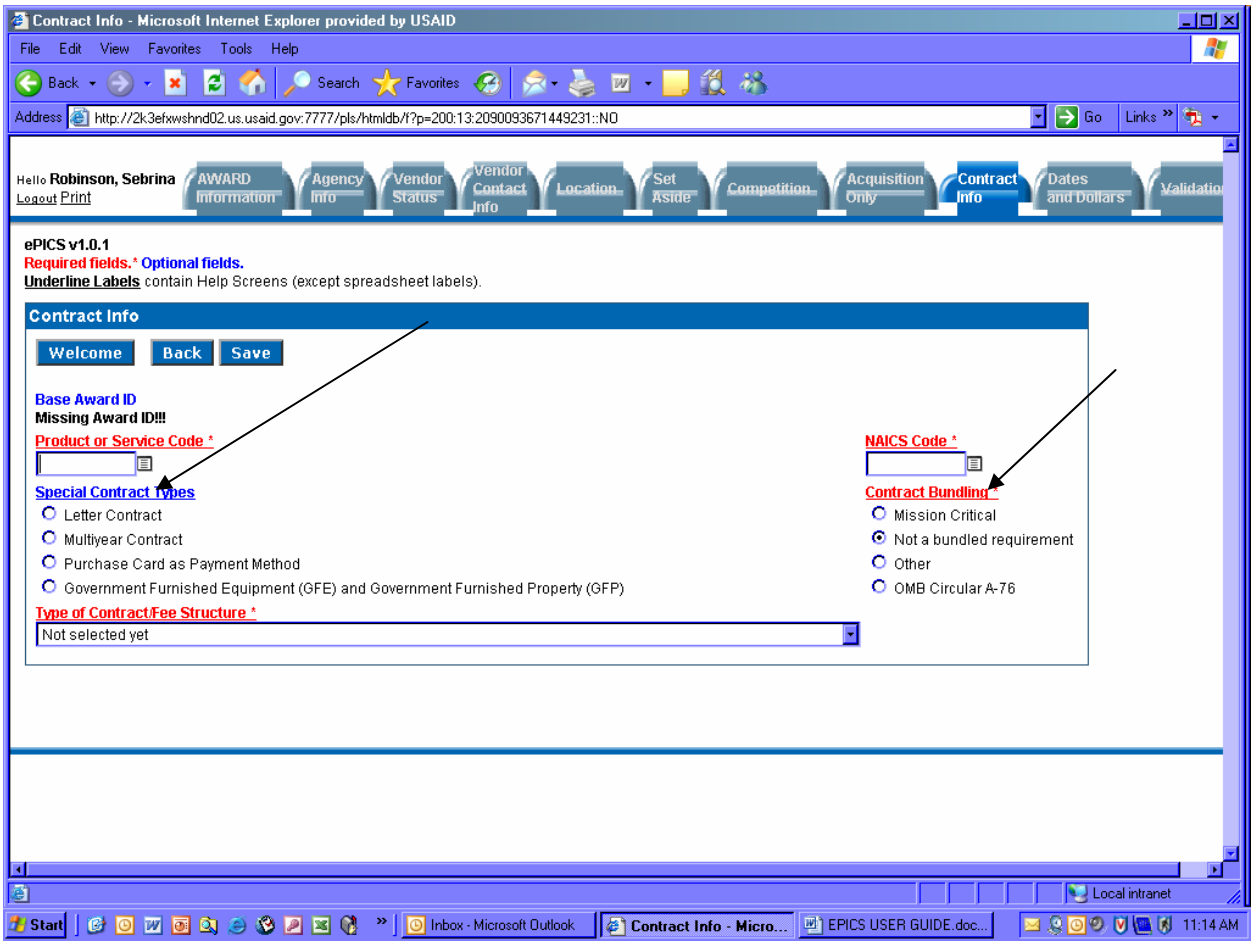
• Davis Bacon Act
Check the box if the award is subject to the Davis Bacon Act and the Davis Bacon Act clause and wage determination or the collective bargaining agreement is included in the award. Otherwise, leave blank. (FAR 22.403-1).

EPA Designated Products –
The Resource Conservation and Recovery Act (RCRA), Section 6002, and Executive Order 13101 require the purchase of Environmental Protection Agency (EPA) designated products with a required minimum recovered material content as described in an agency's Affirmative Procurement Program. This list of EPA designated products is available at http://www.epa.gov/cpg. This requirement applies to all contracts that require EPA designated products. If more than one exception applies, report the predominant exception code or the code for the highest cost EPA designated item for which a justification was completed. The drop down lists the following options:
• **Meets Requirements –** The contracting officer purchased the EPA designated product or products and all contained the required minimum recovered material content.
• **Justification -** Performance – EPA designated product or products were purchased without the required minimum recovered material content and a justification was completed based on the inability to acquire the product(s) to reasonable performance standards in the specifications (FAR 23.405(c)(3)).
• **Justification - Price –** EPA designated product or products were purchased without the required minimum recovered material content and a justification was completed based on the inability to acquire the product(s) at a reasonable price (FAR 23.405(c)(2)).
• **Justification - Time –** The required minimum recovered material content and a justification was completed based on the inability to acquire the product(s) competitively within a reasonable time (FAR 23.405(c)(1)).
• **Not Required –** No EPA designated product(s) were required.

National Interest Action –
This field identifies the awards made in response to national interest actions. Select the appropriate entry from the drop down menu.
• Hurricane Katrina
• Hurricane Ophelia
• Hurricane Rita
• Hurricane Wilma
• None

Recovered Material Clauses –
This designates whether the contracting officer included clauses in the contract for the Recovered Material Certification and/or Estimate of Percentage of Recovered Material Content for EPA designated Products. The drop down lists the following options:
• **FAR 52.223-4 Included –** The solicitation included the provision at FAR 52.223-4, Recovered Material Certification.
• **FAR 52.223-4 and FAR 52.223-9 Included –** The solicitation included the provision at FAR 52.223-4, Recovered Material Certification and the contract includes the clause at FAR 52.223-9, Estimate of Percentage of Recovered Material Content for EPA designated Products.
• **No Clauses Included –** Neither clause is included in the contract.

CONTRACT INFORMATION TAB



'Look-up' buttons are available for Product or Service Code, and for NAICS Code.

Product or Service Code –
Enter the Product or Service Code or use the ellipses button on the screen to find the appropriate Product or Service Code. Report the four-character code from the FPDS Product and Service Codes Manual identifying research and development, services, or supplies and equipment. If more than one code applies, report the code that represents the predominance of the dollars obligated or de-obligated for the contract/action.

• **For research and development** – Report the appropriate code from Section I, Part A of the FPDS Product and Service Codes Manual. These codes begin with the letter "A". Do not report as R&D acquisitions, rental, or lease of supplies or services when incidental to and purchased separately from R&D, in accordance with Section I, Parts B and C, of the FPDS Product and Service Codes Manual (even though R&D appropriations are used). Do not use R&D codes for orders under federal schedule contracts.
• **For services other than research and development** – Report the appropriate code from Section I, Part B, of the FPDS Product and Service Codes Manual. These codes begin with a

letter other than “A”.
• **For supplies and equipment** – Report the appropriate code from Section I, Part C of the FPDS Product and Service Codes Manual. These codes are numeric.
• **For construction** – Report the code from Section I, Part C of the FPDS Product and Service Codes Manual. Construction begins with “Y” or “Z”, with a NAICS beginning with “23” and labor statutes should either be “Davis Bacon Act” or “Service Contract Act” when place of performance is U.S. Architect and Engineering begins with “C”.

Special Contract Types-
• **Letter Contract-** Check the box if the award is a Letter Contract. Otherwise, leave blank.
• **Multiyear Contract -**Check the box if this transaction is a multi-year contract. These are contracts issued under specific Congressional multi-year authority for specific programs. The key distinguishing difference from multiple year contracts is that multi-year contracts authorize performance beyond the period for which funding has been appropriated, without having to exercise options for each program year. They normally include a cancellation ceiling, i.e., the maximum amount the Government will pay for termination if the remaining funding is not appropriated. (FAR 17.103)
• **Purchase Card as Payment Method-**Check the box if the method of payment under an award is the Purchase Card. Agencies may issue formal contract documents and make payment using the Purchase Card.
• **Government Furnished Equipment (GFE) and Government Furnished Property (GFP)-** Check the box if the contractor authorizes the use of Government Furnished Equipment (GFE) or Government Furnished Property (GFP), pursuant to FAR 45. Otherwise, leave blank.

NAICS Code-
Enter the NAICS Code or use the ellipses button on the screen to find the appropriate NAICS Code. Report the 6-digit code from the **North American Industry Classification System (NAICS) Manual**. If more than one code applies, report the code that best identifies the product or service acquired and represents the predominance of the dollars obligated or deobligated for the contract/action. The Product or Service Code (PSC) must correlate to the selected NAICS.
The ‘Look-up” is available for this field.

Contract Bundling-
This designates when the value of the contract, including all options, is expected to exceed $5M. In addition, the contracting officer determines if this contract action is a result of consolidating two or more requirements previously solicited, provided, or performed by small businesses under separate contracts into a solicitation unsuitable for small business. (FAR 19.2, FAR 4.6, FAR 2.101). From the drop-down menu select the appropriate option listed below:
• **Mission Critical** – The agency has determined that the bundling of requirements is critical to the agency's mission. See FAR 7.107.

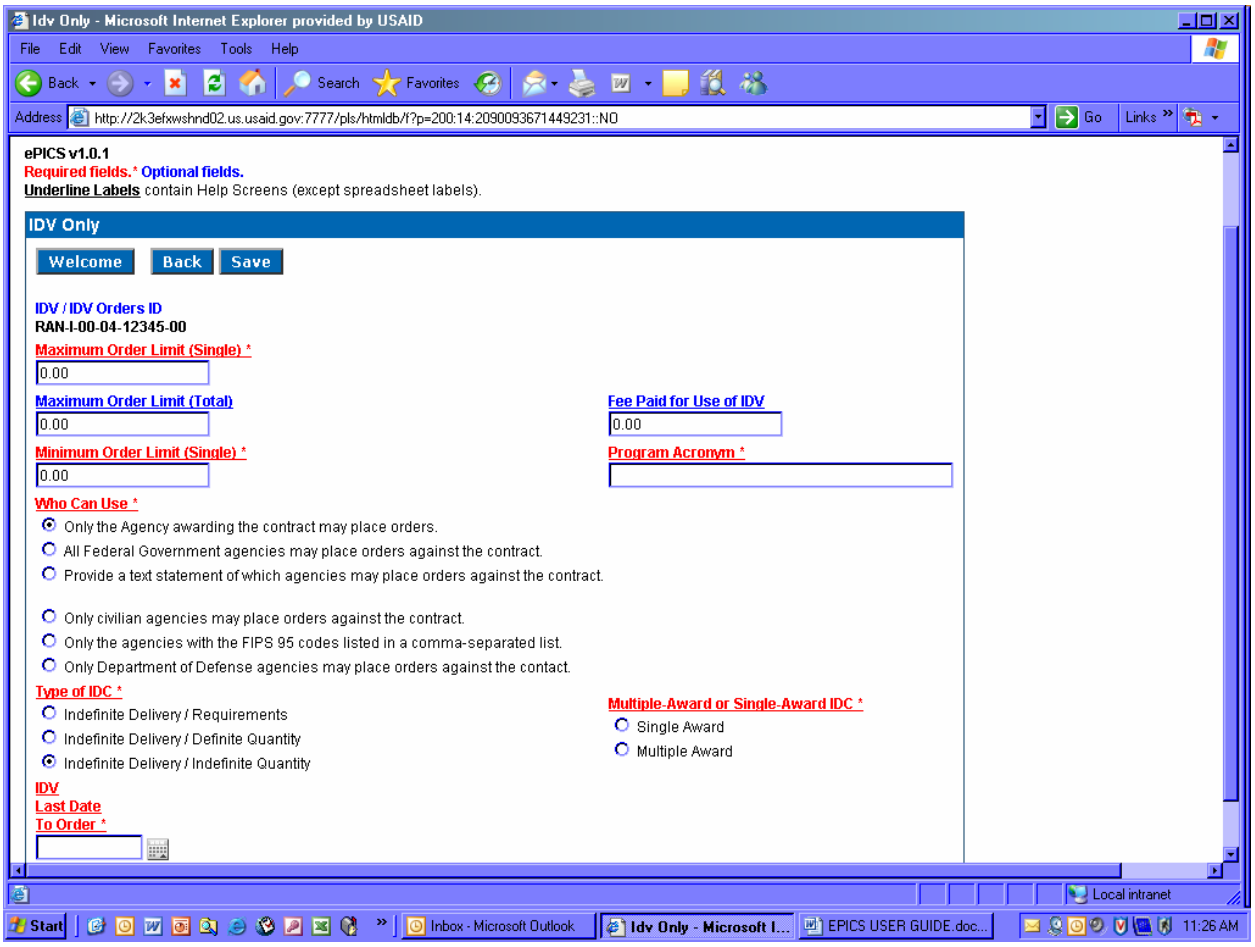
• **OMB Circular A-76** – The agency used the OMB Circular A-76 process to determine that bundling of requirements is necessary and justified, rather than applying the substantial benefits analysis required by FAR 7.107. •**Other** – The requirement is "bundled" and if neither of the above two options (“Mission Critical” or “OMB Circular A-76”) apply.
• **Not a bundled requirement** – The award is not a bundled action or the total contract value is less than $5M.

Type of Contract/Fee Structure-
Select from the drop-down menu the type of contract from FAR Part 16 that applies to this procurement. If award has more than one contract type, identify the type with greater contract value, or, for agencies that report multiple actions, follow agency instructions.

The types include:
•**Fixed Price Redetermination.**
•**Fixed Price Level of Effort.**
•**Fixed Price.**
•**Fixed Price with Economic Price Adjustment.**
•**Fixed Price Incentive.**
•**Fixed Price Award Fee.**
•**Cost Plus Award Fee.**
•**Cost No Fee.**
•**Cost Sharing.**
•**Cost Plus Fixed Fee.**
•**Cost Plus Incentive.**
•**Time and Materials.**
•**Labor Hour.**
•**Order Dependent** – This applies to IDVs only. IDVs allow pricing arrangements to be determined separately for each order.
•**Combination** – This applies to awards only; it applies to awards where two or more of the above apply.
•**Other** – This applies to awards only when none of the above is applicable.

(THIS SCREEN IS FOR <u>BASE</u> IDVs ONLY)

This screen will only appear if you chose IDV as the Award Type at the start of the record.



Maximum Order Limit (Single)-
This is the maximum dollar amount that applies to a single order against an Indefinite Delivery Vehicle. If this action is an initial load of an IDV, then enter the maximum dollar amount that applies to a single order against the IDV.

Maximum Order Limit (Total)-
If this action is an initial load of an IDV, Then enter the maximum dollar amount that can be applied to a single order against the IDV. If there is no maximum, enter 0.00

Minimum Order Limit (Single)-
If this action is an initial load of an IDV, then enter the minimum dollar amount that can be applied to a single order against the IDV. If there is no minimum, enter 0.00.

Fee Paid for Use of IDV-
The agency placing the order will enter the dollar value of the fee charged for this action. This is only required on delivery orders and BPA calls.

Program Acronym-
Enter the short name, title, or code used for a GWAC or other major contracting program. For an IQC you would enter the IQC Group Name. Examples include: COMMITS, ITOPS, FEWS NET, and TASC II.

Who Can Use-
This field designates agencies that may place orders against this indefinite delivery vehicle. For the initial award of an IDV, select one of the following:

• **Only My Agency** – Only the agency awarding the contract may place orders.
• **All Agencies** – All Federal Government agencies may place orders against the contract.
• **Defense** – Only Department of Defense agencies may place orders against the contract.
• **Civilian** – Only civilian agencies may place orders against the contract.
• **Codes** – Only the agencies with the FIPS 95 codes listed in a comma-separated list.
• **Other** – Provide a text statement of which agencies may place orders against the contract.

Type of IDC-
This field identifies whether the IDC or Multi-Agency Contract is Indefinite Delivery/Requirements, Indefinite Delivery/Indefinite Quantity, or Indefinite Delivery/Definite Quantity (FAR 16.5). Select from the following options:

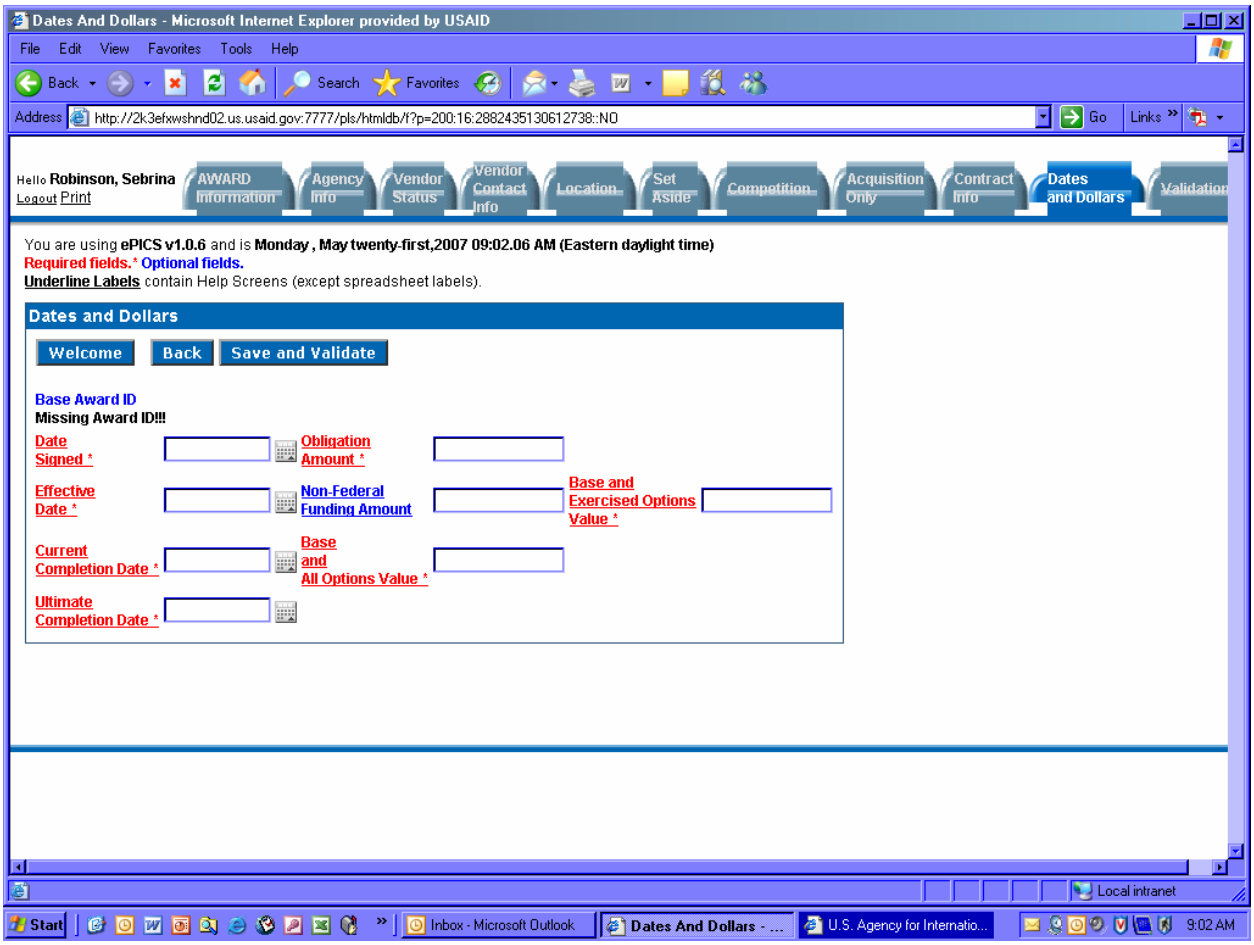
• **Indefinite Delivery/Requirements**
• **Indefinite Delivery/Indefinite Quantity**
• **Indefinite Delivery/Definite Quantity**

Multiple-Award or Single Award IDC-
This field indicates whether the contract is one of many that resulted from a single solicitation, or all of the contracts are for the same or similar items, and contracting officers are required to compare their requirements with the offerings under more than one contract or are required to acquire the requirement competitively among the awardees.

• **Multiple Award** – The contract is one of several awarded under a single solicitation for which contracting officers are required to compete their requirements among several vendors.
• **Single Award** – The contract does not meet the definition of a multiple award contract.

IDV Last Date to Order-
Complete for IDVs only. The last date on which an order may be placed against this Indefinite Delivery Vehicle (IDV)

DATES AND DOLLARS TAB



Date Signed-
The date the Contracting/Agreement Officer signed the award.

Obligation Amount-
Amount obligated by this transaction.

Effective Date –
The starting date for the award's requirements.

Non-Federal Funding Amount –
Funding from Non-federal resources that will be used in the award (i.e. contributions).

Base and Exercised Options Value-
The value of the contract plus any option years that have been exercised.

Current Completion Date –
For the base award, report the completion date of the base award plus any options that have been exercised at the time of award. For modifications, report the revised scheduled completion date.

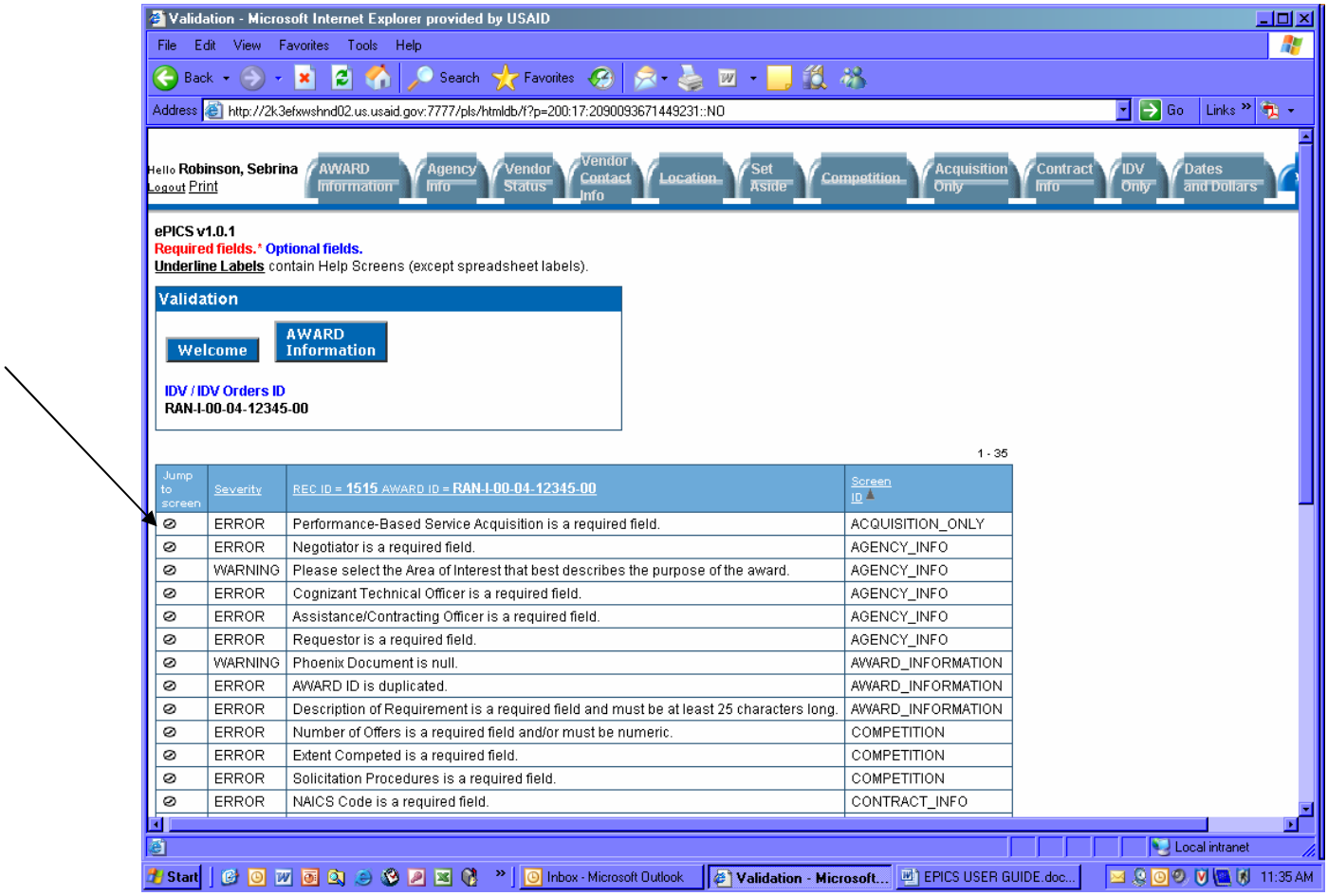
Base and All Options Value –
The Total Estimated Cost (TEC) for the entire award including all options. For IDVs, enter the total estimated cost for all anticipated orders.

Ultimate Completion Date –
Report the proposed completion date, whether option years/periods have been exercised or not. Example: Award signed on Sept 30, 2006 (sign date). Work is to begin on October 1, 2006 (Effective Date). The award completion date is Sept 30, 2007 (Current Completion Date) with two option years which if exercised, would take the award through September 30, 2009 (Ultimate Completion Date).

NOTE: Once you have entered all data, you will click **"Save and Validate"**. The system will validate the data that you have entered and present any errors that have been found. (See section on VALIDATING AN ACTION)

IV. VALIDATING AN ACTION

This screen appears when you click on the Validation tab, the last tab at the top of the screen.



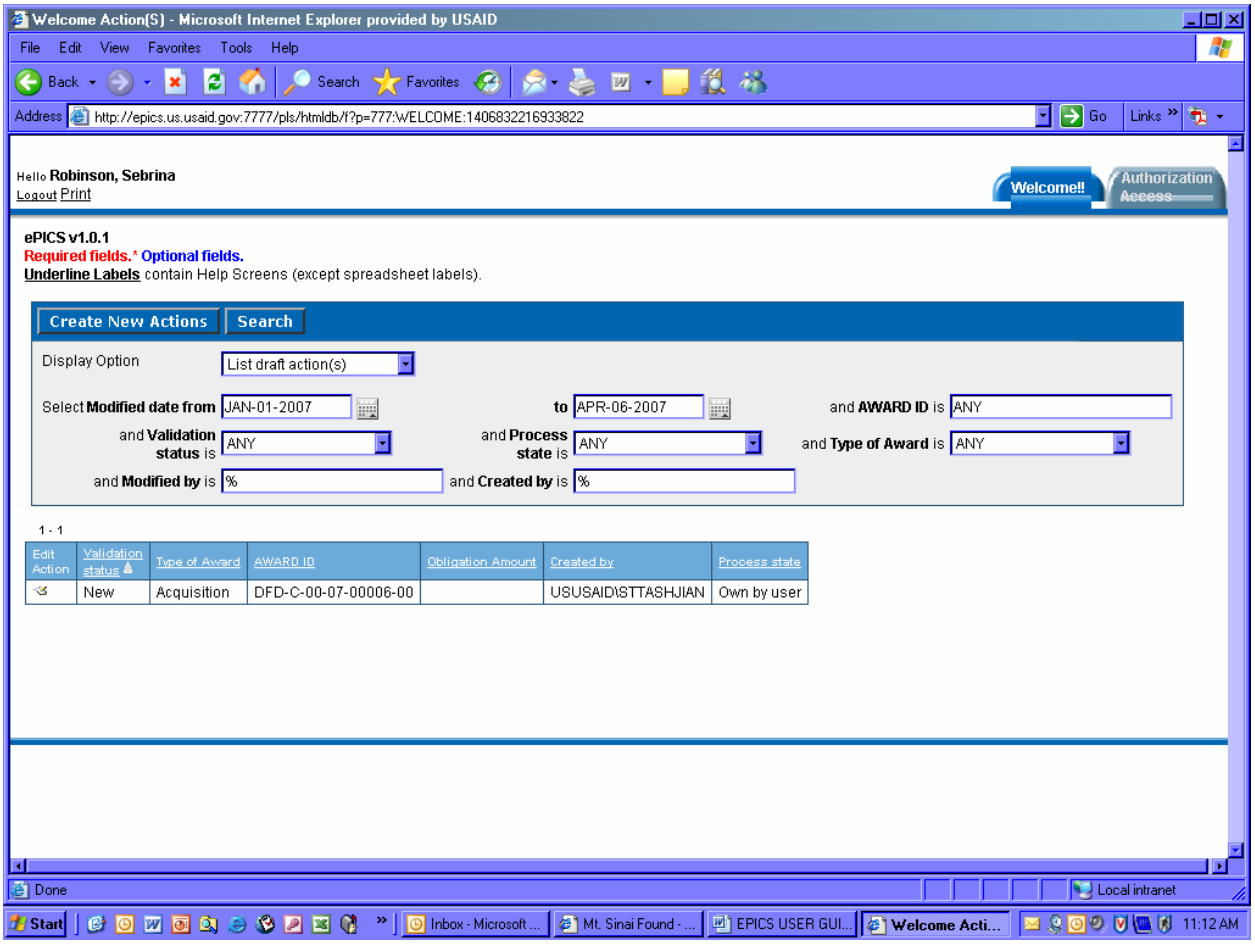
When you click on the symbol in the first column you will be taken to the screen where the error is located.

VALIDATION COMPLETED- No Errors Found

ERRORS -are hard-stops and will not allow the data to be transmitted to FPDS-NG. Corrections must be made before the data will be transmitted. A listing of the error(s) are displayed on the last tab, with links to the screen that contains the error.

WARNINGS- are not hard-stops. The system will return a status of "VALIDATE w/Warnings", and proceed with reporting the action to FPDS-NG.

V. SEARCHING FOR AN ACTION



From the Welcome/Opening page you can search for actions previously entered in several ways.

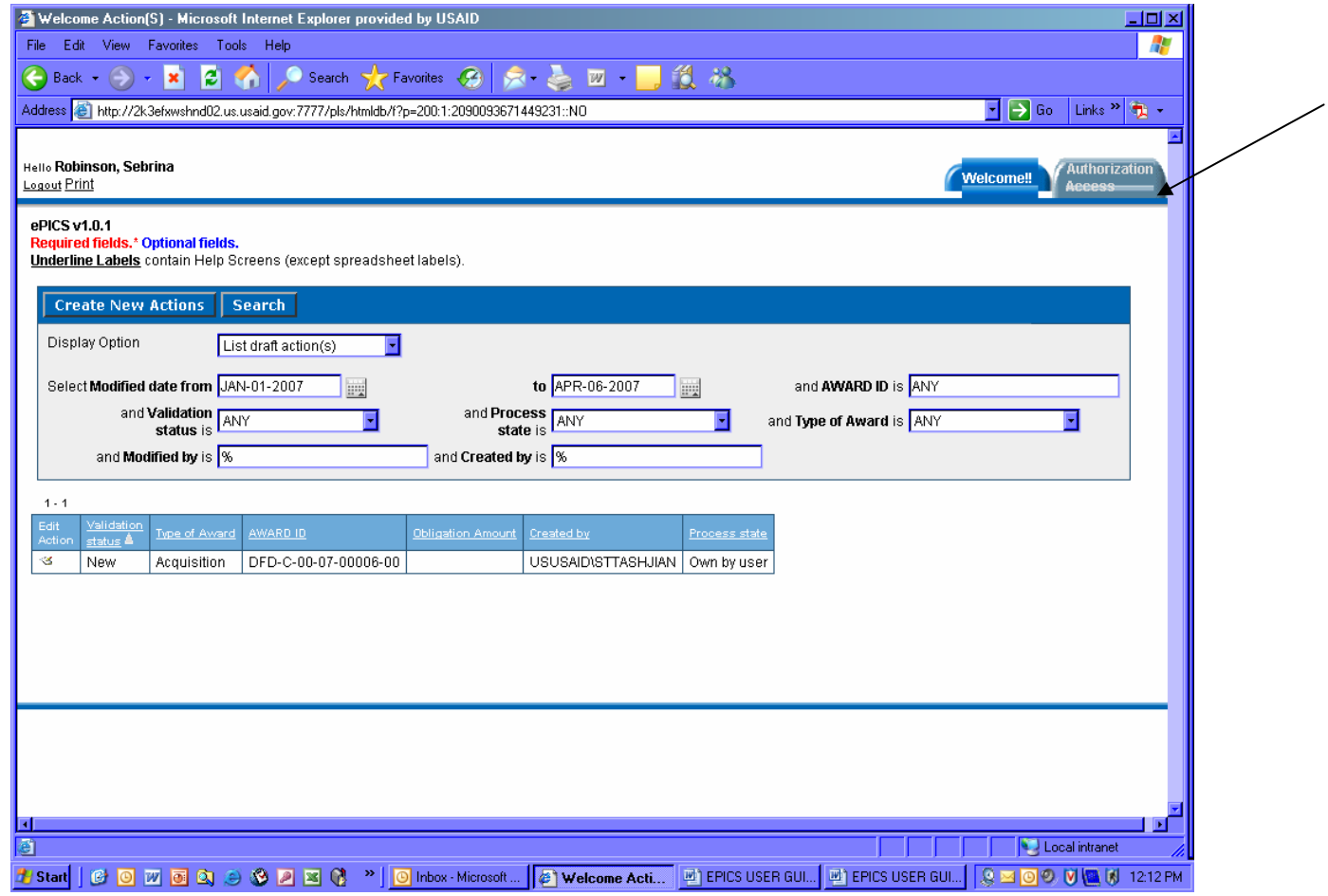
You can search by:

- Date Range
- Award ID
- Validation Status (Records that have Errors, Warnings, etc.)
- Process State (Records reported/not reported to FPDS-NG)
- Type of Award
- Modified By (Name of person who last modified the record)
- Created By (Name of person that originally entered the record)

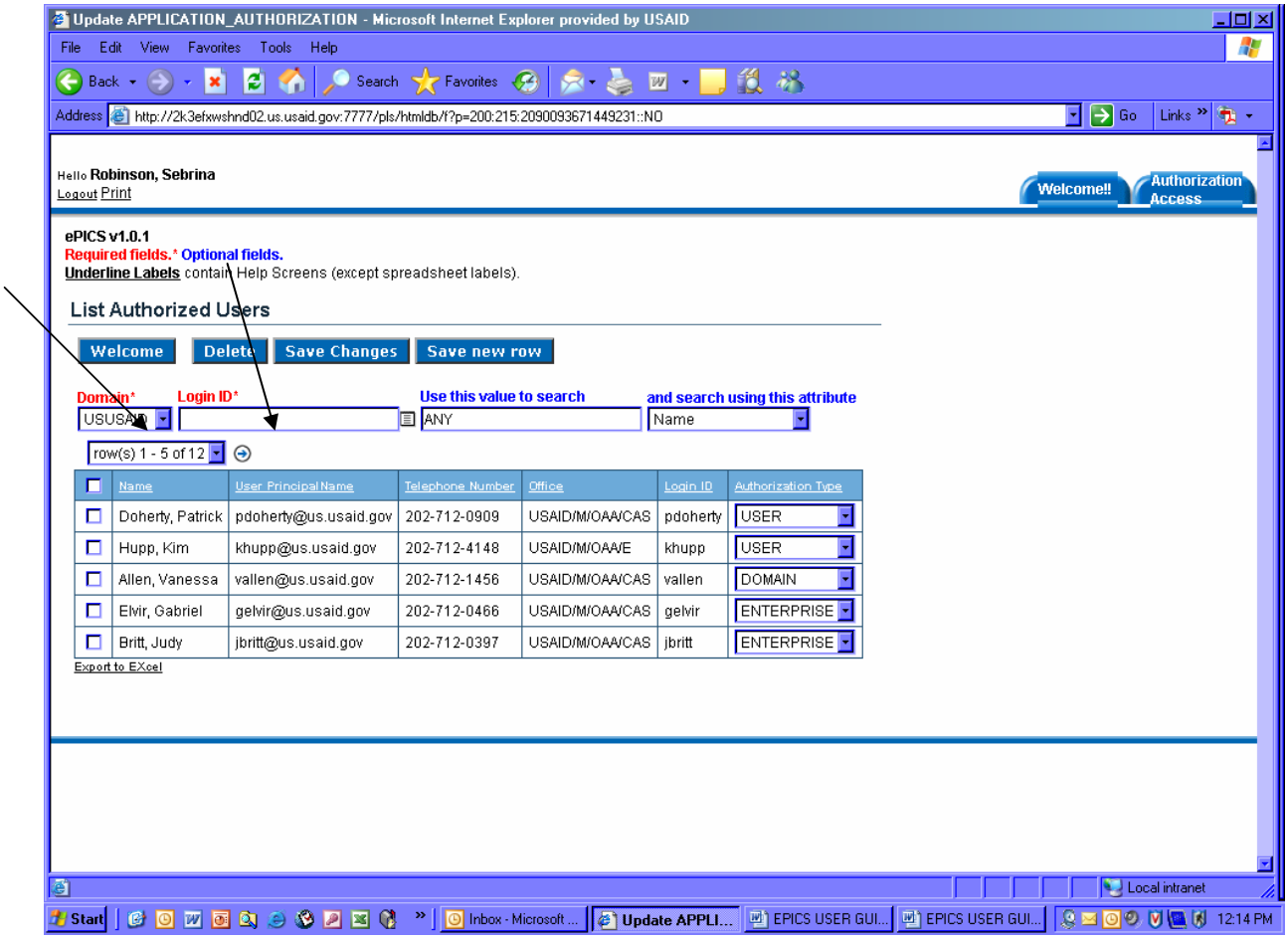
The **"%"** is a wild card and can be used in the fields to broaden the search and assist when all information is not known.

VI. SYSTEM ADMINISTRATION

From the home page, **click the "Authorization Access" tab** next to the Welcome tab (top right corner of the screen). *** If you do not have "Authorization Access" tab, then you do not have System Administrator access.**

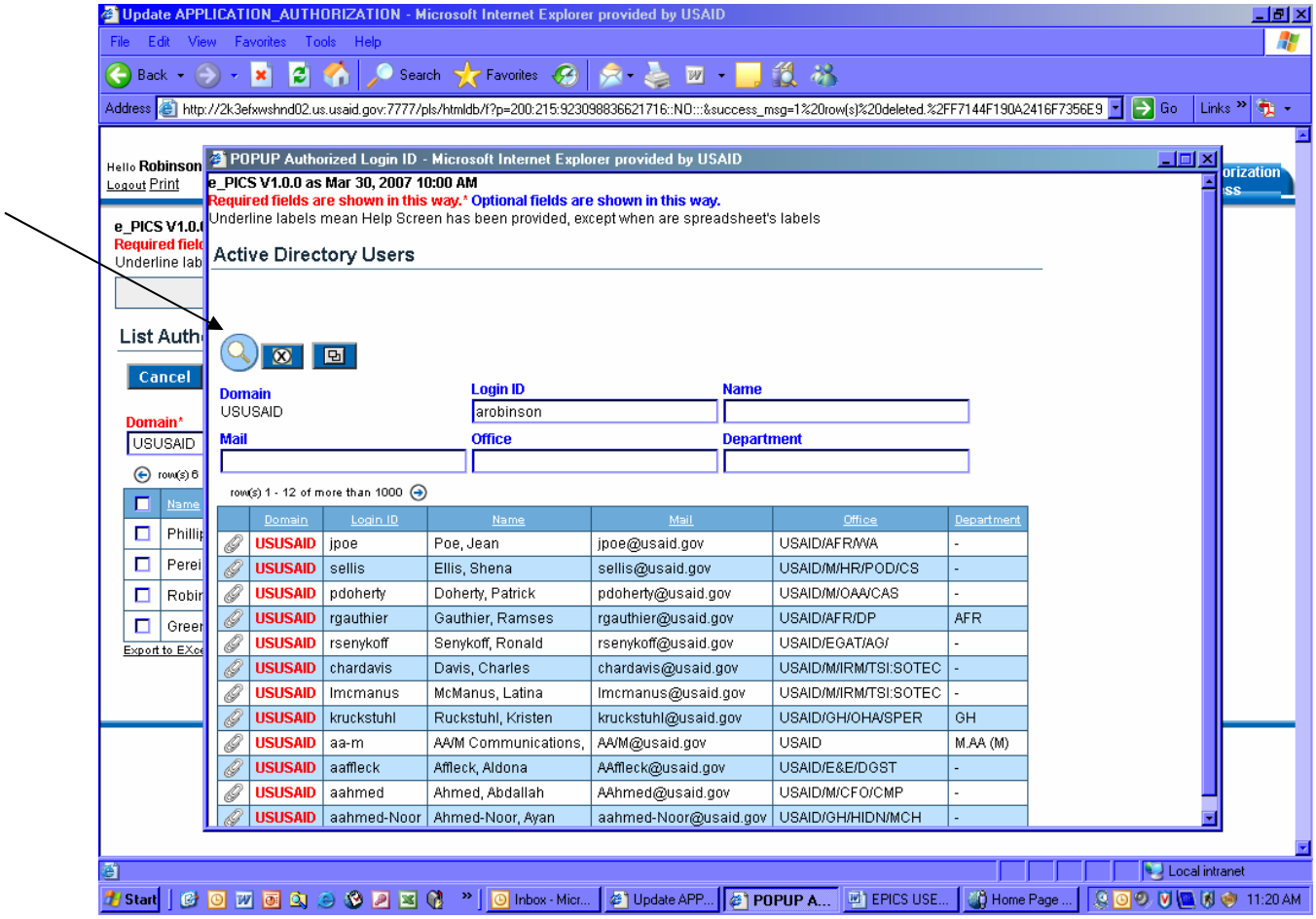


A. Adding A User To The System



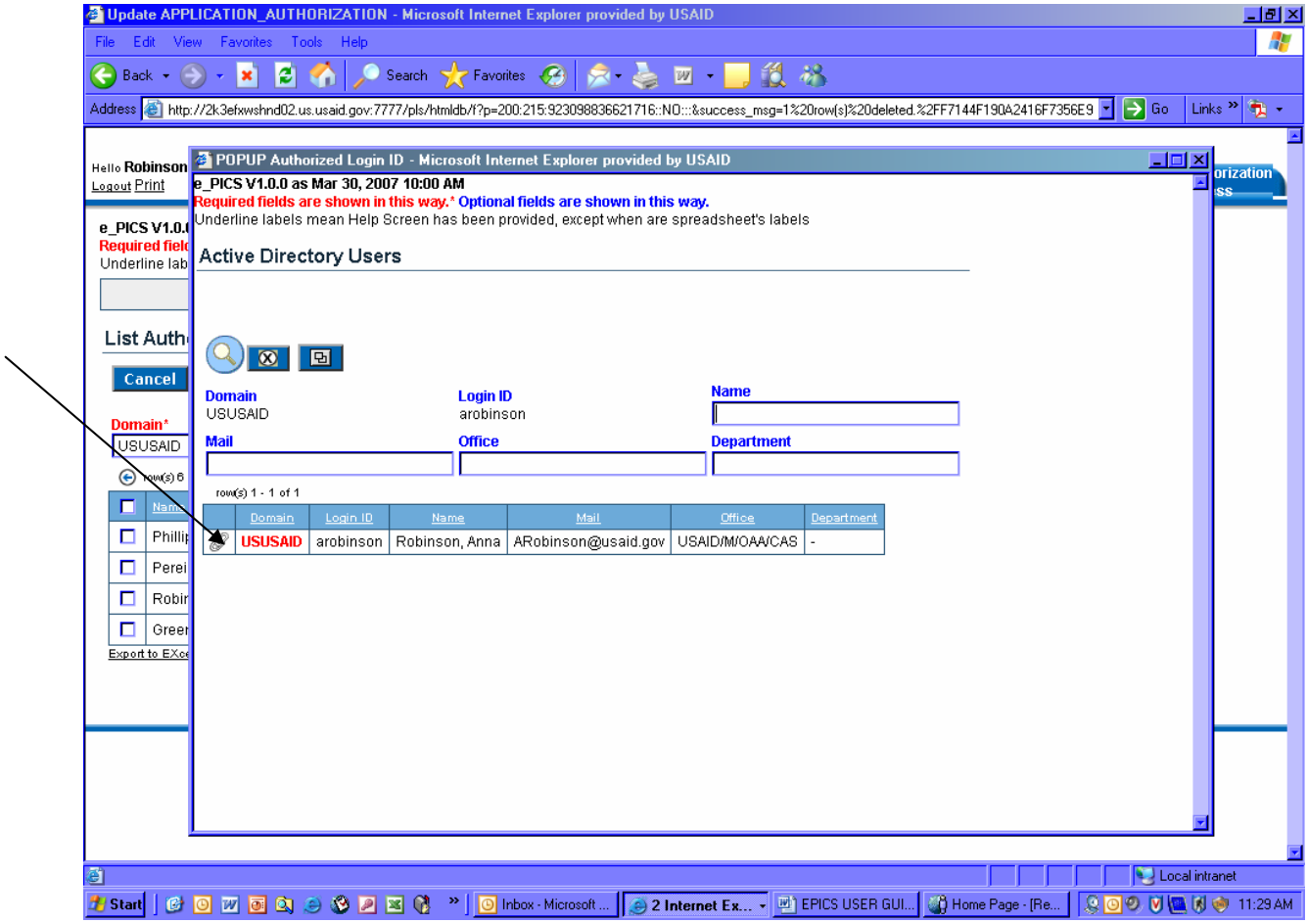
Step 1: From the drop down menu, choose the domain location of the person you are granting access to.

Step 2: Either type in the person's Login ID (usually their first initial and last name). If you are unsure of their login id, click the look-up button next to the Login ID field.

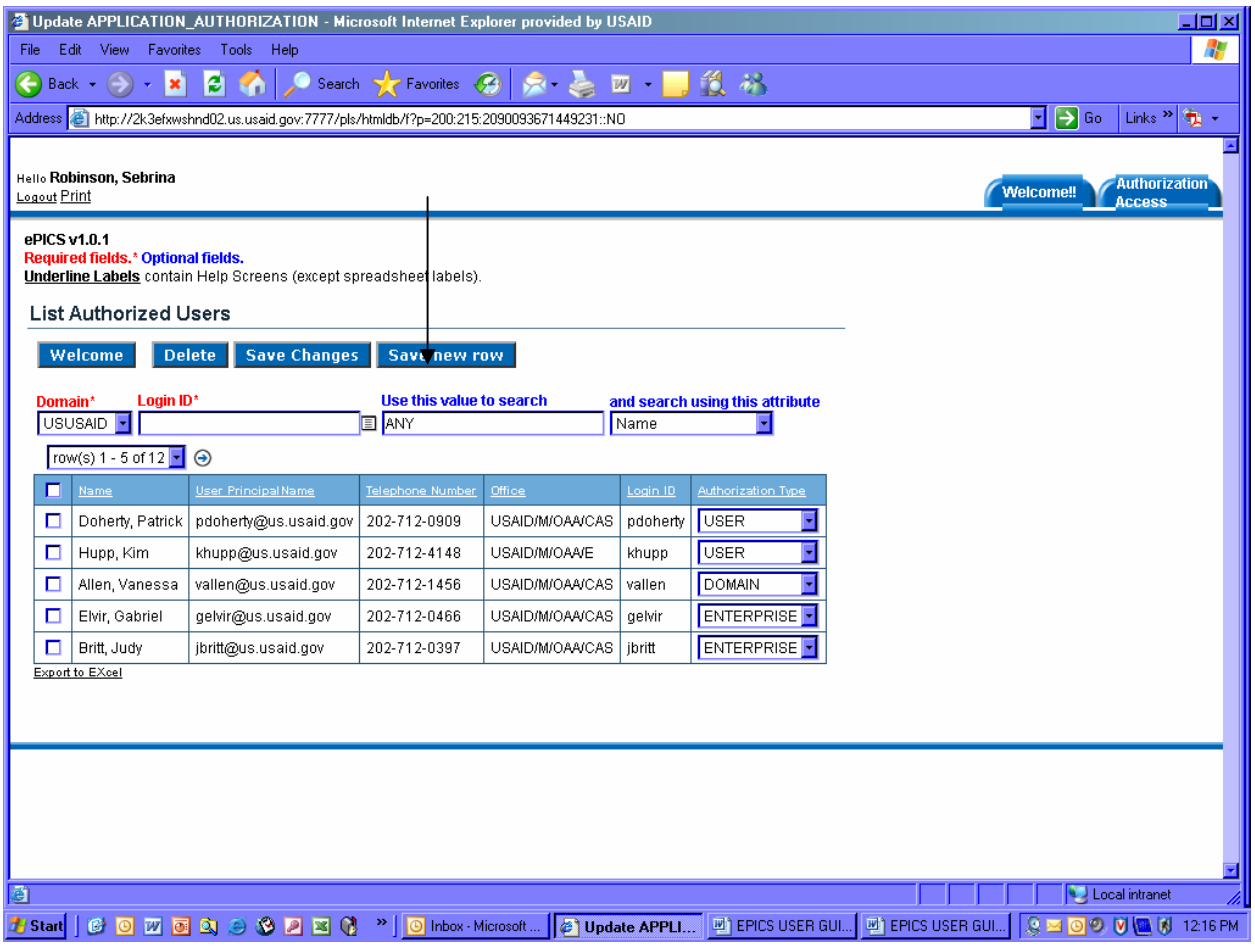


* If you use the look-up button, the screen above will appear and you will have more search options to help locate the person's name. Use the fields provided to type in known information. You may use the "%" as a wild card for any field. Then click the "search" button (the button that resembles a magnifying glass).

Names can be sorted by user simply by clicking on the header of the "Name" column.



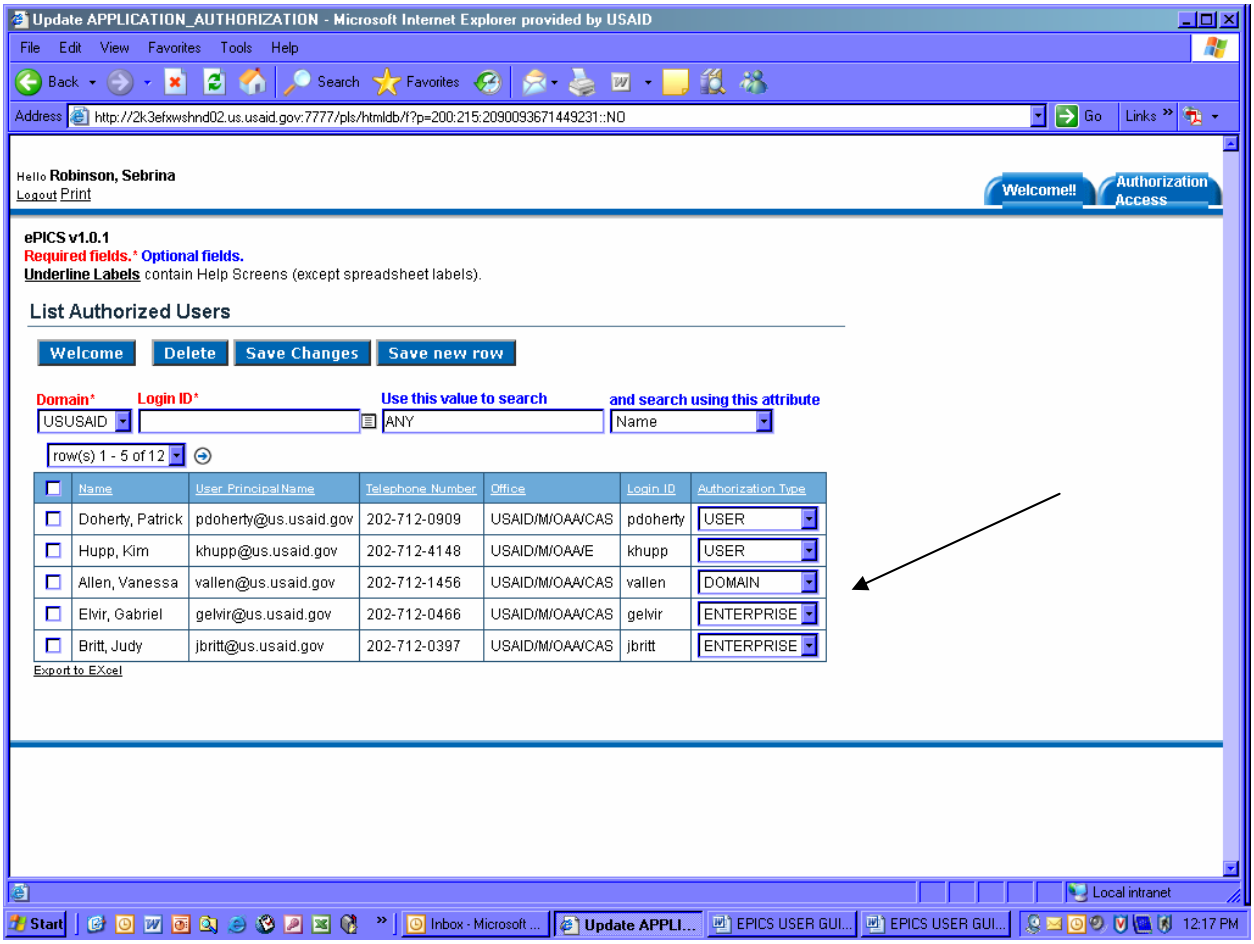
Step 3: Once you locate the person's name in the list, click the paper clip next to their name, and it will populate the person's name in the original screen.



Step 4: The person's name is now in the Login ID field. Click the "Add Row" button, to add the person to the list of people who already have access to the system.

The person's name is now added to the list.

B. Granting Access To A User

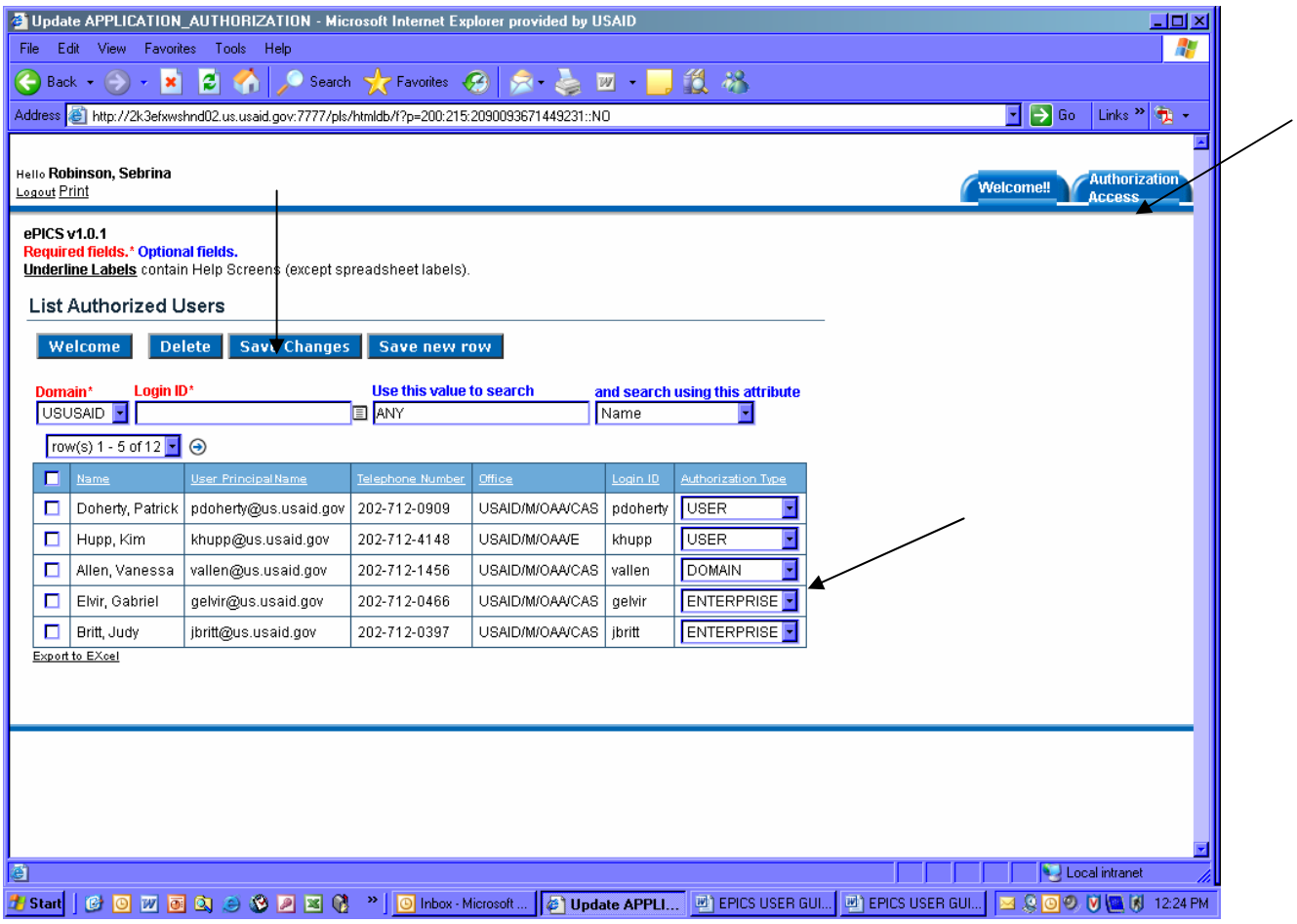


There are three authorization levels in EPICS:

1. Enterprise - At the **Enterprise** authorization level, you are able to view all actions within USAID. As a System Administrator at this level, you are able to grant authorization to a user for this level and either of the other levels.

2. Domain - At the **Domain** authorization level, you are able to view all actions for your location (i.e. Washington or Mission location). As a System Administrator at this level, you are able to grant authorization to a user for this level or the Group level.

3. Group - At the **Group** authorization level, you are able to view all action for your group (i.e. GH, DCHA, GRO, etc.). This is the level of authorization that most users will have.

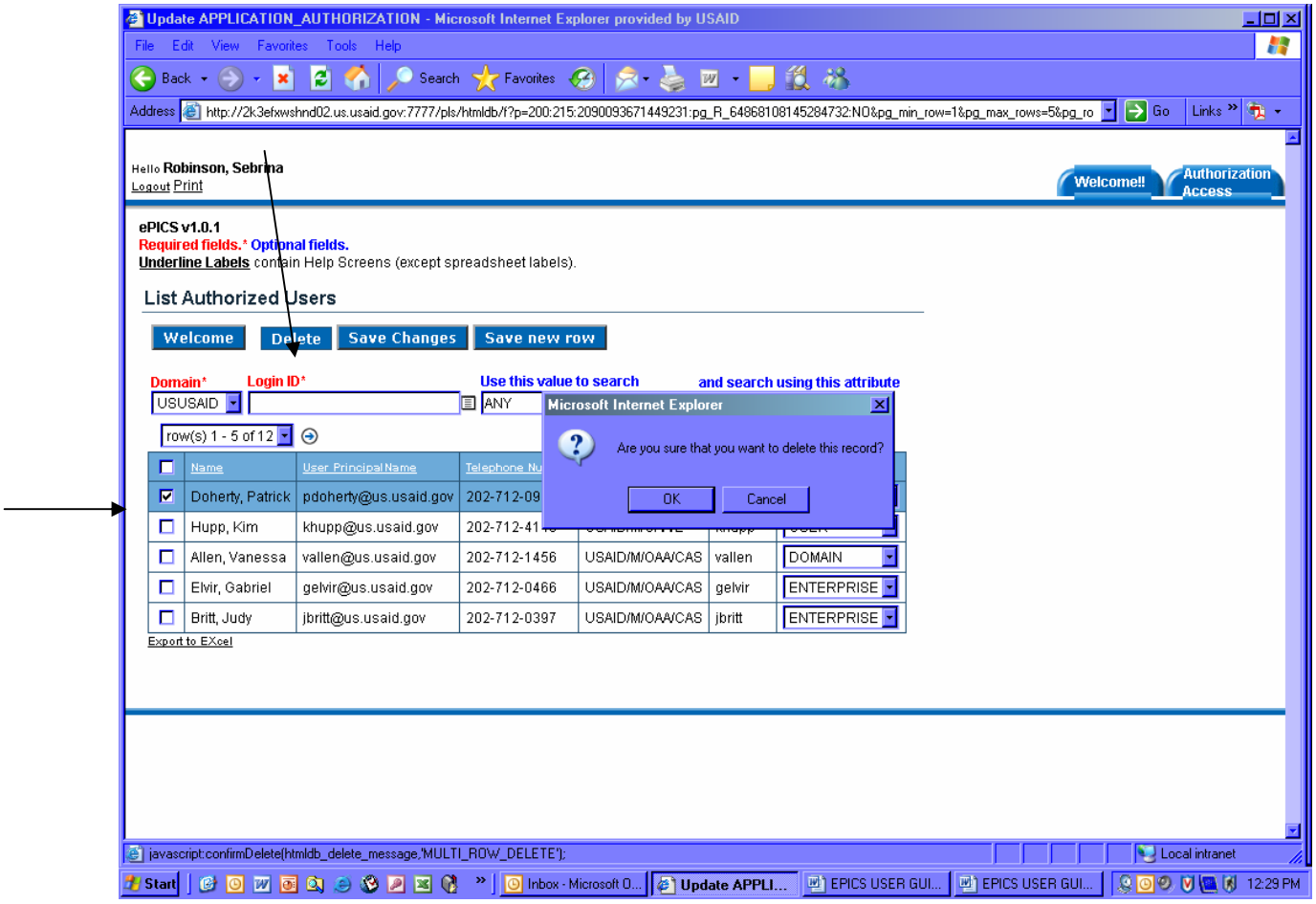


Step 1: Click on the "Authorization Access" tab from the home page.

Step 2: The system automatically defaults to the "User" authorization level. To change this, click on the drop down menu next to the person's name and choose the appropriate level.

Step 3: Click the "Save Changes" button to save the change.

C. Deleting a User



Step 1: From the home page, click on the "Authorization Access" tab.

Step 2: Check the box next to the user's name.

Step 3: Click the "Delete" button. The system will ask you to confirm that you would like to delete the user. Click "Yes" or "Cancel".

VII. INDEX

A. CFDA Table

- **Catalog for Federal Domestic Assistance (CFDA) –**This was established by the Federal Program Information Act (31 U.S.C. 6104) and OMB Circular A-89. It catalogs all federal domestic assistance programs, including programs that finance grants or cooperative agreements to U.S. recipients for activities abroad.

United States Agency for International Development Assistance Programs

PROGRAM TITLE	CFDA #
USAID Foreign Assistance for Programs Overseas	98.001
Cooperative Development Program (CDP)	98.002
Ocean Freight Reimbursement Program (OFR)	98.003
Non-Governmental Organization Strengthening (NGO)	98.004
Institutional Capacity Building (ICB)	98.005
Foreign Assistance to American Schools and Hospitals Abroad (ASHA)	98.006
Food for Peace Development Assistance Program (DAP)	98.007
Food for Peace Emergency Program (EP)	98.008
John Ogonowski Farmer-to-Farmer Program	98.009
Denton Program	98.010
Global Development Alliance	98.011
USAID Development Partnerships for University Cooperation and Development	98.012

B. Product Service Codes Table

- **PRODUCT SERVICE CODES:** Report the four-character code that identifies the research and development, services, or supplies and equipment. If more than one code applies, report the code that represents the predominance of the dollars obligated or de-obligated for the contract/action. (see attached listing of generally used numbers). A look-up field is also available:
  - **For research and development** – These codes begin with the letter "A".
  - **For services other than research and development** –These codes begin with any other letter other than "A".
  - **For supplies and equipment** – Use the numeric codes
  - **For construction** – These codes begin with "Y" or "Z"

AB90	R&D-OTHER SVC & DEVELOP	
B599	OTHER SPECIAL STUDY & ANALYSES	
C111	BLDGS & FAC / ADMIN & SVC BLDGS	
C118	BLDGS & FAC / R&D FACILITIES	
C119	BLDGS & FAC / OTHER BUILDINGS	
D301	ADP FACILITY MANAGEMENT	
D302	ADP SYSTEMS DEVELOP	
D303	ADP SVCS/DATA ENTRY	
D304	ADP SVCS/TELECOMM & TRANSMISSION	
D305	ADP TELEPROCESSING & TIMESHARE	
D306	ADP SYSTEM ANALYSIS	
D307	AUTOMATED INFORMATION SYSTEM SVCS	
D308	ADP PROGRAMMING SVCS	
D309	ADP INF, BROADCAST & DIST SVCS	
D310	ADP BACKUP & SECURITY SVCS	
D311	ADP DATA CONVERSION SVCS	
D312	ADP OPTICAL SCANNING SVCS	
D313	COMPUTER AIDED DESGN/MFG SVCS	
D314	ADP ACQUISITION SUP SVCS	
D399	OTHER ADP & TELECOMMUNICATIONS SVCS. (INCL. DATA STORAGE)	
F999	OTHER ENVIR SVC/STUD/SUP	
H199	QUALITY CONT SV/MISC EQ	
H999	MISC TEST & INSPECT SVC	
L069	TECH REP SVCS/TRAINING AIDS-DEVICES	
L070	TECH REP SVCS/ADP EQ & SUPPLIES	
L075	TECH REP SVCS/OFFICE SUPPLIES	
L099	TECH REP SVCS /MISC EQ	
Q999	OTHER MEDICAL SVCS	
R119	BLDGS & FAC / OTHER BUILDINGS	
R219	OTHER ARCHITECTS & ENGIN GEN	
R301	ADP FACILITY MANAGEMENT	
R305	ADP TELEPROCESSING SVCS	
R306	ADP SYSTEM ANALYSIS	
R307	AUTOMATED INFORMATION SYSTEM SVCS	
R399	OTHER ADP SVCS	
R401	PERSONAL CARE SERVICES	
R419	PROF SVCS/EDUCATIONAL SERVICES	
R421	PROF SVCS/TECHNICAL ASSISTANCE	
R497	PERSONAL SERVICES CONTRACTS	
R498	PATENT AND TRADEMARK SERVICES	

R499	OTHR PROFESSIONAL SVCS	
R506	STUDY/DATA - OTHER THAN SCIENTIFIC	
R599	OTHER SPECIAL STUDY & ANALYSES	
R610	PERSONAL PROPERTY MANAGEMENT SVCS	
R699	OTHER ADMINISTRATIVE SUPPORT SVCS	
R701	MGT SVCS/ADVERTISING	
R702	MGT SVCS/DATA COLLECTION	
R703	ACCOUNTING SERVICES	
R704	MGT SVCS/AUDITING SERVICES	
R706	MGT SVCS/LOGISTICS SUPPORT	
R707	MGT SVCS/CONTRACT & PROCUREMENT SUP	
R710	FINANCIAL SERVICES	
S206	GUARD SVCS	
U099	OTHER ED & TRNG SVCS	
V002	MOTOR POOL OPERATIONS	
Y111	CONSTRUCT/OFFICE BUILDINGS	
Y199	CONSTRUCT/MISC BLDGS	

C. NAICS Codes Table

- **North American Industry Classification System (NAICS)** Report the 6-digit code that best identifies the product or service acquired and represents the predominance of the dollars obligated or deobligated for the contract/action. The Product or Service Code (PSC) must correlate to the selected NAICS. (see attached listing of generally used numbers). The 'Look-up" is available for this field. Construction codes beginning with "23".

MOST FREQUENTLY USED NAICS CODES	
DESCRIPTION	**NAIC**
1. Administrative management & general management consulting service	541611
2. All other business support services	561499
3. All other information services	514199
4. All other personal services	812990
5. All other professional & technical services	541990
6. All other support services	561990
7. All other travel arrangement & reservation services	561599
8. Architectural services	541310
9. Commodity contracts dealing	523130
10. Computer & office machine repair & maintenance	811212
11. Computer management facilities	541513
12. Computer systems design services	541512
13. Computer training	611420
14. Couriers	492110
15. Custom computer programming services	541511
16. Data processing services	514210
17. Document preparation services	561410
18. Educational support services	611710
19. Emergency & other relief services	624230
20. Engineering services	541330
21. Environmental consulting services	541620
22. Facilities support services	561210
23. Fitness & recreational sports centers	713940
24. Foodservice contractors	722310
25. Freight transportation arrangement	488510
26. General warehousing & storage	493110
27. Graphic design services	541430
28. Highway & street construction	234110
29. Janitorial services	561720
30. Language schools	611630
31. Motor vehicle supplies & new parts whsle	421120
32. Multifamily housing construction	233220
33. New car dealers	441110
34. Office administrative services	561110
35. On-line information services	541519
37. Other management consulting services	541618
38. Other scientific & technical consulting services	541690
39. Other telecommunications	513390
40. Remediation services	562910
41. Satellite telecommunications	513340
42. Security guards & patrol services	233210
44. Temporary help services	561230