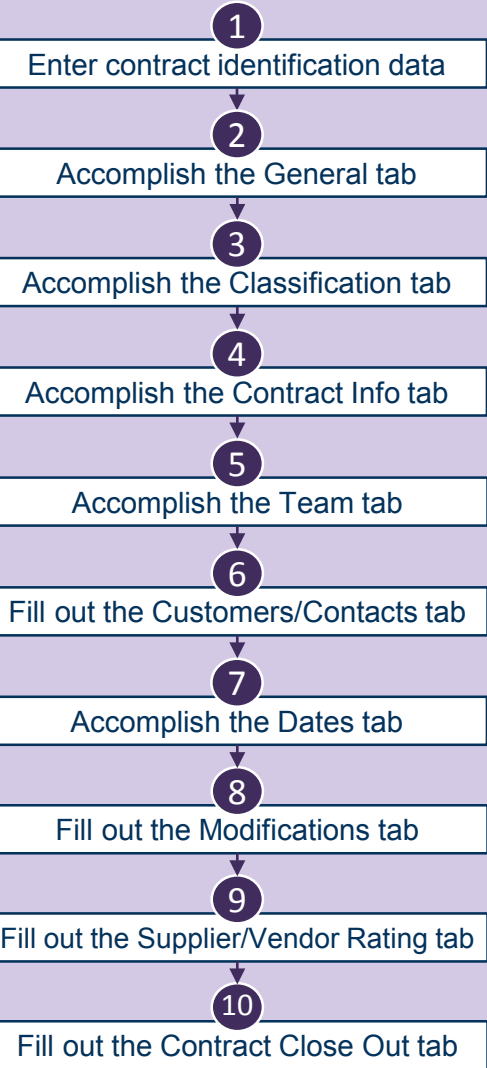


# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification New Copy Delete Approval 1 of 1 New Table Query

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID Name

Prime Contract No

General Classification Contract

Basic Info

Prime Contractor

Master Contract No

☐ Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Contact Info

Project Manager

Billing Analyst

Primary Agency

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

☐ Contract is at Risk

☐ Alert Sent

View Financial Information

Purpose of Contract

Best viewed in IE or Adobe PDF Reader.

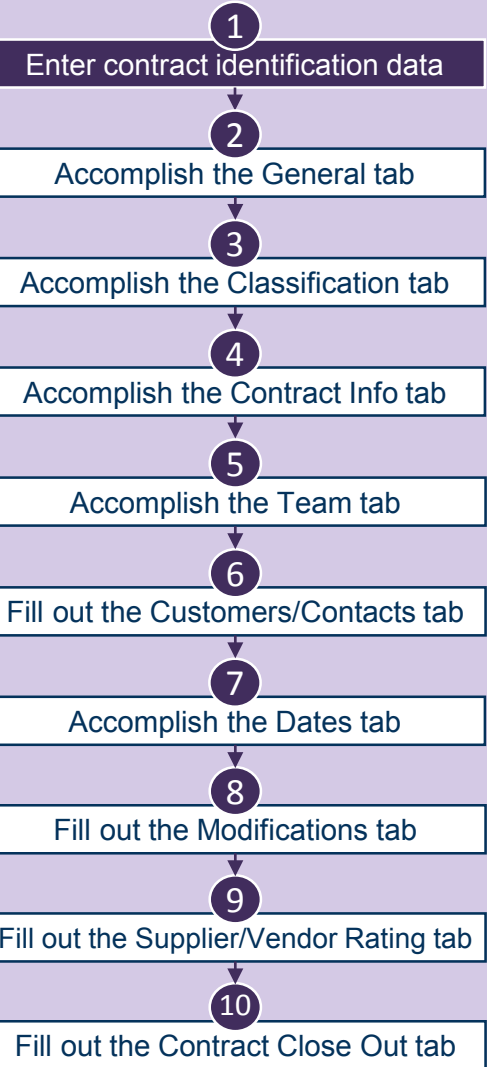
This click-thru introduces contracts in Contract Management and shows you how to create a new contract record.

Click the numbered circles on the left to move to the first step in each phase.

Use the arrows or Pg Up/Down keys to proceed through each step and sub-step.

Begin

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

### Identification

Contract ID  Name  ☐ Costpoint Opportunity ☐ Exclude from Reports

Main Opportunity ID  Name

Prime Contract No

**General** Classification Contract Info Team Customers Suppliers

**Basic Info**

Prime Contractor  Contract Status

Master Contract No  Contract Type

☐ Subcontract Project Type  Date Last Modified

Subcontract

Purchase Order

Contract

Task Order

Primary Work Location

**Secondary Project Types**

☐ BPA ☐ CPFF ☐ FFP ☐ IDIQ

☐ CPAF ☐ CR ☐ FFI ☐ TM

☐ CPIF ☐ CS ☐ FPLOE

☐ Other

**Contact Info**

Project Manager  Subcontract Administrator

Billing Analyst  Contract Administrator

Primary Agency  Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value  ☐ Contract is at Risk ☐ Alert Sent

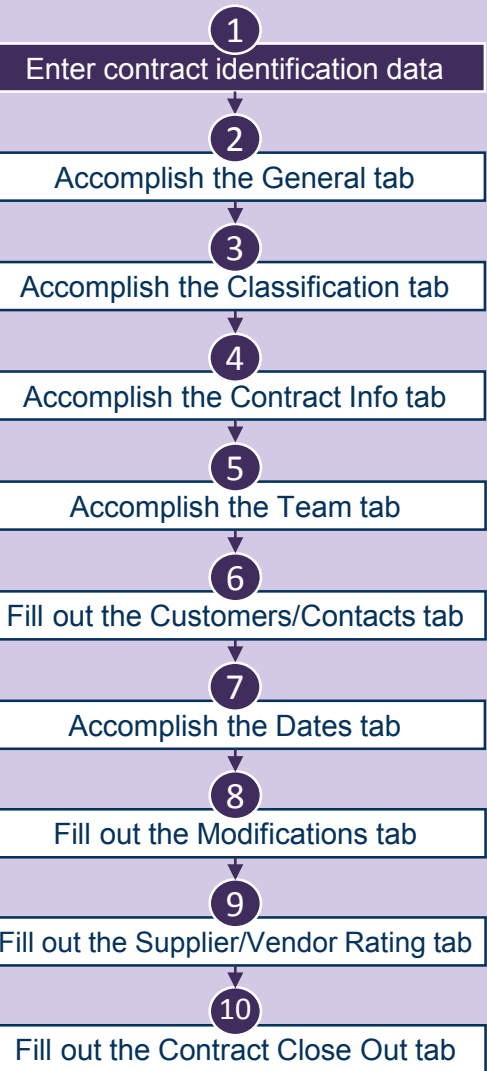
View Financial Information

**Purpose of Contract**

**Annotations:**

- A:** Enter a unique ID and name to identify the contract.
- Follow the steps on the next few slides to fill in identification data for the contract record.
- If the option to automatically assign contract IDs is selected on the Configure Contract Management Settings screen, you can leave the **Contract ID** field blank and Costpoint automatically populates it.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

### Identification

Contract ID  Name \*

Main Opportunity ID

Prime Contract No

☐ Costpoint Opportunity ☐ Exclude from Reports

General Classification Contract Info Team Customers/Contacts

Basic Info

Prime Contractor

Master Contract No

☐ Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Contract types

☐ CPFF ☐ CR ☐ CS ☐ Other

Contact Info

Project Manager

Billing Analyst

Primary Agency

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

View Financial Information

Purpose of Contract

☐ Contract is at Risk ☐ Alert Sent

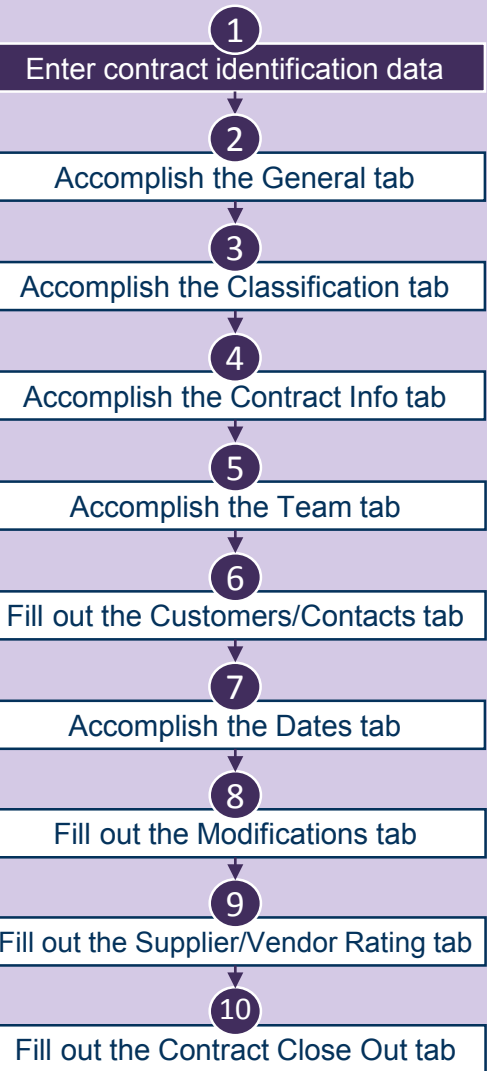
**B** Select this check box to have the system validate the opportunity that you want to associate with the contract.

**C** Select this check box to exclude the contract from reports generated in the Contracts domain.

If you do not select this check box, you can manually enter any opportunity ID and name, and no validation takes place.

This is important when you need to generate reports and exclude certain types of contracts (for example, indefinite delivery/indefinite quantity and blanket purchase agreement contracts) to avoid overstating the reports.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification New Copy Delete Approval 1 of 1 New Table Query

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID Name

Prime Contract No Name Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Basic Info

Prime Contractor

Master Contract No

Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Contract Status

Contract Type

Project Type \* Date Last Modified

Secondary Project

BPA

CPAF

CPIF

Other

Contact Info

Project Manager

Billing Analyst

Primary Agency

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

View Financial Information

Contract is at Risk

Alert Sent

Purpose of Contract

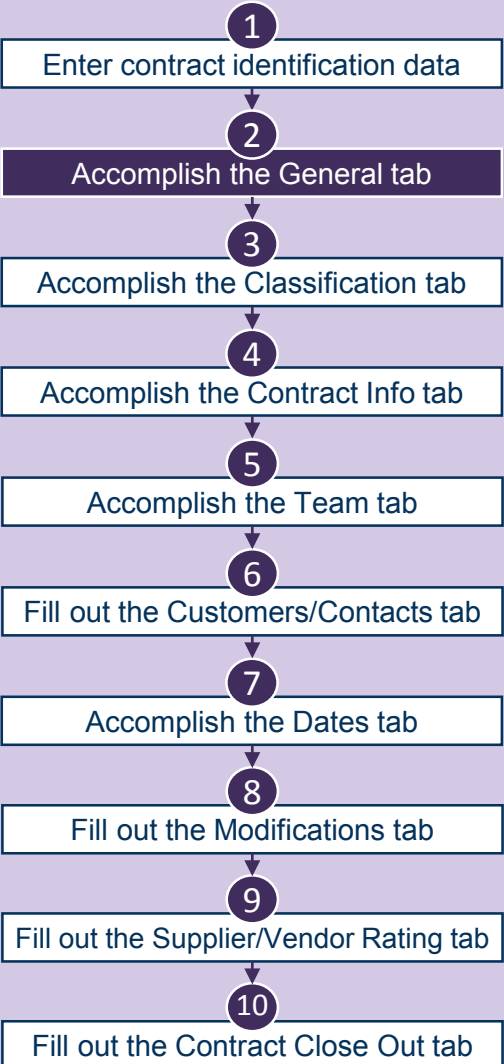
D Enter the main opportunity and prime contract number that you want to associate with the contract.

E Select either Active or Inactive.

If you select Inactive, this contract will not be available in the lookup within a subcontract record, but you can manually enter the contract ID. Also, you will not be able to initialize a project from this contract on the Project Initialization subtask.

You can link more opportunities to the contract using the Additional Opportunities subtask.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Enter relevant information on the General tab.

Contract Name \* Name Costpoint Opportunity Exclude from Reports

Main Name

Project Contract No Name Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Basic Info

Contract Status \* Contract Type \* Project Type \* Date Last Modified

Secondary Project Types

☐ BPA ☐ CPFF ☐ FFP ☐ IDIQ

☐ CPAF ☐ CR ☐ FFI ☐ TM

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

View Financial Information

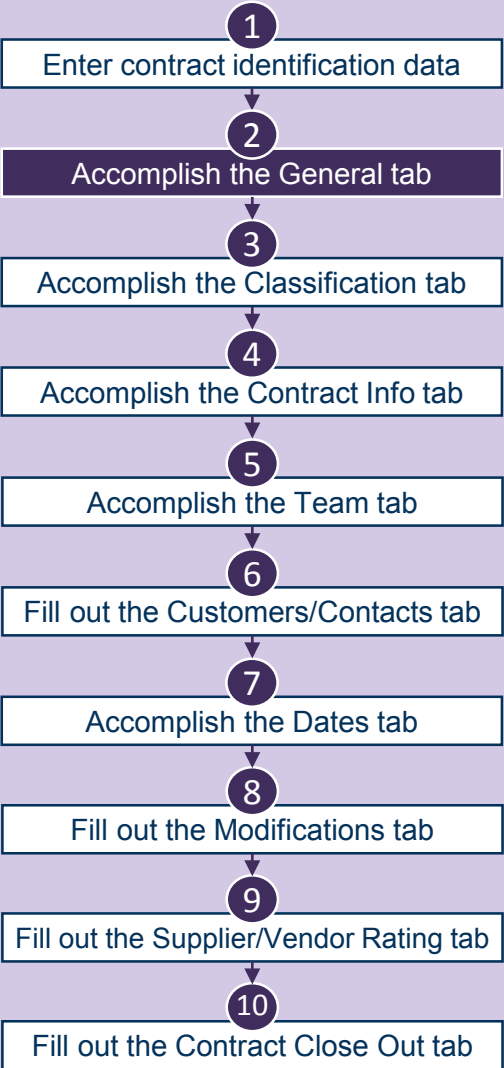
Purpose of Contract

Contract is at Risk

Alert Sent

Follow the steps on the next slides to accomplish the General tab.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification New Copy Delete Approval 1 of 1 New Table Query

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID Name

Prime Contract No Name Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Basic Info

Prime Contractor Contract Status \*

Master Contract No Contract Type \*

☐ Subcontract Project Type \* Date Last Modified

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Secondary Project Types

☐ BPA ☐ CPFF ☐ FFP ☐ IDIQ

☐ CPAF ☐ CR ☐ FFI ☐ TM

☐ CPIF ☐ CS ☐ FPLOE

Contact Info

Project Manager

Billing Analyst

Primary Agency

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

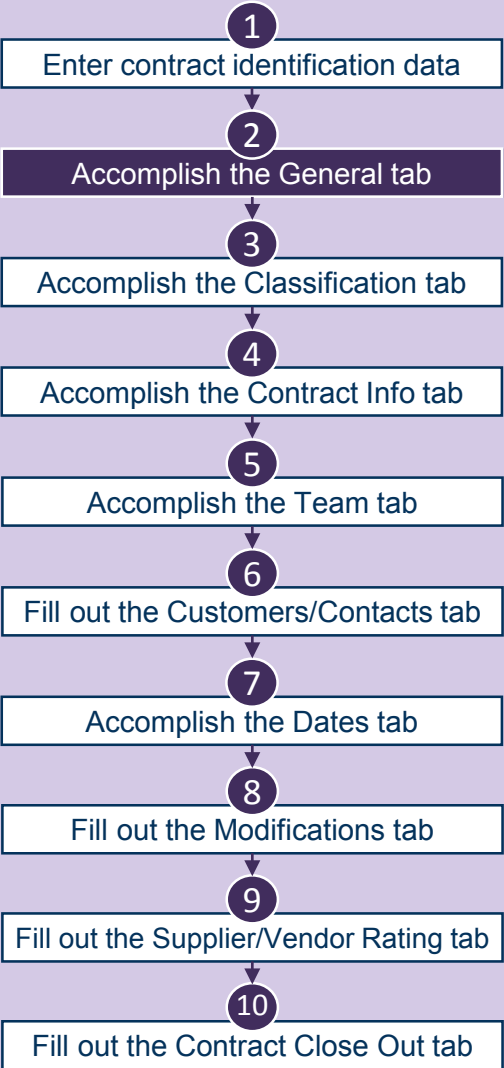
☐ Contract is at Risk ☐ Alert Sent

View Financial Information

Purpose of Contract

B After you have filled in the fields on the tab, scroll down to the bottom of the screen to access the tab's subtasks.

# Contracts Overview



Contract ID

Name

☐ Suspense Opportunity

☐ Exclude from reports

Main Opportunity ID

Name

Prime Contract No

Name

Record Status\*

Active

General

Classification

Contract Info

Team

Customers/Contacts

Dates

Modifications

Supplier/Vendor Rating

Contract Close Out

Basic Info

Prime Contractor

Contract Status\*

Master Contract No

Contract Type\*

☐ Subcontract

Subcontract No

Project Type\*

Date Last Modified

Purchase Order No

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contract Vehicle

Task Order No

Primary Work Location

Contact Info

Project Manager

Subcontract Administrator

Billing Analyst

Contract Administrator

Primary Agency

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

☐ Contract is at Risk

☐ Alert Sent

View Financial Information

Purpose of Contract

Click this link to open the Additional Task Orders subtask.

C

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

Activities

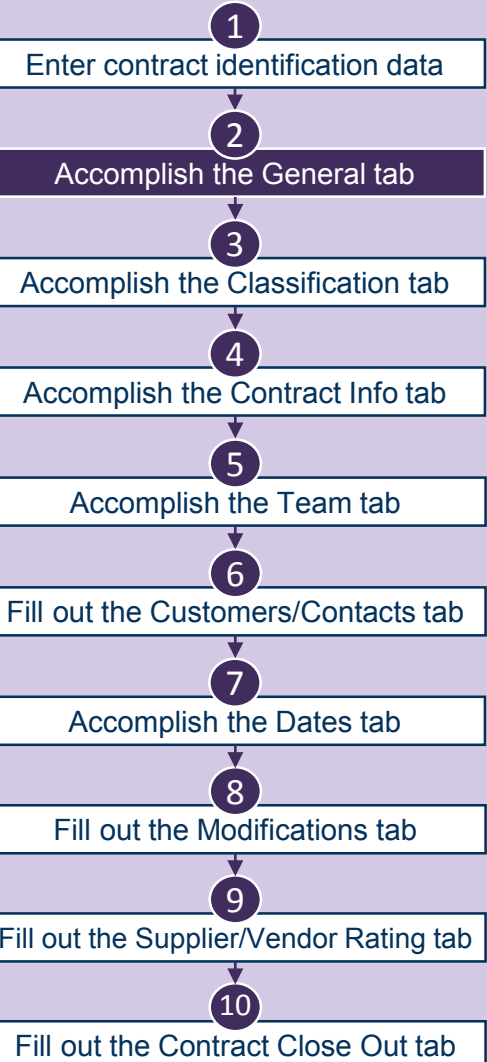
Documents

User-Defined Info

Project Initialization



# Contracts Overview



Subcontract No

Contract Vehicle

Task Order No

Primary Work Location

CIOSP3

HHSP233201700137W

200 Independence Ave SW, Washington DC 20201

☐ BPA

☐ CPAF

☐ CPIF

☒ Other

☐ CFPF

☐ CR

☐ CS

☐ FFP

☐ FFI

☐ FPLOE

☐ IDIQ

☒ TM

Hybrid FFP TM

Contact Info

Project Manager

Billing Analyst

Primary Agency

Anticipated Contract Value

View Financial Information

1019

1010

NITAAC

11,853,225.32

CNTR-0000000000000008

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

Address

Contract is at Risk

Alert Sent

Sexton, Tina

Williams, Ted

8725 John J Kingman Rd, Ft Belvoir VA 22060

☐

☐

Purpose of Contract

The Chief Information Officer, Solutions and Partners 2 (CIO SP2) Small Business Government-Wide Acquisition Contract (GWAC) is a ten (10) year Indefinite Delivery/Indefinite Quantity (IDIQ) contract...

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

Activities

Documents

User-Defined Info

Project Initialization

Identification > Additional Task Orders

Query

	Contract ID	Task Order No	Primary Customer	Contract Status	Project	Record Status
<input checked="" type="checkbox"/>	CNTR-0000000000000008	HHSP233201700137W	100052	AWARDED	10115	Active
	CNTR-0000000000000008	HHSP233201700137W	100052	AWARDED	10115.00	Active
	CNTR-0000000000000008	HHSP233201700137W	100052	AWARDED	10115.00.01	Active
	CNTR-0000000000000008	HHSP233201700137W	100052	AWARDED	10115.10	Active
	CNTR-0000000000000008	HHSP233201700137W	100052	AWARDED	10115.10.01	Active
	CNTR-0000000000000008	HHSP233201700137W	100052	AWARDED	10115.20	Active

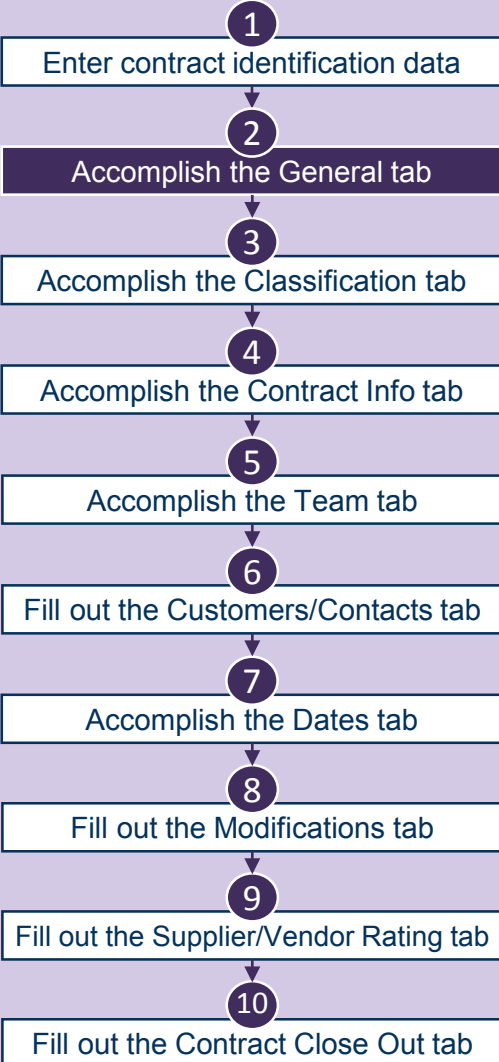
Close

Use the Additional Task Orders subtask to view additional task orders associated with the contract.

Costpoint automatically loads the task orders associated with the prime contract number linked to the contract. You cannot add, edit, or delete task orders in the table window.



# Contracts Overview



Contract ID

Name

☐ Suspense Opportunity

☐ Exclude from reports

Main Opportunity ID

Name

Prime Contract No

Name

Record Status \*

Active

General

Classification

Contract Info

Team

Customers/Contacts

Dates

Modifications

Supplier/Vendor Rating

Contract Close Out

Basic Info

Prime Contractor

Contract Status \*

Master Contract No

Contract Type \*

☐ Subcontract

Subcontract No

Project Type \*

Date Last Modified

Purchase Order No

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contract Vehicle

Task Order No

Primary Work Location

Contact Info

Project Manager

Subcontract Administrator

Billing Analyst

Contract Administrator

Primary Agency

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

☐ Contract is at Risk

☐ Alert Sent

View Financial Information

Purpose of Contract

Click this link to open the Additional Opportunities subtask.

E

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

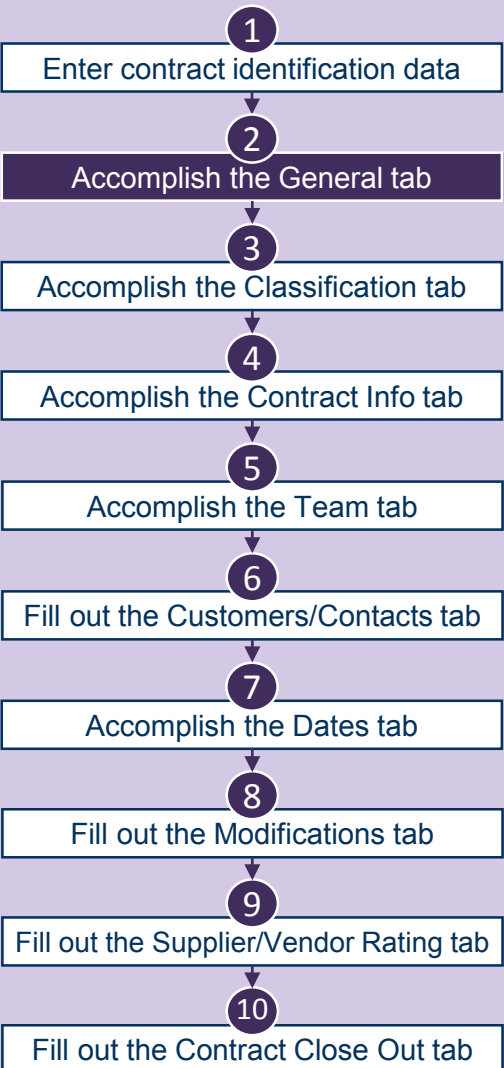
Activities

Documents

User-Defined Info

Project Initialization

# Contracts Overview



Purchase Order No

Contract Vehicle

Task Order No

Primary

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Administrator

Administrator

Agency

CAA Office

is at Risk

☐ Alert Sent

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

Activities

Documents

User-Defined Info

Project Initialization

→ Identification > Additional Opportunity

Costpoint Opportunity \*

Opportunity ID \*

Opportunity Name

Master Contract No

Our Value

Primary Customer

New

Copy

Delete

1 of 1

New

Table

Query

Opportunity Status

Date Opened

Date Closed

Type

Y

Active

Click **New** to begin adding opportunities that you want to link to the contract.

Close

Fill out the Contract Close Out tab

Contract ID

Name

Record Status

Active

Main Opportunity ID

Name

Prime Contract No

Name

General

Classification

Contract Info

Team

Customers/Contacts

Dates

Modifications

Supplier/Vendor Rating

Contract Close Out

Basic Info

Prime Contractor

Contract Status

Master Contract No

Contract Type

☐ Subcontract

Subcontract No

Project Type

Date Last Modified

Purchase Order No

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

Contract Vehicle

☐ CPAF

☐ CR

☐ FFI

☐ TM

Task Order No

☐ CPIF

☐ CS

☐ FPLOE

Primary Work Location

☐ Other

Contact Info

Project Manager

Subcontract Administrator

Billing Analyst

Contract Administrator

Primary Agency

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

☐ Contract is at Risk

☐ Alert Sent

View Financial Information

Purpose of Contract

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

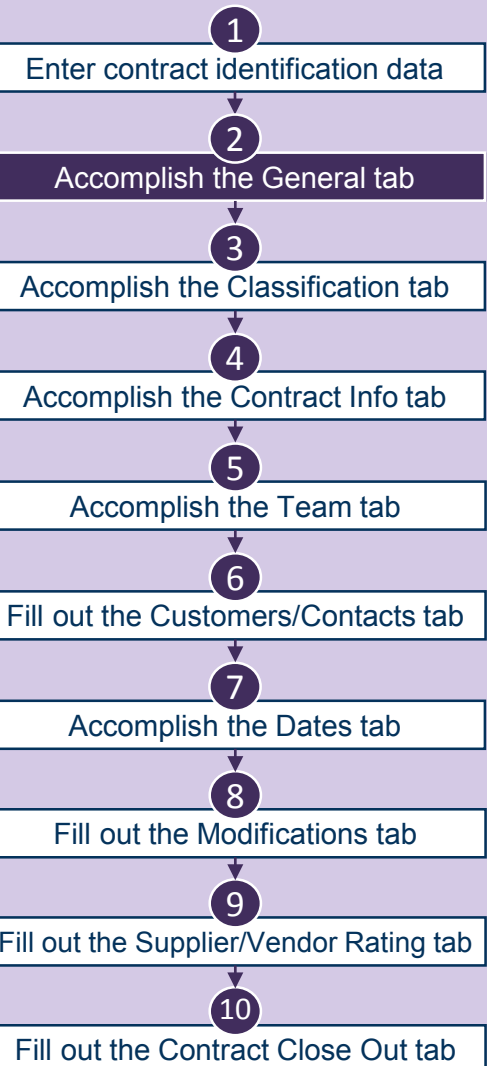
Activities

Documents

User-Defined Info

Project Initialization

# Contracts Overview



Contract Vehicle

CIOSP3

Task Order No

HHSP233201700137W

Primary Work Location

200 Independence Ave SW, Washington DC 20201

Contact Info

Project Manager

1019

Sexton, Tina

Billing Analyst

1010

Williams, Ted

Primary Agency

NITAAC

Anticipated Contract Value

11,853,225.32

View Financial Information

CNTR-0000000000000008

Purpose of Contract

The Chief Information Officer–Solutions and Partners 3 (CIO-SP3) S...

Use the Projects Linked subtask to view information about the projects linked to the contract.

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

Activities

Documents

User-Defined Info

Project Initialization

Project Reports

To view or print Project Reports, highlight the Project you'd like to see, and click on Print Preview or Print icon at the top of the page and select the report you would like to print. You can use Print Setup to change how and where the report prints.

Identification > Projects Linked

Query

Expand All

Collapse All

	Project	Project Link	Project Name	Prime Contract No	Task Order No	Opportunity ID
<input checked="" type="checkbox"/>	10115	<a href="#">10115</a>	HHS IT Ops & Maint B/4	HHSN847351200567W	HHSP233201700137W	OPP-0000000000000001
<input checked="" type="checkbox"/>	10370	<a href="#">10370</a>	IT SUPPORT	HHSN847351200567W	HHSP233201700137W	OPP-0000000000000001

Deliverables

Close

You can use the Project Initialization subtask on the Manage Contracts screen to create projects and link these projects to the contract. These projects then display on the Projects Linked subtask.

All fields are read-only, but you can do the following on the Projects Linked subtask:

- Click the project link to open the Manage Project User Flow screen and access additional information about the project.
- Limit the projects that display on the table window through the expand and collapse options.
- Preview or print project reports for the selected project.

Projects can also be manually linked on the Manage Project User Flow screen by entering the contract ID in the **CTM Contract ID** field.

# Contracts Overview

1

Enter contract identification data

2

Accomplish the General tab

3

Accomplish the Classification tab

4

Accomplish the Contract Info tab

5

Accomplish the Team tab

6

Fill out the Customers/Contacts tab

7

Accomplish the Dates tab

8

Fill out the Modifications tab

9

Fill out the Supplier/Vendor Rating tab

10

Fill out the Contract Close Out tab

Contract ID  Name  ☐ Suspense Opportunity ☐ Exclude from reports

Main Opportunity ID  Name

Prime Contract No  Name  Record Status\* **Active**

**General** Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

**Basic Info**

Prime Contractor   Contract Status\*

Master Contract No  Contract Type\*

☐ Subcontract Project Type\*  Date Last Modified

Subcontract No

**Secondary Project Types**

☐ BPA ☐ CPFF ☐ FFP ☐ IDIQ

☐ CPAF ☐ CR ☐ FFI ☐ TM

☐ CPIF ☐ CS ☐ FPLOE

☐ Other

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

**Contact Info**

Project Manager   Subcontract Administrator

Billing Analyst   Contract Administrator

Primary Agency  Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value  ☐ Contract is at Risk ☐ Alert Sent

View Financial Information

**Purpose of Contract**

**Subcontracts**

Click this link to open the Subcontracts subtask.

**Additional Task Orders** **Additional Opportunities** **Projects Linked** **Subcontracts** **Activities** **Documents** **User-Defined Info** **Project Initialization**

## Enter contract identification data

## Accomplish the General tab

### Accomplish the Contract Info tab

### Accomplish the Contract Info tab

Fill out the Customers/Contacts tab

### Fill out the Customers/Contacts tab

Fill out the Modifications tab

Fill out the Supplier/Vendor Rating tab

Fill out the Supplier/Vendor Rating tab

Fill out the Contract Close Out tab

## Fill out the Contract Close Out tab

**Master Contract No** HHSN847351200567W  
☐ Subcontract  
**Subcontract No**  
**Purchase Order No**  
**Contract Vehicle** CIOSP3  
**Task Order No** HHSP233201700137W  
**Primary Work Location** 200 Independence Ave SW, Washington DC 20201

**Project Type\*** GOVERNMENT **Date Last Modified** 11/29/2017  
**Secondary Project Types**  
☐ BPA ☐ CPFF ☐ FFP ☐ IDIQ  
☐ CPAF ☐ CR ☐ FFI ☒ TM  
☐ CPIF ☐ CS ☐ FPLOE  
☒ Other Hybrid FFP TM

**Contact Info**  
**Project Manager** 1019 Sexton, Tina **Subcontract Administrator** 1016 Page, Amy  
**Billing Analyst** 1010 Williams, Ted **Contract Administrator** 1015 Long, William  
**Primary Agency** NITAAC **Acquisition Agency**  
**Cognizant DCAA Office** Address: 8725 John J Kingman Rd, Ft Belvoir VA 22060  
Phone 703.767.2246  
**Anticipated Contract Value** 11,853,225.32 ☐ Contract is at Risk ☐ Alert Sent  
**View Financial Information** CNTR-000000000000008

**Purpose of Contract**  
The Chief Information Officer-Solutions and Partners 3 (CIO-SP3) Small Business Government-Wide Acquisition Contract (GWAC) is a ten (10) year Indefinite Delivery/Indefinite Quantity (ID/IQ) contract... and further clarified in the Clinger-Cohen Act of 1996... administrative, operational, increasingly integrated within a broader IT architecture and a...

**J** Use the Subcontracts subtask to view the subcontracts associated with the contract.

The **Subcontract ID** is linked to the subcontract record found on the Manage Subcontracts screen.

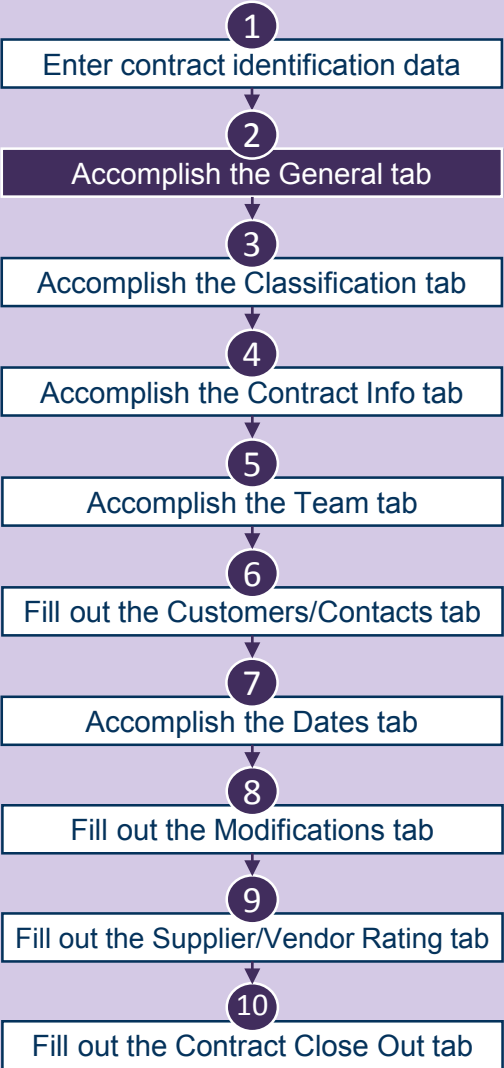
[Additional Task Orders](#) [Additional Opportunities](#) [Projects Linked](#) [Subcontracts](#) [Activities](#) [Documents](#) [User-Defined Info](#) [Project Initialization](#)

Subcontract ID	Subcontract Name	Agreement Type	Status	Subcontract Start Date	Subcontract End Date	Subcontractor/ Vendor ID	Subcontractor/ Vendor Name	Subcor Project
SUBC-000000000000001	HHS-Balmar-Subc-0001	Subcontractor Agreement	Awarded	06/01/2017	05/31/2022	V100013	Balmar Consulting	10370.IT
SUBC-000000000000002	HHS-Premier-Subc-0001	Subcontractor Agreement	Awarded	06/01/2017	05/31/2022	V100089	Premiere Solutions	10370.IT

Close



# Contracts Overview



Contract ID

Name

☐ Subcontract Opportunity

☐ Exclude from reports

Main Opportunity ID

Name

Prime Contract No

Name

Record Status\*

Active

General

Classification

Contract Info

Team

Customers/Contacts

Dates

Modifications

Supplier/Vendor Rating

Contract Close Out

Basic Info

Prime Contractor

Contract Status\*

Master Contract No

Contract Type\*

☐ Subcontract

Subcontract No

Project Type\*

Date Last Modified

Purchase Order No

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contract Vehicle

Task Order No

Primary Work Location

Contact Info

Project Manager

Subcontract Administrator

Billing Analyst

Contract Administrator

Primary Agency

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

☐ Contract is at Risk

☐ Alert Sent

View Financial Information

Purpose of Contract

Click this link to open the Activities subtask.

K

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

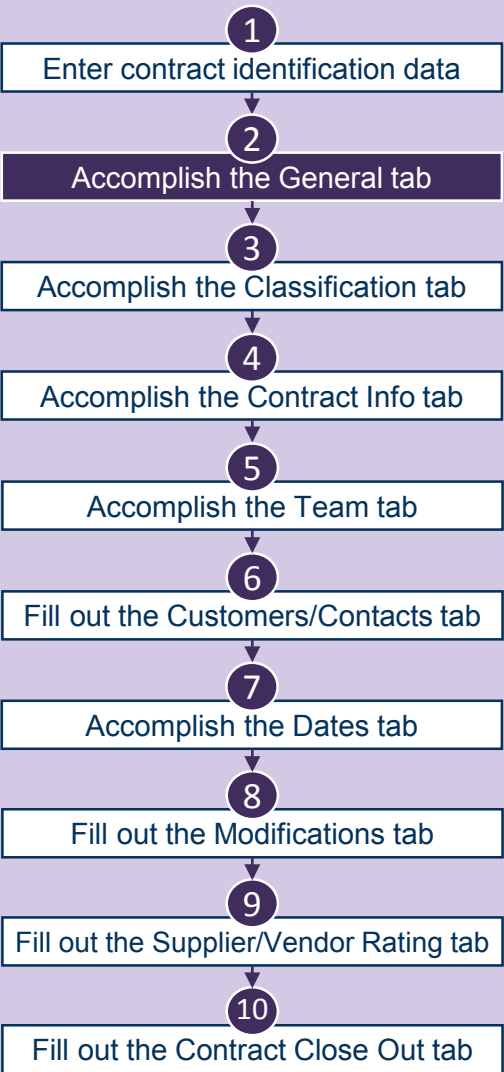
Activities

Documents

User-Defined Info

Project Initialization

# Contracts Overview



Deltek Costpoint

Additional Task OrdersAdditional OpportunitiesProjects LinkedSubcontractsActivitiesDocumentsUser-Defined InfoProject Initialization

Identification > Activities

NewCopy▼Delete1 of 1 NewTableQuery

Activity

Activity ID

Subject

Location

Method

Activity Date

Completed

Enter relevant information on this subtask.

Primary Contacts

Activity Owner

Customer

Primary Contact

Business #

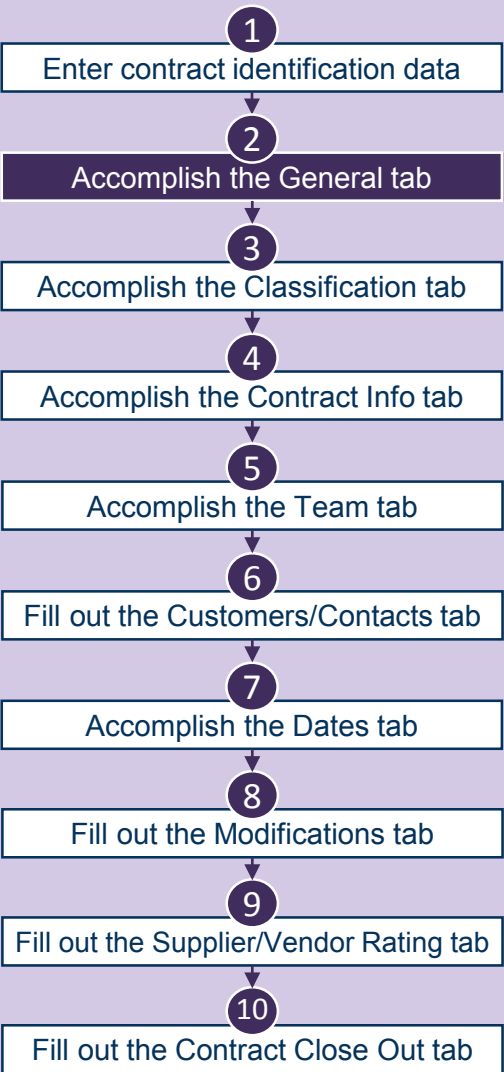
Other Attendees

Here, you can schedule and manage milestones, meetings or touchpoints, phone calls, and other tasks related to the contract.

Activity Notes

Close

# Contracts Overview



Delttek Costpoint

Additional Task OrdersAdditional OpportunitiesProjects LinkedSubcontractsActivitiesDocumentsUser-Defined InfoProject Initialization

→ Identification > Activities

NewCopy▼Delete1 of 1 NewTableQuery

Activity

Activity ID

Subject

Location

Method

Activity Date

Completed

Select this check box only when the activity has been completed.

Primary Contacts

Activity Owner

Customer

Primary Contact

Business #

Other Attendees

All fields are optional on this subtask. Note, however, that when you select the **Completed** check box, you will not be able to delete or modify this activity record.

Activity Notes

Close

# Contracts Overview

1

Enter contract identification data

2

Accomplish the General tab

3

Accomplish the Classification tab

4

Accomplish the Contract Info tab

5

Accomplish the Team tab

6

Fill out the Customers/Contacts tab

7

Accomplish the Dates tab

8

Fill out the Modifications tab

9

Fill out the Supplier/Vendor Rating tab

10

Fill out the Contract Close Out tab

Contract ID  Name  ☐ Subcontract Opportunity ☐ Exclude from reports

Main Opportunity ID  Name

Prime Contract No  Name  Record Status\* **Active**

**General** Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

**Basic Info**

Prime Contractor   Contract Status\*

Master Contract No  Contract Type\*

☐ Subcontract Project Type\*  Date Last Modified

Subcontract No

**Secondary Project Types**

☐ BPA ☐ CPFF ☐ FFP ☐ IDIQ

☐ CPAF ☐ CR ☐ FFI ☐ TM

☐ CPIF ☐ CS ☐ FPLOE

☐ Other

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

**Contact Info**

Project Manager   Subcontract Administrator

Billing Analyst   Contract Administrator

Primary Agency  Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value  ☐ Contract is at Risk ☐ Alert Sent

View Financial Information

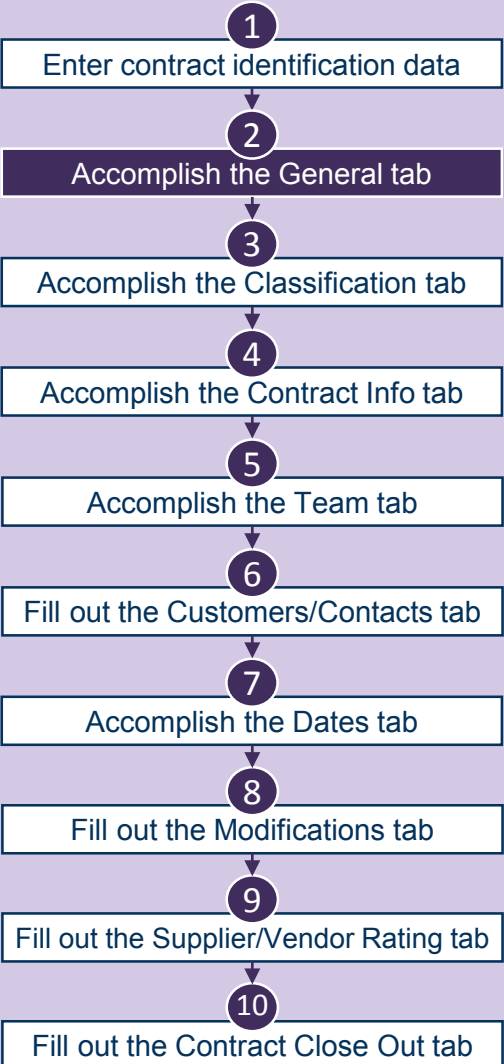
**Purpose of Contract**

Click this link to open the Documents subtask.

**N**

[Additional Task Orders](#) [Additional Opportunities](#) [Projects Linked](#) [Subcontracts](#) [Activities](#) [Documents](#) [User-Defined Info](#) [Project Initialization](#)

# Contracts Overview



Prime Contractor

Master Contract No

☐ Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Contract Type \*

Project Type \*

Date Last Modified

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contact Info

Project Manager

Subcontract Administrator

Billing Analyst

Contract Administrator

Primary Agency

Acquisition Agency

Cognizant DCAA Office

☐ Contract is at Risk

☐ Alert Sent

Purpose of Contract

Use the Documents subtask to enter and view documents attached to the contract.

Click **New** to add a new line.

Orders

Additional Opportunities

Projects

Documents

User-Defined Info

Project Initialization

Identification > Documents

New

Copy

Delete

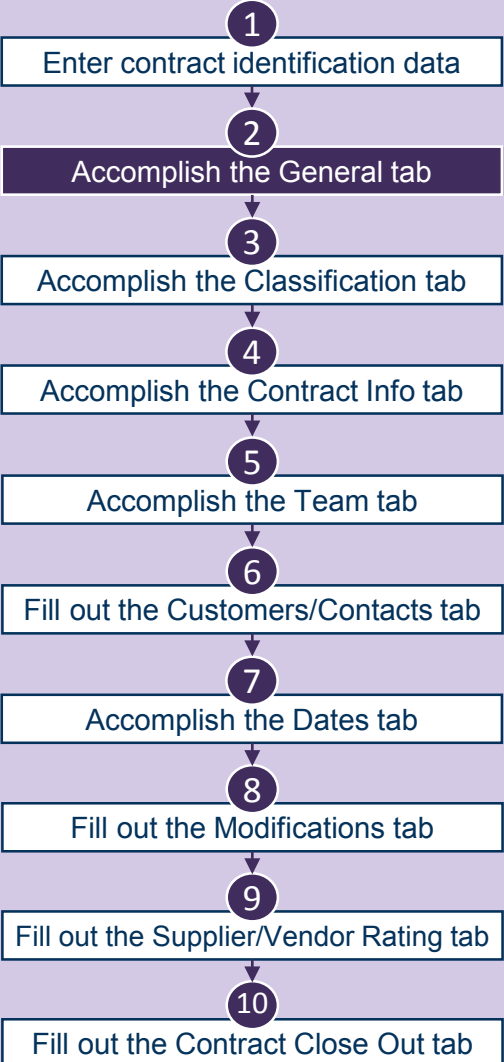
Query

<input checked="" type="checkbox"/>	Document ID *	Date Received	Document Type	File Location	File Name

View Document

Close

# Contracts Overview



Master Contract No

☐ Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Project Type

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Date Last Modified

Contact Info

Project Manager

Billing Analyst

Primary Agency

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

View Financial Info

Contract is at Risk

Alert Sent

Purpose of Contract

Enter a unique **Document ID** to identify the contract document record. Also enter or select the **File Location** of the document you want to assign to the contract. You can also specify the date the document was reviewed, the document type, file name, and document description.

Documents

Projects Linked

Subcontracts

Activities

Documents

User-Defined Info

Project Initialization

Identification > Documents

New Copy Delete Query

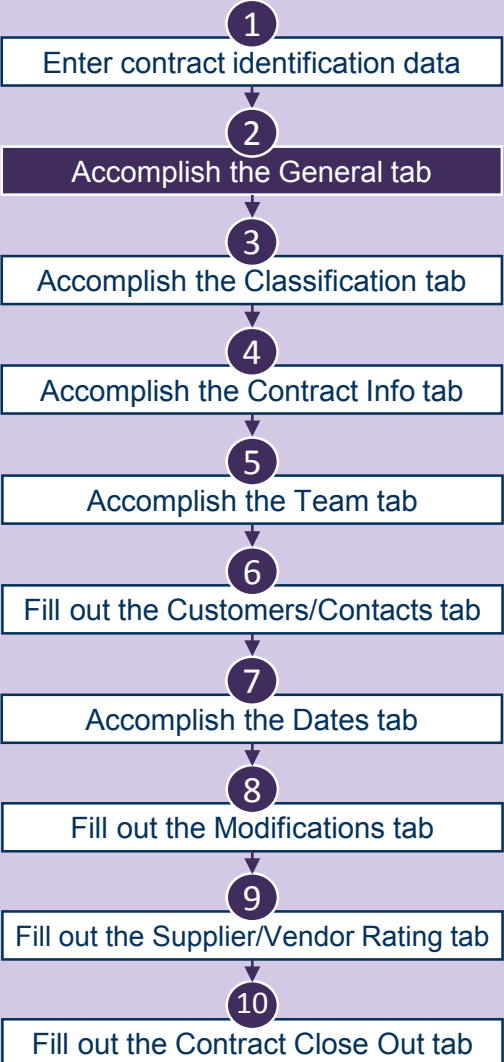
Document ID *	Date Received	Document Type	File Location	File Name

View Document

Close



# Contracts Overview



Master Contract No

☐ Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Project Type ^

Date Last Modified

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contact Info

Project Manager

Billing Analyst

Primary Agency

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

View Financial Information

☐ Contract is at Risk

☐ Alert Sent

Purpose of Contract

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontract

Project Initialization

Identification > Documents

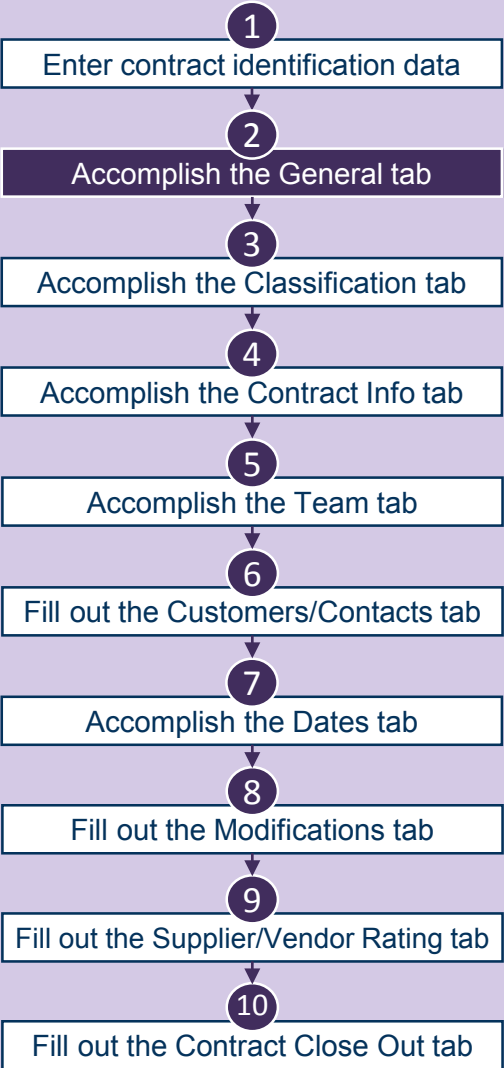
<input checked="" type="checkbox"/>	Document ID *	Date Received	Document Type	File Location
<input checked="" type="checkbox"/>	12345678	<input type="text"/>	Contract Brief	CONTRACTMGMT

View Document

Close

Click **View Document** to download the document. Upon clicking this button, you will see a prompt asking if you want to open or save the document.

# Contracts Overview



Contract ID

Name

☐ Contract Opportunity

☐ External Opportunity

Main Opportunity ID

Name

Prime Contract No

Name

Record Status \*

Active

General

Classification

Contract Info

Team

Customers/Contacts

Dates

Modifications

Supplier/Vendor Rating

Contract Close Out

Basic Info

Prime Contractor

Contract Status \*

Master Contract No

Contract Type \*

☐ Subcontract

Subcontract No

Project Type \*

Date Last Modified

Purchase Order No

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contract Vehicle

Task Order No

Primary Work Location

Contact Info

Project Manager

Subcontract Administrator

Billing Analyst

Contract Administrator

Primary Agency

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

☐ Contract is at Risk

☐ Alert Sent

View Financial Information

Purpose of Contract

Click this link to open the User-Defined Info subtask.

R

Additional Task Orders

Additional Opportunities

Projects Linked

Subcontracts

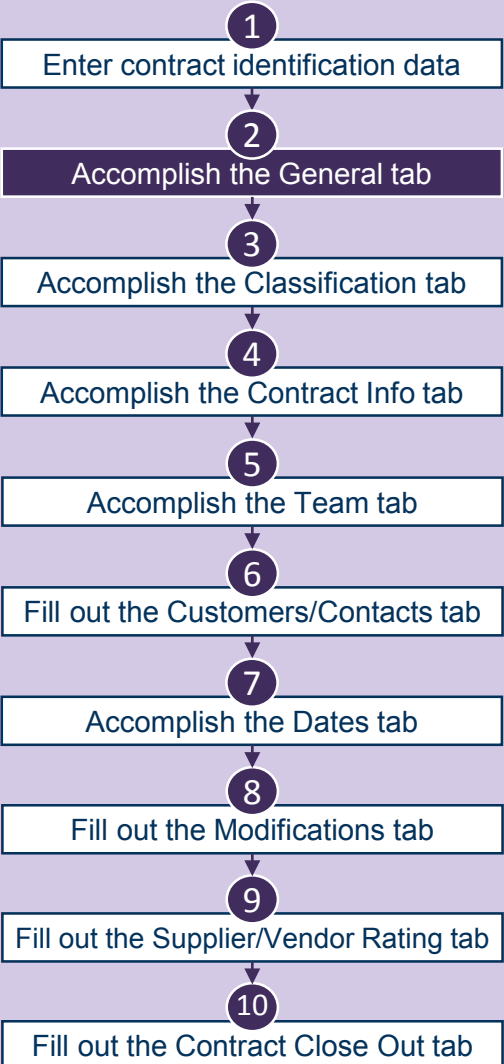
Activities

Documents

User-Defined Info

Project Initialization

# Contracts Overview



Basic Info

Prime Contractor

Master Contract No

☐ Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Contract Status \*

Contract Type \*

Project Type \*

Date Last Modified

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contact Info

Project Manager

Billing Analyst

Primary Agency

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

☐ Contract is at Risk

Identification > User-Defined Info

New

Copy

Delete

Form

Query

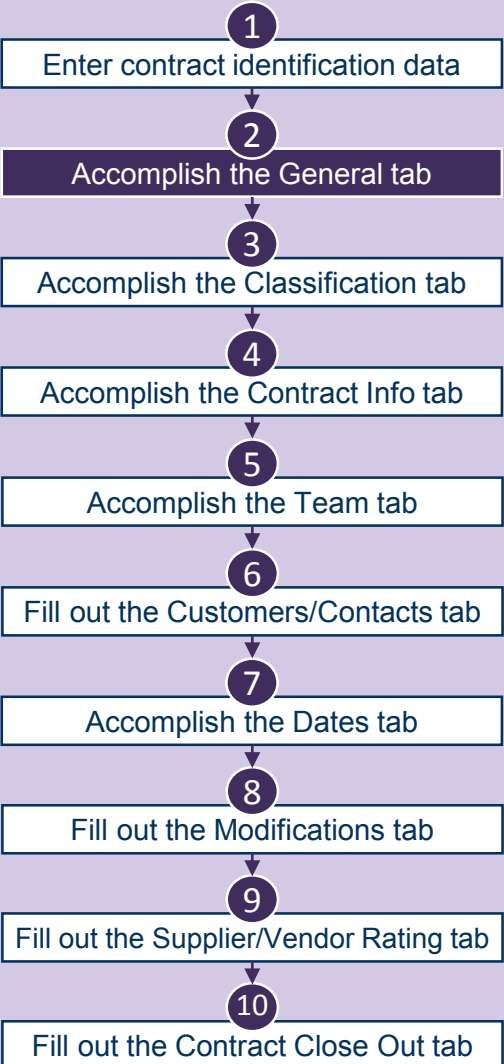
<input checked="" type="checkbox"/>	Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
								Autoload

Close

Use the User-Defined Info subtask to enter, edit, and view values for user-defined fields for a contract record. These user-defined fields are set up on the Manage Contract User-Defined Labels screen.

Click **New** to add a new line, or click **Autoload** to automatically populate the User-Defined Info subtask with data available on the Manage Contract User-Defined Labels screen.

# Contracts Overview



Prime Contractor

Master Contract No

☐ Subcontract

Subcontract No

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

Contract Type

Project Type \*

Date Last Modified

Secondary Project Types

☐ BPA

☐ CPFF

☐ FFP

☐ IDIQ

☐ CPAF

☐ CR

☐ FFI

☐ TM

☐ CPIF

☐ CS

☐ FPLOE

☐ Other

Contact Info

Project Manager

Billing Analyst

Primary Agency

Subcontract Administrator

Contract Administrator

Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value

View Financial Information

☐ Contract is at Risk

☐ Alert Sent

Purpose of Contract

Identification > User-Defined Info

New Copy Delete Form Query

	Data Type	Labels *	Text Value	Numeric Value	Date Value	Costpoint Validation Field	Validated Text	Required
→								

Autoload

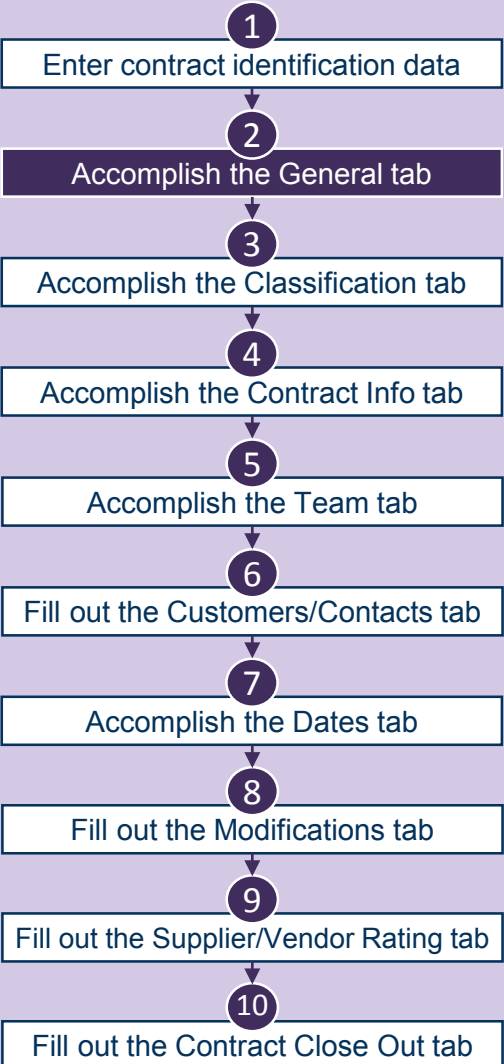
Close

T

If you click **New** instead of **Autoload**, enter relevant information on this subtask.

Enter the **Data Type** for the user-defined label, which can be text, numeric, or date. If **Required** is Y, you must enter a value in either **Text Value**, **Numeric Value**, or **Date Value** before you can save the record on this subtask.

# Contracts Overview



Contract ID  Name  ☐ Subcontract Opportunity ☐ Exclude from reports

Main Opportunity ID  Name

Prime Contract No  Name  Record Status\* Active

**General** Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

**Basic Info**

Prime Contractor   Contract Status\*

Master Contract No  Contract Type\*

☐ Subcontract Project Type\*  Date Last Modified

Subcontract No

**Secondary Project Types**

☐ BPA ☐ CPFF ☐ FFP ☐ IDIQ

☐ CPAF ☐ CR ☐ FFI ☐ TM

☐ CPIF ☐ CS ☐ FPLOE

☐ Other

Purchase Order No

Contract Vehicle

Task Order No

Primary Work Location

**Contact Info**

Project Manager   Subcontract Administrator

Billing Analyst   Contract Administrator

Primary Agency  Acquisition Agency

Cognizant DCAA Office

Anticipated Contract Value  ☐ Contract is at Risk ☐ Alert Sent

View Financial Information

**Purpose of Contract**

Click this link to open the Project Initialization subtask. **U**

[Additional Task Orders](#) [Additional Opportunities](#) [Projects Linked](#) [Subcontracts](#) [Activities](#) [Documents](#) [User-Defined Info](#) [Project Initialization](#)

```
graph TD; 1((1)) --> 2[2 Accomplish the General tab]; 2 --> 3((3)); 3 --> 4[4 Accomplish the Contract Info tab]; 4 --> 5((5)); 5 --> 6[6 Fill out the Customers/Contacts tab]; 6 --> 7((7)); 7 --> 8[8 Accomplish the Dates tab]; 8 --> 9((9)); 9 --> 10[10 Fill out the Supplier/Vendor Rating tab]; 10 --> 11((11)); 11 --> 12[12 Fill out the Contract Close Out tab];
```

- 1
- 2 Accomplish the General tab
- 3
- 4 Accomplish the Contract Info tab
- 5
- 6 Fill out the Customers/Contacts tab
- 7
- 8 Accomplish the Dates tab
- 9
- 10 Fill out the Supplier/Vendor Rating tab
- 11
- 12 Fill out the Contract Close Out tab

Additional Task OrdersAdditional OpportunitiesProjects LinkedSubcontractsActivitiesDocumentsUser-Defined InfoProject Initialization

Identification > Project Initialization

NewCopyDelete0 of 0 ExistingTableQuery

Parameter ID \*Description \*End

Use the Project Initialization subtask to create projects and link these projects to the contract. This subtask is also available as a subtask of Manage Opportunities (Project Initialization subtask).

Click **New** to start adding a project.

Options

Project

☐ Include Basic Info

☐ Include Lower Levels

Include

Project Org AccountProject Revenue SetupOverride Fee on BurdenOverride Fee on DirectProject Billing Info

Autoload

Details

Close

Identification > Project Initialization > Details

Template Project	Destination Project *	Destination Project Name *	Destination Project Abbrev	Active	Owning Organization *



# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID Name

Prime Contract Name Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

SBU/Industry - Check all that apply

- ☐ Audit
- ☐ Energy
- ☐ Environmental & Transportation
- ☐ Defense & Intelligence
- ☐ Financial Services
- ☐ Other

NAICS Code

NAICS(primary)

NAICS(supporting)

Restrictions

- ☐ DD254 Required
- ☐ HSAR
- ☐ DOE
- ☐ AIDAR
- ☐ DFARS
- ☐ GSAR
- ☐ AMS
- ☐ NASA
- ☐ Other

Statement of Work

Enter relevant information on the Classification tab.

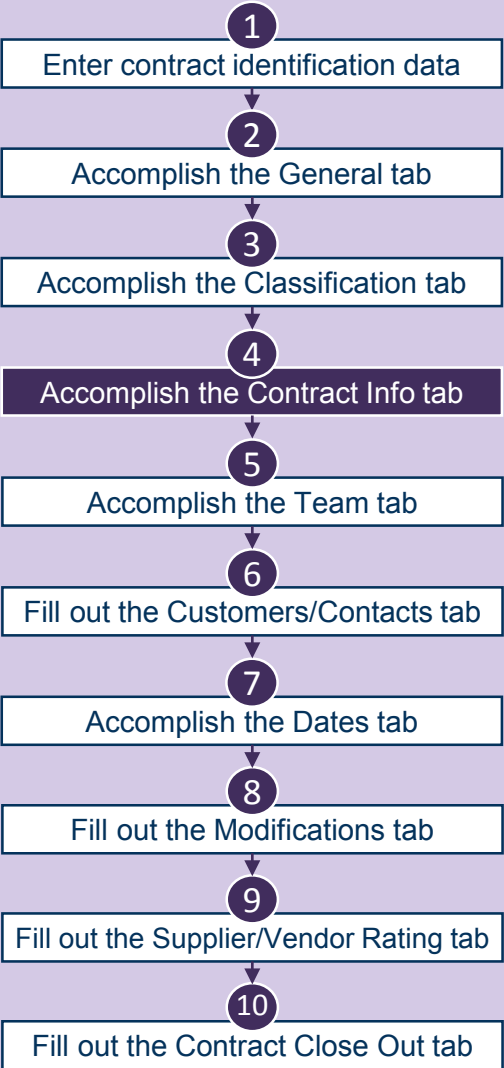
A

Use this tab to specify the small business unit (SBU) or industry classifications as well as procurement regulations associated with the contract.

You can also indicate the North American Industry Classification System (NAICS) codes associated with the contract, and the security details and statement of work for the contract.

This tab has no subtasks.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract ID Main Opportunity ID Prime Contract No

Name \* Name Name

Costpoint Opportunity Exclude from Reports

Record Status \* Active

General Classification **Contract Info** Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

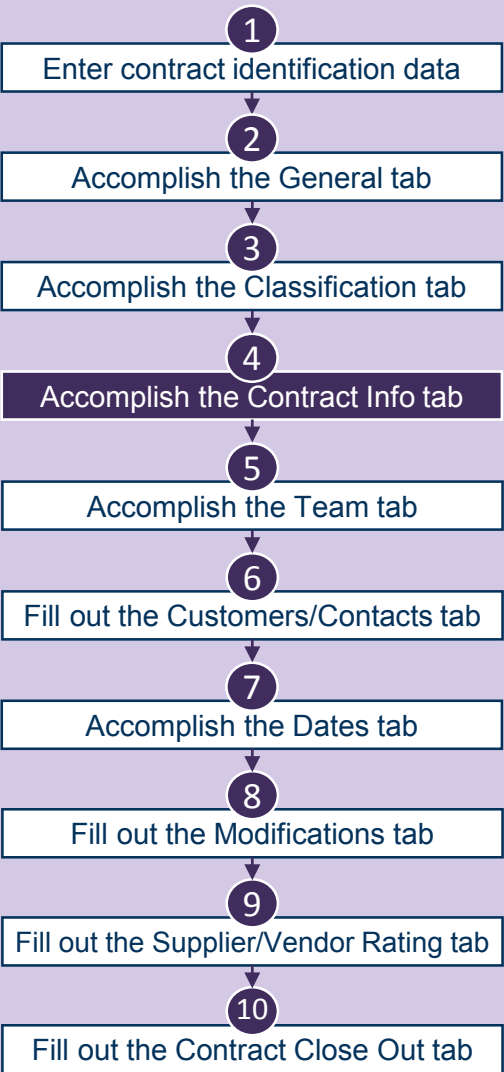
Has copy of proposal been received? \*  
Has executed copy of contract been received? \*  
Is this a GSA Order? \*  
If yes, provide schedule and SIN info in GSA subtask of the Team tab.  
Is this a Time & Materials or Fixed Price Contract? \*  
If T&M, provide schedule of negotiated rates in the Labor Rates subtask of the Team tab.  
DPAS Purchasing Rating  
Does contract contain a level of effort clause? \*  
If yes, identify limitations specified in contract  
Any Government Furnished Equipment (GFE)? \*  
If yes, provide information on Government Furnished Equipment

-Select-  
-Select-  
-Select-  
-Select-  
-Select-  
-Select-  
-Select-  
-Select-  
-Select-  
-Select-

Use this tab to indicate the regulations that apply to the contract, identify limitations and provisions specified in the contract, and enter other background information about the contract.

Follow the steps on the next slides to accomplish the Contract Info tab.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID Name

Prime Contract No Name Record Status \* Active

General Classification **Contract Info** Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Has copy of proposal been received? \* -Select- Is this a Commercial Contract? \* -Select-

Has executed copy of contract been received? \* -Select- Is this an 8A Contract? \* -Select-

Is this a GSA Order? \* -Select- CAS Covered? \* -Select-

If yes, provide schedule and SIN info in GSA subtask Is the Subcontract Plan submitted? \* -Select-

Is this a Time & Materials or Fixed Price Contract? \* -Select- Is the Service Contract Act Required? \* -Select-

If T&M, provide schedule of negotiated rates in the Labor Rates subtask of the Team tab. Is the Davis Bacon Act Required? \* -Select-

Any special facility requirements (e.g. SCIF)? \* -Select-

DPAS Purchasing Rating

Does contract contain a level of effort clause? \* -Select- e/special requirements for subcontractors? \* -Select-

If yes, identify limitations specified in contract

Any Government Furnished Equipment (GFE)? \* -Select- Is Facilities Capital Money allowable on contract? \* -Select-

If yes, provide information on Government Furnished Equipment If yes, provide info FCCM (COM), including rates

**B** After you have filled in the fields on the tab, scroll down to the bottom of the screen to access the tab's subtasks.

# Contracts Overview

1

Enter contract identification data

2

Accomplish the General tab

3

Accomplish the Classification tab

4

Accomplish the Contract Info tab

5

Accomplish the Team tab

6

Fill out the Customers/Contacts tab

7

Accomplish the Dates tab

8

Fill out the Modifications tab

9

Fill out the Supplier/Vendor Rating tab

10

Fill out the Contract Close Out tab

DPAS Purchasing Rating

Does contract contain a level of effort clause? \*

-Select-

If yes, identify limitations specified in contract

Any Government Furnished Equipment (GFE)? \*

-Select-

If yes, provide information on Government Furnished Equipment

Does contract contain ceilings on the indirect rates? \*

-Select-

If yes, identify the ceiling rates

Identify any restrictions on allowable costs

Identify any cost sharing arrangements within contract

Any special facility requirements (e.g. SCIF)?

-Select-

Does contract have restrictive/special requirements for subcontractors? \*

-Select-

If yes, identify relevant portions of contract

Is Facilities Capital Cost of Money allowable on contract? \*

-Select-

If yes, provide information on FCCM (COM), including rates

Identify any profit and fee provisions in contract

Identify any unallowable costs by terms of contract

Identify any other special provisions/limitations specified in contract

Click this link to open the  
GSA Schedule subtask.

C

[GSA Schedule](#)

[FAR Clauses/Provisions](#)

[Supplemental Regulations](#)

[Import FAR/Supplemental Regulation Files](#)

[Contract Deliverables](#)

```
graph TD; 1((1)) --> 2((2)); 2 --> 3((3)); 3 --> 4((4)); 4 --> 5((5)); 5 --> 6((6)); 6 --> 7((7)); 7 --> 8((8)); 8 --> 9((9)); 9 --> 10((10));
```

- 1 Enter contract identification data
- 2 Accomplish the General tab
- 3 Accomplish the Classification tab
- 4 Accomplish the Contract Info tab
- 5 Accomplish the Team tab
- 6 Fill out the Customers/Contacts tab
- 7 Accomplish the Dates tab
- 8 Fill out the Modifications tab
- 9 Fill out the Supplier/Vendor Rating tab
- 10 Fill out the Contract Close Out tab

**Identification > GSA Schedule**

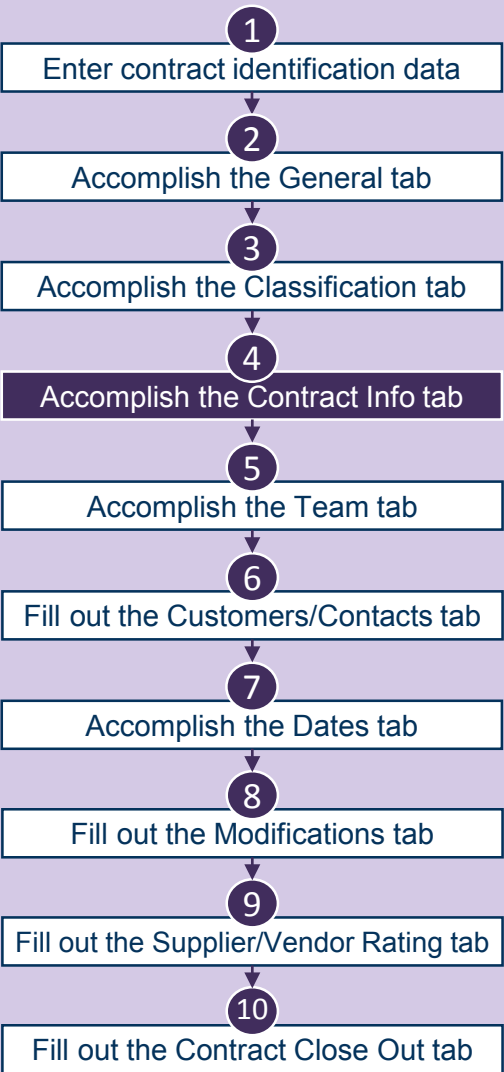
If you selected **Yes** in the **Is this a GSA Order?** field on the Contract Info tab, you can provide the General Services Administration (GSA) schedule and special item number (SIN) for the contract on the GSA Schedule subtask.

Click **New** and fill out the fields on this subtask.

Schedule *	SIN Number/Description *	Comments

**Close**

# Contracts Overview



DPAS Purchasing Rating

Does contract contain a level of effort clause? \*

If yes, identify limitations specified in contract

^

v

Any Government Furnished Equipment (GFE)? \*

If yes, provide information on Government Furnished Equipment

^

v

Does contract contain ceilings on the indirect rates? \*

If yes, identify the ceiling rates

^

v

Identify any restrictions on allowable costs

^

v

Identify any cost sharing arrangements within contract

^

v

Any special facility requirements (e.g. SCIF)?

Does contract have restrictive/special requirements for subcontractors? \*

If yes, identify relevant portions of contract

^

v

Is Facilities Capital Cost of Money allowable on contract? \*

If yes, provide information on FCCM (COM), including rates

^

v

Identify any profit and fee provisions in contract

^

v

Identify any unallowable costs by terms of contract

^

v

Identify any other special provisions/limitations specified in contract

^

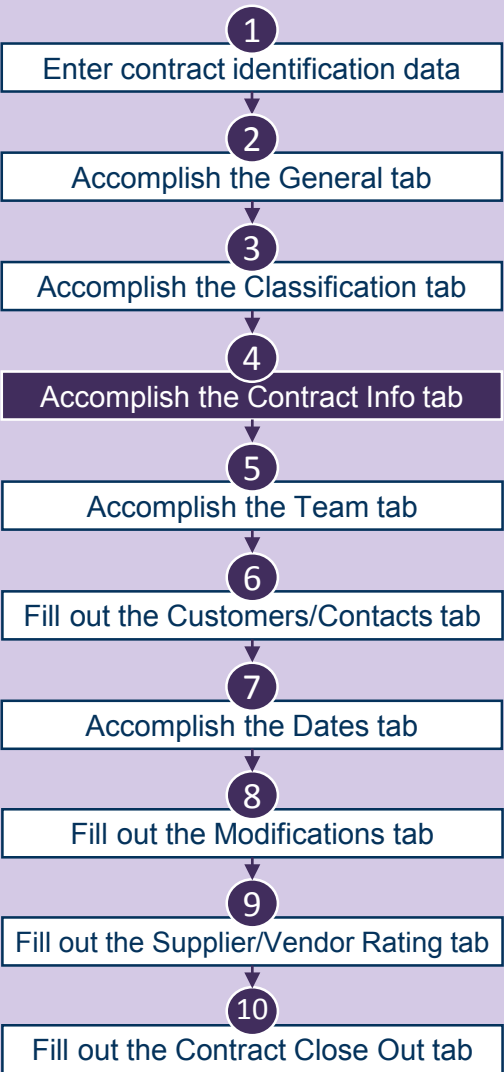
v

Click this link to open the FAR Clauses/Provisions subtask.

E



# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

If yes, identify limitations specified in contract

If yes, identify relevant portions of contract

Any Government Furnished Equipment (GFE)? \* -Select-

Is Facilities Capital Cost of Money allowable on contract? \* -Select-

If yes, provide information on FCCM (COM), including rates

Does contract contain any profit and fee provisions in contract

If you have already assigned Federal Acquisition Regulation (FAR) clauses/provisions to a contract, use the **Load Options** group box to specify the contract from which FAR clauses/provisions will be copied. Click the **Autoload** button to have Costpoint automatically populate the subtask with the specified range of FAR clauses/provisions that are assigned to the selected contract ID.

F

**FAR Clauses/Provisions**

Load Options

Copy FAR Clauses/Provisions from Contract ID

Option Start End

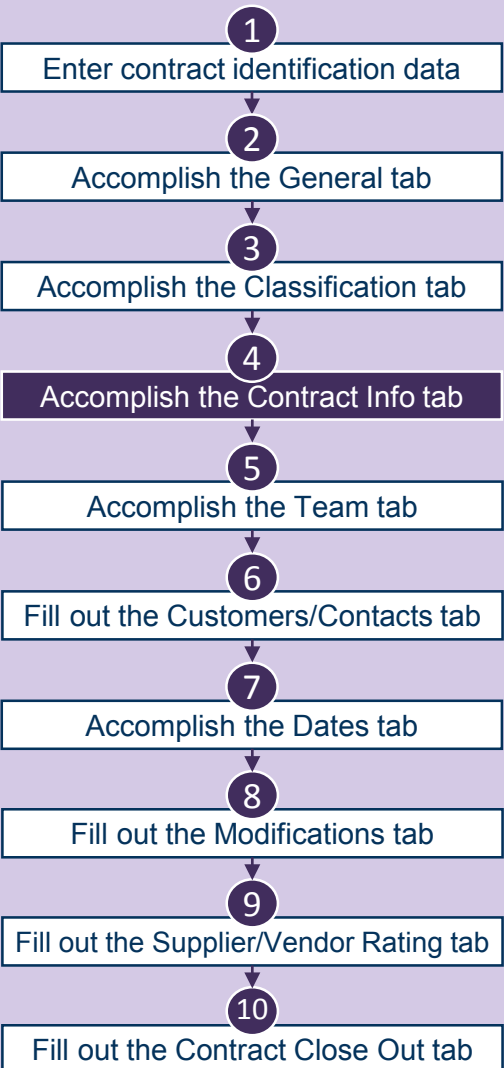
FAR Clauses/Provisions -None- Autoload

New Copy Delete Query

Applicable to Contract	FAR Number	Title	Clause/Provision *	Description from Contract	Page No

Close

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

If yes, identify limitations specified in contract

If yes, identify relevant portions of contract

Any Government Furnished Equipment (GFE)? \* -Select- If yes, provide information on Government Furnished Equipment

Is Facilities Capital Cost of Money allowable on contract? \* -Select- If yes, provide information on FCCM (COM), including rates

Does contract contain ceilings on the indirect rates? \* -Select- If yes, identify the ceiling rates

Identify any profit and fee provisions in contract

### FAR Clauses/Provisions

Load Options

Contract ID

Copy FAR Clauses/Provisions from

Option -None-

Load Predefined Rows

Autoload

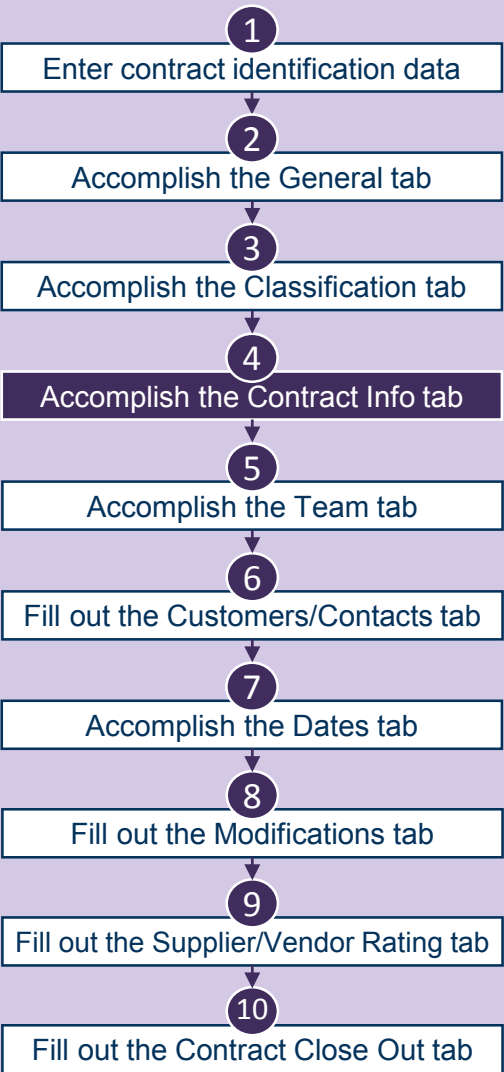
New Copy Delete Query

Applicable to Contract	FAR Number	Title	Clause/Provision *	Description from Contract	Page No

Close

Alternatively, you can click **New** and manually enter FAR clauses/provisions that apply to the contract on the table window.

# Contracts Overview



DPAS Purchasing Rating

Does contract contain a level of effort clause? \*

If yes, identify limitations specified in contract

Does contract have restrictive/special requirements for subcontractors? \*

If yes, identify relevant portions of contract

Any Government Furnished Equipment (GFE)? \*

If yes, provide information on Government Furnished Equipment

Is Facilities Capital Cost of Money allowable on contract? \*

If yes, provide information on FCCM (COM), including rates

Does contract contain ceilings on the indirect rates? \*

If yes, identify the ceiling rates

Identify any profit and fee provisions in contract

Identify any restrictions on allowable costs

Identify any unallowable costs by terms of contract

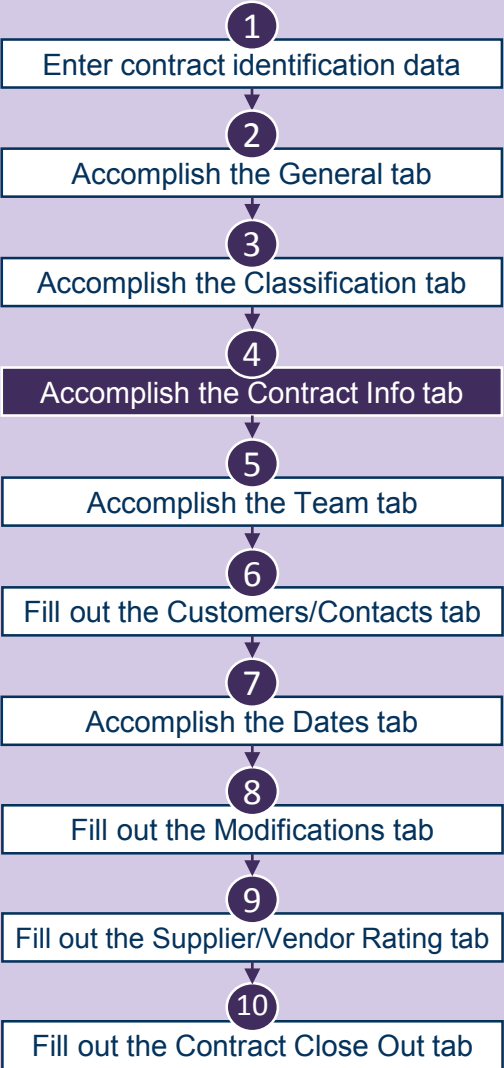
Identify any cost sharing arrangements within contract

Identify any other special provisions/limitations specified in contract

Click this link to open the Supplemental Regulations subtask. **H**

[GSA Schedule](#) [FAR Clauses/Provisions](#) [Supplemental Regulations](#) [Import FAR/Supplemental Regulation Files](#) [Contract Deliverables](#)

# Contracts Overview



DPAS Purchasing Rating

Does contract contain a level of effort clause? \*

If yes, identify limitations specified in contract

Any Government Furnished Equipment (GFE)? \*

If yes, provide information on Government Furnished Equipment

Does contract have restrictive/special requirements for subcontractors? \*

If yes, identify relevant portions of contract

Is Facilities Capital Cost of Money allowable on contract? \*

If yes, provide information on FCCM (COM), including rates

Use the Supplemental Regulations subtask to assign applicable supplemental regulations, including Defense Federal Acquisition Regulation Supplement (DFARS) clauses, to the contract.

Similar to the FAR Clauses/Provisions subtask, you can manually enter supplemental regulation clauses on this subtask, or use the **Load Options** group box to have Costpoint populate the subtask with the specified range of supplemental regulation clauses that are assigned to the selected contract ID.

### Supplemental Regulations

**Load Options**

Contract ID

Copy Supplemental Regulations from

Supplemental Regulations

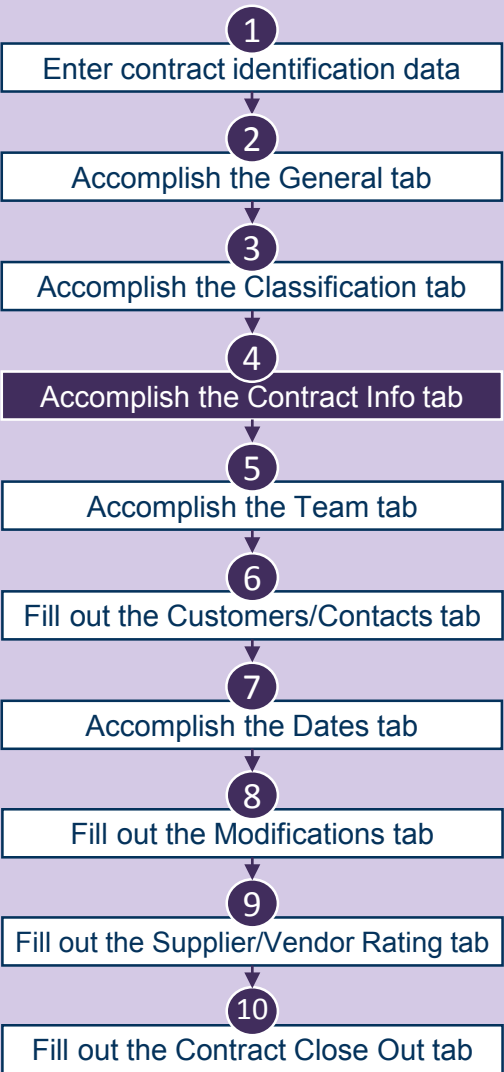
Option

Start

End

<input checked="" type="checkbox"/>	Applicable to Contract	Agency	Clause Number *	Title *	Description from
<input type="checkbox"/>					

# Contracts Overview



DPAS Purchasing Rating

Does contract contain a level of effort clause? \*

-Select-

If yes, identify limitations specified in contract

Any Government Furnished Equipment (GFE)? \*

-Select-

If yes, provide information on Government Furnished Equipment

Does contract contain ceilings on the indirect rates? \*

-Select-

If yes, identify the ceiling rates

Identify any restrictions on allowable costs

Identify any cost sharing arrangements within contract

Any special facility requirements (e.g. SCIF)?

-Select-

Does contract have restrictive/special requirements for subcontractors? \*

-Select-

If yes, identify relevant portions of contract

Is Facilities Capital Cost of Money allowable on contract? \*

-Select-

If yes, provide information on FCCM (COM), including rates

Identify any profit and fee provisions in contract

Identify any unallowable costs by terms of contract

Identify any other special provisions/limitations specified in contract

Click this link to open the Import FAR/Supplemental Regulation Files subtask.

J

[GSA Schedule](#)

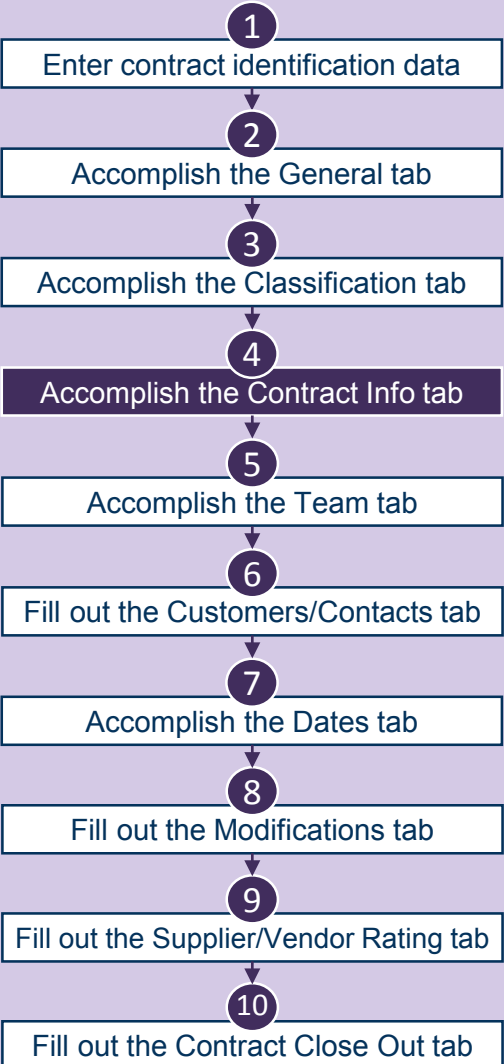
[FAR Clauses/Provisions](#)

[Supplemental Regulations](#)

[Import FAR/Supplemental Regulation Files](#)

[Contract Deliverables](#)

# Contracts Overview



Any Government Furnished Equipment (GFE)? \*

-Select-

If yes, provide information on Government Furnished Equipment

Is Facilities Capital Cost of Money allowable on contract? \*

-Select-

If yes, provide information on FCCM (COM), including rates

Does contract contain ceilings on the indirect rates? \*

-Select-

If yes, identify the ceiling rates

Identify any profit and fee provisions in contract

Identify any restrictions on allowable costs

Identify any unallowable costs by terms of contract

Identify any cost sharing arrangements within contract

Identify any other special provisions/limitations specified in contract

Use this subtask to import FAR, DFARS, and other regulatory clauses from comma-separated file(s) into the contract record.

Click **New** to add a new line.

Before using this subtask, make sure that you have created the CSV file(s) in the format defined in the input file layout.

[GSA Schedule](#) [FAR Clauses/Provisions](#) [Supplemental Regulations](#) [Import FAR/Supplemental Regulation Files](#) [Contract Deliverables](#)

Identification > Import FAR/Supplemental Regulation Files

New

Copy

Delete

Form

Query

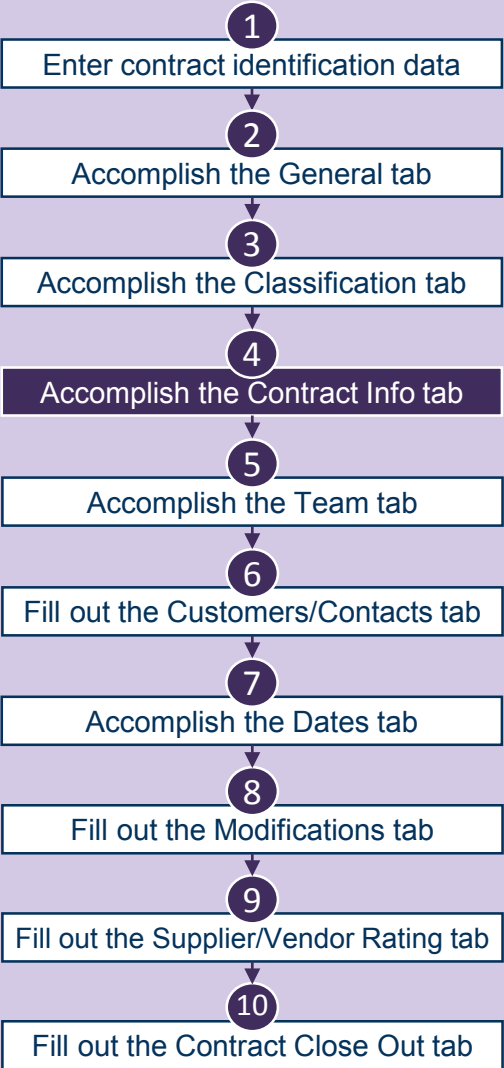
<input checked="" type="checkbox"/>	Regulation Type *	File ID *	Date Imported	Document Type	File Location	File Name *

View File

Import File

Close

# Contracts Overview



Any Government Furnished Equipment (GFE)? \*  
If yes, provide information on Government Furnished Equipment

If yes, provide information on FCCM (COM), including rates

Does contract contain ceilings on the indirect rates? \*  
If yes, identify the ceiling rates

Identify any profit and fee provisions in contract

Identify any restrictions on allowable costs

Identify any unallowable costs by terms of contract

Identify any cost sharing arrangements within contract

Identify any other special provisions/limitations specified in contract

Enter field information on the subtask. To upload the input file(s), you can either use the **File Location** field on the subtask to specify the alternate file location where the input file is located, or leave this field blank and use the File Upload Manager instead.

[Self Schedule](#) [FAR Clause/Provisions](#) [Supplemental Regulations](#) [Import FAR/Supplemental Regulation Files](#) [Contract Deliverables](#)

Identification > Import FAR/Supplemental Regulation Files

New Copy ▼ Delete Form Query

Regulation Type *	File ID *	Date Imported	Document Type	File Location	File Name *
FAR Clause/Provision ▼					

View File Import File Close



# Contracts Overview

1

Enter contract identification data

2

Accomplish the General tab

3

Accomplish the Classification tab

4

Accomplish the Contract Info tab

5

Accomplish the Team tab

6

Fill out the Customers/Contacts tab

7

Accomplish the Dates tab

8

Fill out the Modifications tab

9

Fill out the Supplier/Vendor Rating tab

10

Fill out the Contract Close Out tab

Any Government Furnished Equipment (GFE)? \*

If yes, provide information on Government Furnished Equipment

Does contract contain ceilings on the indirect rates? \*

If yes, identify the ceiling rates

Identify any restrictions on allowable costs

Identify any cost sharing arrangements within contract

If yes, provide information on FCCM (COM), including rates

Identify any profit and fee provisions in contract

Identify any unallowable costs by terms of contract

Identify any other special provisions/limitations specified in contract

[GSA Schedule](#)

[FAR Clauses/Provisions](#)

[Supplemental Regulations](#)

[Import FAR/Supplemental Regulation Files](#)

[Contract Deliverables](#)

[Identification](#) > Import FAR/Supplemental Regulation Files

New Copy

<input checked="" type="checkbox"/>	Regulation Type *	File ID *	Date Imported	Document Type	File Location	
→	FAR Clause/Provision	CNTRFAR1		*****	CCIMPORT	CNT

If errors are encountered after you imported the file(s), make corrections to the input file(s) and upload them again. Save the contract record when the import process completes without errors.

After you have entered values, click **Import File**.

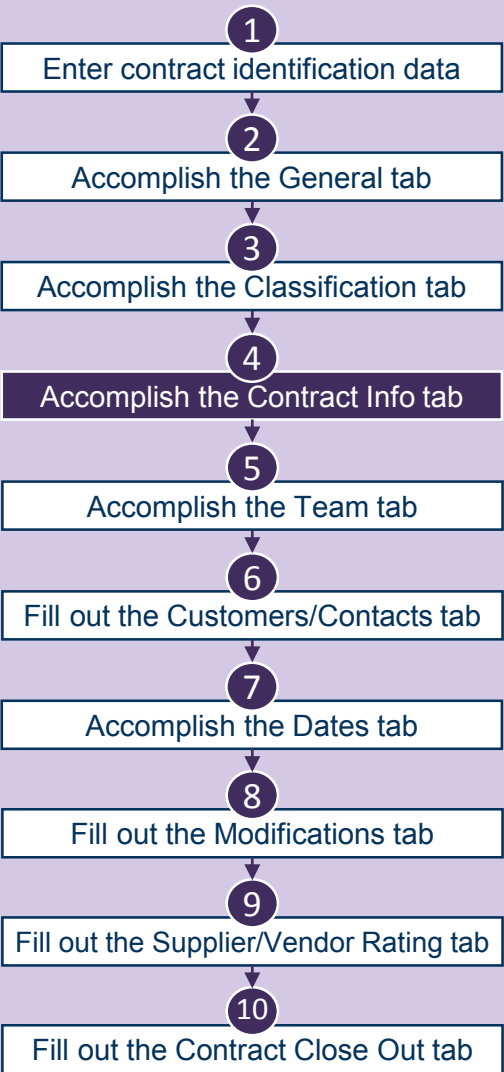
M

View File

Import File

Close

# Contracts Overview



DPAS Purchasing Rating

Does contract contain a level of effort clause? \*

-Select-

If yes, identify limitations specified in contract

Any Government Furnished Equipment (GFE)? \*

-Select-

If yes, provide information on Government Furnished Equipment

Does contract contain ceilings on the indirect rates? \*

-Select-

If yes, identify the ceiling rates

Identify any restrictions on allowable costs

Identify any cost sharing arrangements within contract

Any special facility requirements (e.g. SCIF)?

-Select-

Does contract have restrictive/special requirements for subcontractors? \*

-Select-

If yes, identify relevant portions of contract

Is Facilities Capital Cost of Money allowable on contract? \*

-Select-

If yes, provide information on FCCM (COM), including rates

Identify any profit and fee provisions in contract

Identify any unallowable costs by terms of contract

Identify any other special provisions/limitations specified in contract

Click this link to open the Contract Deliverables subtask.

N

[GSA Schedule](#)

[FAR Clauses/Provisions](#)

[Supplemental Regulations](#)

[Import FAR/Supplemental Regulation Files](#)

[Contract Deliverables](#)

# Contracts Overview

1

Enter contract identification data

2

Accomplish the General tab

3

Accomplish the Classification tab

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Accomplish the Contract Info tab

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Accomplish the Dates tab

8

Fill out the Modifications tab

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Fill out the Supplier/Vendor Rating tab

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Fill out the Contract Close Out tab

Does contract contain ceilings on the indirect rates? \*

If yes, identify the ceiling rates

Identify any profit and fee provisions in contract

Identify any restrictions on allowable costs

Identify any unallowable costs by terms of contract

Identify any cost sharing arrangements within contract

Identify any other special provisions/limitations specified in contract

Use the Contract Deliverables subtask to enter contract deliverables and to track dates for each deliverable.

Only the **Number** field is required on the subtask.

→ Identification > Contract Deliverables

New Copy ▼ Delete 1 of 1 New Table Query

- Deliverable

- Customer

Number \*

Description

- Due Date

Original

Revised

- Date

Delivered

Accepted

Am

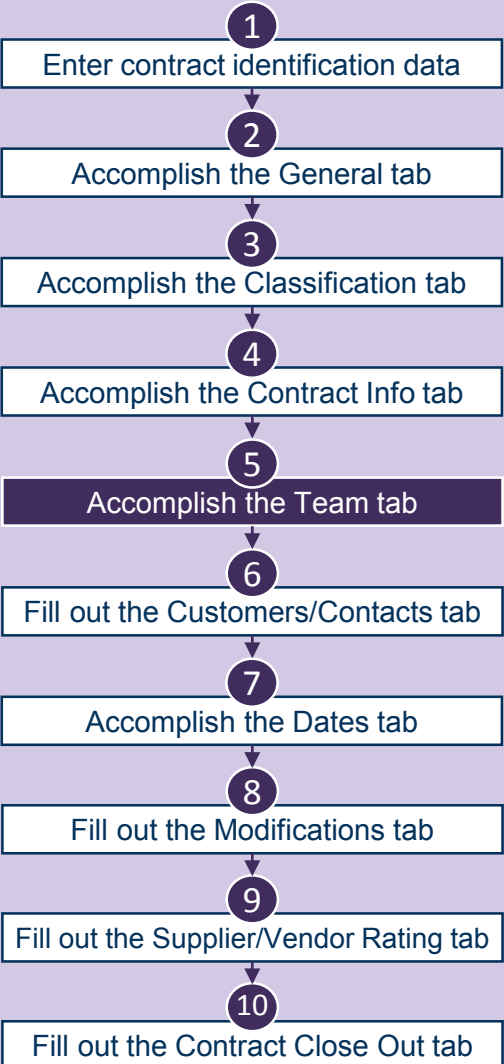
Code

Work Order Number

Enter a unique number for the deliverable. An error occurs if you enter a number that already exists for the contract.

Close

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

→ Identification

Contract ID Main Opportunity ID Prime Contract No

General Classification Contract Info **Team** Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

→

Labor Rates Contract Employee Team Potential Work Force Employees Contract Teammates

Team > Labor Rates

Load Opp PLC

	GSA Labor Category Description	GLC	General Labor Category Description	Labor Rate
<input checked="" type="checkbox"/>				

Close

Team > Contract Employee Team

Load Opp Employees

	Employee *	Name	Title	Role Description
<input checked="" type="checkbox"/>				

Close

Team > Potential Work Force Employees

Load Opp Work Force Employees

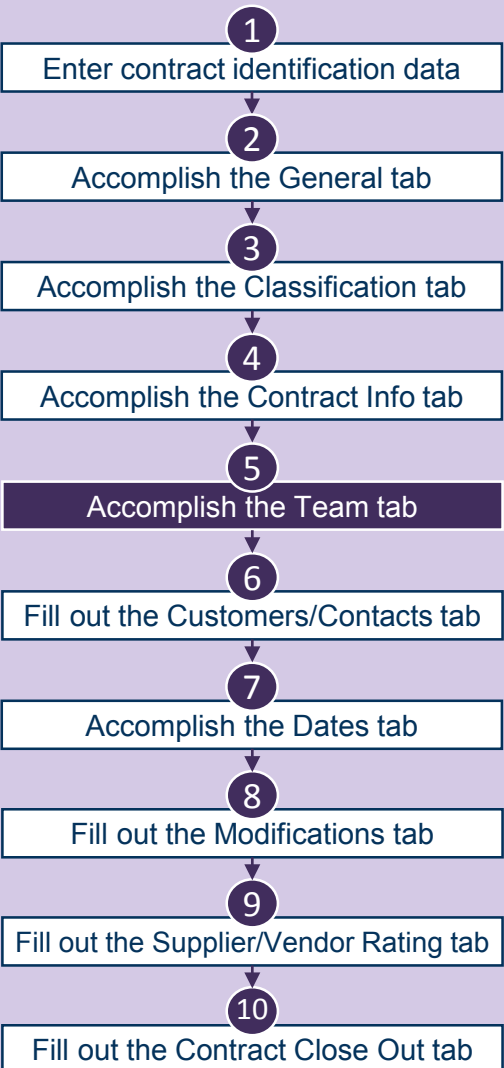
	Employee *	Name	Title	Role Description	Include in Work Force	ITAR	U.S. Citizen
<input checked="" type="checkbox"/>							

Click the Team tab to display its subtasks. All subtasks display automatically, but you can minimize or close them.

Use the Team tab to associate employees and vendors/partners to the contract, and set up labor rates for the contract.

Follow the steps on the next slides to accomplish the subtasks on the Team tab.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Home Star 1 Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Approval 1 of 1 New

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID

Prime Contract No

Record Status \* Active

General Classification Contract Info

er/Vendor Rating Contract Close Out

New Delete 1 of 1 New

Labor Rates Contract Employee Team Potential Work Force Employees Contract Teammates

Team > Labor Rates

Load Opp PLC

New Copy Delete Query

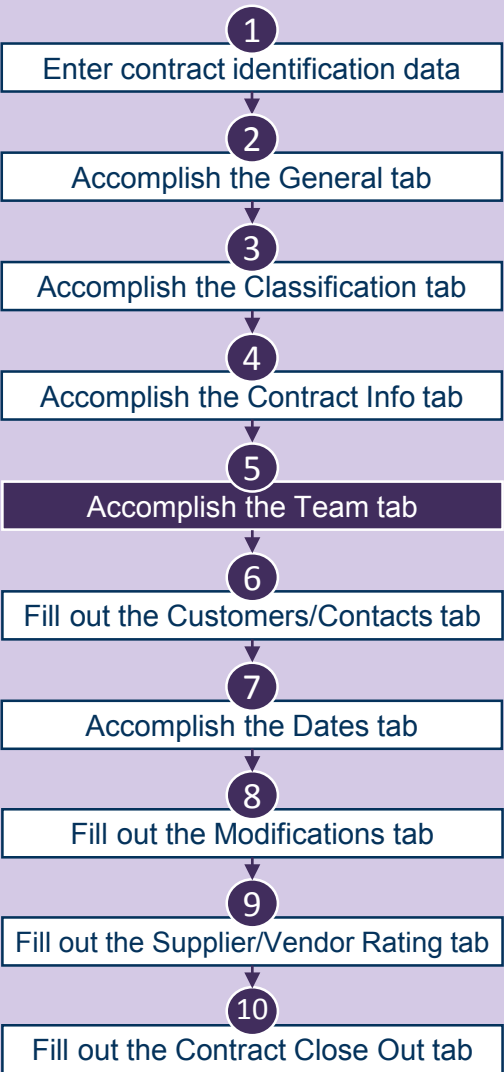
GLC	General Labor Category Description	Labor Rate	La

Close

If you answered T&M in the Is this a Time & Materials or Fixed Price Contract? field on the Contract Info tab, you can use the Labor Rates subtask to enter the schedule of negotiated rates for the contract.

B Click **New** to manually add labor rates applicable to the contract, or click **Load Opp PLC** to have Costpoint automatically populate the table window with the project labor categories (PLCs) associated with the opportunities linked to the contract.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

→ Identification

Contract ID  ☐ Costpoint Opportunity ☐ Exclude from Reports

Main Opportunity ID

Prime Contract No  Record Status \* Active

General Classification Contract Info T Supplier/Vendor Rating Contract Close Out

Labor Rates Contract Employee Team Potential Work Force Employees Contract Teammates

Team > Contract Employee Team

Load Opp Employees

Employee *	Name	Role Description
------------	------	------------------

Close

Use the Contract Employee Team subtask to associate one or more employees with the contract proposal process and define their roles.

Click **New** to manually add employees to the table window, or click **Load Opp Employees** to have Costpoint automatically populate the table window with employees associated with the main opportunity linked to the contract.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

→ Identification

Contract ID Main Opportunity ID Prime Contract No

Costpoint Opportunity Exclude from Reports

Record Status \* Active

General Classification Contract Info Team

Labor Rates Contract Employee Team Potential Work Force Employees Contract Teammates

Team > Potential Work Force Employees

Load Opp Work Force Employees

New Copy Delete Query

Employee *	Name	Description	Include in Work Force	ITAR	U.S. Citizen

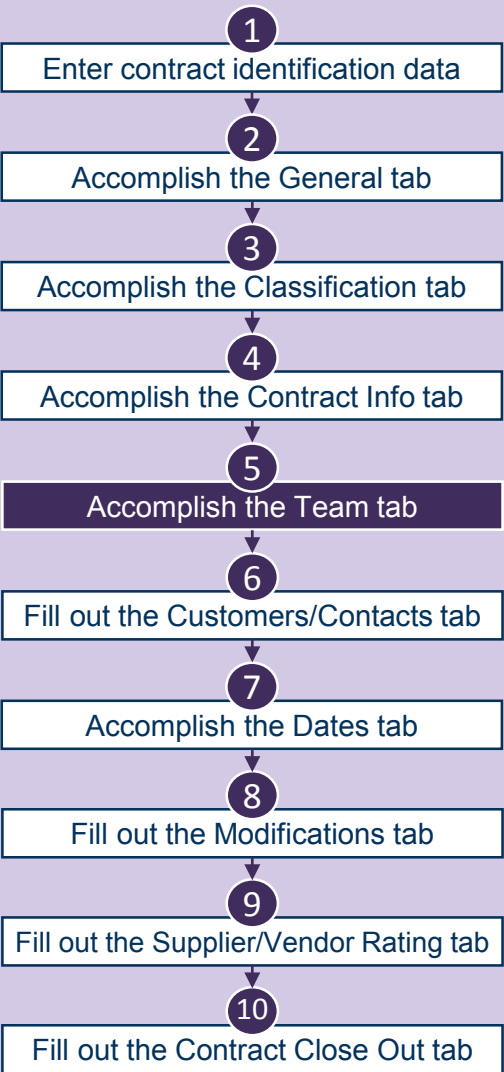
Close

Use the Potential Work Force Employees subtask to associate the contract with employees that may be added to the employee work force and may be included on a project associated with the contract.

D Click **New** to manually add employees to the table window, or click **Load Opp Work Force Employees** to have Costpoint automatically populate the table window with potential work force employees associated with the main opportunity linked to the contract.



# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

→ Identification

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID

Prime Contract No Record Status \* Active

General Classification Contract Info Vendor Rating Contract Close Out

Labor Rates Contract Employee Team Potential Work Force Employees Contract Teammates

Team > Contract Teammates

Load Opp Teamates

Prime/Subcontractor *	ID *	Include in Work Force	PLC	Default PLC	Address
-----------------------	------	-----------------------	-----	-------------	---------

Vendor Employees

Close

Use the Contract Teammates subtask to associate one or more prime contractors and/or subcontractors with the contract and define their roles.

Click **New** to manually add prime contractors/subcontractors to the table window, or click **Load Opp Teammates** to have Costpoint automatically populate the table window with prime contractors/subcontractors associated with the main opportunity linked to the contract.

# Contracts Overview

- 1 Enter contract identification data
- 2 Accomplish the General tab
- 3 Accomplish the Classification tab
- 4 Accomplish the Contract Info tab
- 5 Accomplish the Team tab
- 6 Fill out the Customers/Contacts tab
- 7 Accomplish the Dates tab
- 8 Fill out the Modifications tab
- 9 Fill out the Supplier/Vendor Rating tab
- 10 Fill out the Contract Close Out tab

FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

→ Identification

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID Name

Prime Contract No Name Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

→

Labor Rates Contract End

Team > Contract Teammates

Load Opp Teamates

Prime/Subcontractor *	ID *	Name	Role Description	Address
→ Subcontractor				

Vendor Employees

Close

Team > Contract Teammates > Vendor Employees

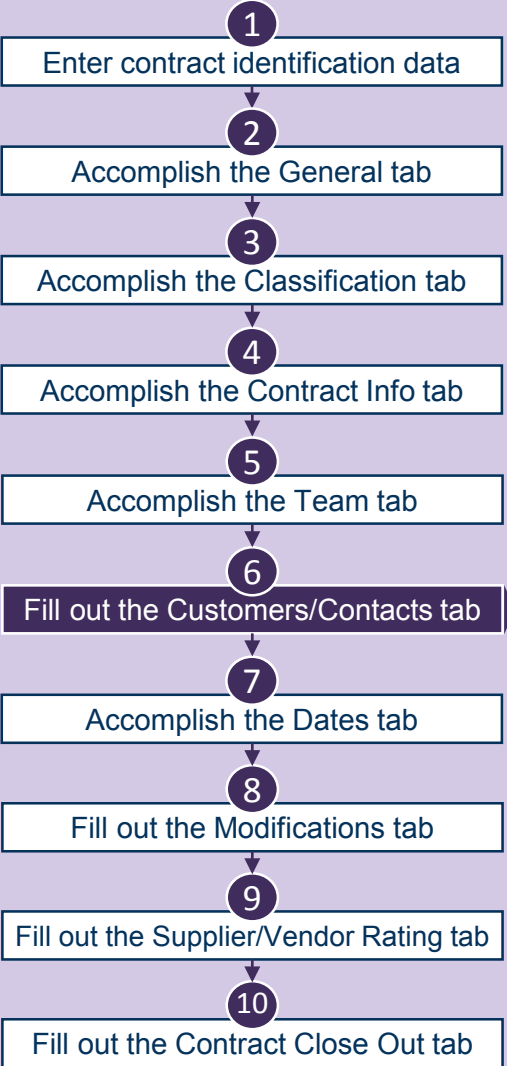
Vendor ID	Vendor Name	Vendor Employee ID *	Vendor Employee Description	Include in Work Force

New

On the Vendor Employees subtask, click **New** to start adding vendor employees.

If you selected **Subcontractor** on the Contract Teammates subtask, click the Vendor Employees subtask to add vendor employees who will work on the contract.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

→ Identification

Contract ID Main Opportunity ID Prime Contract No

Name Record Status Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Load All Contact Types

Contact Type Description *	Customer	Address Code	Point of Contact	Point of Contact First Name	Point of Contact Last Name

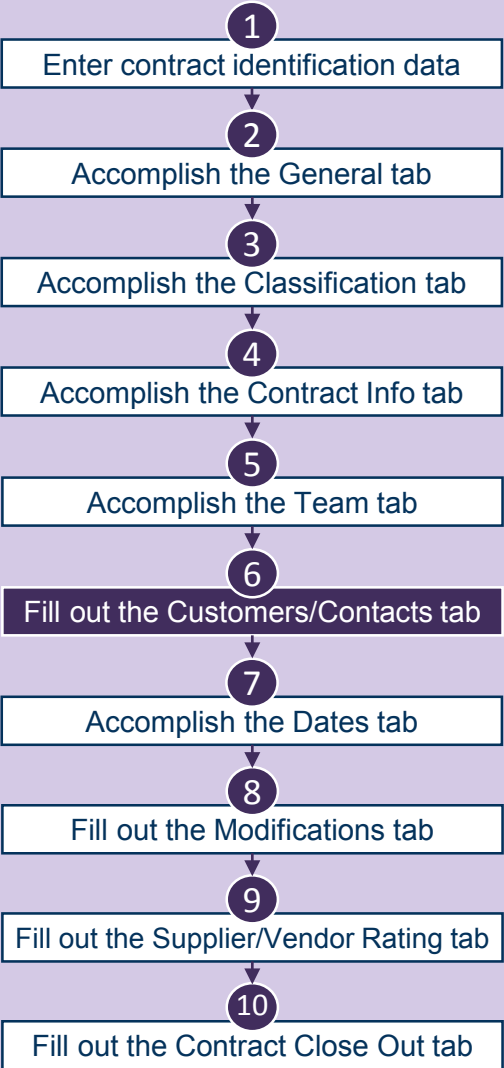
Click this tab to open the Customers/Contacts tab.

Use this tab to link one or more customers or contacts to the contract.

A

Follow the step on the next slide to complete the Customers/Contacts tab.

# Contracts Overview



FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract IDMain Opportunity IDPrime Contract No

GeneralClassificationContract InfoTeamCu

Record Status \*Active

Costpoint OpportunityExclude from Reports

Vendor RatingContract Close Out

NewCopyDeleteQuery

Load All Contact Types

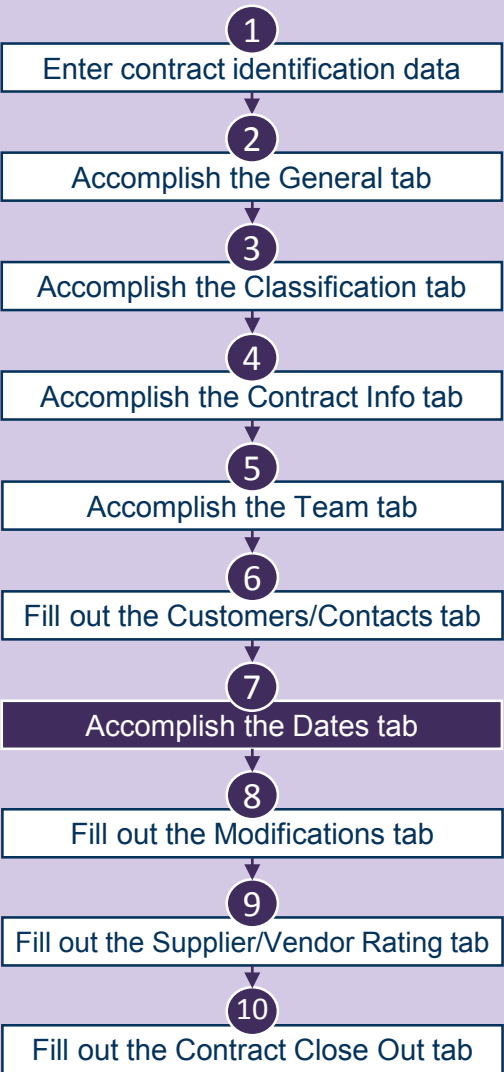
	Contact Type Description *	Customer	Address Code	Point of Contact	Point of Contact First Name	Point of Contact Last Name	Title	Phone Number	Fax Number	Email Address
→	Administrative Contracting Officer (ACO)									
→	Acquisition Customer									
→	Billing Customer									
→	Contract Representative									
→	Contract Officer									
→	Contracting Officers Technical Representative									
→	Procurement Officer (PCO)									
→	Primary Customer									

B

Click **New** to manually add customers/contacts, or click **Load All Contact Types** to have Costpoint populate the table window with the contact types available in the system.

The contact types you see on this screen are automatically loaded when you click **Load All Contact Types**.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

### Identification

Contract ID  Enter field information on the Dates tab. A

Main Opportunity ID

Prime Contract No

Use this tab to enter, edit, or review dates for the contract.

Contract Award Date

Contract Start Month  Contract End Month

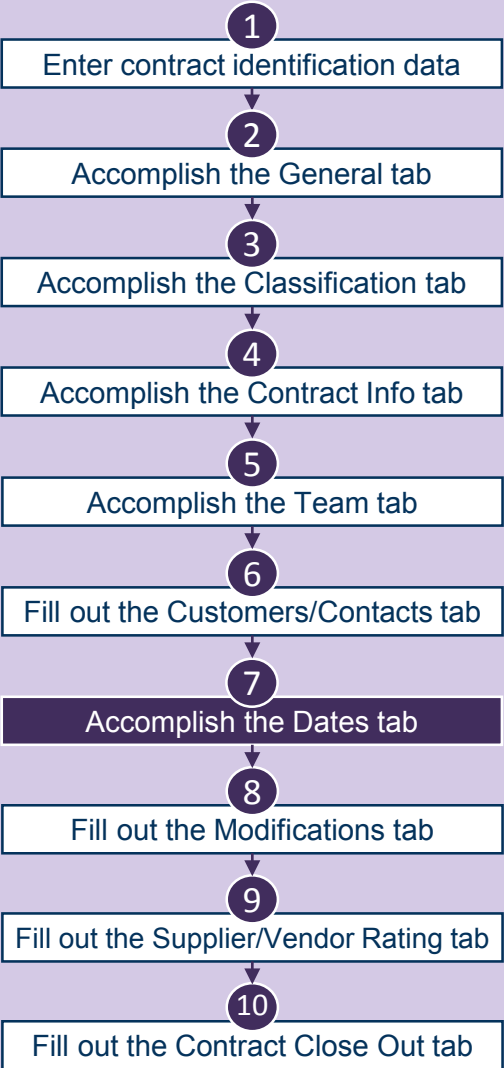
Contract Start Date  Contract End Date

Click this link to open the Key Contract Dates subtask. B

[Key Contract Dates](#)

Follow the step on the next slide to complete the Dates tab.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract ID Name \* Costpoint Opportunity Exclude from Reports

Main Opportunity ID Name

Prime Contract No Name Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Contract Award Date

Period of Performance

Contract Start Month Contract End Month

Contract Start Date Contract End Date

Key Contract Dates

Type \* Start Date End Date

Amount

Comments

Close

C Enter or select the contract date type for the contract date. Valid values are only those that exist on the Manage Contract Date Types screen.

# Contracts Overview

- 1 Enter contract identification data
- 2 Accomplish the General tab
- 3 Accomplish the Classification tab
- 4 Accomplish the Contract Info tab
- 5 Accomplish the Team tab
- 6 Fill out the Customers/Contacts tab
- 7 Accomplish the Dates tab
- 8 Fill out the Modifications tab
- 9 Fill out the Supplier/Vendor Rating tab
- 10 Fill out the Contract Close Out tab

FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract ID CNTR-0000000000000008 & Maint Srvs ☒ Costpoint Opportunity ☐ Exclude from Reports

Main Opportunity ID OPP-0000000000000001 1-HHS IT O&M

Prime Contract No HHSN847351200567W Name NITAAC P3 Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Collapse All Expand All

	Project	Project Link	Name	Contract Mod ID	Project Mod ID	Modification Description	Effective Date	Start Date	End Date	Contract Value Modifications Amount	Contract Value Modifications Fee %
+ 10115.00.01	10115.00.01		HHS IT Ops & Maint BY							0.00	

Contract/Project Modifications

Complete the Modifications tab.

A

Follow the steps on the next few slides to accomplish the Modifications tab.

When you open this tab, the table window displays modifications for the projects linked to the contract record. No rows are displayed unless there are project modifications at or below the project linked to the contract record. The only exception is if there are rows manually entered on the Contract/Project Modifications subtask; these rows display on this tab.

All fields in the table window are read-only. You can modify existing project modifications or create new modifications using the Contract/Project Modifications subtask if these functionalities are enabled on the Configure Project Settings screen.



# Contracts Overview

- 1 Enter contract identification data
- 2 Accomplish the General tab
- 3 Accomplish the Classification tab
- 4 Accomplish the Contract Info tab
- 5 Accomplish the Team tab
- 6 Fill out the Customers/Contacts tab
- 7 Accomplish the Dates tab
- 8 Fill out the Modifications tab
- 9 Fill out the Supplier/Vendor Rating tab
- 10 Fill out the Contract Close Out tab

FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract ID CNTR-0000000000000008 Name \* HHS IT Ops & Maint Srvs ☒ Costpoint Opportunity ☐ Exclude from Reports

Main Opportunity ID OPP-0000000000000001 Name CIO-SP3-TO1-HHS IT O&M

Prime Contract No HHSN847351200567W Name NITAAC CIO-SP3 Record Status \* Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

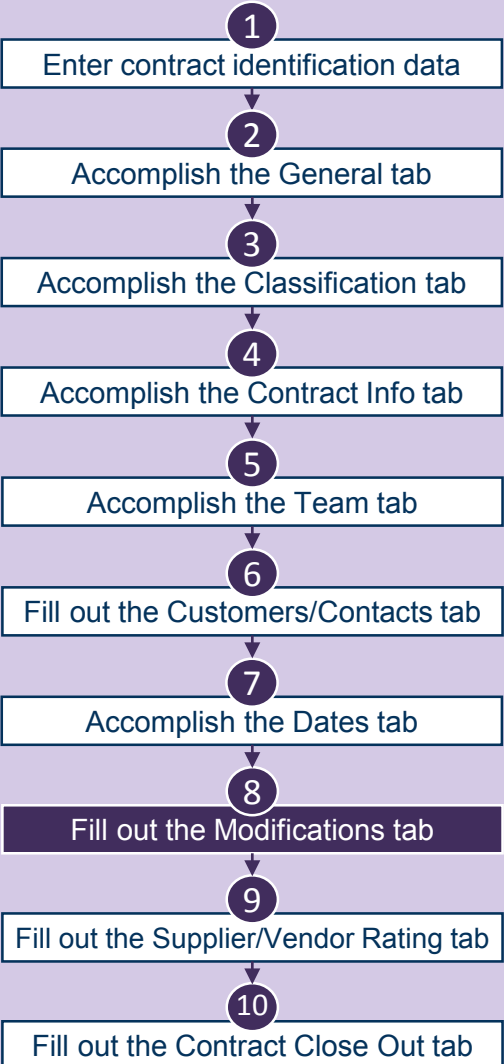
Collapse All Expand All

	Project	Project Link	Name	Contract Mod ID	Project Mod ID	Modification Description	Effective Date	Start Date	End Date	Contract Value Modifications Amount	Contract Value Modifications Fee %
+ 10115.00.01	10115.00.01		HHS IT Ops & Maint BY							0.00	

Click this link to open the Contract/Project Modifications subtask.

[Contract/Project Modifications](#)

# Contracts Overview



Contract ID: CNTR-0000000000000000

Main Opportunity ID: OPP-0000000000000001

Prime Contract No: HHSN847351200567W

Name: CIO-SP3-TO1-HHS IT O&M

Name: NITAAC CIO-SP3

Record Status: Active

General

Classification

Contract Info

Team

Customers/Contacts

Dates

Modifications

Supplier/Vendor Rating

Contract Close Out

Collapse All

Expand All

<input checked="" type="checkbox"/>	Project	Project Link	Name	Contract Mod ID	Project Mod ID	Modification Description	Effective Date	Start Date	End Date	Contract Value Modifications Amount	Contract Value Modifications Fee %
<input type="checkbox"/>	10115.00.01	10115.00.01	HHS IT Ops & Maint BY							0.00	

Contract/Project Modifications

Modifications > Identification

New Copy Delete 1 of 1 New Table Query

Project Name

Description

Start Date: 01/25/2019

End Date

Value

Fee%

Cost

Fee

Notes

Create New Project Modifications

Use the Contract/Project Modifications subtask to enter, edit, or view modifications for signed and funded values as well as period of performance for the contract.

The **Create New Project Modifications** check box displays only when you click **New** on the subtask. Its value defaults from the value of the **Allow Creation of New Project Modifications from Contract and Subcontract Modifications** check box on the Configure Project Settings screen, but can be changed if the **Allow Override** check box is selected on that screen.

# Contracts Overview

- 1 Enter contract identification data
- 2 Accomplish the General tab
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- 10 Fill out the Contract Close Out tab

FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

Contract ID CNTR-0000000000000008

Main Opportunity ID OPP-0000000000000001

Prime Contract No HHSN847351200567W

Name NITAAC CIO-SP3

Record Status \* Active

Costpoint Opportunity Exclude from Reports

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

Subcontractor/Vendor ID *	Subcontractor/Vendor Name	Date Reviewed	Subcontract ID	Total Score	Percent	Project ID	Project Name	Products/Services Provided
V100013	Balmar Consulting			93	89%	10370.IT	SLA MANAGEMENT	System Solution Services
V100013	Balmar Consulting		SUBC-0000000000000001	60	56%			
V100089	Premiere Solutions		SUBC-0000000000000002	78	74%			
V100089	Premiere Solutions						MANAGEMENT	System Solution Services

Supplier/Vendor Rating

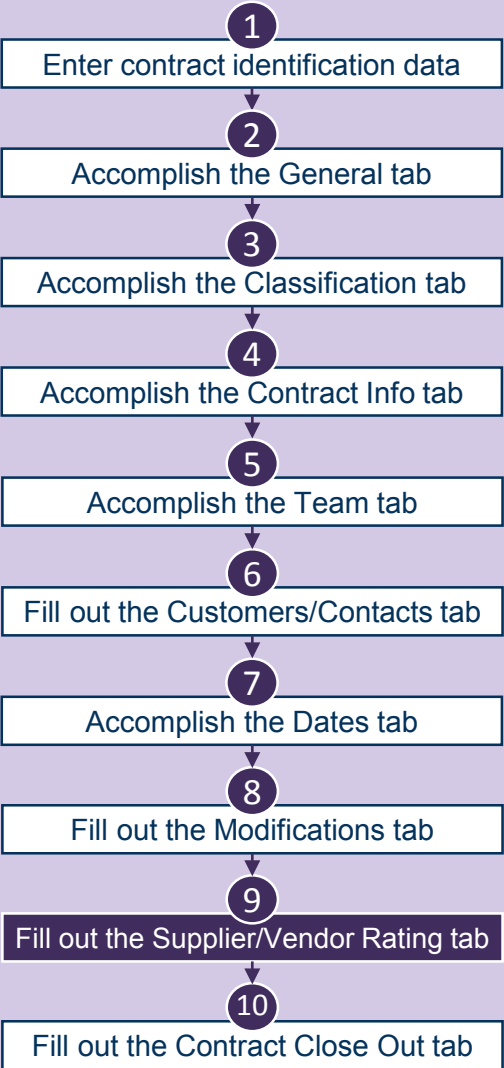
Click this tab to open the Supplier/Vendor Rating tab.

A

Use this tab to assign or review supplier/vendor ratings for suppliers/vendors associated with the contract. You can use the fields on this tab to evaluate the performance of suppliers/vendors, and rank them based on their rating. You enter the scores on the Supplier/Vendor Rating subtask.

Follow the steps on the next few slides to accomplish the Supplier/Vendor Rating tab.

# Contracts Overview



FILE LINE OPTIONS PROCESS HELP

Save Save & Continue Refresh Clone Lookup Default Action Actions/Reports Execute Page Setup Print Options Preview

Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

### Identification

Contract ID: CNTR-0000000000000008 Name: HHS IT Ops & Maint Srvs ☒ Costpoint Opportunity ☐ Exclude from Reports

Main Opportunity ID: OPP-0000000000000001 Name: CIO-SP3-TO1-HHS IT O&M

Prime Contract No: HHSN847351200567W Name: NITAAC CIO-SP3 Record Status: Active

General Classification Contract Info Team Customers/Contacts Dates Modifications **Supplier/Vendor Rating** Contract Close Out

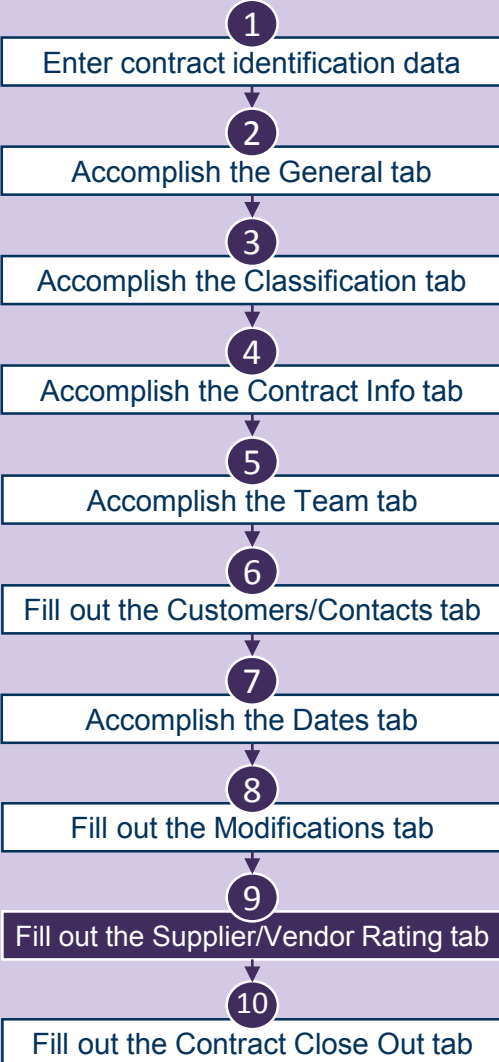
	Subcontractor/Vendor ID *	Subcontractor/Vendor Name	Date Reviewed	Subcontract ID	Total Score	Percent	Project ID	Project Name	Products/Services Provided
<input checked="" type="checkbox"/>	V100013	Balmar Consulting			93	89%	10370.IT	SLA MANAGEMENT	System Solution Services
	V100013	Balmar Consulting		SUBC-0000000000000001	60	56%			
	V100089	Premiere Solutions		SUBC-0000000000000002	78	74%			
	V100089	Premiere Solutions			70	67%	10370.IT	SLA MANAGEMENT	System Solution Services

**B**

Click this link to open the Supplier/Vendor Rating subtask.

[Supplier/Vendor Rating](#)

# Contracts Overview



SaveSave & ContinueRefreshClone

Deltek Costpoint

HomeStar1Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Approval10 of 16 Existing

Identification

Contract IDCNTR-0000000000000008Name \*HHS IT Ops & Maint SrvsCostpoint OpportunityExclude from Reports

Main Opportunity IDOPP-0000000000000001NameCIO-SP3-TO1-HHS IT O&M

Prime Contract NoHHSN847351200567WNameNITAAC CIO-SP3Record Status \*Active

GeneralCustomers/ContactsDatesModificationsSupplier/Vendor RatingContract Close Out

NewCopyDeleteFormQuery

Item Reviewed	Subcontract ID	Total Score	Percent	Project ID	Project Name	Products/Services Provided
		89%	10370.IT	SLA MANAGEMENT	System Solution Services	
		56%				
		74%				
		67%	10370.IT	SLA		

Supplier/Vendor Rating > Supplier/Vendor Rating

NewDelete1 of 1 Existing

Responsiveness/Innovation

Vendor understands and complies with company's requirements

Vendor contact is knowledgeable on products/services

Vendor communicates all relevant information efficiently

Company can easily find right vendor contract when needed

Vendor provides "best in class" practices

Customer Service, Quality and Delivery

Products/Services provided promptly and with proper documentation

Products/Services are accurate/complete and free of defects

Vendor handles concerns/issues appropriately

Rating

Fully Meets

Mostly Meets

Meets Some

Barely Meets

Does Not Meet

Fully Meets

Fully Meets

Fully Meets

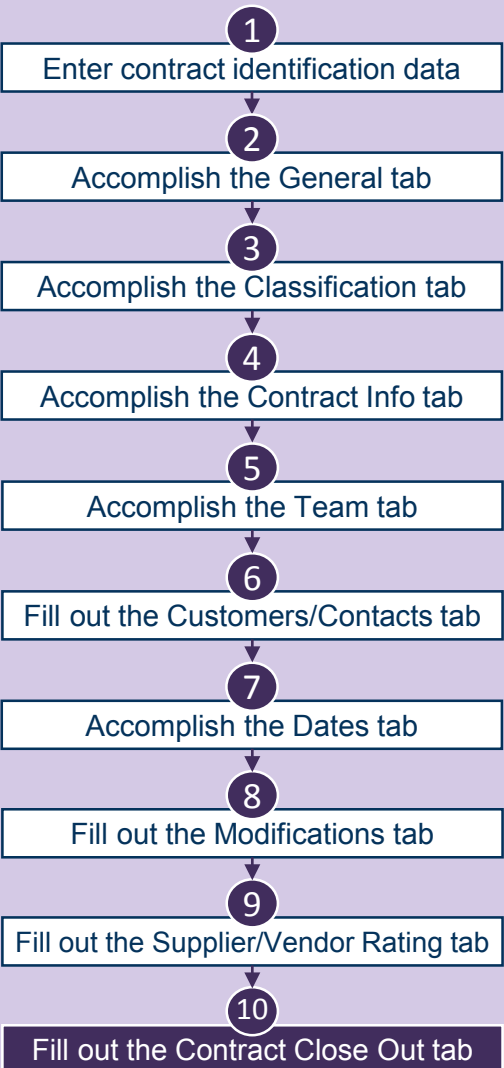
Responsiveness and Innovation comments

Although the vendor has been great about meeting deliverables and knows how to do the services, it is very challenging to get them to communicate if there is an issue and track down the employees to address questions.

Customer Service, Quality and Delivery comments

The team has consistently met all deliverables.

# Contracts Overview



Save Save & Continue Refresh Clone

Deltek Costpoint

Home Star 1 Browse Applications > Contracts > Contracts > Contracts > Manage Contracts

Identification

New Copy Delete Approval 10 of 18 Existing Table Query

Contract ID CNTR-0000000000000008 Name \*HHS IT Ops & Maint S Community ☐ Exclude from Reports

Main Opportunity ID OPP-0000000000000001 Name CIO-SP3-TO1-HHS IT

Prime Contract No HHSN847351200567W Name NITAAC CIO-SP3 Record A Active

General Classification Contract Info Team Customers/Contacts Dates Modifications Supplier/Vendor Rating Contract Close Out

CheckList

Completed		Date Completed	Completed By	
Yes	Project Complete	06/22/2017	1104	Barnes, Robert
Yes	Customer Requested Closeout	07/05/2017	1101	Bridges, Stephen
Yes	All Mods Executed	06/22/2017	1101	Bridges, Stephen
Yes	All Subcontracts Closed			Baker, Peggy
Yes	Financial Reconciliation Complete			Barnes, Robert
N/A	Incurred Cost Submission			
N/A	Rate Audit Completed			
Yes	Final Invoice Submitted			Barnes, Robert
Yes	Final Invoice Paid	07/26/2017	1104	Barnes, Robert
Yes	Closeout Package Sent	08/01/2017	1101	Bridges, Stephen

Disposition Summary

Classified Materials N/A

Government Property All employee issued laptops were returned on the final day of work.

Complete the Contract Close Out tab.

Use this tab to enter and manage contract closeout dates and information. A contract closeout occurs when all terms of a contract have been met and final payments have been made.



# Contracts Overview

1 Enter contract identification data

2 Accomplish the General tab

3 Accomplish the Classification tab

4 Accomplish the Contract Info tab

5 Accomplish the Team tab

6 Fill out the Customers/Contacts tab

7 Accomplish the Dates tab

8 Fill out the Modifications tab

9 Fill out the Supplier/Vendor Rating tab

10 Fill out the Contract Close Out tab

Save Save & Continue Refresh Clone Deltek Costpoint

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New Copy Delete Approval 10 of 16 Existing Table Query

### Identification

Contract ID CNTR-0000000000000008 Name \* HHS IT Ops & Maint Srvs ☒ Costpoint Opportunity ☐ Exclude from Reports

Main Opportunity ID OPP-0000000000000001 Name CIO-SP3-TO1-HHS IT O&M

Prime Contract No HHSN847351200567W Name NITAAC CIO-SP3 Record Status \* Active

General Classification Contract Info

CheckList Completed

Yes	Project Complete			
Yes	Customer Requested Closeout			
Yes	All Mods Executed			
Yes	All Subcontracts Closed			
Yes	Financial Reconciliation Complete	07/31/2017	1104	Barnes, Robert
N/A	Incurred Cost Submission			
N/A	Rate Audit Completed			
Yes	Final Invoice Submitted	07/03/2017	1104	Barnes, Robert
Yes	Final Invoice Paid	07/26/2017	1104	Barnes, Robert
Yes	Closeout Package Sent	08/01/2017	1101	Bridges, Stephen

Disposition Summary

Classified Materials N/A

Government Property All employee issued laptops were returned on the final day of work.

This concludes the  
Contracts Overview click-thru.