

# User Manual

for the

## Departmental Contracts Information System (DCIS)



**2014**

U.S. Department of Health and Human Services  
Office of the Secretary  
ASAM/OAMP

## VERSION HISTORY

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0					Base Document
1.1	Swain Techs	4/3/2014			Reorganized Document New Cover, Major revisions to sections 1 and 2. Combined section 2 and 3, Added new section 3 and began section 4.
1.2	Swain Techs	4/24/2014			Removed Appendices Added new Section 3, shifted other sections completed section 4-5, started section 6, added section 8 as placeholder
1.3	Swain Techs	4/30/14			Current Version, Delivered to PMO.
1.4	Swain Techs	5/5/2014			Added OTAs
1.5	Swain Techs	7/2/2014			Updated mission statement, prepared document for website deployment.
2.0	Swain Techs	8/21/14			Updated entire document to reflect new DCIS web/application style. Removed Google Application section
2.1	Swain Techs	9/11/14			Revised contact information and the DCIS Front Page section to reflect changes on the website.

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## **1.0 INTRODUCTION**

This document is the User Manual for the enhanced Departmental Contracts Information System (DCIS) for the Department of Health and Human Services (HHS). DCIS provides a system for processing HHS contract actions, interactively and through Contract Writing Systems (CWSs), and reporting them to the Federal Procurement Data System (FPDS).

DCIS operations are conducted through the following program components:

- Web Page, Information and Documentation [dcis.hhs.gov](http://dcis.hhs.gov)
- DCIS Support Team
- DCIS Application and Database
- Reports and Business Intelligence

The DCIS web site contains system documentation, announcements, guidance on specific data issues, contact information, and it provides access to the DCIS application.

The DCIS Support Team may be contacted for assistance in application operations, and data issues and clarifications. The Support Team also assists with report generation, FOIA requests, Congressional inquiries, and other items as needed.

The DCIS application provides a platform for data entry, data lookup and viewing, and generation of standard reports. The application supports web services and provides direct interfaces with acquisition systems and FPDS-NG. All contract actions entered in DCIS simultaneously stored in FPDS-NG.

DCIS provides access to and generation of standard reports. COGNOS is being implemented as the tool for generation of standard reports, ad hoc reports, and data analysis. Additionally custom SQL reports can be acquired through DCIS Support.

### **1.1 DCIS Mission**

DCIS provides procurement data collection and reporting capabilities to enable the HHS Operating Divisions (OPDIVs) to comply with requirements under Public Law 93-400 and FAR Subpart 4.6 regarding the reporting of contract actions to the Federal Procurement Data System (FPDS).

DCIS provides a single system capability within HHS that collects, edits, and stores information on the individual procurement and contracting actions executed by Operating Divisions (OPDIVs) and other offices of HHS.

## 1.2 System Operations and Management Contacts

### 1.2.1 DCIS Support Contacts

**Hours:** 8:00 AM to 5:00 PM Eastern Standard Time, Monday through Friday, excluding Federal Holidays.

**Telephone:** (888) 905-5767

**Email:** [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com)

To open a support ticket, call or send an email explaining the issue to the DCIS support email.

## 2.0 DCIS OVERVIEW

DCIS is made up of several components that work together with multiple Contract Writing Systems (CWSs) to view, retrieve, create, edit, delete, and update contracts which feed into, and are stored in and retrieved from the Federal Procurement Data System (FPDS). The DCIS System components are explained below and are illustrated in Figure 2-1.

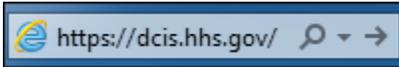
The DCIS system consists of the following integrated components:

1. **Contract Writing Systems:** Multiple CWSs feed data into, and receive data from the DCIS system. The CWSs contain custom interfaces and information that may not be required by DCIS and FPDS, but are vital to OPDIV operations. The majority of DCIS users perform most if not all of their contract related duties within their individual Contract Writing Systems.
2. **DCIS:** DCIS is a single system capability within HHS that collects, edits, and stores information on individual procurement and contract actions executed by the Operating Divisions (OPDIVS) and other Offices. DCIS receives data from the CWSs as well as from FPDS. It coordinates the communications between them, performs data validation, stores HHS required information, and passes required information on to FPDS.
3. **DCIS Front Page:** The DCIS Front Page is the main user portal and hub. It contains DCIS news and alerts, and information links for users. It also contains direct links to the DCIS application and the DCIS Reporting systems (reporting system in development).
4. **DCIS Application:** The DCIS Application acts as a user interface where contracts can be viewed, created, updated, and deleted without the use of a CWS. It is accessed from the DCIS Front Page.
5. **DCIS Reporting/ Business Intelligence:** DCIS contains systems that provide automatic and on demand reports to OPDIVS and individual users. For user generated reports, DCIS is currently transitioning away from the older legacy reporting system, to a new reporting and Business Intelligence system that will be based outside of the main DCIS application. The DCIS Reports will be accessed directly from the DCIS Front Page. Additionally, custom reports are generated using SQL and are available from DCIS Support.
6. **FPDS:** DHHS and all other Federal agencies are required to report any contract estimated to be worth more than \$3000 to the Federal Procurement Data System. Your individual OPDIVs or DHHS will let you know what needs to be reported under that threshold. DCIS is the primary system that handles the FPDS reporting for DHHS. DCIS applies and enforces the FPDS validation and formatting rules to HHS contracts during processing and before they are can be saved in FPDS.

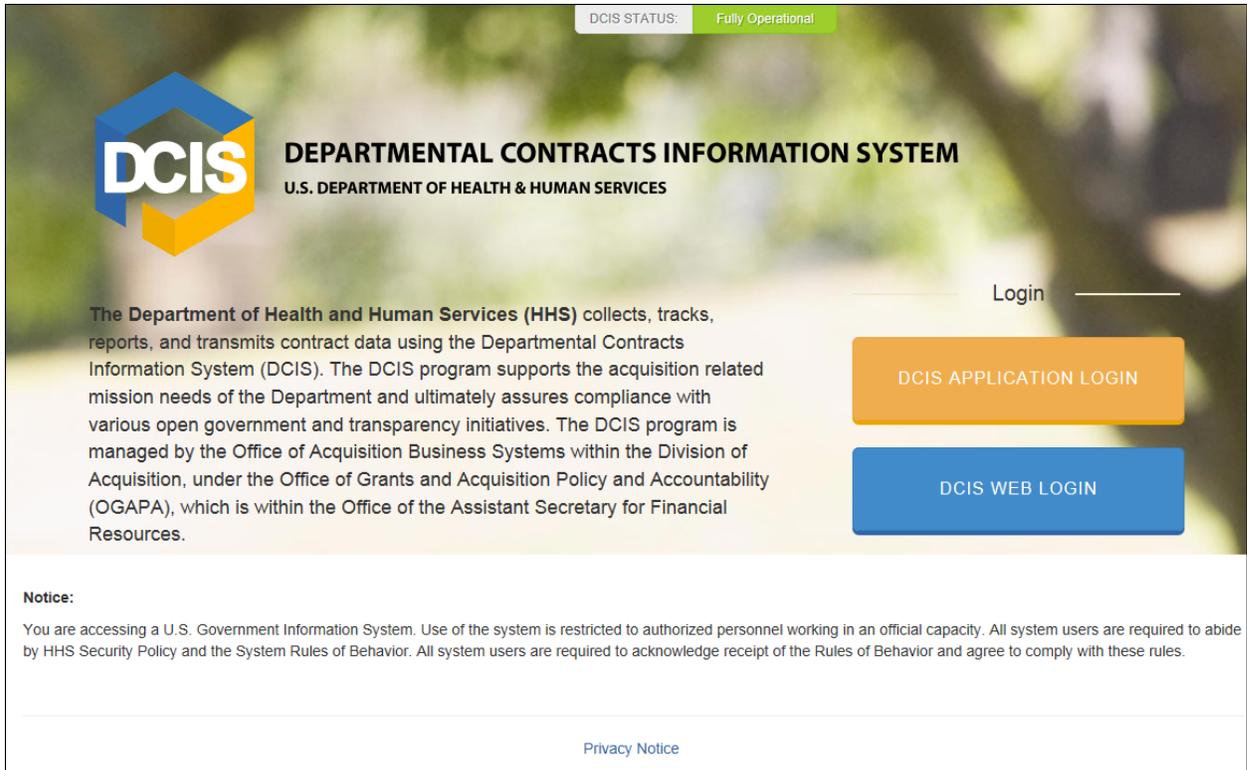
### 3.0 Accessing the DCIS Front Page

The DCIS Front Page is the hub for DCIS user functionality and information.

1. In a browser, navigate to <https://dcis.hhs.gov/> .

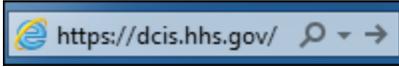


2. The DCIS **Front Page** is the portal to the DCIS application and DCIS Web.

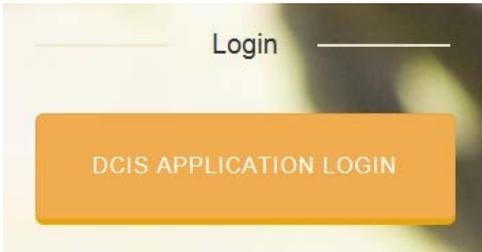


## 4.0 Logging in to DCIS

1. In a browser, navigate to <https://dcis.hhs.gov/> .



2. On the DCIS **Front Page**, click the **DCIS-HHS Login** link.



3. On the next page, read the messages, and then click **I AGREE**.



**U.S. Department of Health and Human Services**  
**Departmental Contracts Information System (Version 1.5.1)**  
Help Desk: [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com) 888-905-5767

**Notice:**

You are accessing a U.S. Government Information System. Use of the system is restricted to authorized personnel working in an official capacity. All system users are required to abide by HHS Security Policy and the System Rules of Behavior. All system users are required to acknowledge receipt of the Rules of Behavior and agree to comply with these rules.

**Receipt Acknowledgement:**

I have received a copy of the [DCIS Rules of Behavior](#) that provides information on individual responsibilities, expected behavior, and the consequences of behavior not consistent with the rules. I have read the rules in their entirety.

I recognize that it is my responsibility to comply with these rules. I also recognize that it is my responsibility to comply with the computer security policies and procedures described in the *HHS Information Security Program Policy*, December 15, 2004.

**I AGREE** to the terms, provisions and guidelines of the *DCIS Rules of Behavior* document.

4. In the **DCIS Login** window:

- In the **Username** field, enter your DCIS username
- In the **Password** field, enter your DCIS password
- Click **Login**.

U.S. Department of Health and Human Services  
Departmental Contracts Information System (Version 1.5.1)  
Help Desk: [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com) 888-905-5767

**DCIS**

Username:  ←

Password:  ←

#### 4.1 Setting a new DCIS Password on First Login

If this is the first login of a new DCIS account, you will be required to set a new password.

If not, please continue to **4.2 Successful Login**.

In the **Change User Password** window:

- In the **Current Password** textbox, enter the same password used to login.
- In the **New Password** textbox, enter a new password based on the following rules:
  - Cannot be the same as the Username
  - Cannot be the same as the current password
  - Must be at least eight characters long
  - Cannot contain spaces (do not hit the spacebar)
  - Must contain at least one letter, at least one number, and at least one special character.
- In the **Re-type New Password** textbox, reenter the password you just created.
- In the **Email (Optional)** textbox, enter your email, (or leave it blank).
- Click **Submit**.

**System Security:**  
Security policy requires your password to be changed at this time.

### Change User Password

Current Password

New Password

Re-type New Password

**GUIDELINE:**

- Password must not be the same as username.
- New password must not be the same as the old password.
- Password must contain at least 8 characters.
- Password must not contain space.
- Password must contain at least one alphabetic character, one numeric character and one special character.

## 4.2 Successful Login

Once an active Username and Password have been submitted correctly, the DCIS application should open with a Welcome (Username) message displayed.



If you have any questions or issues, please contact DCIS support by clicking the [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com) link on any DCIS page, or call 888-905-5767.

## 5.0 DCIS View Tab

The DCIS View tab is accessible to all DCIS users, and provides search and view functionality for DCIS contracts as well as Contractor Information.

### 5.1 Accessing DCIS Views

1. Log into DCIS.
2. Click the **View** tab.



### 5.2 View Contract Information

The contract information screen is used to find and view completed DCIS contracts.

1. In the **View** tab, click the **Contract Information** button.



2. In the **View Contract Information** window fill out at least one of the fields:

**Note:** Not all fields are required for a search; filling out more fields helps narrow the search.

- **Contract Number:** Enter all or part of the Contract Number (if known)
- **Order Number:** Enter all or part of the Order Number (if known)
- **Procurement Instrument Identifier (PIID):** Enter all or part of the PIID (if known)
- **Referenced PIID:** Enter all or part of the Referenced PIID (if known)
- **Modification Number:** Enter all or part of the Modification number (if known)
- **Agency Code:** The agency within which the search will return results (Most users will not be able to change this field)
- **Office Code:** Select a value from this dropdown to list contracts created by a specific office

**Note:** **Office Code** does not narrow down results from the **Contract Number** field. If you want results from a certain office, select the office from **Office Code**, and leave the **Contract Number** field blank. You can search using **Office Code** and any other field.

Click **Search**

**View Contract Information**

Contract Number	Optional
Order Number	Optional
Procurement Instrument Identifier (PIID)	Optional
Modification Number	Optional
Referenced PIID	Optional
Agency Code	Optional
Office Code	Optional (See Note)

**Search** **Clear** **Close**

- In the **Results** list, click the **Contract Number** of the contract you would like to view.

Results 1 - 100 (Maximum 100 results per page) <a href="#">Next Page</a>							
No.	Contract Number	Mod Number	Order Number	Agency Code	Office Code	PIID	Referenced PIID
1	<a href="#">HHSF223201400001A</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001A	0000000000000000
2	<a href="#">HHSF223201400001C</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000
3	<a href="#">HHSF223201400001C</a>	0001	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000

- The **View Contract Information** screen will display with the contract that was selected.

CAR
View
User Profile

Contract Information
Contractor Information

### View Contract Information

Print
Close

<b>Contract Number</b>	HHSF223201400001C	<b>Order Number</b>	0000000000000000
<b>Mod Number</b>	0000		
<b>1A. Procurement Instrument Identifier(PIID)</b>	HHSF223201400001C	<b>1B. Modification Number</b>	0000
<b>1C. Referenced PIID</b>	0000000000000000	<b>1D. Transaction Number</b>	0

### 5.2.1 Printing Contract Information

If a paper record of the contract is needed, or you would like to view the contract information as a form, the Print functionality can be used.

- In the **View Contract Information** window, click the **Print** button.



2. The **DCIS Data Collection Sheet** will display, and is formatted to print to standard 8.5 X 11 sized sheets.

Department of Health and Human Services DCIS Data Collection Sheet		
1A	Procurement Instrument Identifier (PIID)	HHSF223201400001C
1B	Modification Number	0000
1C	Referenced PIID	0000000000000000
1D	Transaction Number	0
1E	Solicitation Identifier	
1F	Agency Identifier	7524
1G	Referenced IDV Modification Number	
1H	Referenced IDV Agency Identifier	
2A	Date Signed(YYYYMMDD)	20140106
2B	Effective Date(YYYYMMDD)	20140106
2C	Current Completion Date(YYYYMMDD)	20150214
2D	Ultimate Completion Date(YYYYMMDD)	20150214
2E	Indefinite Delivery Vehicle Last Date to Order(YYYYMMDD)	
2G	Fiscal Year(YYYY)	
3A	Base and All Options Value \$	172,800
3B	Base and Exercised Options Value \$	86,400
3C	Action Obligation \$	86,400
3G	Non Government Dollars \$	0
4A	Contracting Agency Code	7524
4B	Contracting Office Code	00223
4C	Program/Funding Office - Code	7524
4D	Program/Funding Office - Code	00223
4F	Contract Full/Partially Funded by Foreign Government or International Organization (Y, N)	X
5A	Web Site URL	
5B	Who Can Use 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	
5C	Maximum Order Limit \$	0
5D	Fee for Use of Service FIX - Fixed RVA - Range - Varies by Amount RVO - Range - Varies by Other Factor NO - No Fee	
5E	Fixed Fee Value	0
5F	Fee Range Lower Value	0
5G	Fee Range Upper Value	0
5H	Ordering Procedure	

### 5.3 View Contractor information

The Contractor information screen is used to lookup contractor/ vendor information pulled from the System for Award Management (SAM) and used in DCIS and FPDS.

1. In the **View** tab, click the **Contractor information** button.



2. In the **Contractor Information** window fill out at least one of the fields:

**Note:** Not all fields are required for a search; filling out more fields helps narrow the search.

- **Contractor Name:** Enter all or part of the Contractor/ Vendor name (if known)
- **DUNS Number:** Enter all or part of part of the DUNS Number (if known)
- **Street Address:** Enter all or part of the street address of mailing address of the vendor (if known)
- **Referenced PIID:** Enter all or part of the Referenced PIID (if known)
- **Contractor TIN:** Enter all or part of the Contractor's Taxpayer Information Number (if known)
- **City Name:** Enter all or part of the name of the city from the contractor/ vendor mailing address (if known)
- **Zip Code:** Enter all or part of the zip code from the contractor/ vendor mailing address (if known)
- **State Code:** Select the state from the contractor/ vendor mailing address (if known)
- **Country Code:** Select the country the vendor/ contractor is located in (if known)

**Note:** The following two fields are searchable, but are not displayed to maintain privacy.

- **Owner's Name:** Enter part or all of the company owner's name (if known)
- **Owner Phone:** Enter the first three digits (area code) or the entire 10 digit phone number of the company (if known)

Click **Search**

**Contractor Information**

Contractor Name	<input type="text" value="Optional"/>	DUNS Number	<input type="text" value="Optional"/>
Street Address	<input type="text" value="Optional"/>	Contractor TIN	<input type="text" value="Optional"/>
City Name	<input type="text" value="Optional"/>	Zip Code	<input type="text" value="Optional"/>
State Code	<input type="text" value="Optional"/> ▼	Country Code	<input type="text" value="Optional"/> ▼
Owner Name	<input type="text" value="Optional"/>	Owner Phone	<input type="text" value="Optional"/>

A list of contractors/ vendors will be displayed based on the information entered in the search fields.

Maximum 100 items returned per search

Item No.	Contractor Name	DUNS	Contractor's TIN	Street Address	City Name	State	Zip Code	Country	Doing Business As Name
1	1041 BRIGHTON AVE., LLC	145854571	010519260	1041 BRIGHTON AVE.	PORTLAND	ME	041011042	USA	
2	1301 WRIGHTS LANE PARTNERS LP	078372288	611663238	1301 WRIGHTS LN E	WEST CHESTER	PA	193803443	USA	
3	247 BRIGHTSTAR HEALTHCARE, LLC	121166503	030477762	1790 NATIONS DR STE 103	GURNEE	IL	600319175	USA	

## 6.0 DCIS CAR Tab

The DCIS **CAR** (Individual Contract Action Report) tab contains the tools needed to edit, create, validate, and save HHS contracts. Only users with the correct permissions can access this tab.

**Note:** If you feel you need access to this tab but do not, contact your supervisor or your OPDIV helpdesk. They will need to submit a request to [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com) to have your permissions upgraded.

### 6.1 Accessing DCIS Contracts

1. Log into DCIS. The **CAR** tab is displayed by default.

Or:

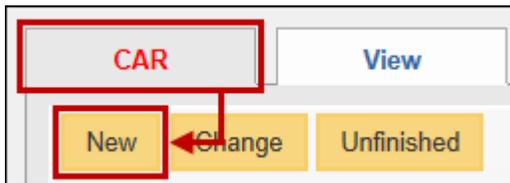
2. If you are already in DCIS, click the **CAR** tab.



### 6.2 Creating a New Contract

The New Contract Information window is used to create new Awards, IDVS, Orders, and Modifications.

1. In the **CAR** tab, click the **New** button.



- In the **New Contract Information** window, select the type of action to be created from the IDV/AWARD Type dropdown menu.

The screenshot shows a window titled "New Contract Information". On the left, there is a label "IDV/Award Type" next to a dropdown menu. The dropdown menu is open, displaying a list of contract action types. The list is as follows:

- AWARD - BPA Call BPA Call
- AWARD - DCA Definitive Contract Action
- AWARD - DO Delivery Order
- AWARD - PO <= \$25K Purchase Order Less Than Or Equal To \$25,000
- AWARD - PO > \$25K Purchase Order Greater Than \$25,000
- IDV - BOA Basic Ordering Agreement
- IDV - BPA Blanket Purchase Agreement
- IDV - BPA under FSS Blanket Purchase Agreement Under Federal Supply Schedule
- IDV - GWAC Government-Wide Agency Contract
- IDV - IDC Indefinite Delivery Contract
- OT - AGREEMENT Other Transaction Agreement
- OT - IDV Other Transaction IDV
- OT - ORDER Other Transaction Order
- Modification Modification

**Note:** If you are not sure what type of action you need to create, consult with your Contract Officer or Supervisor, or contact your OPDIV support desk.

### Award Types

- **AWARD – BPA Call:** A call against an existing blanket purchase agreement to request a service or product provided under the established agreement.
- **AWARD – DCA Definitive Contract Action:** A mutually binding legal relationship obligating the seller to furnish the supplies or services (including construction) and the buyer to pay for them. It includes all types of commitments that obligate the Government to an expenditure of appropriated funds and that, except as otherwise authorized, are in writing.
- **AWARD – DO Delivery Order:** An order for supplies against an established contract.
- **AWARD – PO <= \$25K Purchase Order Less Than Or Equal to \$25,000:** An offer by the Government established to buy supplies or services, including construction and research and development, upon specified terms and conditions, using simplified acquisition procedures. Use this option for all Purchase Orders that are valued at \$25,000 or less.
- **AWARD – PO > \$25K Purchase Order Greater Than \$25,000:** Same as above, but reserved for Purchase Orders valued at more than \$25,000.

## IDV Types

- **IDV – BOA Basic Ordering Agreement:** A written instrument of understanding, negotiated between an agency, contracting activity, or contracting office and a contractor, that contains (1) terms and clauses applying to future contracts (orders) between the parties during its term, (2) a description, as specific as practicable, of supplies or services to be provided, and (3) methods for pricing, issuing, and delivering future orders under the basic ordering agreement. A basic ordering agreement is not a contract.
- **IDV – BPA Blanket Purchase Agreement:** A simplified method of filling anticipated repetitive needs for services and products. BPAs are "charge accounts" that ordering offices establish with contractors to provide themselves with an easy ordering tool.
- **IDV-BPA under FSS Blanket Purchase Agreement Under Federal Supply Schedule:** A Blanket Purchase Agreement under Federal Supply Schedule is a BPA created against an existing Federal Supply Schedule Contract. "Ordering activities shall establish the BPA with the schedule contractor(s) that can provide the supply or service that represents the best value."
- **IDV – GWAC Government-Wide Agency Contract:** A task-order or delivery-order contract for information technology established by one agency for Government wide use that is operated (1) by an executive agent designated by the Office of Management and Budget pursuant to section 5112(e) of the Clinger-Cohen Act, 40 U.S.C. 1412(e); or (2) under a delegation of procurement authority issued by the General Services Administration (GSA) prior to August 7, 1996, under authority granted GSA by the Brooks Act, 40 U.S.C. 759 (repealed by Pub. L. 104-106). A GWAC is a pre-competed, multiple-award, indefinite delivery, indefinite quantity (IDIQ) contract that agencies can use to buy total IT solutions.
- **IDV-IDC Indefinite Delivery Contract:** A vehicle that has been awarded to one or more vendors to facilitate the delivery of supply and service orders.

## Other Transactions Types

- **OT- Agreement – Other Transaction Agreement:** A contract action made outside of the usual Federal procurement regulations. Can only be created by specially authorized users.
- **OT-IDV Other Transaction IDV** A task order or delivery order based contract action made outside of the usual Federal procurement regulations. Can only be created by specially authorized users.
- **OT-Order Other Transaction Order:** Orders placed against internal or external OT-IDVs. Can only be created by specially authorized users.

- 

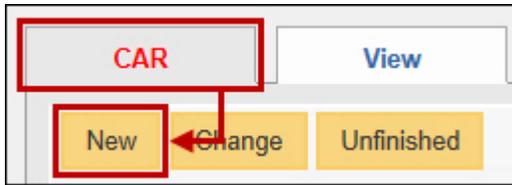
## Modifications

- **Modification:** Created to document changes in contract terms and conditions to existing contract actions.

### 6.2.1 Creating an Award – BPA Call

BPA Calls are issued against an existing BPA IDV.

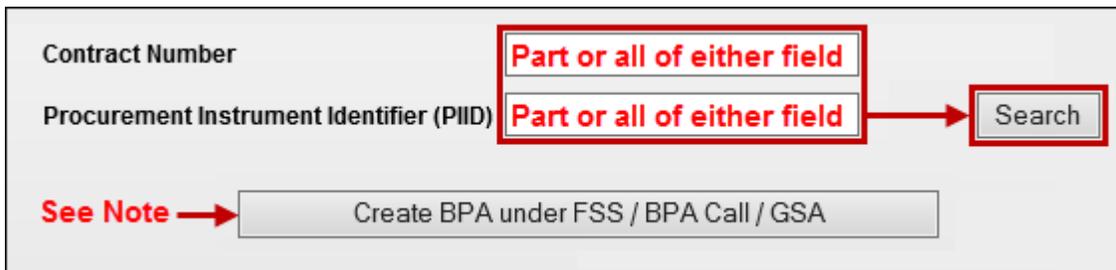
1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **AWARD – BPA Call BPA Call**.



3. The **Contract Number** field and the **Procurement Instrument Identifier (PIID)** field are used to search for the HHS IDV the BPA Call will be issued against. Fill out all or part of either field, and then click **Search**.



**Note:** If you are creating a BPA against a Non HHS FSS or GSA contract, enter the entire **Contract Number**, and then click **Create BPA under FSS/BPA Call/GSA**. Skip to step 5.

4. In the Results table, search for the IDV the BPA will be issued against, and click the link in the **Contract Number** field.

Results 1 - 7 (Maximum 100 results per page)							
No.	Contract Number	Mod Number	Date Signed (MM/DD/YYYY)	Order Number	Agency Code	Office Code	PIID
1	<a href="#">HHSF223201400006I</a>	0000	02/12/2014	0000000000000000	DHRF	00223	HHSF223201400006I
2	<a href="#">HHSF223201400006I</a>	0000	02/14/2014	HHSF22301002T	DHRF	00223	HHSF22301002T

5. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field will be pre-selected for most users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- In the **Order Number** field, enter the order number
- In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
- In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the IDV. (This field is pre populated if you used the **Search** button in step 2.

6. Click the **Create** Button.

**New Contract Information**

**Agency \*** F Food and Drug Administration

**Office \*** 223

**Contract Number:** HHSF223201400006I

**Order Number:** HHS F 223 12345

**Mod Number:**

**Referenced Agency ID:** 7524

Cancel Create Close

7. See section **6.3** for information on completing contracts.

### 6.2.2 Creating an Award – DCA Definitive Contract Action

A Definitive Contracts is a mutually binding legal relationship obligating the seller to furnish the supplies or services (including construction) and the buyer to pay for them. It includes all types of commitments that obligate the Government to an expenditure of appropriated funds and that, except as otherwise authorized, are in writing.

1. In the **CAR** tab, click **New**.

CAR View

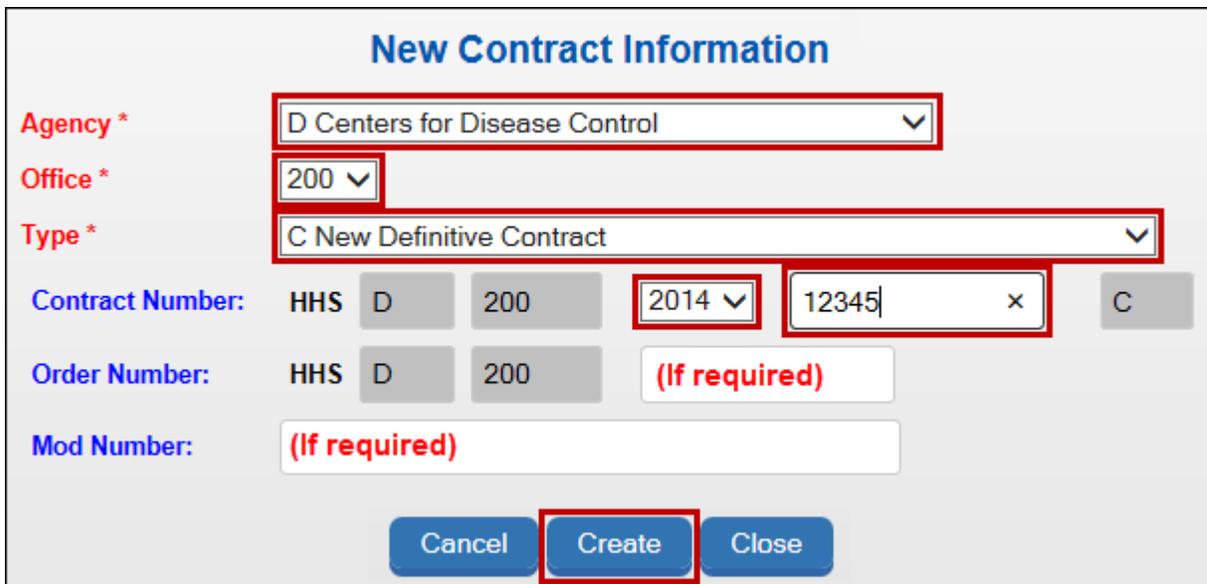
New Change Unfinished

- From the **IDV/Award Type** dropdown choose **AWARD – DCA Definitive Contract Action** and then click **Next**.



The screenshot shows a window titled "New Contract Information". At the top, the title is in blue. Below the title, there is a dropdown menu labeled "IDV/Award Type" with the selected option "AWARD - DCA Definitive Contract Action". A red box highlights the dropdown menu. Below the dropdown menu is a button labeled "Next", also highlighted with a red box.

- In the **New Contract Information** window:
  - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
  - From the **Office** dropdown, select your office number or the number of the office issuing the contract
  - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
  - In the **Contract Number** field
    - Select the year the contract was awarded
    - Enter the contract number
  - (Optional) In the **Order Number** field, enter the order number if required
  - (Optional) In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
- Click the **Create** Button.



The screenshot shows a window titled "New Contract Information". The fields are as follows:

- Agency \***: D Centers for Disease Control
- Office \***: 200
- Type \***: C New Definitive Contract
- Contract Number:** HHS D 200 2014 12345 C
- Order Number:** HHS D 200 (If required)
- Mod Number:** (If required)

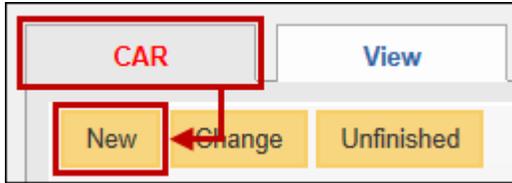
At the bottom, there are three buttons: Cancel, Create, and Close. The Create button is highlighted with a red box.

- See section **6.3** for information on completing contracts.

### 6.2.3 Creating an Award – DO Delivery Order

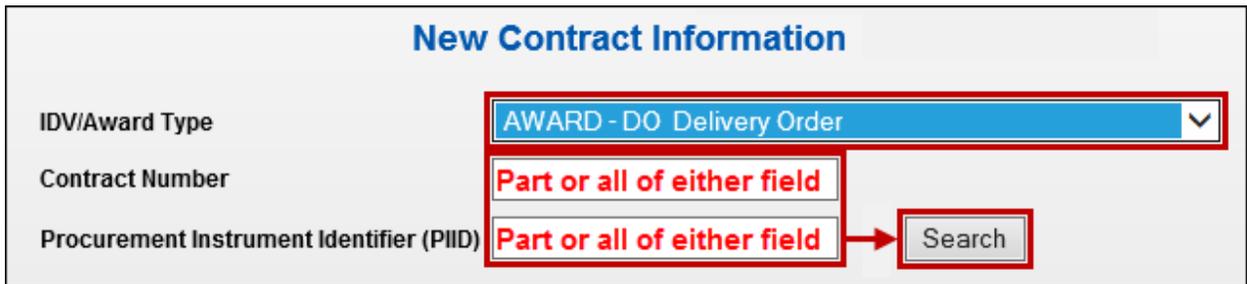
A Delivery Order is an order for supplies against an established contract.

1. In the **CAR** tab, click **New**.



2. In the **New Contract Information** window:

- From the **IDV/Award Type** dropdown choose **AWARD – DO Delivery Order**
- The **Contract Number** field and the **Procurement Instrument Identifier (PIID)** field are used to search for the contract the Delivery Order will be issued against. Fill out all or part of either field, and then click **Search**



3. In the **Results** table, search for the contract the DO will be issued against, and click the link in the **Contract Number** field.

Results 1 - 7 (Maximum 100 results per page)							
No.	Contract Number	Mod Number	Date Signed (MM/DD/YYYY)	Order Number	Agency Code	Office Code	PIID
1	<a href="#">HHSF223201400006I</a>	0000	02/12/2014	0000000000000000	DHRF	00223	HHSF223201400006I
2	<a href="#">HHSF223201400006I</a>	0000	02/14/2014	HHSF22301002T	DHRF	00223	HHSF22301002T

4. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field will be pre-selected for most users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- In the **Order Number** field, enter the order number
- In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
- In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the Contract. (This field is usually pre populated)

5. Click the **Create** Button.

**New Contract Information**

**Agency \*** F Food and Drug Administration

**Office \*** 223

**Contract Number:** HHSF223201400006I

**Order Number:** HHS F 223 12345

**Mod Number:**

**Referenced Agency ID:** 7524

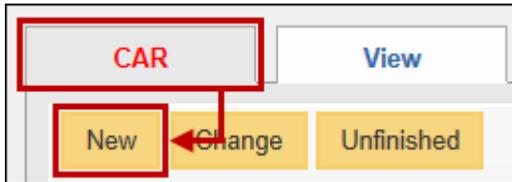
Cancel Create Close

6. See section **6.3** for information on completing contracts.

## 6.2.4 Creating an Award – Purchase Order

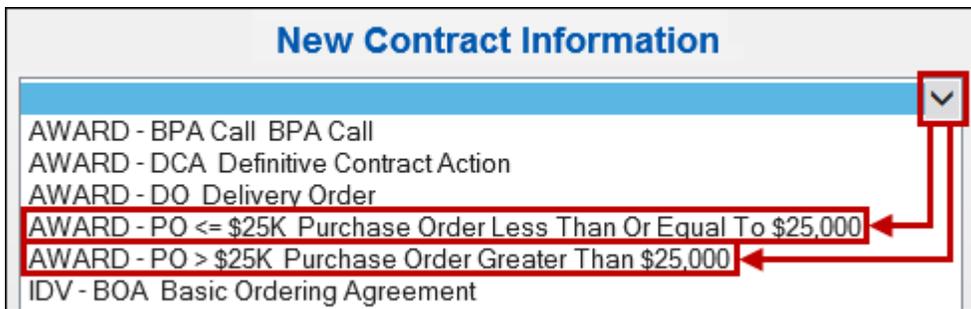
A Purchase Order is an offer by the Government established to buy supplies or services, including construction and research and development, upon specified terms and conditions, using simplified acquisition procedures.

1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown:

- Choose **AWARD – PO <= \$25K Purchase Order Less Than or Equal to \$25,000** if the purchase order being created is for \$25,000 or less
- Choose **AWARD – PO > \$25K Purchase Order Greater Than \$25,000** if the purchase order being created for more than \$25,000



3. Click **Next**.



4. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
- In the **Contract Number** field
  - Select the year the contract was awarded
  - Enter the contract number

5. Click the **Create** Button.

The screenshot shows the 'New Contract Information' window. The title bar reads 'New Contract Information'. The form contains the following elements:

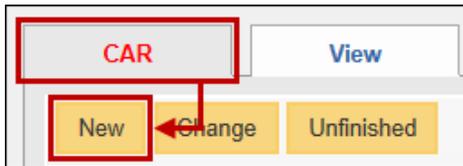
- Agency \***: A dropdown menu with 'I Indian Health Service' selected.
- Office \***: A dropdown menu with '102' selected.
- Type \***: A dropdown menu with 'P Purchase Using Simplified Acquisition' selected.
- Contract Number:** A grid of input fields. The first row contains 'HHS', 'I', '102', '2014', '123456', and 'P'. The '2014' and '123456' fields are highlighted with red boxes.
- Order Number:** A grid of input fields. The first row contains 'HHS', 'I', '102', and an empty field.
- Mod Number:** An empty input field.
- Buttons:** 'Cancel', 'Create', and 'Close'. The 'Create' button is highlighted with a red box.

6. See section **6.3** for information on completing contracts.

### 6.2.5 Creating an IDV – Basic Ordering Agreement

A Basic Ordering Agreement is a written instrument of understanding, negotiated between an agency, contracting activity, or contracting office and a contractor, that contains (1) terms and clauses applying to future contracts (orders) between the parties during its term, (2) a description, as specific as practicable, of supplies or services to be provided, and (3) methods for pricing, issuing, and delivering future orders under the basic ordering agreement. A basic ordering agreement is not a contract.

1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **IDV – BOA Basic Ordering Agreement** and then click **Next**.



3. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
- In the **Contract Number** field
  - Select the year the contract was awarded
  - Enter the contract number

4. Click the **Create** Button.

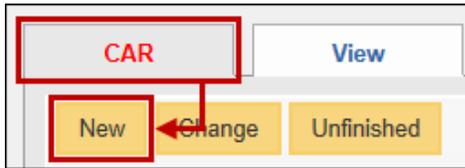


5. See section **6.3** for information on completing contracts.

## 6.2.6 Creating an IDV – Blanket Purchase Agreement

A Blanket Purchase Agreement is a simplified method of filling anticipated repetitive needs for services and products. BPAs are "charge accounts" that ordering offices establish with contractors to provide themselves with an easy ordering tool.

1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **IDV – BOA Blanket Purchase Agreement** and then click **Next**.



3. In the **New Contract Information** window:
  - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
  - From the **Office** dropdown, select your office number or the number of the office issuing the contract
  - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
  - In the **Contract Number** field
    - Select the year the contract was awarded
    - Enter the contract number
4. Click the **Create** Button.



5. See section **6.3** for information on completing contracts.

## 6.2.7 Creating an IDV – Blanket Purchase Agreement Under Federal Supply Schedule (BPA FSS)

A Blanker Purchase Agreement under Federal Supply Schedule is a BPA created against an existing Federal Supply Schedule Contract. “Ordering activities shall establish the BPA with the schedule contractor(s) that can provide the supply or service that represents the best value.”

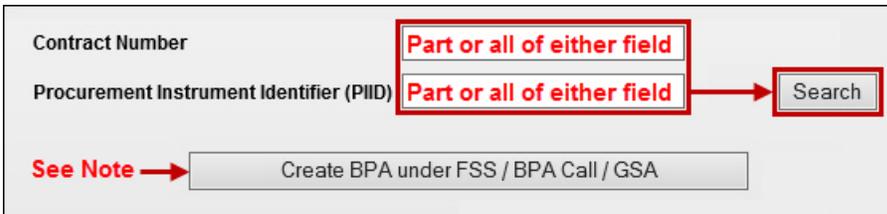
1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **IDV-BPA under FSS Blanket Purchase Agreement under Federal Supply Schedule**.



3. The **Contract Number** field and the **Procurement Instrument Identifier (PIID)** field are used to search for the HHS FSS contract the BPA FSS will be based on. Fill out all or part of either field, and then click **Search**.



**Note:** If you are creating a BPA FSS against a Non HHS FSS or GSA contract, enter the entire **Contract Number**, and then click **Create BPA under FSS/BPA Call/GSA**. Skip to step 5.

4. In the **Results** table, search for the FSS contract the BPA FSS will be issued against, and click the link in the **Contract Number** field.

Results 1 - 100 (Maximum 100 results per page) <a href="#">Next Page</a>							
No.	Contract Number	Mod Number	Order Number	Agency Code	Office Code	PIID	Referenced PIID
1	<a href="#">HHSF223201400001A</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001A	0000000000000000
2	<a href="#">HHSF223201400001C</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000
3	<a href="#">HHSF223201400001C</a>	0001	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000

5. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field will be pre-selected for most users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
- In the **Contract Number** field
  - Select the year the contract was awarded
  - Enter the contract number
- In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
- In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the FSS contract. (This field is pre populated if you used the **Search** button in step 2.

6. Click the **Create** Button.

The screenshot shows a web form titled "New Contract Information". The form contains the following fields and controls:

- Agency \***: A dropdown menu with "M Centers for Medicare and Medicaid Services" selected.
- Office \***: A dropdown menu with "500" selected.
- Type \***: A dropdown menu with "B Blanket Purchase Agreement (BPA)" selected.
- GSA Contract Number:** A text input field containing "HHSF223201400001A".
- Contract Number:** A series of input fields: "HHS", "M", "500", a dropdown menu with "2014" selected, a text input field with "66447", a clear button "x", and a dropdown menu with "B" selected.
- Mod Number:** An empty text input field.
- Referenced Agency ID:** A text input field containing "7524".
- At the bottom, there are three buttons: "Cancel", "Create" (highlighted with a red box), and "Close".

7. See section **6.3** for information on completing contracts.

## 6.2.8 Creating an IDV – GWAC Government Wide Agency Contract

A GWAC is a task-order or delivery-order contract for information technology established by one agency for Government wide use that is operated (1) by an executive agent designated by the Office of Management and Budget pursuant to section 5112(e) of the Clinger-Cohen Act, 40 U.S.C. 1412(e); or (2) under a delegation of procurement authority issued by the General Services Administration (GSA) prior to August 7, 1996, under authority granted GSA by the Brooks Act, 40 U.S.C. 759 (repealed by Pub. L. 104-106). A GWAC is a pre-competes, multiple-award, indefinite delivery, indefinite quantity (IDIQ) contract that agencies can use to buy total IT solutions.

1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **IDV-GWAC Government-Wide Agency Contract** and then click **Next**.



3. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
- In the **Contract Number** field
  - Select the year the contract was awarded
  - Enter the contract number
- (Optional) In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank

4. Click the **Create** Button.

**New Contract Information**

**Agency \*** S Substance Abuse Health Administration

**Office \*** 270

**Type \*** W GWAC

**Contract Number:** HHS S 270 2014 55448 x W

**Order Number:** HHS S 270

**Mod Number:**

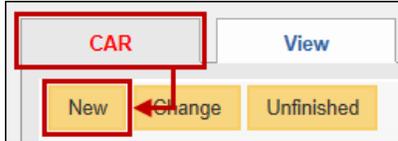
Cancel Create Close

5. See section **6.3** for information on completing contracts.

## 6.2.9 Creating an IDV – IDC Indefinite Delivery Contract

An Indefinite Delivery contract is a vehicle that has been awarded to one or more vendors to facilitate the delivery of supply and service orders.

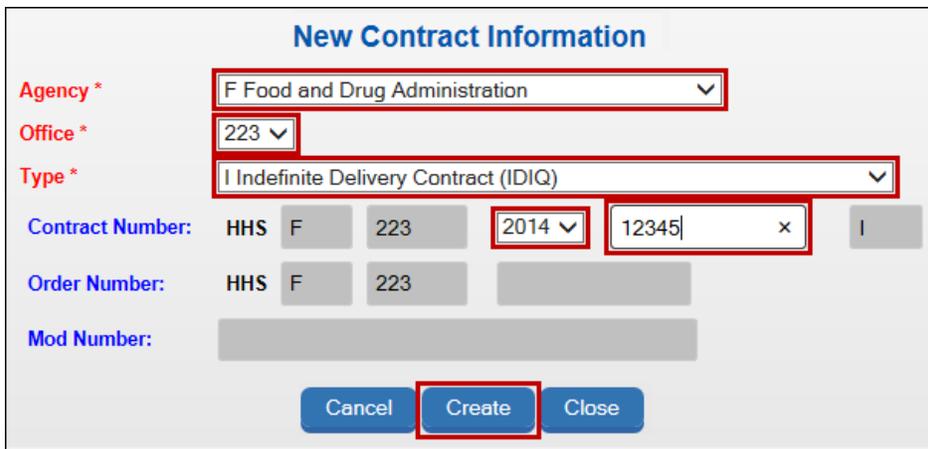
1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **IDV-ICD Indefinite Delivery Contract** and then click **Next**.



3. In the **New Contract Information** window:
  - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
  - From the **Office** dropdown, select your office number or the number of the office issuing the contract
  - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
  - In the **Contract Number** field:
    - Select the year the contract was awarded
    - Enter the contract number
4. Click the **Create** Button.



5. See section **6.3** for information on completing contracts.

## 6.2.10 Creating an OT Agreement – Other Transaction Agreement

An Other Transaction Agreement (OTA) is a contract action made outside of the usual Federal procurement regulations. OTAs can only be created by specially authorized users.

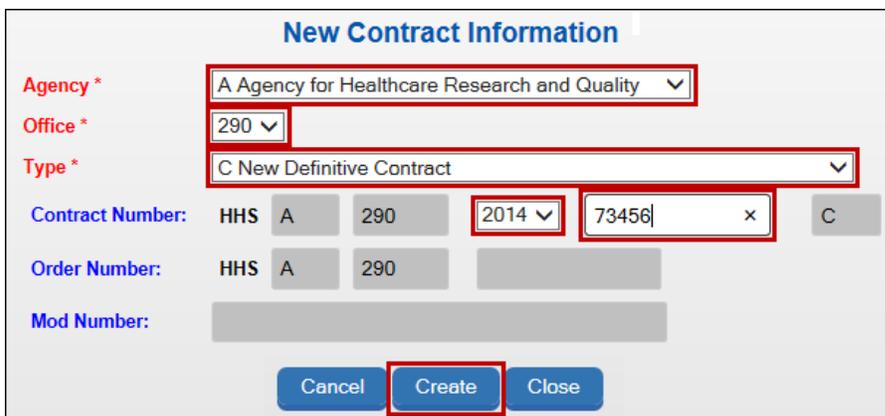
1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **OT – AGREEMENT Other Transaction Agreement** and then click **Next**.



3. In the **New Contract Information** window:
  - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field may be pre-selected for some users)
  - From the **Office** dropdown, select your office number or the number of the office issuing the contract
  - From the **Type** dropdown, select the type of contract you are creating. (For OTAs, choose the type of contract that comes closest to the OTA being issued. For IDVs see next section.)
  - In the **Contract Number** field:
    - Select the year the contract was awarded
    - Enter the contract number
4. Click the **Create** Button.



5. See section **6.3** for information on completing contracts.

### 6.2.11 Creating an OT IDV – Other Transaction IDV

An Other Transaction IDV (OT-IDV) is a task order or delivery order based contract action made outside of the usual Federal procurement regulations. OT-IDVs can only be created by specially authorized users.

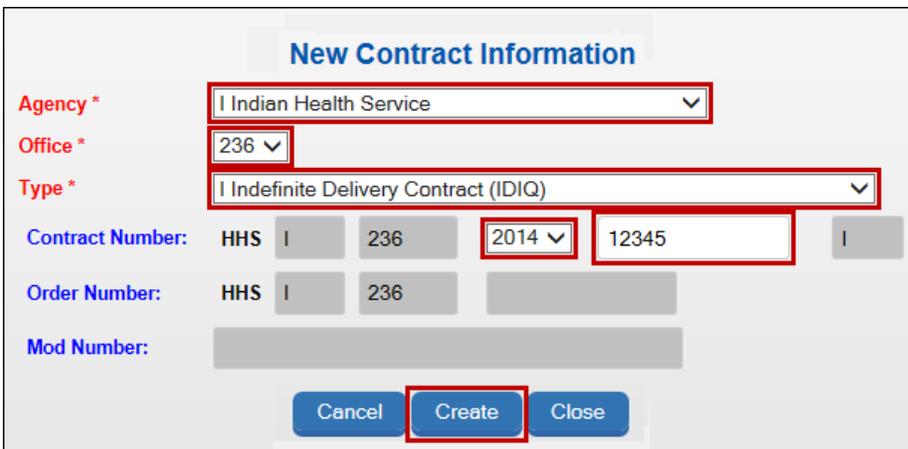
1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **OT – IDV Other Transaction IDV** and then click **Next**.



3. In the **New Contract Information** window:
  - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field may be pre-selected for some users)
  - From the **Office** dropdown, select your office number or the number of the office issuing the contract
  - From the **Type** dropdown, select the type of contract you are creating. (For OT-IDVs, choose the type of contract that comes closest to the IDV being issued. For contracts see the previous section.)
  - In the **Contract Number** field:
    - Select the year the contract was awarded
    - Enter the contract number
4. Click the **Create** Button.



5. See section **6.3** for information on completing contracts.

## 6.2.12 Creating an OT-Order Other Transaction Order

An Other Transaction Order (OTO) is an order placed against internal or external OT-IDVs. OTOs can only be created by specially authorized users.

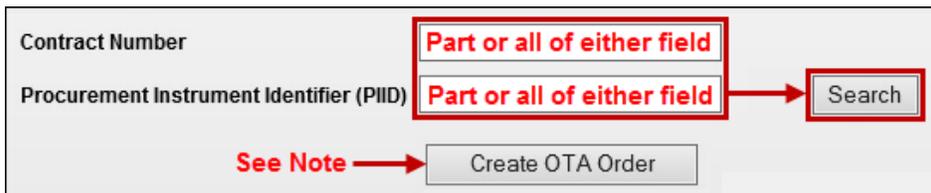
1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **OT-Order Other Transaction Order** and then click **Next**.



3. The **Contract Number** field and the **Procurement Instrument Identifier (PIID)** field are used to search for the HHS OT- IDV or contract the order will be based on. Fill out all or part of either field, and then click **Search**.



**Note:** If you are creating a OTA Order against a Non HHS OT-IDV or GSA contract, enter the entire **Contract Number**, and then click **Create OTA Order**. Skip to step 5.

4. In the **Results** table, search for the OT-IDV or contract the OTA Order will be issued against, and click the link in the **Contract Number** field.

Results 1 - 100 (Maximum 100 results per page) <a href="#">Next Page</a>							
No.	Contract Number	Mod Number	Order Number	Agency Code	Office Code	PIID	Referenced PIID
1	<a href="#">HHSF223201400001A</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001A	0000000000000000
2	<a href="#">HHSF223201400001C</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000
3	<a href="#">HHSF223201400001C</a>	0001	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000

5. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field may be pre-selected for some users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- In the **Order Number** field, enter the order number
- In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
- In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the Contract. (This field is usually pre populated)

6. Click the **Create** Button.

**New Contract Information**

**Agency \*** F Food and Drug Administration

**Office \*** 223

**Contract Number:** HHSF223201400006I

**Order Number:** HHS F 223 12345

**Mod Number:**

**Referenced Agency ID:** 7524

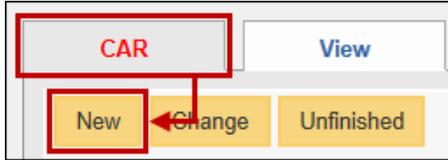
Cancel Create Close

7. See section **6.3** for information on completing contracts.

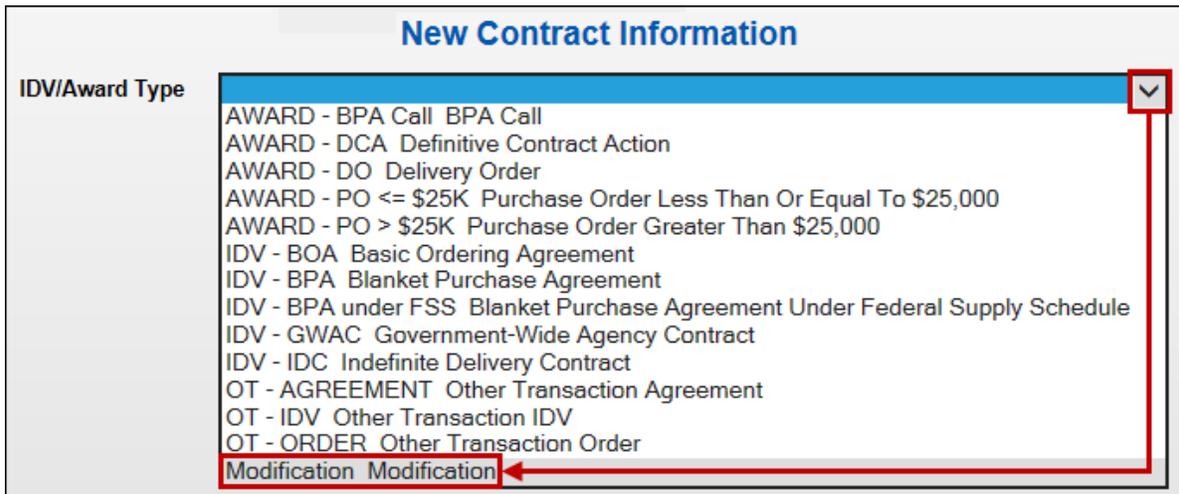
### 6.2.13 Creating a Modification

Modifications are changes to contracts that are created to document changes in contract terms and conditions to existing contract actions.

1. In the **CAR** tab, click **New**.



2. From the **IDV/Award Type** dropdown choose **Modification**.



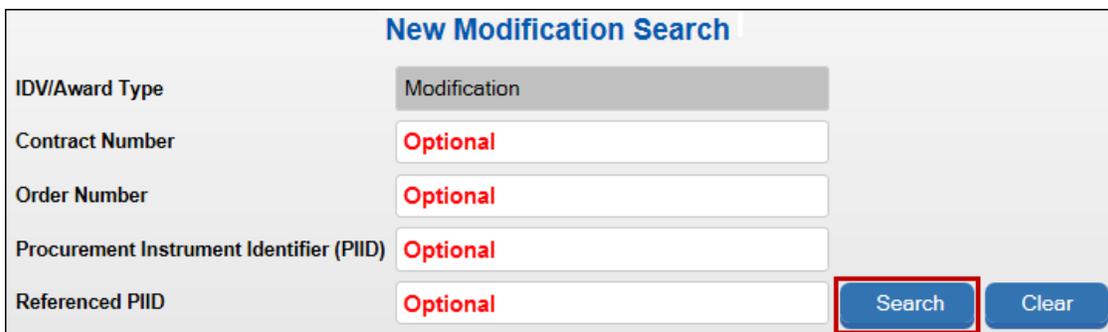
The **New Modification Search** window will open.

3. In the **New Modification Search** window fill out at least one of the fields:

**Note:** Not all fields are required for a search; filling out more fields helps narrow the search.

- **Contract Number:** Enter all or part of the Contract Number (if known)
- **Order Number:** Enter all or part of the Order Number (if known)
- **Procurement Instrument Identifier (PIID):** Enter all or part of the PIID (if known)
- **Referenced PIID:** Enter all or part of the Referenced PIID (if known)

Click **Search**

A screenshot of the 'New Modification Search' window. It contains a dropdown menu for 'IDV/Award Type' with 'Modification' selected. Below are four input fields: 'Contract Number', 'Order Number', 'Procurement Instrument Identifier (PIID)', and 'Referenced PIID'. Each field has 'Optional' written in red text to its right. At the bottom right, there are two buttons: 'Search' and 'Clear'. The 'Search' button is highlighted with a red box.

- In the **Results** list, select the radio button next to the contract you want to modify, and then click **Create**.

Results 1 - 100  
(Maximum 100 results per page)

[Next Page](#)

No.	Contract Number	Order Number	Mod Number	Date Signed (MM/DD/YYYY)	Agency Code	Office Code	PIID	Referenced PIID	
<input type="radio"/>	1	HHSF223201400001A	0000000000000000	0000	11/18/2013	DHRF	00223	HHSF223201400001A	0000000000000000
<input checked="" type="radio"/>	2	HHSF223201400001C	0000000000000000	0000	01/06/2014	DHRF	00223	HHSF223201400001C	0000000000000000
<input type="radio"/>	3	HHSF223201400001C	0000000000000000	0001	05/27/2014	DHRF	00223	HHSF223201400001C	0000000000000000

- In the **Create New Modification** window, add a 4 digit **Modification Number**, and then click **Continue to Create**.

**Note:** Modification Numbers should be 4 digits. Use leading zeroes for any non 4 digit numbers. (Ex. 0001, 0016, 0035 and etc.)

### Create New Modification

Please Provide Modification Number for the New Modification

Contract Number

Order Number

Modification Number\*

- The information from the base contract will populate many of the fields in the **Modification**. See section **6.3** for information on completing contracts.

### 6.3 Completing Contracts

- Once a base contract type (or modification) is selected, the **New Contract Information/Modification** window will open. The **Contract Information** screen is used to update, validate, save, print and delete DCIS contract actions. All contract data entry, verification and correction occurs on this screen.

- In each appropriate field, enter the information for the contract that is being recorded.
  - Be careful to transcribe the information exactly.
- Certain DCIS fields are greyed out. These fields are either not used for the type of contract that is being created, has information that is entered by the system or brought in from FPDS, or information that is inherited from the base contract or IDV.



- All field 13 (13F-13SS) information is inherited from FPDS, and cannot be changed in DCIS.
  - If the information in a Greyed-Out field is incorrect, the Base document (contract or IDV) will have to be modified for the information to appear correctly in the Modification or Order you are working on.
- Other fields may contain information that is inherited from the Base document that can be edited as needed.

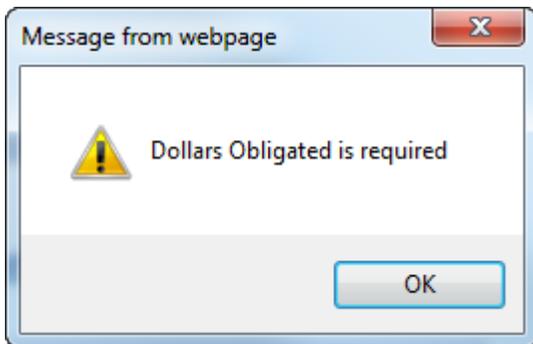
- As you fill out fields, you can click the **Verify** button to run checks on what was entered, and to let you know exactly which fields are required to be filled out for the contract you are creating or modifying.



### 6.3.1 Working through Validations

Validations are checks that are run against FPDS and HHS rules for contract creation. Validations are in place to make sure all required fields are filled out, and that what is entered in the fields meets Federal requirements. Contracts cannot be finalized in DCIS until all validation errors are corrected.

- Validation checks are run when the **Verify**, **Save**, **Save Unfinished Record** or the **FPDS-NG** buttons are clicked. Certain validations also occur automatically while the contract fields are being updated. There are two types of validation messages that users will encounter:
  - Pop-up validations will appear during validation checks and when certain fields are filled out incorrectly. They contain instructions about fields that must be filled out, or formatting errors within fields.



- Error Message table validations appear if there are errors after the **Verify**, **Save**, **Save Unfinished Record** or the **FPDS-NG** buttons are clicked. The blue links are errors within the contract. Red text in the **Error Message** column generally point to errors that have to be corrected outside of the contract.

This action does not pass the validations. Please correct the following error(s).	
Item	Error Message
9A	<a href="#">The value "194231777" for Data Element "DUNS Number" is invalid.</a>
7D	<a href="#">Mandatory element: "DavisBaconAct" is missing for the Award.</a>
10M	<a href="#">Mandatory element: "solicitationProcedures" is missing for the Award.</a>
7B	<a href="#">Mandatory element: "WalshHealyAct" is missing for the Award.</a>
8L	<a href="#">Mandatory element: "recoveredMaterialClauses" is missing for the Award.</a>

- In the **Error Message Table**, clicking a blue link will focus the browser on the field that needs to be filled out or corrected (unless the field is not updateable in the contract).

10L	<a href="#">Mandatory element: "A76Action" is missing for the Award.</a>
2D	<a href="#">Mandatory element: "ultimateCompletionDate" is missing for the Award.</a>
4F	<a href="#">Mandatory element: "foreignFunding" is missing for the Award.</a>

Contract Number HHSF22320140067P	Order Number 0000000000000000	Mod Number 0000
1A. <a href="#">Procurement Instrument Identifier (PIID)</a> HHSF22320140067P	1B. <a href="#">Modification Number</a> 0000	
1C. <a href="#">Referenced PIID</a> 0000000000000000	1D. <a href="#">Transaction Number</a> 0	
1E. <a href="#">Solicitation Identifier</a>	<input type="text"/>	
1F. <a href="#">Agency Identifier</a>	7524 FOOD AND DRUG ADMINISTRATION	
1G. <a href="#">Referenced IDV Modification Number</a>	<input type="text"/>	
1H. <a href="#">Referenced IDV Agency Identifier</a>	<input type="text"/>	
2A. <a href="#">Date Signed (YYYYMMDD)</a>	> 20140127	2B. <a href="#">Effective Date (YYYYMMDD)</a>
2C. <a href="#">Current Completion Date (YYYYMMDD)</a>	> 20140307	2D. <a href="#">Ultimate Completion Date (YYYYMMDD)</a>
		> <input type="text" value="20140804"/>

- Once the field is corrected, and one of the **Verify**, **Save**, **Save Unfinished Record** or the **FPDS-NG** buttons is clicked; the contract fields will be revalidated, and if it is acceptable, the validation error will no longer display.

10H	<a href="#">Mandatory element: "commercialItemAcquisitionProcedures" is missing for the Award.</a>
10L	<a href="#">Mandatory element: "A76Action" is missing for the Award.</a>
4F	<a href="#">Mandatory element: "foreignFunding" is missing for the Award.</a>

Contract Number HHSF22320140067P	Order Number 0000000000000000	Mod Number 0000
1A. <a href="#">Procurement Instrument Identifier (PIID)</a> HHSF22320140067P	1B. <a href="#">Modification Number</a> 0000	
1C. <a href="#">Referenced PIID</a> 0000000000000000	1D. <a href="#">Transaction Number</a> 0	
1E. <a href="#">Solicitation Identifier</a>	<input type="text"/>	
1F. <a href="#">Agency Identifier</a>	7524 FOOD AND DRUG ADMINISTRATION	
1G. <a href="#">Referenced IDV Modification Number</a>	<input type="text"/>	
1H. <a href="#">Referenced IDV Agency Identifier</a>	<input type="text"/>	
2A. <a href="#">Date Signed (YYYYMMDD)</a>	> 20140127	2B. <a href="#">Effective Date (YYYYMMDD)</a>
2C. <a href="#">Current Completion Date (YYYYMMDD)</a>	> 20140307	2D. <a href="#">Ultimate Completion Date (YYYYMMDD)</a>
		> 20140804

- The contact can be rechecked by clicking the **Verify** button. Once all errors are corrected, the **"This action passes the validations."** message will appear. The contract can now be saved.

<b>Verify</b>	<b>Update</b>	<b>Delete</b>	<b>Print</b>	<b>Close</b>
---------------	---------------	---------------	--------------	--------------

→ **This action passes the validations.**

**Note:** If you do not know how to correct a validation, please consult a Contract Officer, your supervisor, your OPDIV helpdesk, or contact DCIS Support at [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com).

### 6.3.2 Saving Contract Actions

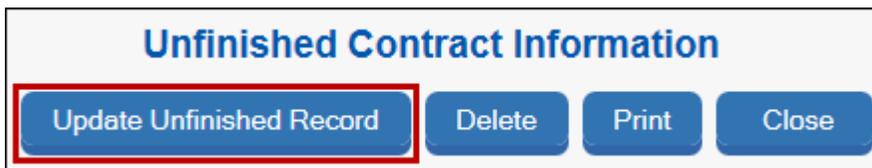
There are two ways to save a DCIS contract; **Save /Update Unfinished** and **Save/Update**. Both must pass a set of validations before the contract action can be saved in the DCIS system.

#### 6.3.2.1 Save Unfinished/ Update Unfinished Record (Draft)

1. Clicking the **Save Unfinished Record** button will save a contract in unfinished status in DCIS, and Draft status in FPDS.



2. Clicking the **Update Unfinished Record** will save changes to an existing unfinished contract, without finalizing it in DCIS and FPDS.



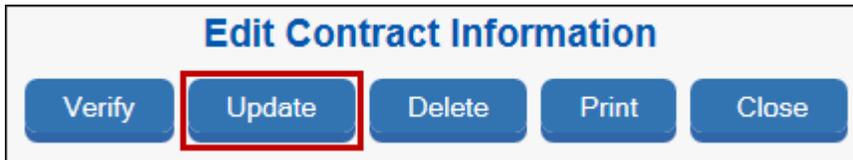
- Unfinished Contracts must pass a very basic set of validations, so if you are not sure about certain fields, saving an unfinished contract will allow you to preserve work without having to fix all of the validations that are required for a “fully” saved contract.
  - Saving Unfinished will also allow contracts to be partially created, and then completed later.
  - Only New contracts and unfinished contracts can be saved or updated as an unfinished contract.
3. To reopen a contract that was saved in unfinished form, see section **6.5 Accessing an Unfinished (Draft) Contract Action**.

### 6.3.2.2 Save /Update Contract (Final)

1. Clicking the **Save** button will convert an unfinished record to “Final” status in DCIS and FPDS.



2. The **Update** button will save changes to a previously saved contract.



- Saving a contract in “Final” status triggers the complete set of validation checks.
    - All validation errors must be fixed before the contract can be finalized.
  - A contract can be saved in “Final” status from creation, as long as all validation errors are addressed.
  - A contract action does not move out of Draft status in FPDS until it has been Saved.
3. To reopen a contract that was saved in “final” form, see section **6.4 Accessing a Complete (Final) Contract Action**.

### 6.3.3 Deleting Contract Actions

The **Delete** button can be used to delete a contract action from DCIS and FPDS.

1. In the **Contract Information** window of the contract you want to remove, click the **Delete** button.

**Note:** There is no verification step once **Delete** is clicked. Be sure you want to completely remove the contract action from DCIS and FPDS before you click **Delete**.



2. The **Delete Contract Action** confirmation will appear. Click **Close**.



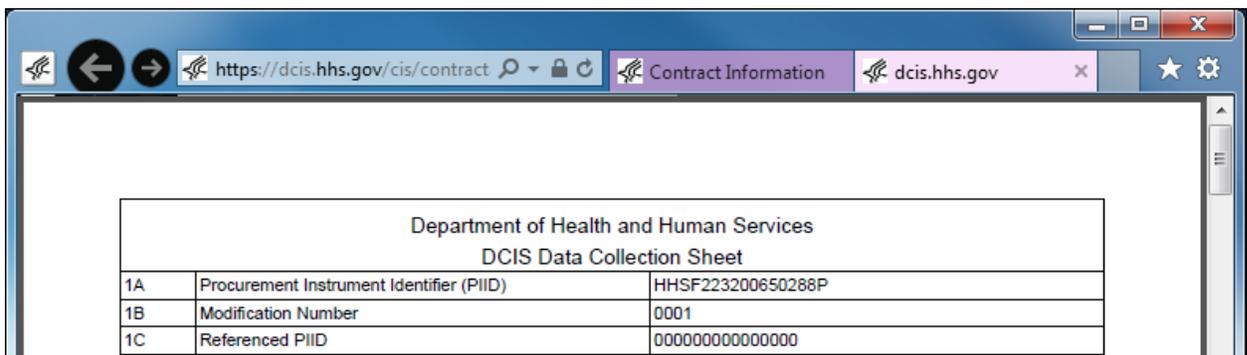
### 6.3.4 Printing Contract Information

If a paper record of the contract is needed, or you would like to view the contract information as a form, the **Print** functionality can be used.

1. In the **Contract Information** window, click the **Print** button.



2. The **DCIS Data Collection Sheet** will display, and is formatted to print to standard 8.5 X 11 sized sheets.



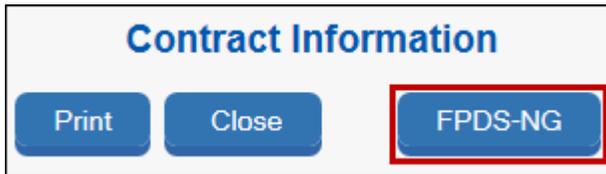
**Note:** Contracts are displayed as-is when the **Print** button is clicked. No validations are run when printing a contract.

### 6.3.5 Viewing FPDS-NG Information

The contact information can be viewed in FPDS by clicking the **FPDS-NG** button.

1. In the **Contract Information** window, click the **FPDS-NG** button.

**Note:** All validations must be passed before the FPDS window will display. Clicking FPDS-NG checks and synchronizes DCIS and FPDS data for the contract.



2. In the **FPDS-NG Launch Page**, check the FPDS information, and then click **Close FPDS-NG**.

The image shows the "FPDS-NG Launch Page" interface. At the top, there is a "Close FPDS-NG" button highlighted with a red box. Below this is a toolbar with buttons for "New", "Save Draft", "Validate", "Approve", "Correct", "Modify", "Save Tmpl", "Delete", "Print", and "Help". The main content area is divided into two sections: "Transaction Information" and "Document Information".

Transaction Information					
Award Type:	Purchase Order	Prepared Date:	05/10/2014 15:09:40	Prepared User:	HHSUSER
Award Status:	Final	Last Modified Date:	08/19/2014 14:02:20	Last Modified User:	HHSUSER

Document Information					
Award ID:	7524	Procurement Identifier	HHSF223201400001A	Modification No	0
Referenced IDV ID:					
Reason For Modification:					
Solicitation ID:					
Treasury Account Symbol:	75	Agency Main Identifier	0600	Sub Account	
				Initiative	Select One

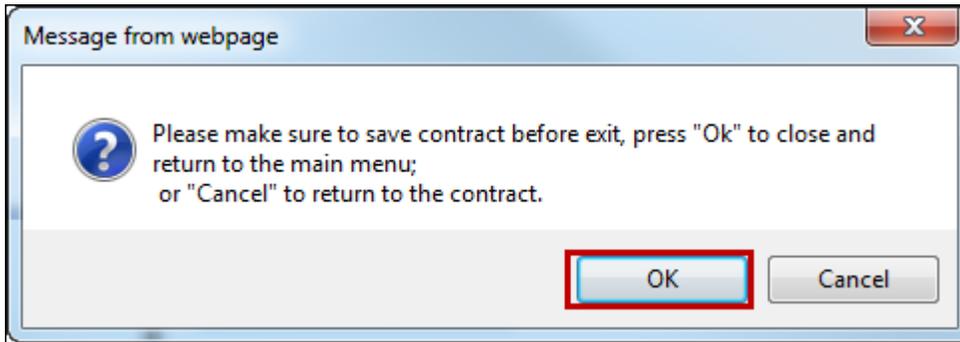
### 6.3.6 Closing a Contract

Closing a contract releases it from being locked from being accessed by other users. It does not save the contract, and if the contract has not been saved, the information will be lost.

1. In the **Contract Information** window, click **Close**.



2. In the pop-up window, click **OK**.

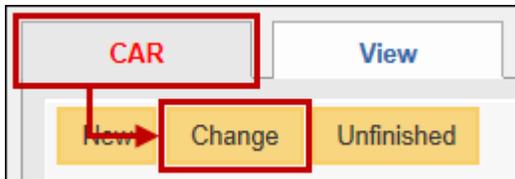


**Note:** Using the **Close** button prevents contracts from being locked. If you lock yourself out of a contract, it will automatically unlock within 45 minutes. You can also contact DCIS support at [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com) to have the contract unlocked faster.

### 6.4 Accessing a Complete (Final) contract action

Once a contract is saved and closed, it can be accessed by using the Change button in the CAR Tab.

1. In the **CAR** tab, click the **Change** button.



2. In the **Edit Contract Information** window fill out at least one of the fields:

**Note:** Not all fields are required for a search; filling out more fields helps narrow the search.

- **Contract Number:** Enter all or part of the Contract Number (if known)
- **Order Number:** Enter all or part of the Order Number (if known)
- **Procurement Instrument Identifier (PIID):** Enter all or part of the PIID (if known)
- **Referenced PIID:** Enter all or part of the Referenced PIID (if known)
- **Modification Number:** Enter all or part of the Modification number (if known)
- **Agency Code:** The agency within which the search will return results (Most users will not be able to change this field)
- **Office Code:** Select a value from this dropdown to list contracts created by a specific office

**Note:** **Office Code** does not narrow down results from the **Contract Number** field. If you want results from a certain office, select the office from **Office Code**, and leave the **Contract Number** field blank.

- **Signed Date:** Enter the range of dates the contract you are searching for was signed within (if known)

Click **Search**

The screenshot shows a window titled "Edit Contract Information" with the following fields and controls:

- Contract Number:** Text input field with "Optional" in red text.
- Order Number:** Text input field with "Optional" in red text.
- Procurement Instrument Identifier (PIID):** Text input field with "Optional" in red text.
- Modification Number:** Text input field with "Optional" in red text.
- Referenced PIID:** Text input field with "Optional" in red text.
- Agency Code:** Dropdown menu with "Optional" in red text and a downward arrow.
- Office Code:** Dropdown menu with "Optional" in red text and a downward arrow.
- Signed Date (YYYYMMDD):** Range selection with "From" and "To" labels, blue arrow buttons, and "Optional" in red text for both date inputs.
- Buttons:** "Search" (highlighted with a red box), "Clear", and "Close" buttons.

- In the **Results** list, click the **Contract Number** of the contract you would like to view.

Results 1 - 100 (Maximum 100 results per page) <a href="#">Next Page</a>							
No.	Contract Number	Mod Number	Order Number	Agency Code	Office Code	PIID	Referenced PIID
1	<a href="#">HHSF223201400001A</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001A	0000000000000000
2	<a href="#">HHSF223201400001C</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000
3	<a href="#">HHSF223201400001C</a>	0001	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000

- The **Edit Contract Information** screen will display with the contract that was selected.

CAR
View
User Profile

New
Change
Unfinished

### Edit Contract Information

Verify
Update
Delete
Print
Close
FPDS-NG

**Contract Number**  
HHSF223201400001C

1A. [Procurement Instrument Identifier \(PIID\)](#)  
HHSF223201400001C

1C. [Referenced PIID](#)  
0000000000000000

1E. [Solicitation Identifier](#)

1F. [Agency Identifier](#)

**Order Number**  
0000000000000000

1B. [Modification Number](#)  
0000

1D. [Transaction Number](#)  
0

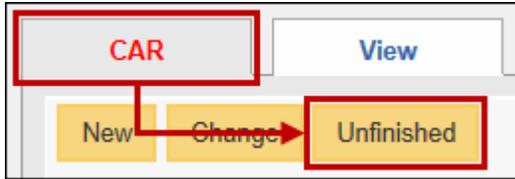
7524 FOOD AND DRUG ADMINISTRATION

**Mod Number**  
0000

## 6.5 Accessing an Unfinished (Draft) Contract action

Unfinished contracts can be accessed by using the **Unfinished** button in the **CAR** tab.

1. In the **CAR** tab, click the **Change** button.



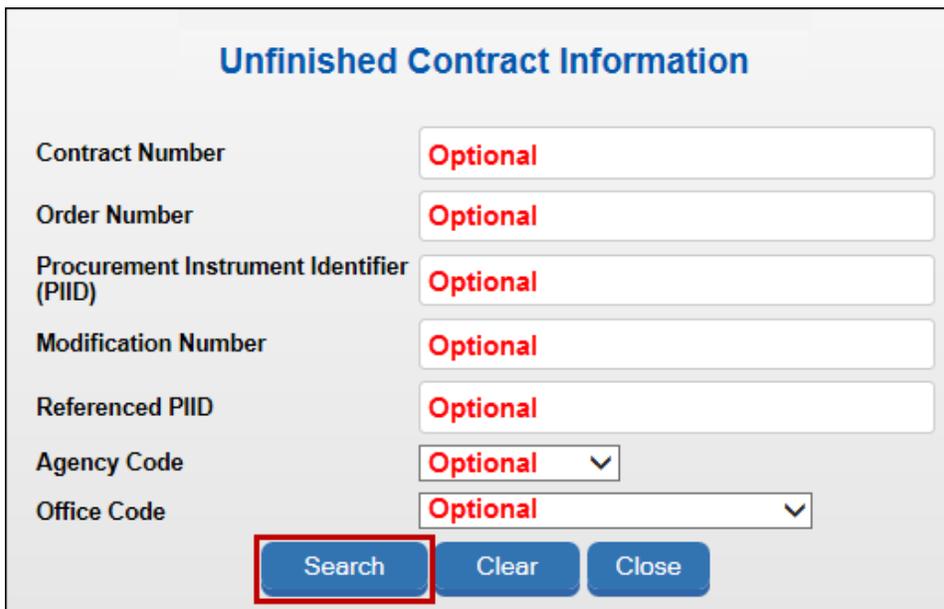
2. In the **Unfinished Contract Information** window fill out at least one of the fields:

**Note:** Not all fields are required for a search; filling out more fields helps narrow the search.

- **Contract Number:** Enter all or part of the Contract Number (if known)
- **Order Number:** Enter all or part of the Order Number (if known)
- **Procurement Instrument Identifier (PIID):** Enter all or part of the PIID (if known)
- **Referenced PIID:** Enter all or part of the Referenced PIID (if known)
- **Modification Number:** Enter all or part of the Modification number (if known)
- **Agency Code:** The agency within which the search will return results (Most users will not be able to change this field)
- **Office Code:** Select a value from this dropdown to list contracts created by a specific office

**Note:** **Office Code** does not narrow down results from the **Contract Number** field. If you want results from a certain office, select the office from **Office Code**, and leave the **Contract Number** field blank.

Click **Search**

A screenshot of a search form titled 'Unfinished Contract Information'. The form contains seven input fields, each with a red 'Optional' label to its right. The fields are: 'Contract Number', 'Order Number', 'Procurement Instrument Identifier (PIID)', 'Modification Number', 'Referenced PIID', 'Agency Code' (a dropdown menu), and 'Office Code' (a dropdown menu). At the bottom of the form are three buttons: 'Search', 'Clear', and 'Close'. The 'Search' button is highlighted with a red rectangular border.

- In the **Results** list, click the **Contract Number** of the contract you would like to view.

Results 1 - 100 (Maximum 100 results per page) <a href="#">Next Page</a>							
No.	Contract Number	Mod Number	Order Number	Agency Code	Office Code	PIID	Referenced PIID
1	<a href="#">HHSF223201400001A</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001A	0000000000000000
2	<a href="#">HHSF223201400001C</a>	0000	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000
3	<a href="#">HHSF223201400001C</a>	0001	0000000000000000	DHRF	00223	HHSF223201400001C	0000000000000000

- The **Unfinished Contract Information** screen will display with the contract that was selected.

CAR
View
User Profile

New
Change
Unfinished

### Unfinished Contract Information

Verify
Save
Update Unfinished Record
Delete
Print
Close
FPDS-NG

Contract Number  
HHSF223201400012C

1A. [Procurement Instrument Identifier \(PIID\)](#)  
HHSF223201400012C

1C. [Referenced PIID](#)  
0000000000000000

1E. [Solicitation Identifier](#)

1F. [Agency Identifier](#)

Order Number  
0000000000000000

1B. [Modification Number](#)  
0000

1D. [Transaction Number](#)  
0

Mod Number  
0000

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## 7.0 DCIS User Profile Tab

The DCIS **User Profile** tab is accessible to all DCIS users, and is used to update the user profile, and change the user's DCIS password.

### 7.1 Accessing DCIS User Profiles

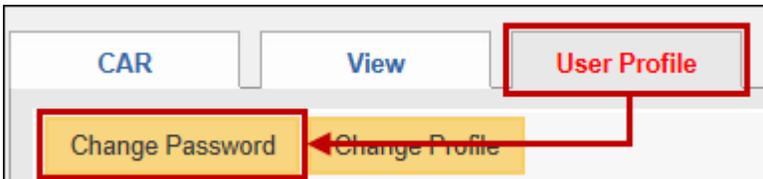
1. Log into DCIS.
2. Click the **User Profile** tab.



### 7.2 Change Password

The **Change Password** screen allows DCIS users to change their password as desired.

1. In the **User Profile** tab, click the **Change Password** button.



2. In the **Change User Password** window:

- In the **Current Password** textbox, enter your current DCIS password.
- In the **New Password** textbox, enter a new password based on the following rules:
  - Cannot be the same as the Username
  - Cannot be the same as the current password
  - Must be at least eight characters long
  - Cannot contain spaces (do not hit the spacebar)
  - Must contain at least one letter, at least one number, and at least one special character
- In the **Re-type New Password** textbox, reenter the password you just created.
- Click **Submit**.

**Change User Password**

Current Password

New Password

Re-type New Password

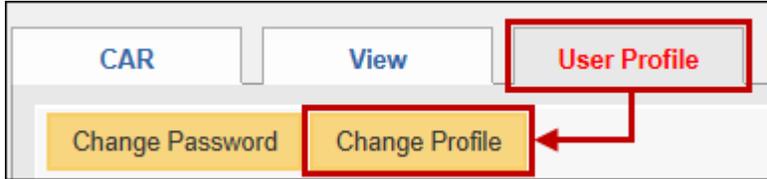
**GUIDELINE:**

- Password must not be the same as username.
- New password must not be the same as the old password.
- Password must contain at least 8 characters.
- Password must not contain space.
- Password must contain at least one alphabetic character, one numeric character and one special character.

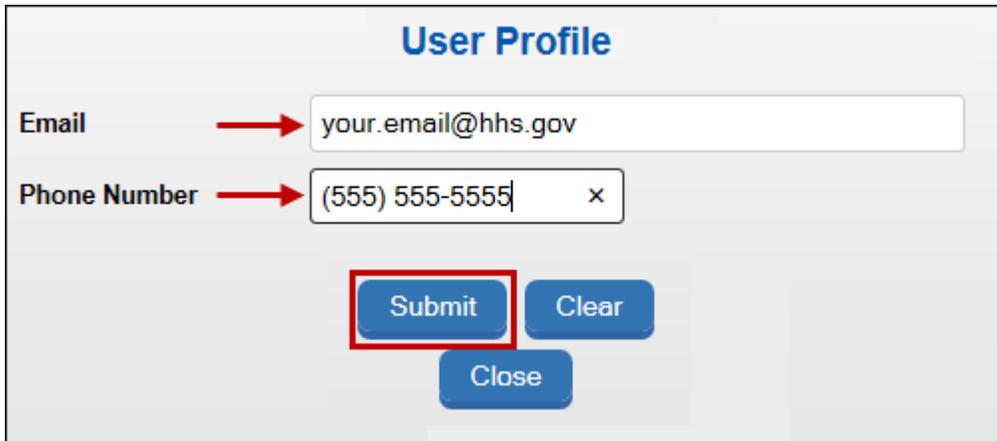
### 7.3 Change Profile

The **Change Profile** screen allows users to update their DCIS user profile email and phone number.

1. In the **User Profile** tab, click the **Change Profile** button.



2. In the **User Profile** window, check the **Email** and **Phone Number** fields, and update as needed.
  - If you make any changes, click **Submit**.



### 8.0 DCIS Reporting/Business Intelligence

A new reporting system is being developed for DCIS, and will link directly from the DCIS Front Page. The current DCIS **Report** tab will be removed.

If you need DCIS reports, or have any other issues with DCIS, please contact DCIS Support at [dcis.support@swaintechs.com](mailto:dcis.support@swaintechs.com) or phone (888) 905-5767.