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

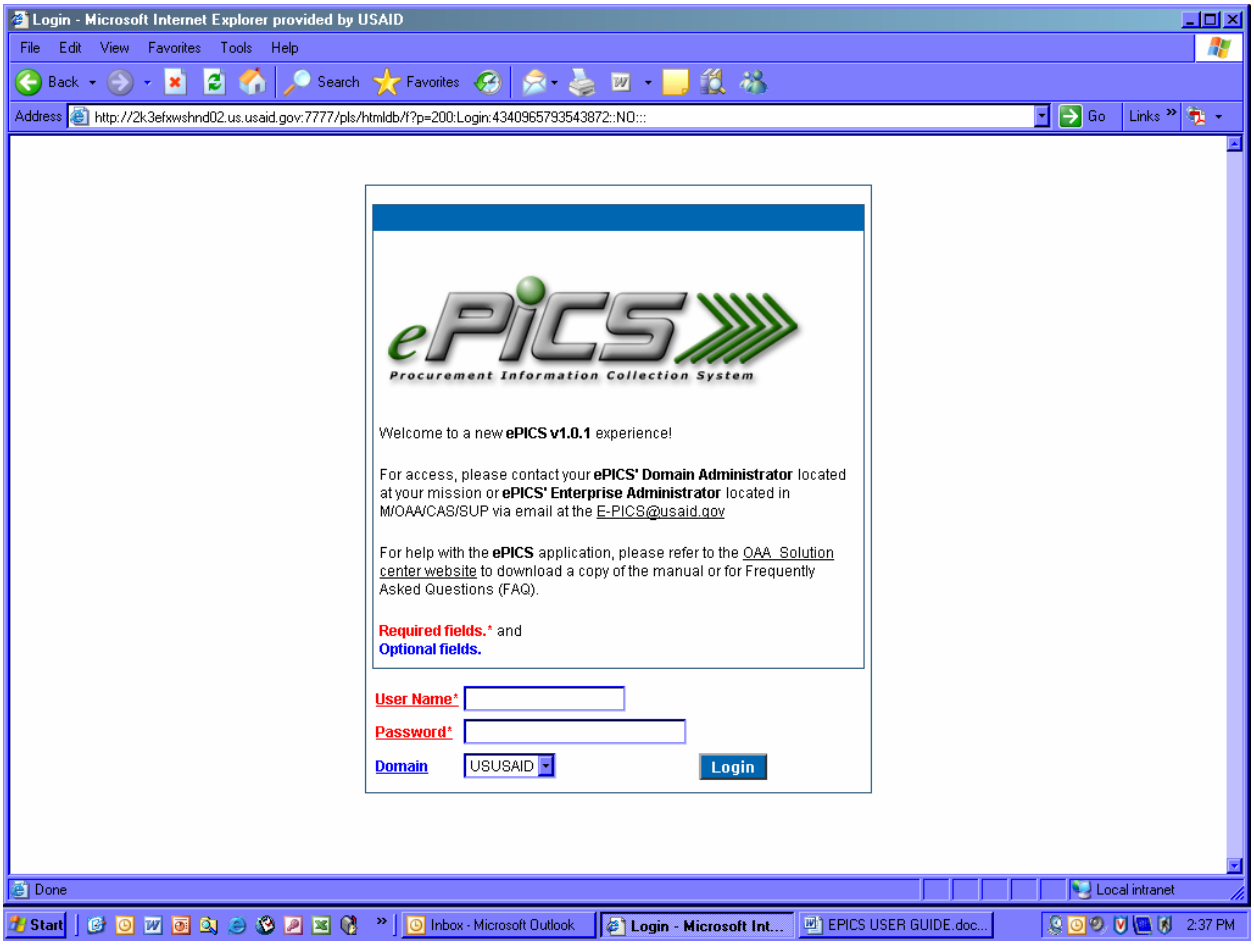
ePICS is a user-friendly system and we ask that you make use of the attached manuals and data entry tips. The manual has been divided into sections by the type of action being entered for easy of use. The Data Entry Tips is an abridged version of the manuals and intended to help with initial use by providing 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.

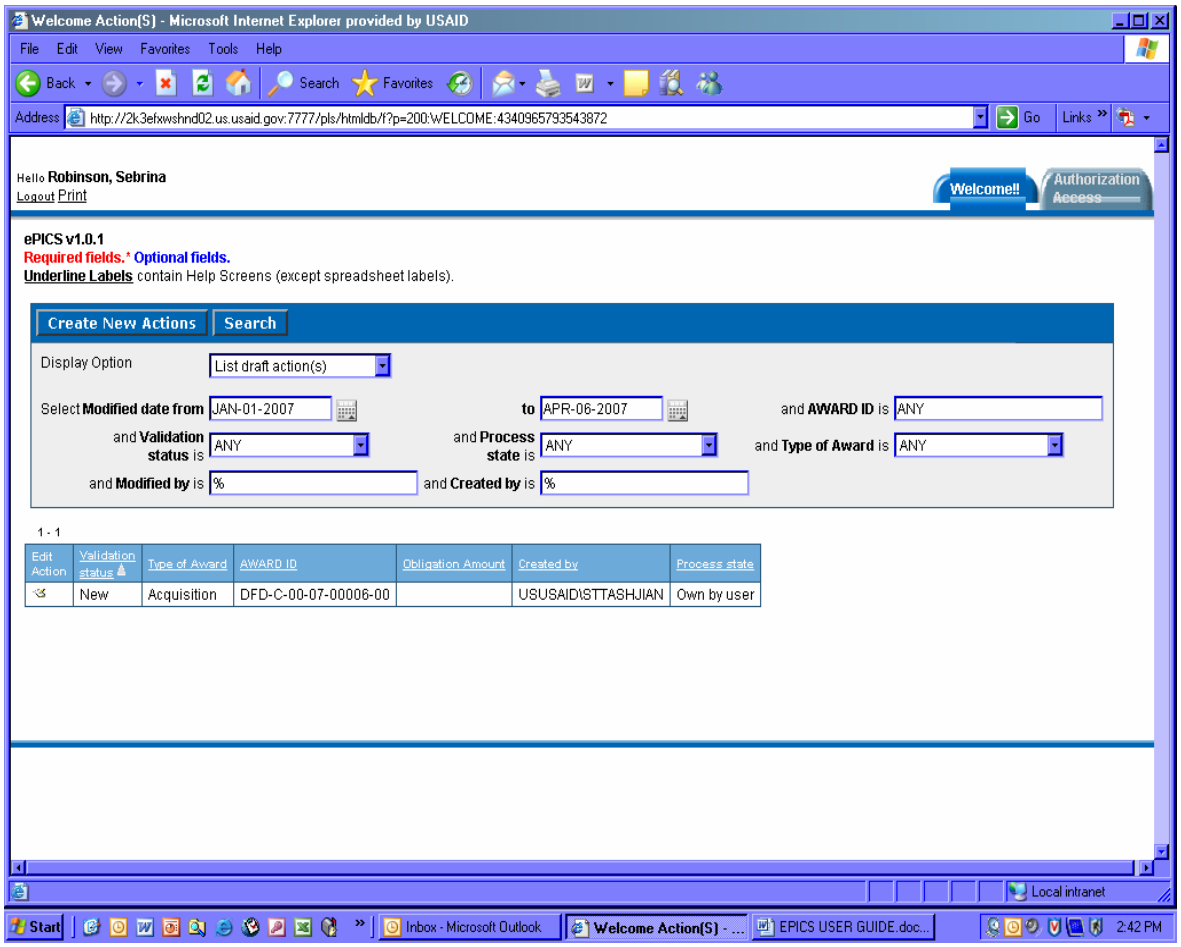
- You must click the 'Save' button on each screen to save your data. If you move between tabs without clicking the 'Save' button, your data will not be saved.

- 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:

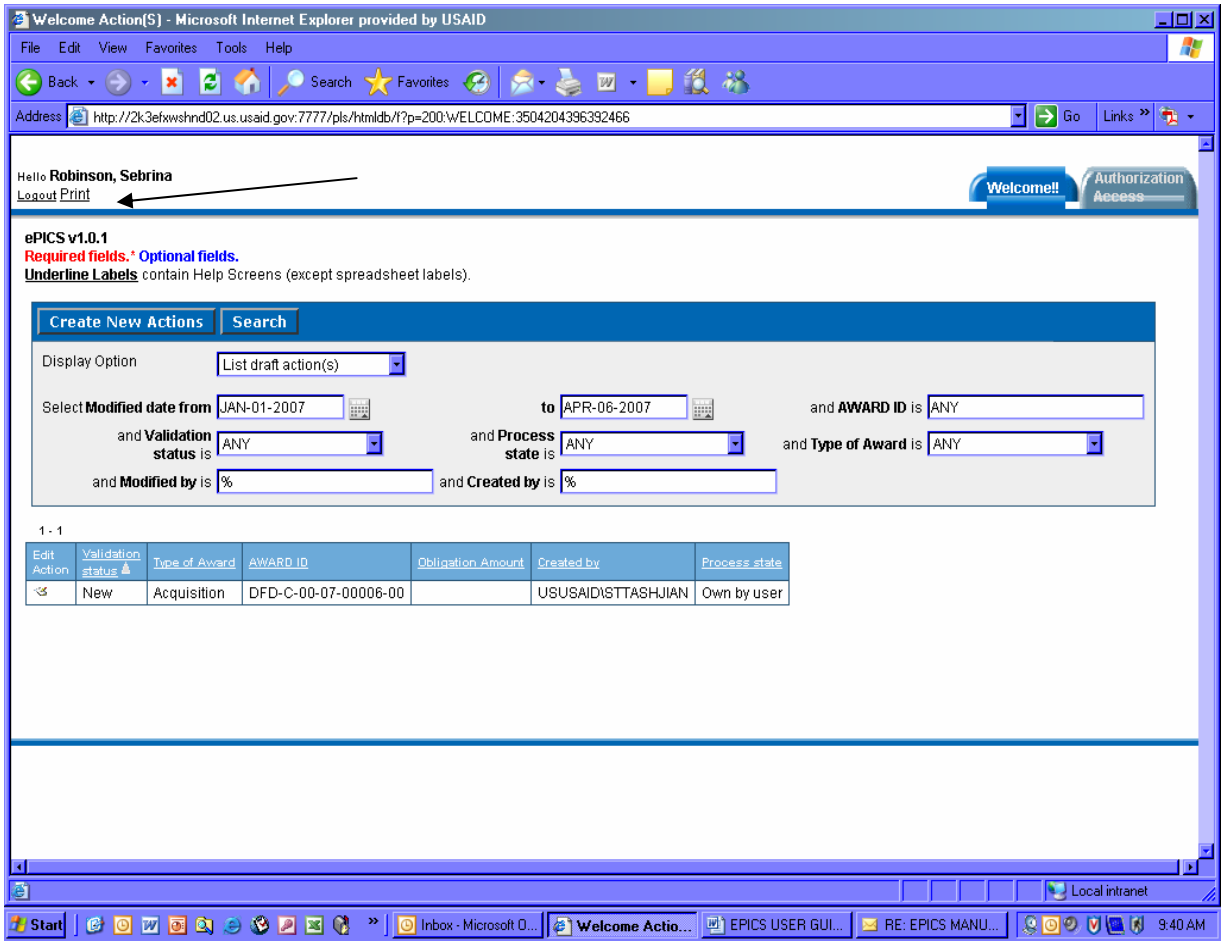
- Date Range
- Award ID
- Validation Status (Records that have Errors, Warnings, etc.)
- Process State (Records reported/not reported to FPDS-NG)
- Type of Award
- Modified By (Name of person who last modified the record)
- Created By (Name of person that originally entered the record)

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

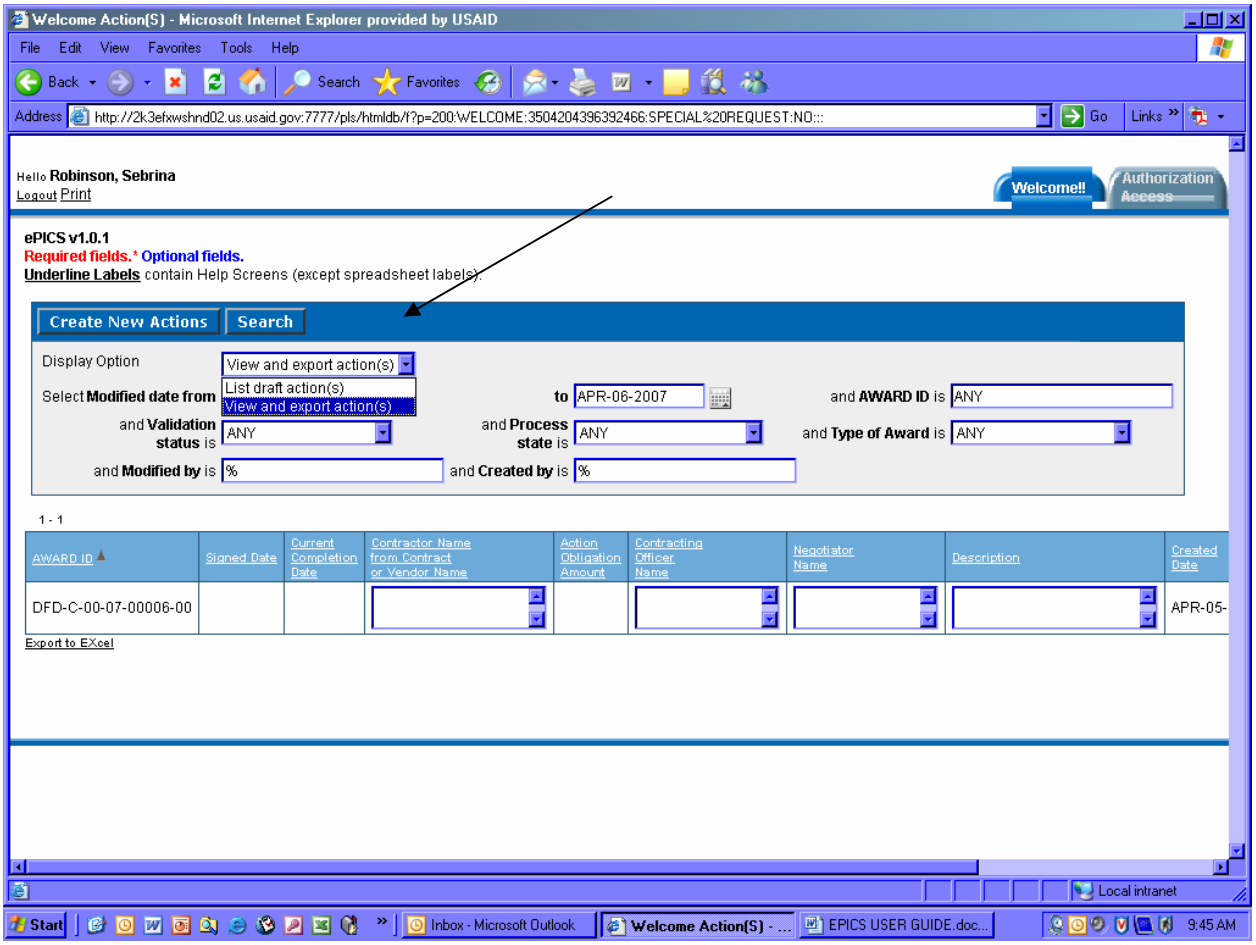
B. Printing a report

Users have two 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.

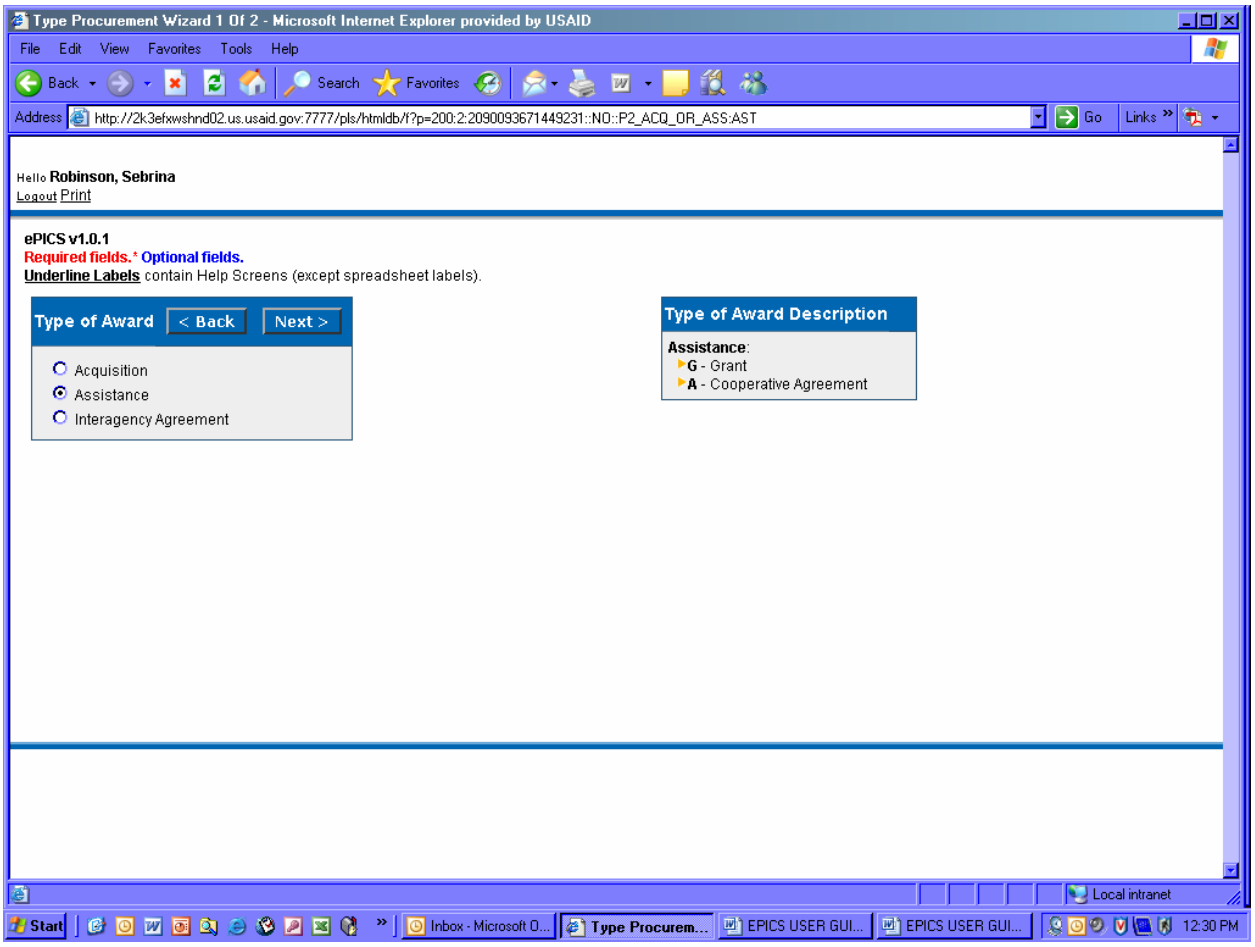

Welcome Action(S) - Microsoft Internet Explorer provided by USAID
File Edit View Favorites Tools Help
Back Search Favorites
Address http://2k3efxwshnd02.us.usaid.gov:7777/pls/htmldb/f?p=200:WELCOME:3504204396392466:SPECIAL%20REQUEST:NO:::
Go Links
Hello Robinson, Sebrina
Logout Print
Welcome!! Authorization 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

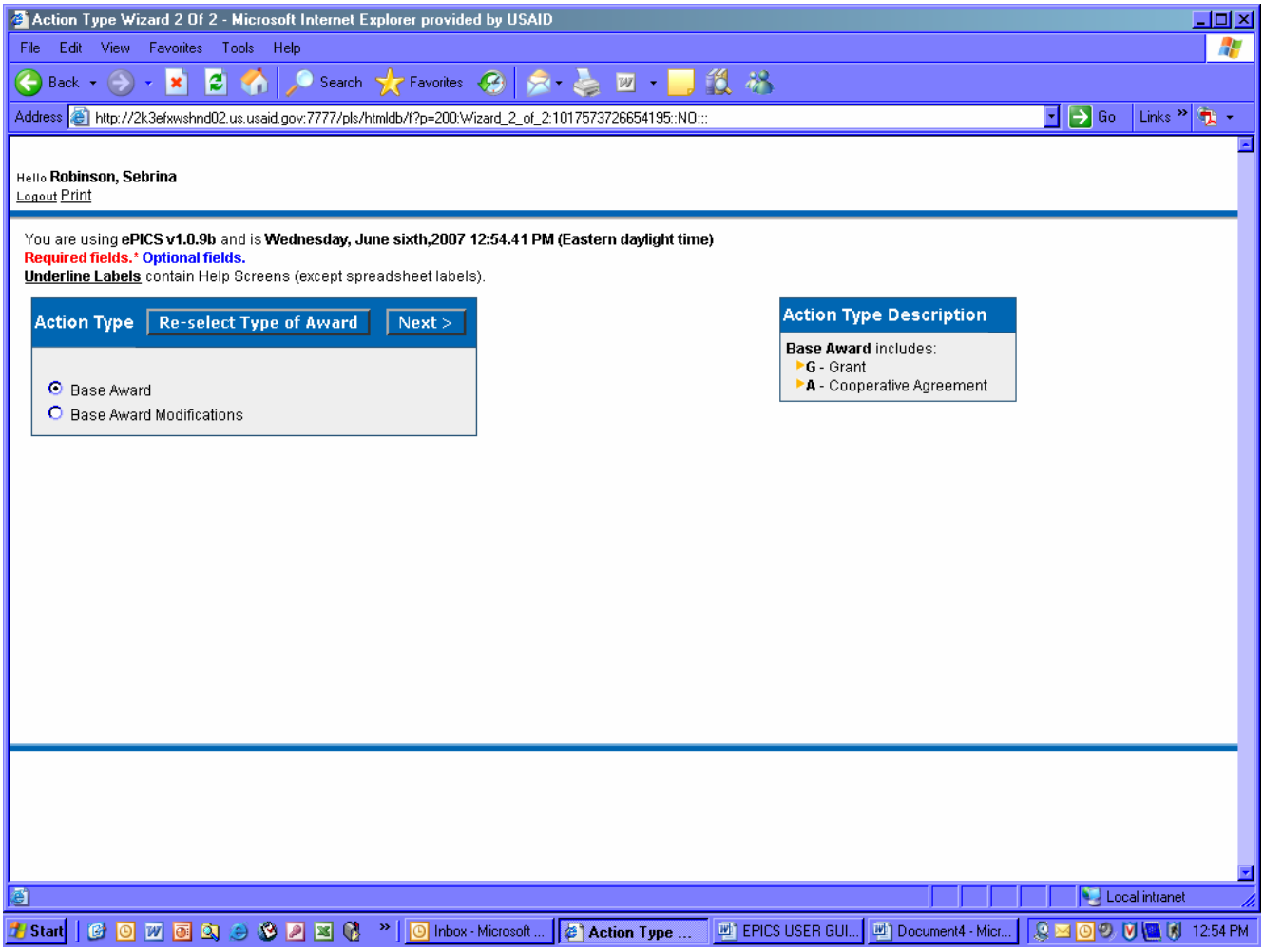
Select “Create New Actions” from the home screen.

A. <u>ASSISTANCE</u>

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



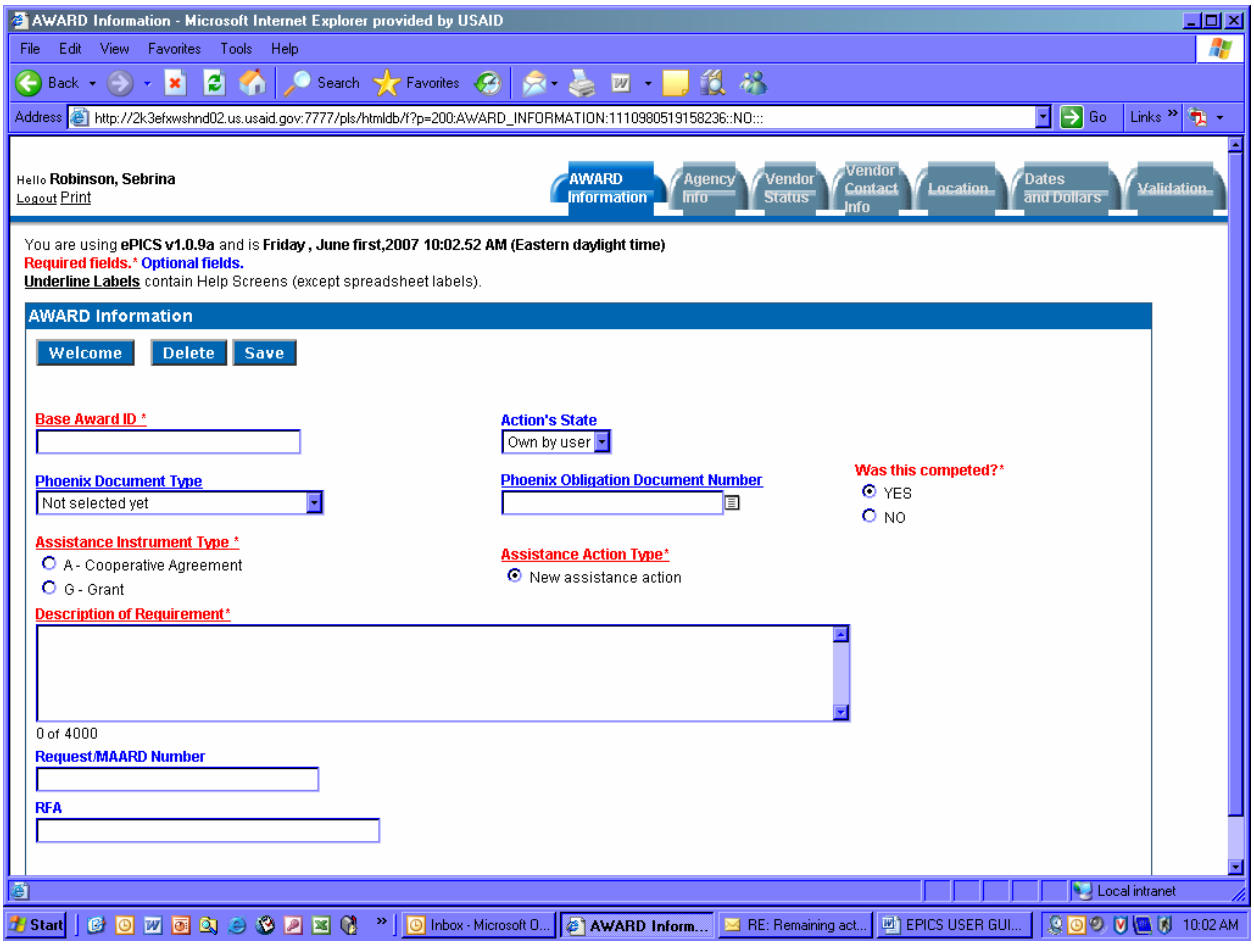
Select “Assistance” as the type of award and click, “Next”.



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.

Phoenix Document Type-
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

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

Acquisition Instrument Type-
This field is based on the Acquisition Instrument type. Select either Cooperative Agreement or Grant.

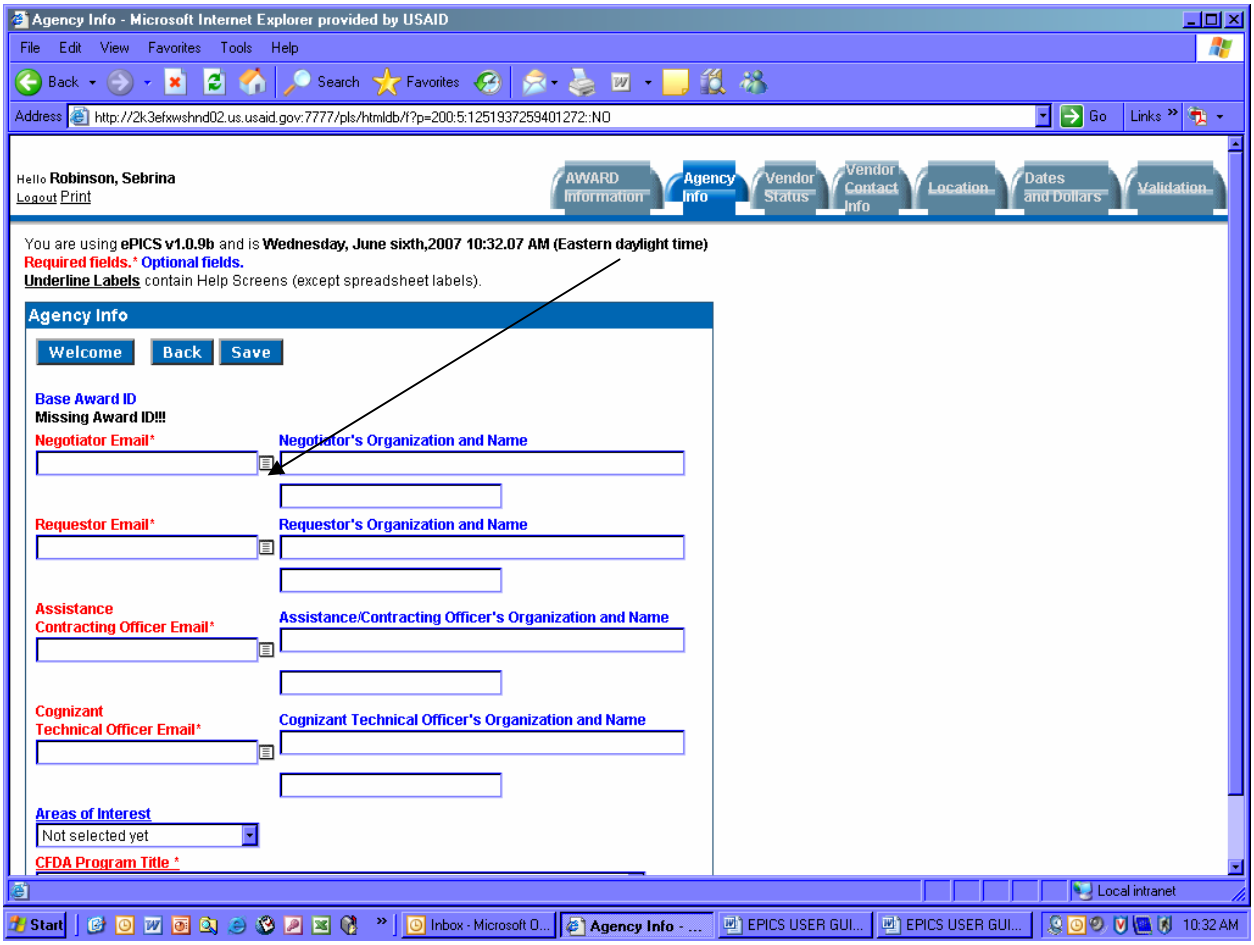
Assistance Action Type-
This data is collected for the Federal Assistance Award Data System (FAADS). This system is sponsored by the Bureau of Census and OMB.

Description of Requirement –
Enter a brief description of your award. For instance "Grantee 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.

RFA –
Enter the Request for Assistance number.

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.

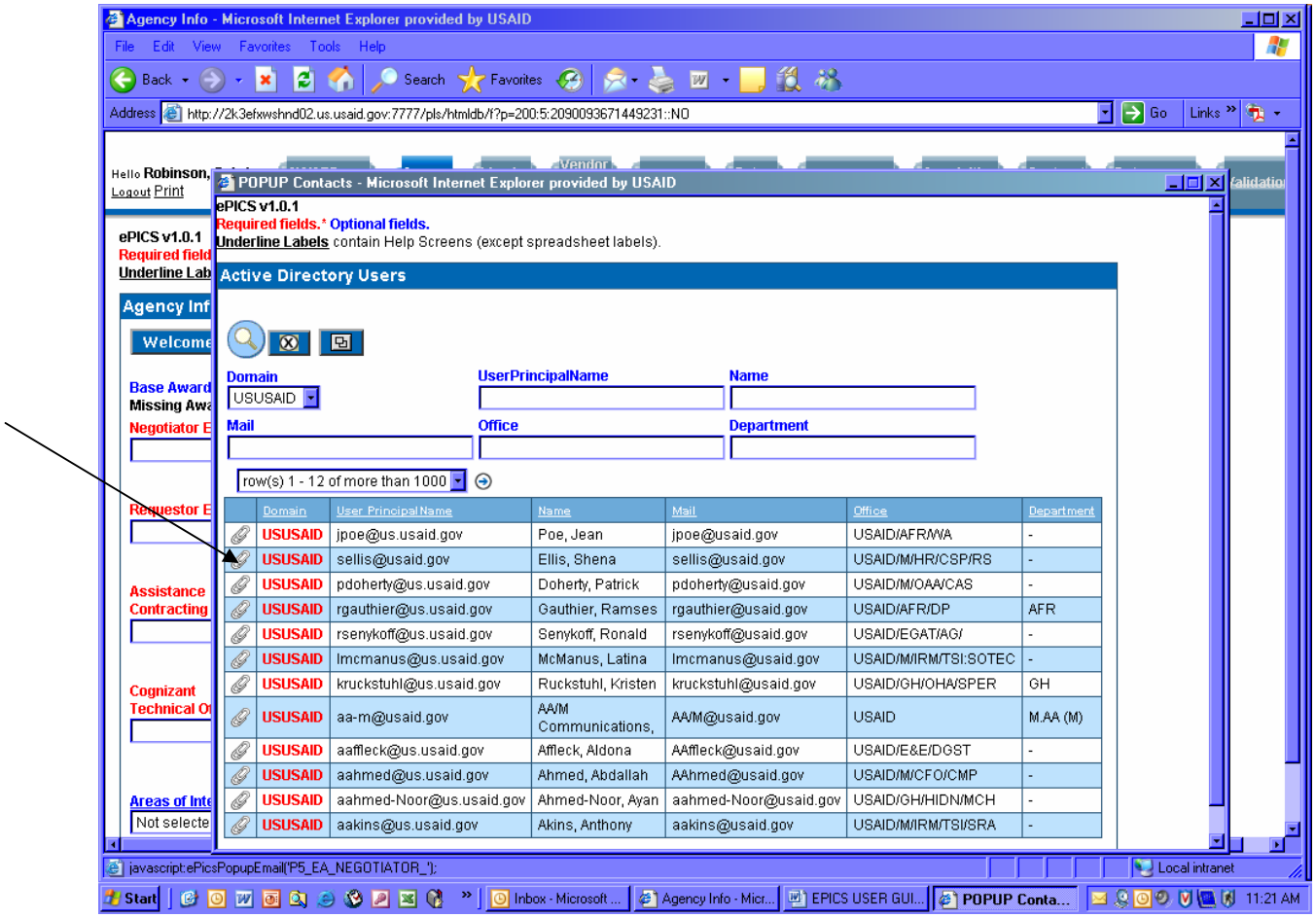
Requestors Email-
Enter the Requestor's email address. (See additional comments under Negotiator Email.)

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.

CFDA Program Title-
This field is required for FAADS (Federal Assistance Award Data System) reporting. The Catalog of Federal Domestic Assistance (CFDA) 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.

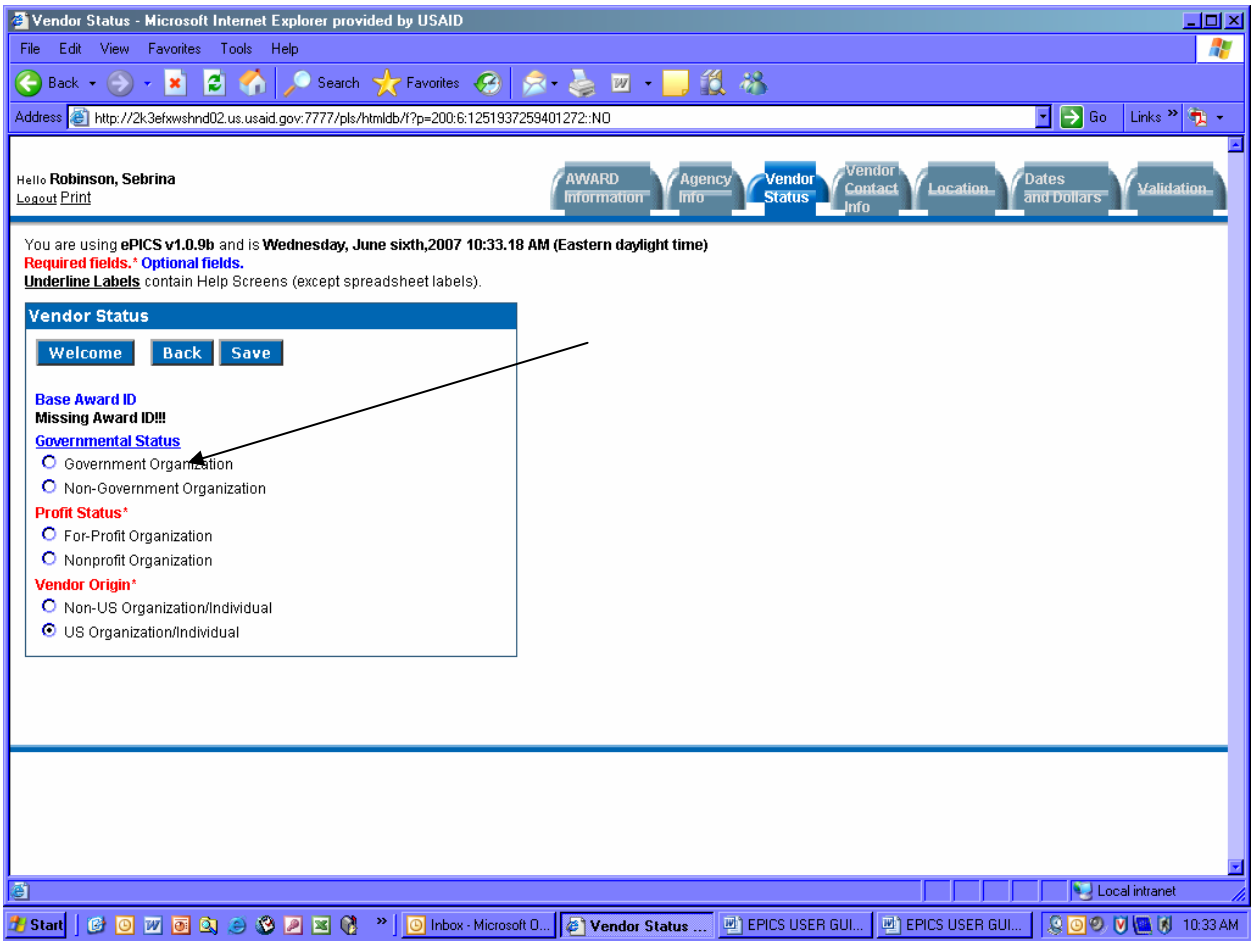


This screen appears when you click the "Look-up" button next to the Negotiator, Requestor, Assistance/Contracting Officer, or Cognizant Technical Officer fields.

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.

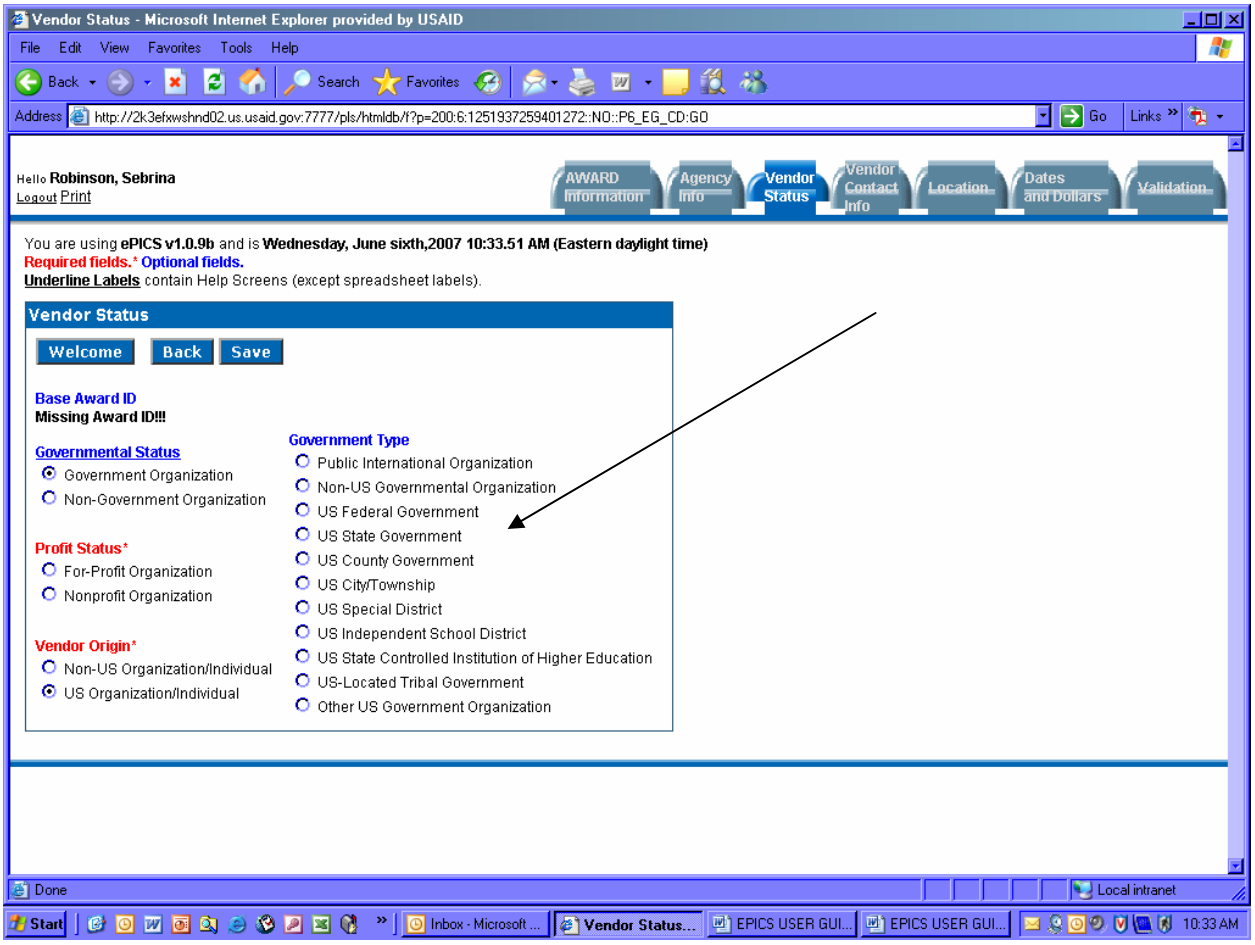
VENDOR STATUS TAB



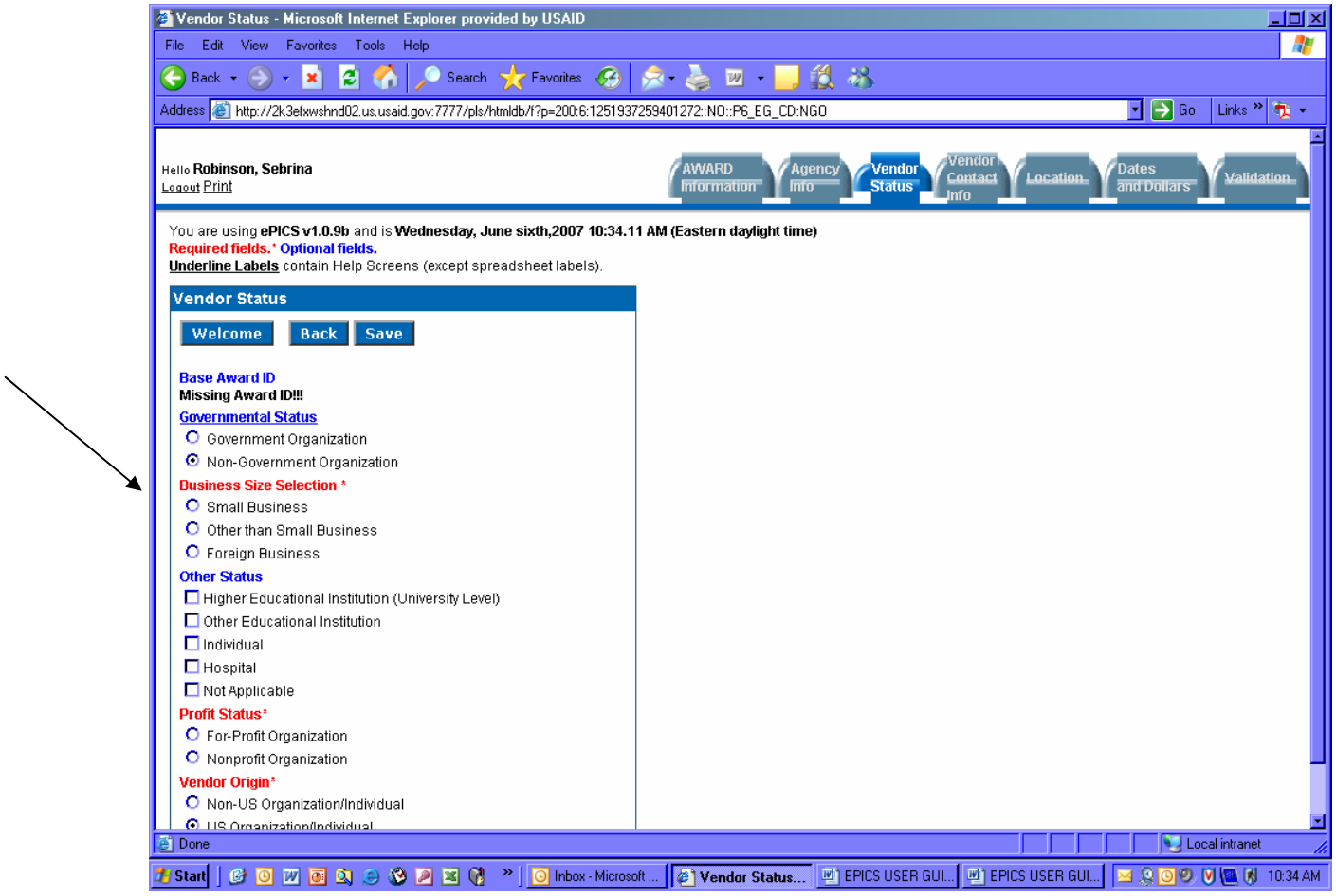
Make the appropriate selections regarding the Vendor.

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)

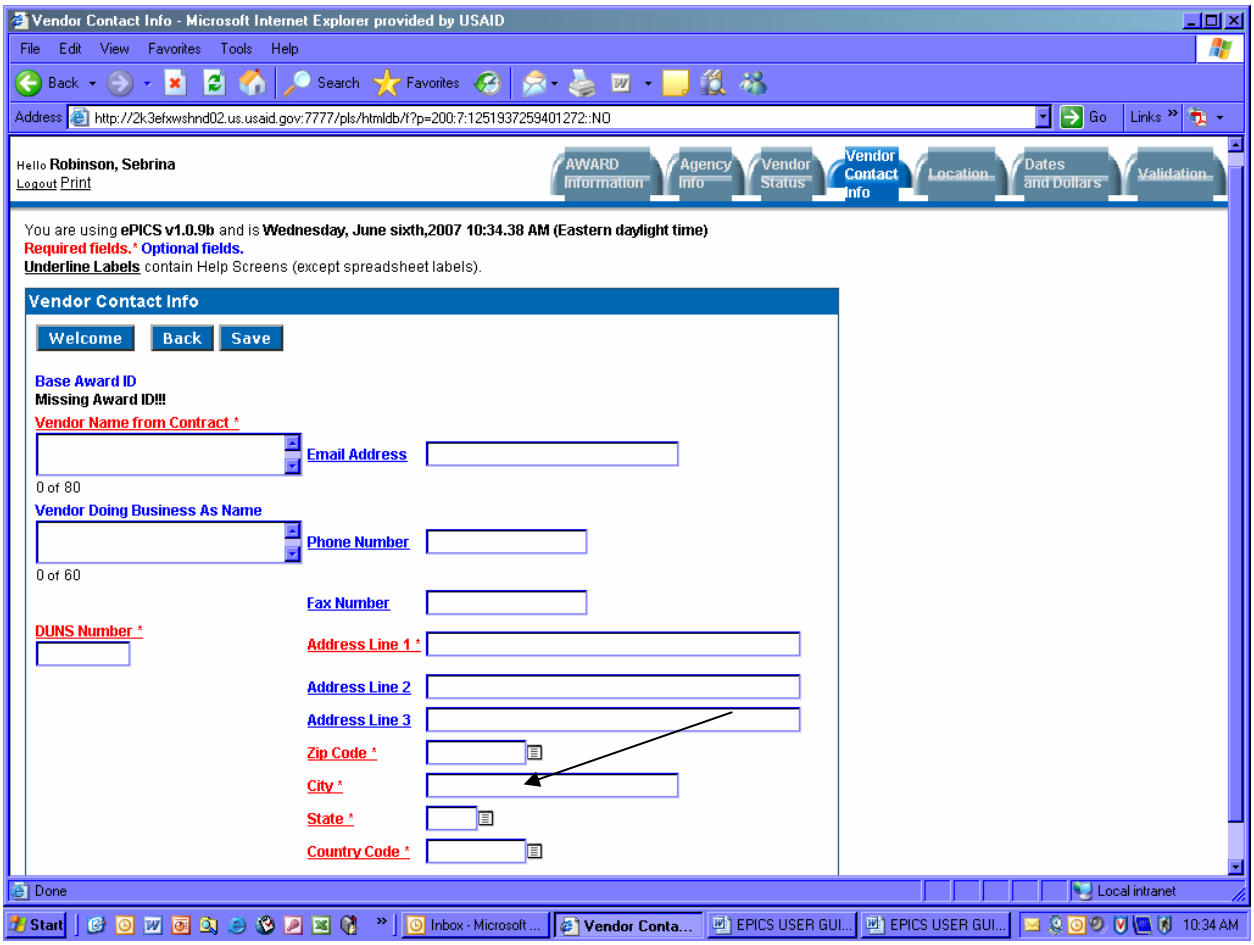
Government Organization



Non-Government Organization



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.

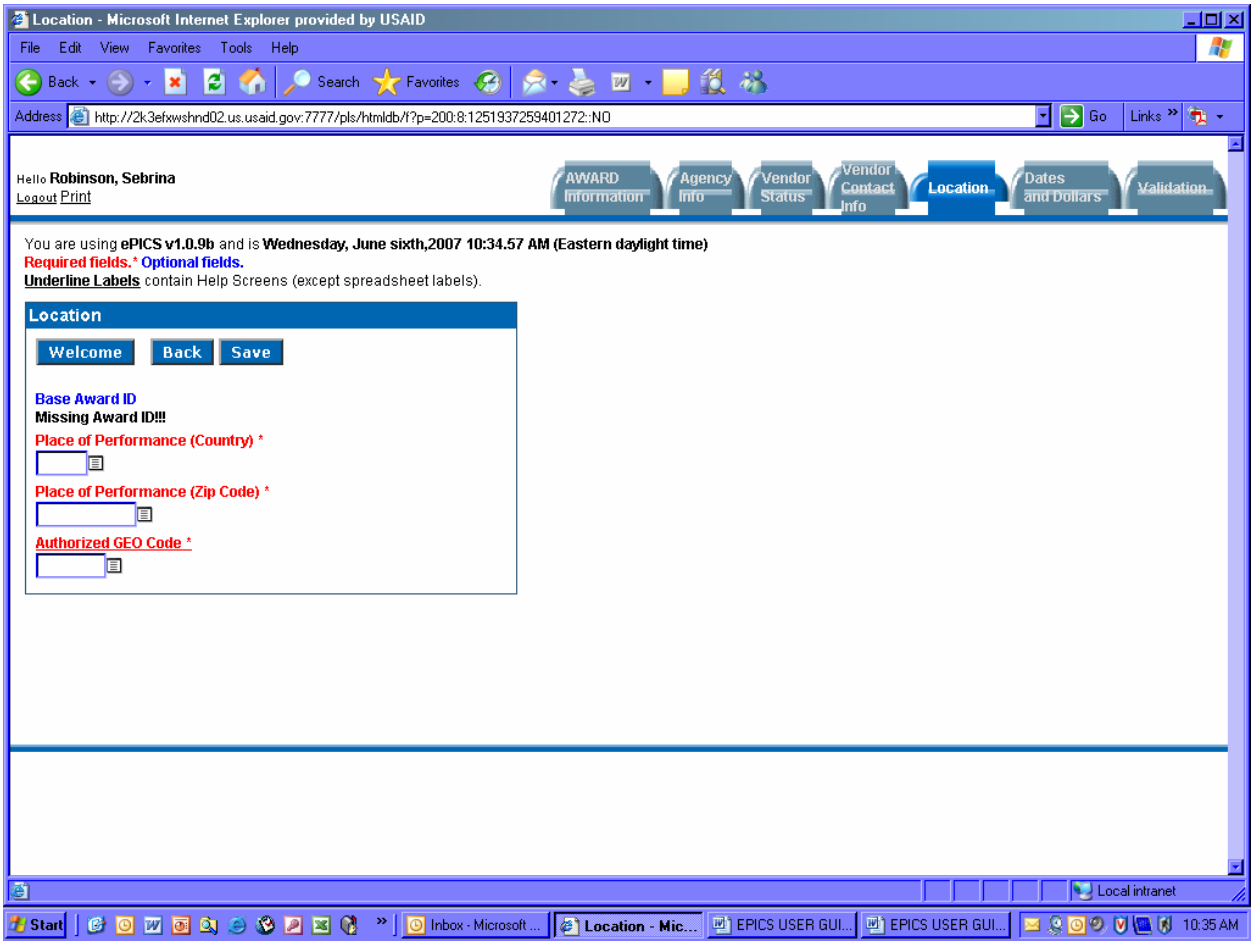
- **123456787 all individuals under US PSCs, FSN PSCs, TCN PSCs or Purchase Orders** will use a generic DUNS and are not required to register with CCR. The Agency has been granted permission temporarily to use a "general" DUNS number for reporting these entities. When issuing an award to an individual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

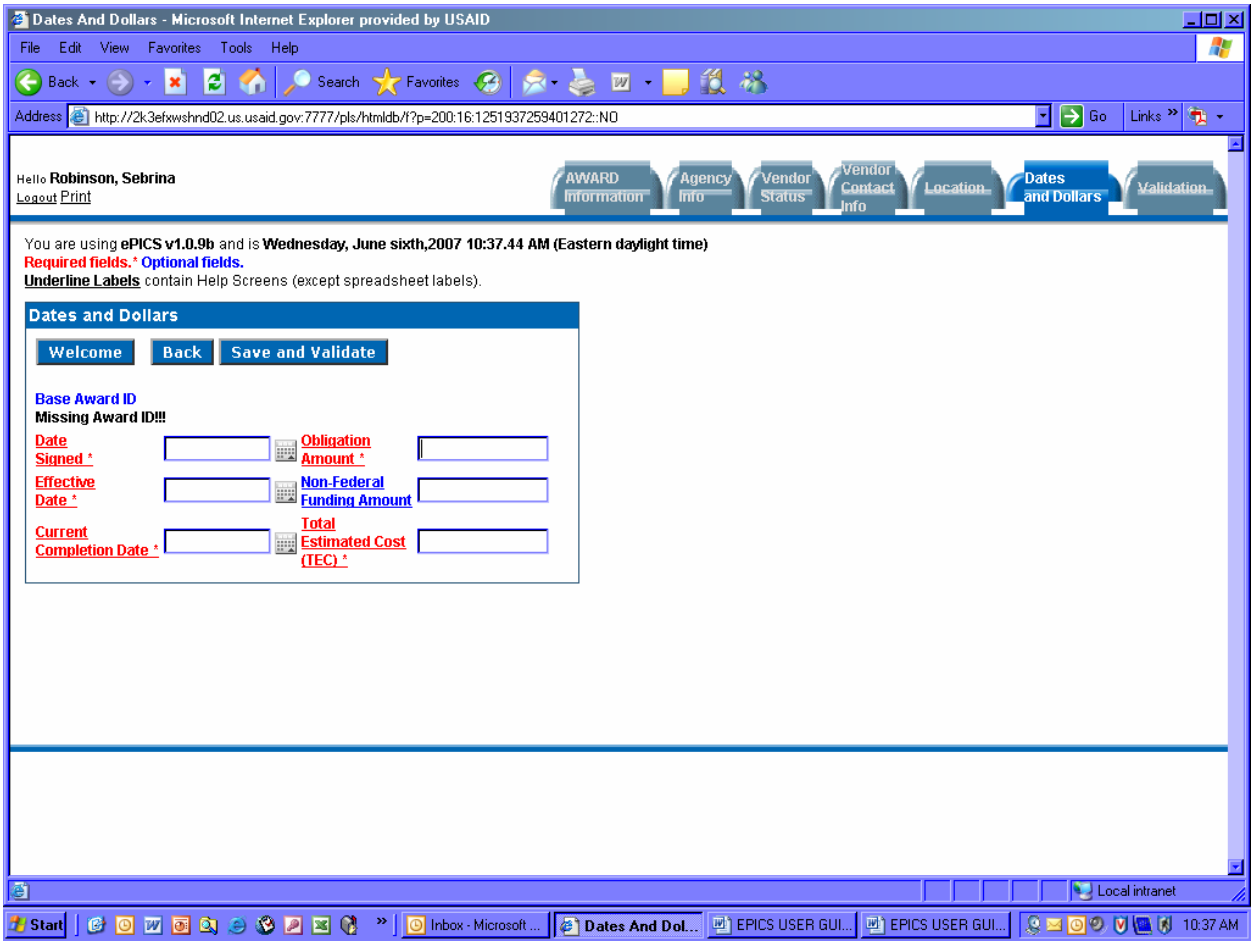
2) **Foreign** = Manufactured outside of the U.S. or if manufactured in the U.S. at least 50% is manufactured outside of the U.S.;
3) **Not Applicable** = Use if Place of Manufacture does not apply such as Services or Construction.

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.

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).

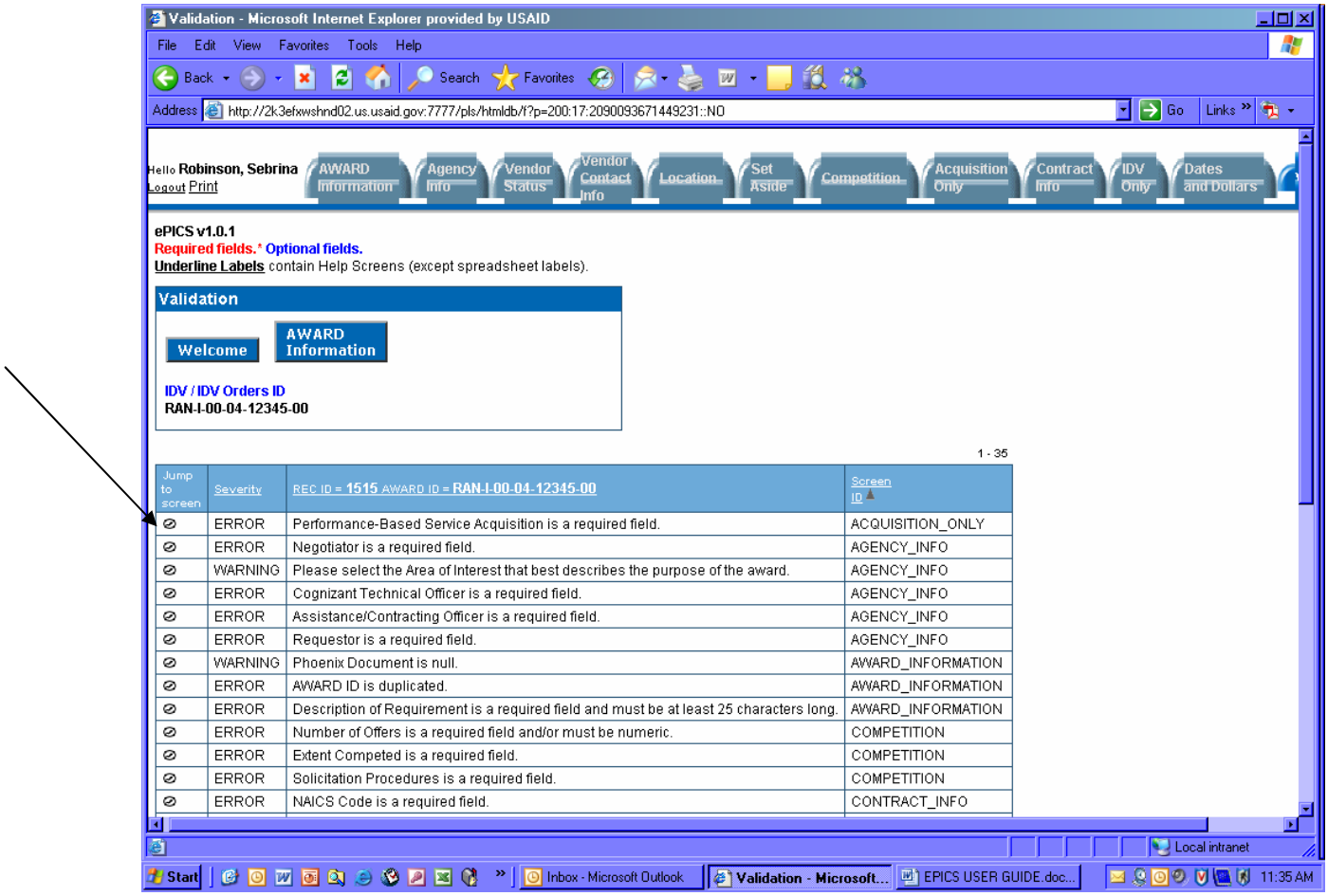
Current Completion Date –
For the base award, report the completion date of the base award plus any options that have been exercised at the time of award. For modifications, report the revised scheduled completion date.

Total Estimated Cost (TEC) –
Enter the TEC for the entire award

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.



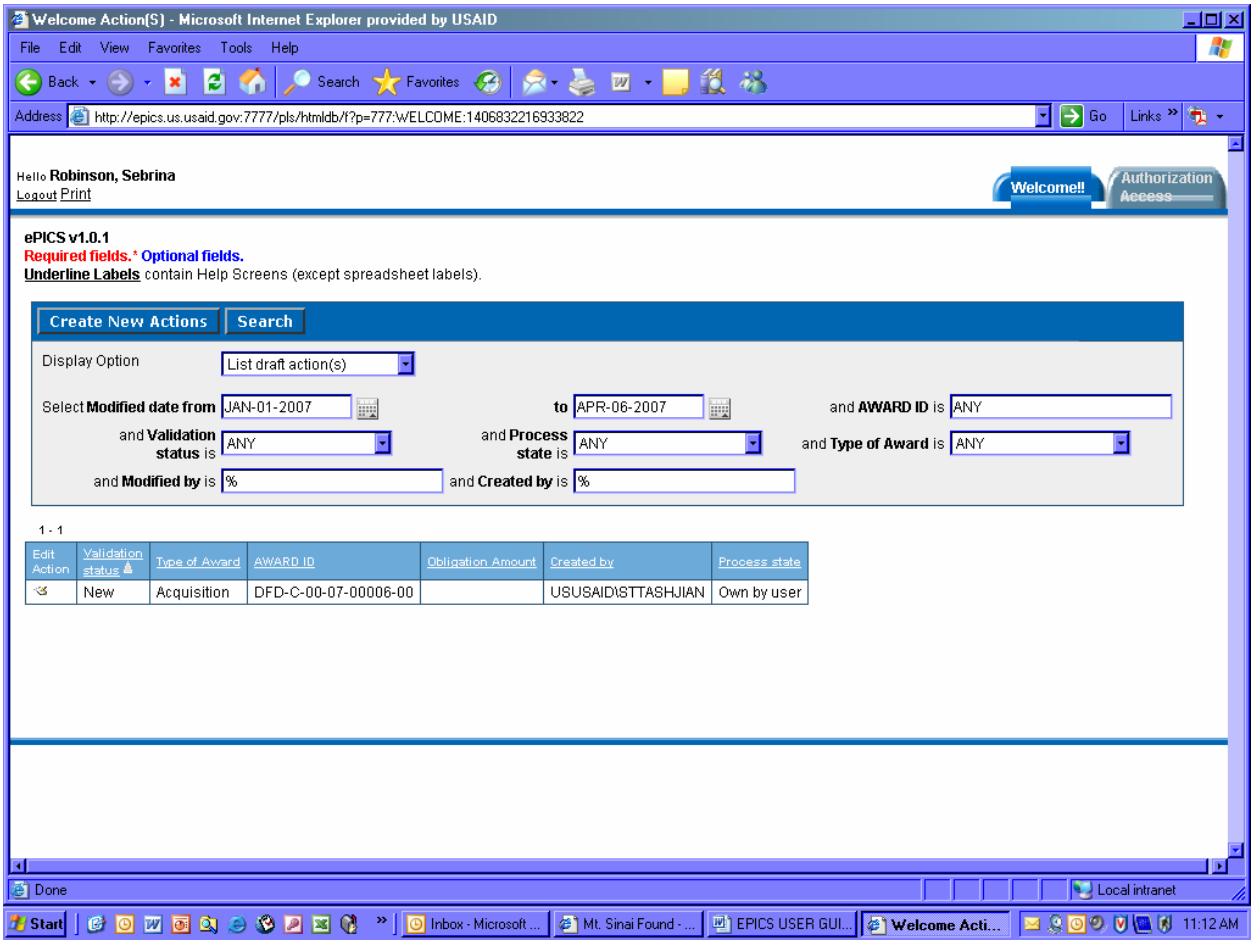
When you click on the symbol in the first column you will be taken to the screen where the error is located.

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 <u>not</u> 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.

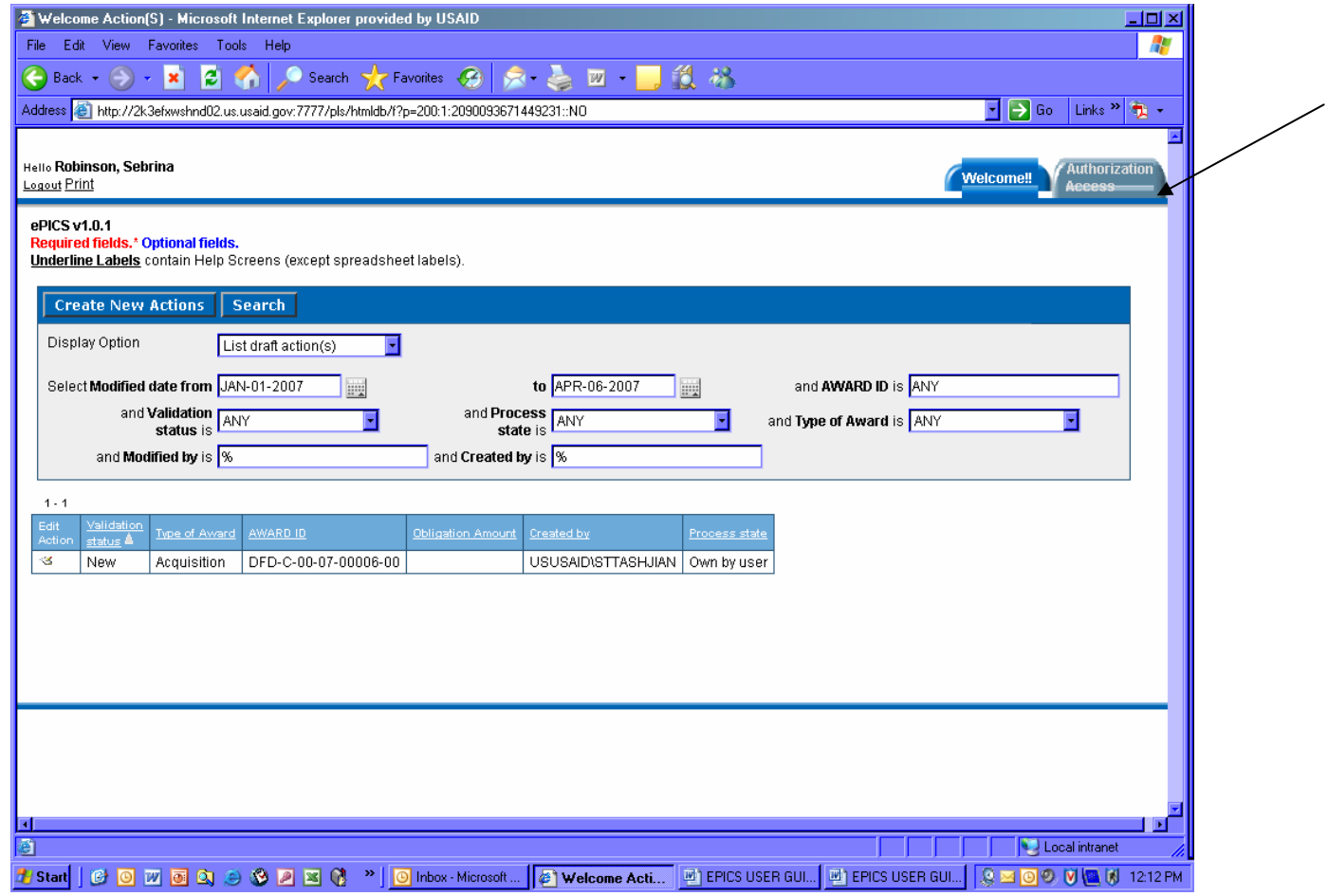
You can search by:

- 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)

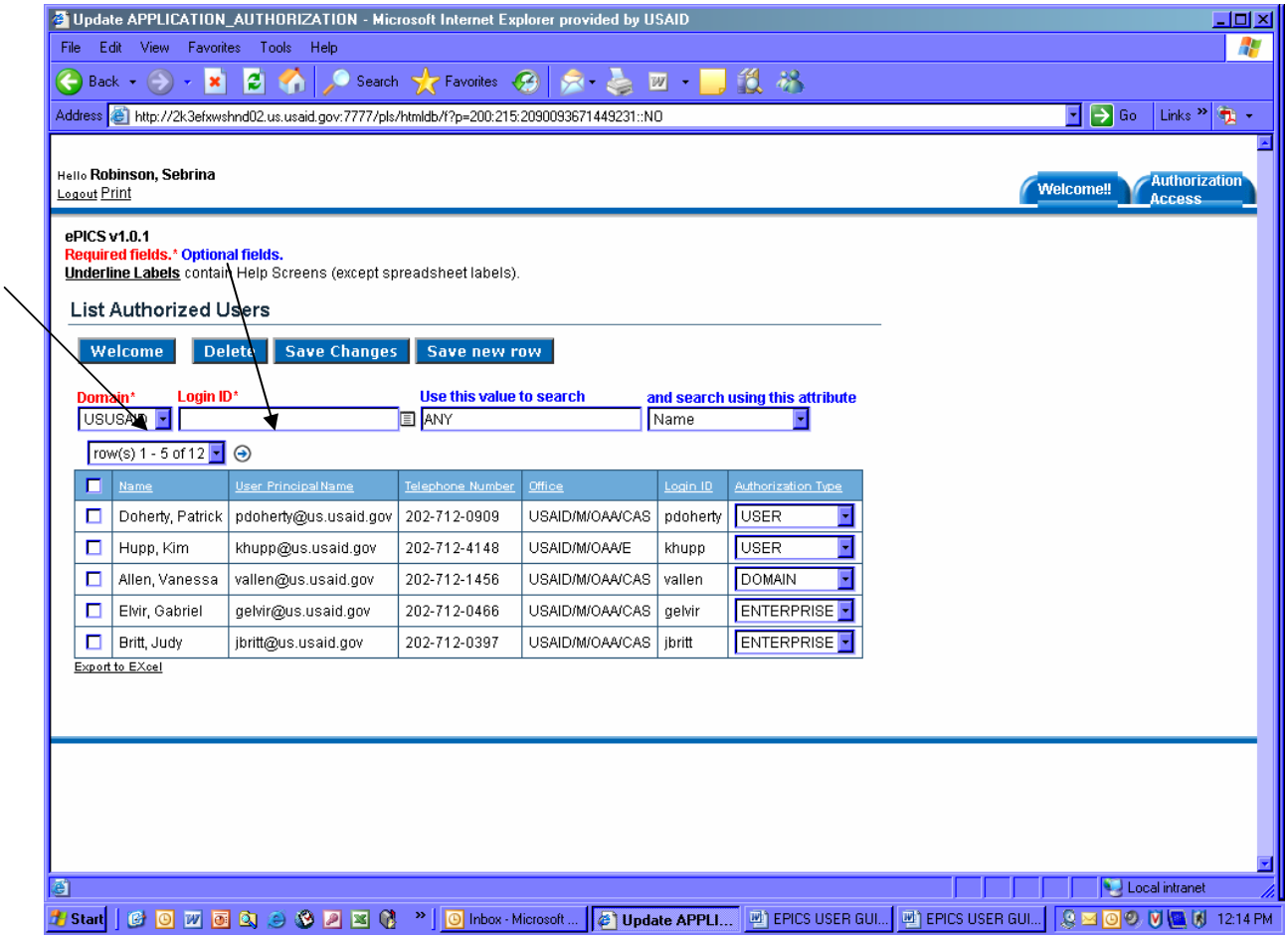
The **"%"** is a wild card and can be used in the fields to broaden the search and assist when all information is not known.

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.**

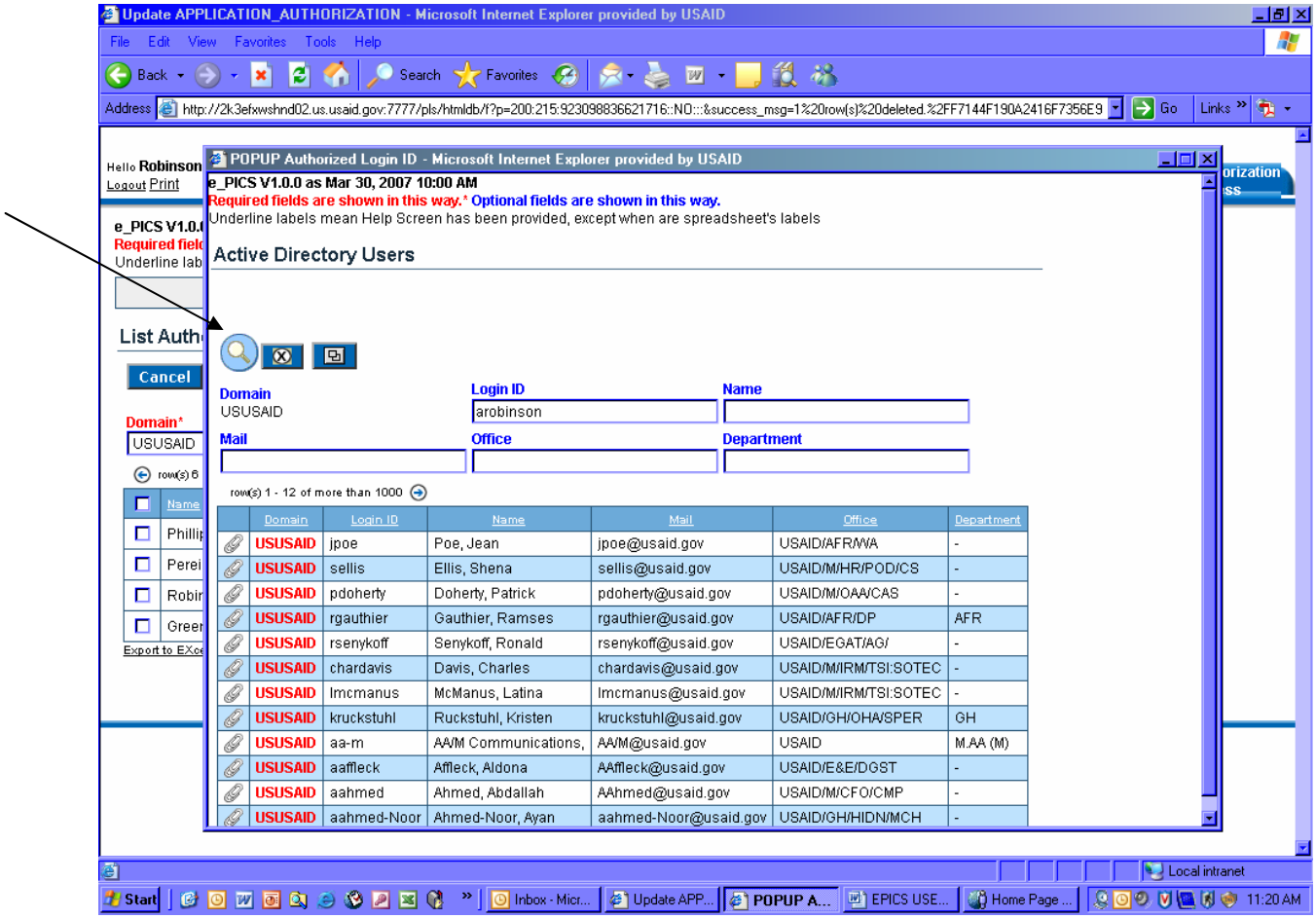


A. Adding A User To The System



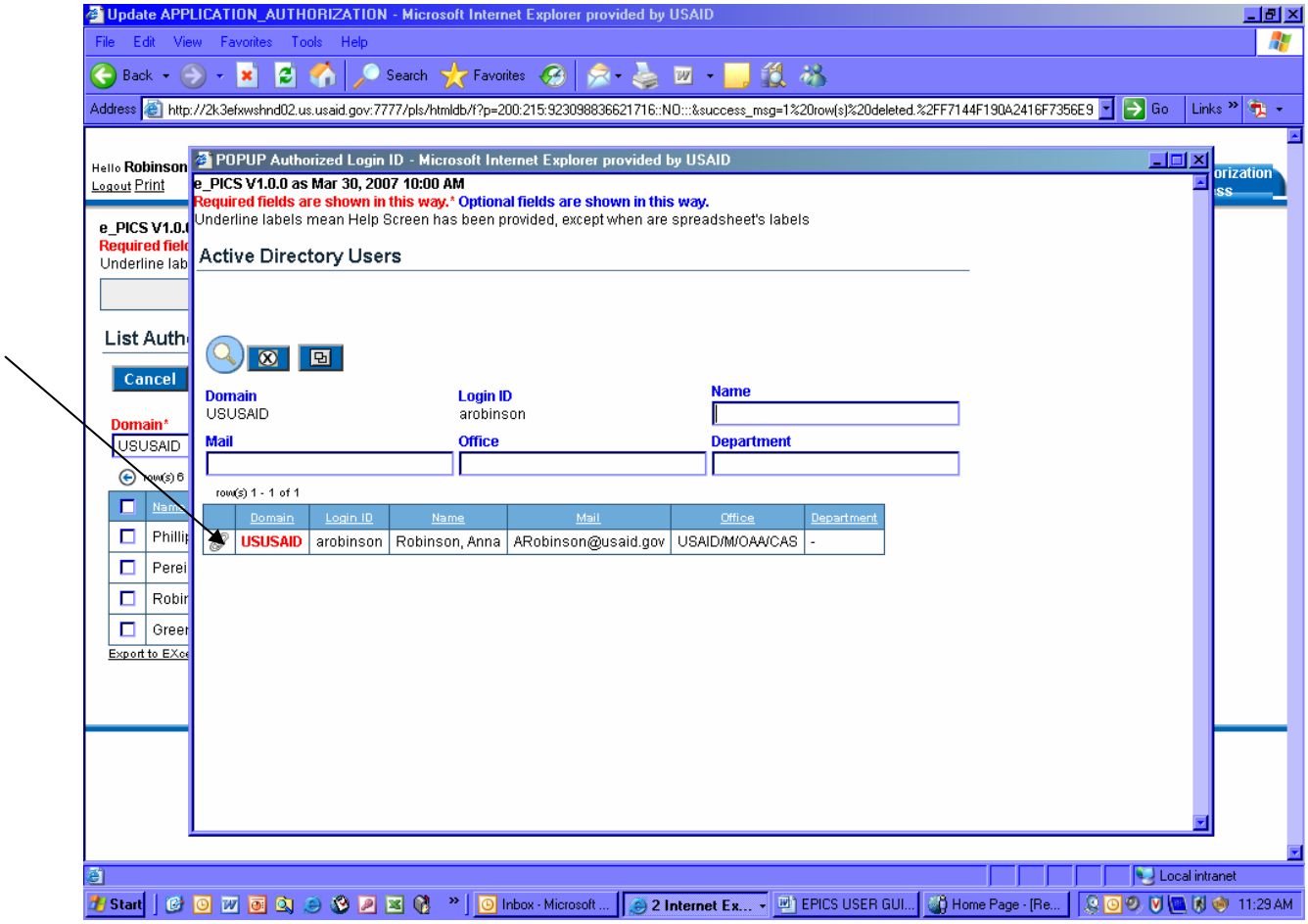
Step 1: From the drop down menu, choose the domain location of the person you are granting access to.

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.

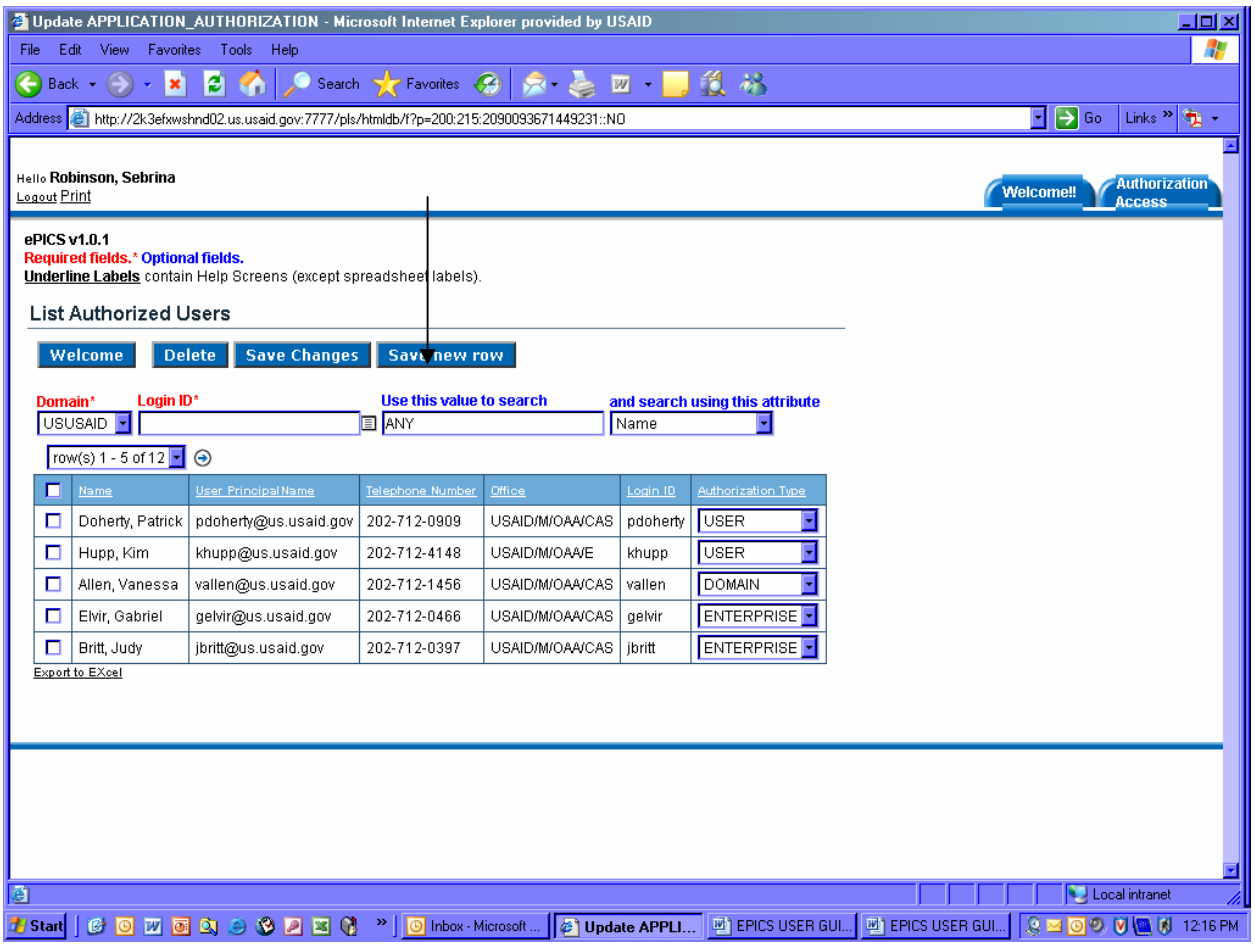


* If you use the look-up button, the screen above will appear and you will have more search options to help locate the person's name. Use the fields provided to type in known information. You may use the "%" as a wild card for any field. Then click the "search" button (the button that resembles a magnifying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

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



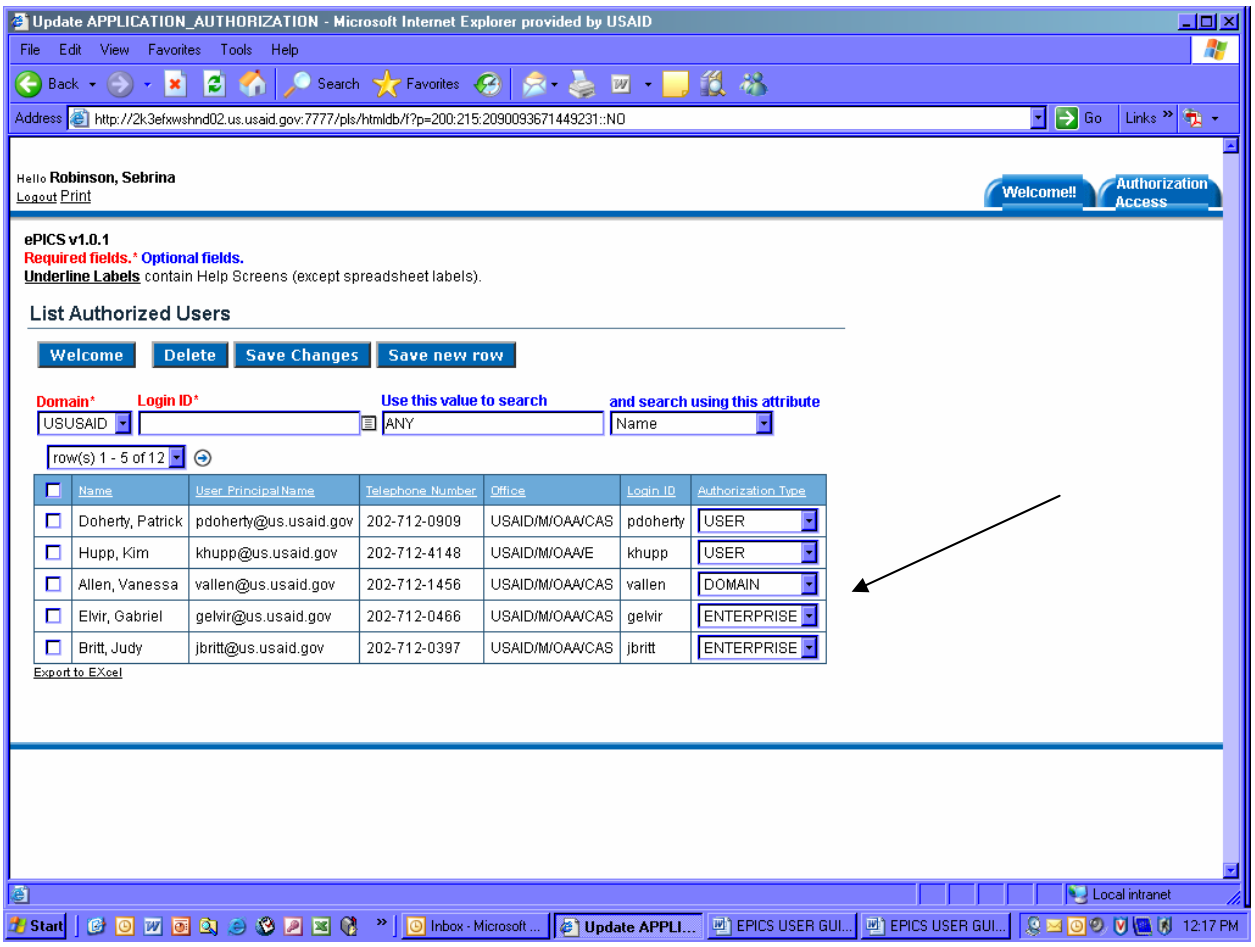
Step 3: Once you locate the person's name in the list, click the paper clip next to their name, and it will populate the person's name in the original screen.



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

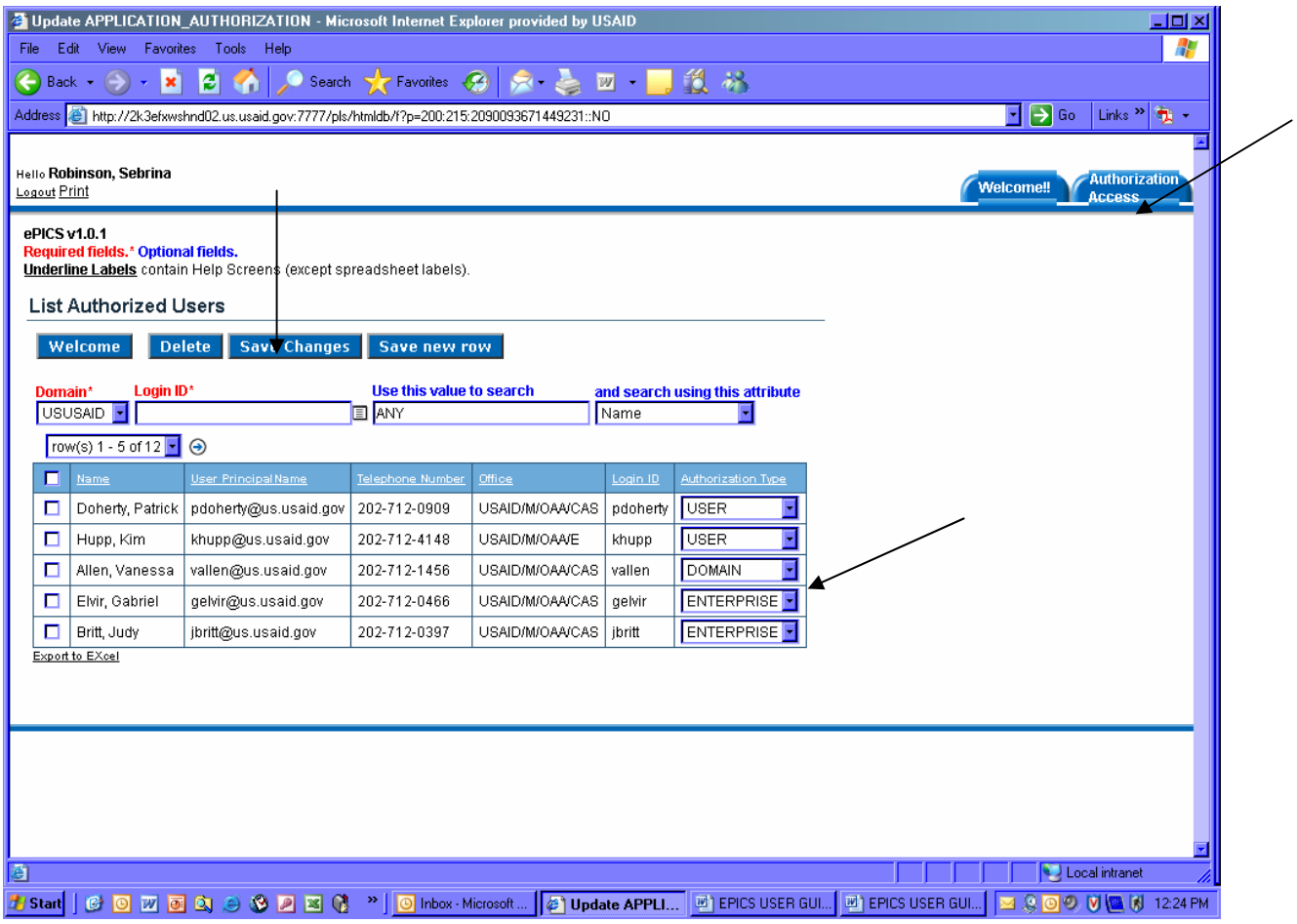


There are three authorization levels in EPICS:

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.

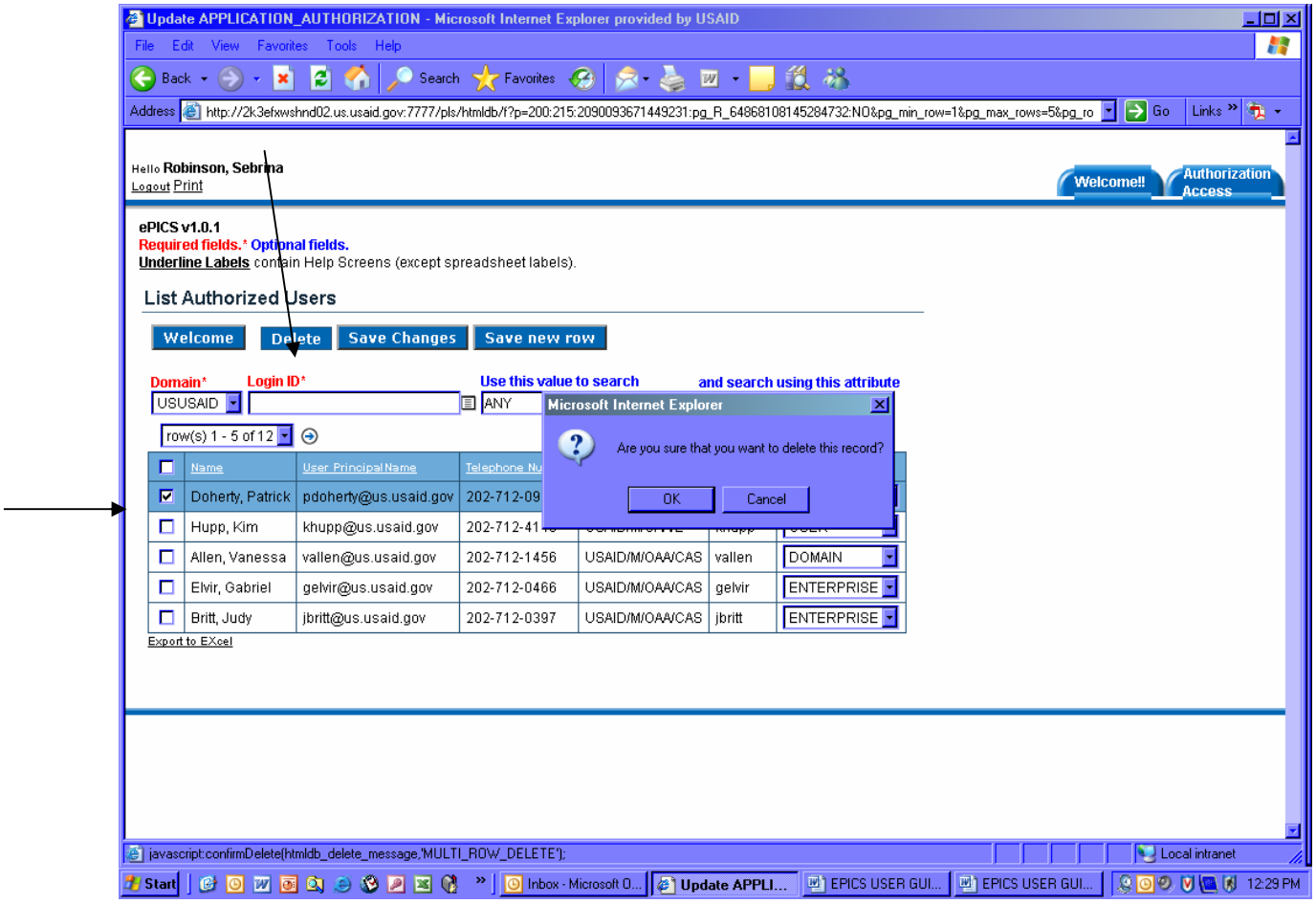


Step 1: Click on the "Authorization Access" tab from the home page.

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