Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

→ Identification

New Copy ▼ Delete   1 of 1 New   Table Query ▼

Subcontract ID

Subcontract Name *

Exclude from Reports

Agreement Type

Status

Subcontract Start Date

Active ▼

General   Subcontract Info   Req

Subcontractor Information

Subcontractor/Vendor ID *

Long Name

Specialty

Subcontractor Administrator

Prime Contract Information

Contract ID

Opportunity ID

Prime Contract No

0.00

Contract Task Order

Contract Start Date

Subcontract No

GSA Schedule

SIN Number/Description

Subcontract Project Data

Subcontract Project ID

Subcontract Project Type

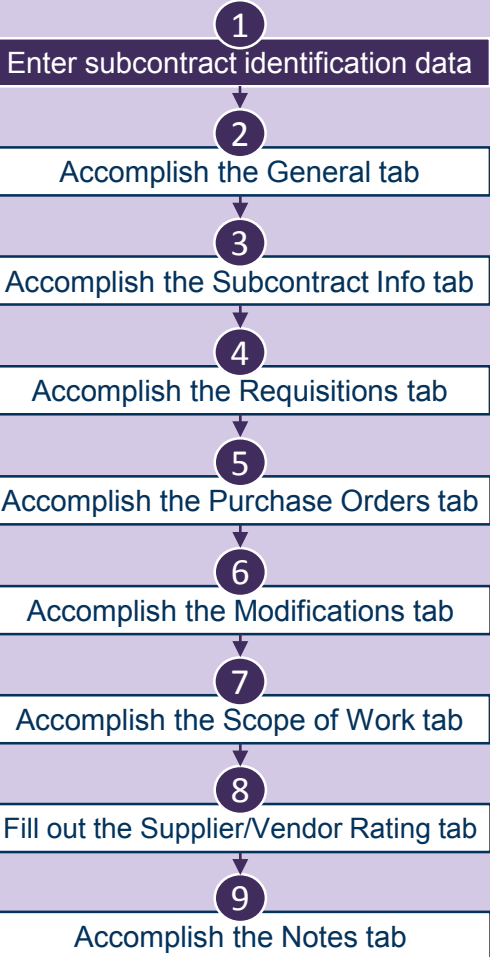Short Description of Work

Project Manager

This click-thru introduces subcontracts in Contract Management and shows you how to create a new subcontract 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

Best viewed in IE or Adobe PDF Reader.

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

FILE   LINE   OPTIONS   PROCESS   HELP

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

→ Identification

New | Copy ▼ | Delete | ◄ | ◄ | 1 of 1 New | ↻ | ► | ►| | Table | Query ▼ | □ | — | ✕

Subcontract ID [   ]   Subcontract Name * [   ]   ☐ Exclude from Reports

Agreement Type [   ]   Status [   ]

Subcontract Start Date [   ] 📅   Subcontract End Date [   ] 📅   Record [Active ▼]

A Enter a unique ID and name to identify the subcontract.

General Subcontract Modifications

Subcontractor Information

Subcontractor/Vendor ID * [   ]   Name [   ]

Long Name [   ]

Specialty [   ]   DUNS Number [   ]

Subcontractor Administrator [   ] [   ]

Prime Contract Information

Cont[   ]   Contract Type [   ]

Opp[   ]   Total Contract Value [   ]

Prim[   ]   Aggregate Subcontract Value [0.00]

Contract Task Order [   ]   Percentage of Total Contract Value [   ]

Contract Start Date [   ]   Contract End Date [   ]

Subcontract No [   ]

GSA Schedule [   ] 📝   SIN Number/Description [   ] 📝

Subcontract Project Data

Subcontract Project ID [   ] [   ]   Subcontract Project Type [   ]
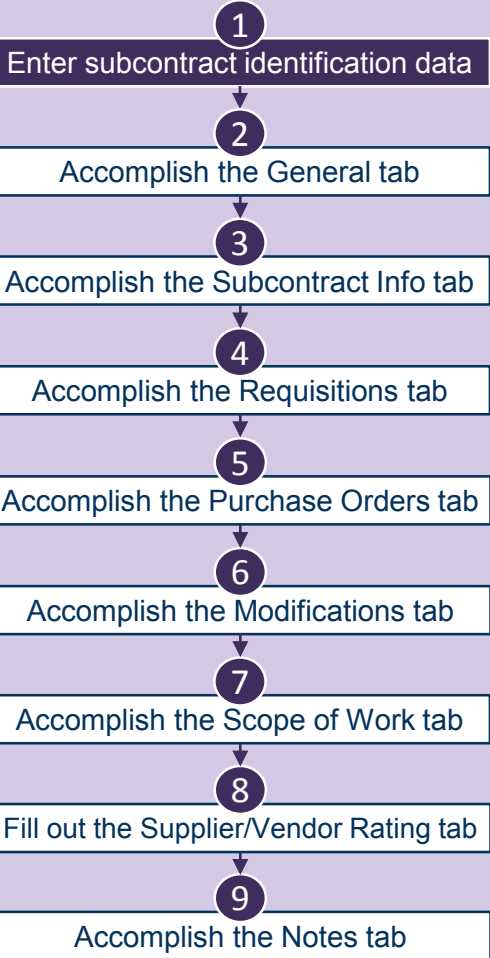
Short Description of Work [   ] 📝

Project Manager [   ]

If the option to automatically assign subcontract IDs is selected on the Configure Contract Management Settings screen, you can leave the **Subcontract ID** field blank and Costpoint automatically populates it.

Follow the steps on the next few slides to fill in identification data for the subcontract record.

To view or print Project Reports for the Subcontract

Subcontracts Overview

1 **Enter subcontract identification data**

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

➜ **Identification**

New | Copy ▼ | Delete | ◄◄ ◄ | 1 of 1 New | ► ►► | Table | Query ▼

Subcontract ID [   ]

Subcontract Name * [   ]

☐ Exclude from Reports

Agreement Type [   ]

St[

B Select this check box to exclude the subcontract from reports generated in the Contracts domain.

Subcontract Start Date [   ] 📅

S[Active ▼

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of |

Subcontractor Information

Subcontractor/Vendor ID * [   ]   Name [   ]

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

Long Name [   ]

Specialty [   ]

Subcontractor Administrator [   ] [   ]

Prime Contract Information

Contract ID [   ] [   ]

Opportunity ID [   ] [   ]

Prime Contract No [   ] [   ]

Aggregate Subcontract Value [0.00]

Contract Task Order [   ]

Percentage of Total Contract Value [   ]

Contract Start Date [   ]   Contract End Date [   ]

Subcontract No [   ]

GSA Schedule [   ] 📝   SIN Number/Description [   ] 📝

Subcontract Project Data

Subcontract Project ID [   ] [   ]

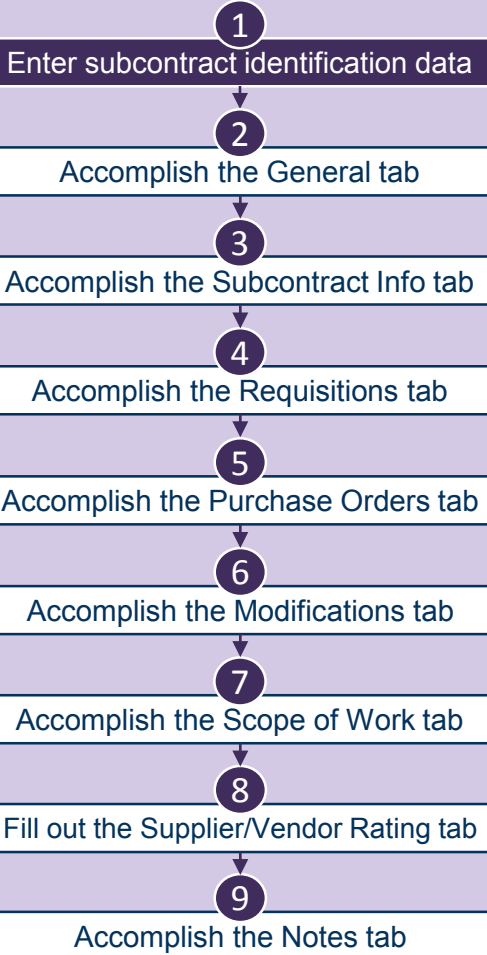Subcontract Project Type [   ]

Short Description of Work [   ] 📝

Project Manager

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

→ **Identification**

| New | Copy ▼ | Delete | ◄ | 1 of 1 New | ► | ►► | Table | Query ▼ |

Subcontract ID

Subcontract Name *   ☐ Exclude from Reports

Agreement Type

Status

Subcontract Start Date

Subcontract End Date   Record Status *   Active ▼

General   Subcon...   Modifications   Scope of Work   Supplier/V...

C Enter the agreement type of the subcontract.

D Enter the status of the subcontract.

Subcontractor Information

Subcontractor/Vendor ID

Long Name

CAGE Code

Specialty

Subcontracto...

Valid values are only those that exist on the Manage Agreement Types screen. Codes that display in the lookup have the **Show in Lookup** check box selected in Manage Agreement Types. Only codes that are available in the lookup can be used for new records in Manage Subcontracts.

Valid values are only those that exist on the Manage Contract Status screen. Codes that display in the lookup have the **Show in Lookup** check box selected in Manage Contract Status. Only codes that are available in the lookup can be used for new records in Manage Subcontracts.

Prime Contract I...

Contract ID

Opportunity ID

Prime Contrac...

Contract Task...

Contract Start D...

Subcontract No

GSA Schedule   SIN Number/Description

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

Project Manager   To view or print Project Reports for the Subcontract

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

Identification

New | Copy ▼ | Delete | ◀◀ ◀ 1 of 1 New ↻ ▶ ▶▶ | Table | Query ▼ | ☐ — ✕

Subcontract ID [   ]   Subcontract Name * [   ]   ☐ Exclude from Reports

Agreement Type [   ]   Status [   ]

Subcontract Start Date [   ] 📅   Subcontract End Date [   ] 📅   Record Status * [Active ▼]

E Enter the start and end dates of the subcontract.

F Select either **Active** or **Inactive**.

If this subcontract is active and linked to a contract and/or project, and you updated its record status to **Inactive**, the contract and/or project will remain linked to this subcontract.

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontractor Information

Subcontractor/Vendor [   ]   [   ]

Long Name [   ]

Specialty [   ]

Subcontractor Administrator [   ]   [   ]

Prime Contract Information

Contract ID [   ]   [   ]

Opportunity ID [   ]   [   ]

Prime Contract No [   ]   [   ]

Contract Task Order [   ]

Aggregate Subcontract Value   0.00

Contract Start Date [   ]   Contract End Date [   ]

Percentage of Total Contract Value [   ]

Subcontract No [   ]

GSA Schedule [   ] ✏   SIN Number/Description [   ] ✏

Subcontract Project Data

Subcontract Project ID [   ]   [   ]   Subcontract Project Type [   ]

Short Description of Work [   ] ✏

Project Manager

To view or print Project Reports for the Subcontract

Subcontracts Overview

FILE   LINE   OPTIONS   PROCESS   HELP

Deltek Costpoint

> Manage Subcontracts

New | Copy ▼ | Delete | 1 of 1 New | Table | Query ▼

→ Ide

Subco

Agree

Su___ct Start Date

A Enter relevant information on the General tab.

Most fields on this tab are either optional or for viewing purposes only, but you must enter or select a value in the **Subcontractor/Vendor ID** field.

Subcontract Name *

☐ Exclude from Reports

Status

Subcontract End Date   Record Status *   Active ▼

General   Subcontract Info   Requisitions   Purchase Orders   Modifications   Scope of Work   Supplier/Vendor Rating   Notes

Subcontractor Information

Subcontractor/Vendor ID *   Name

Long Name

Specialty
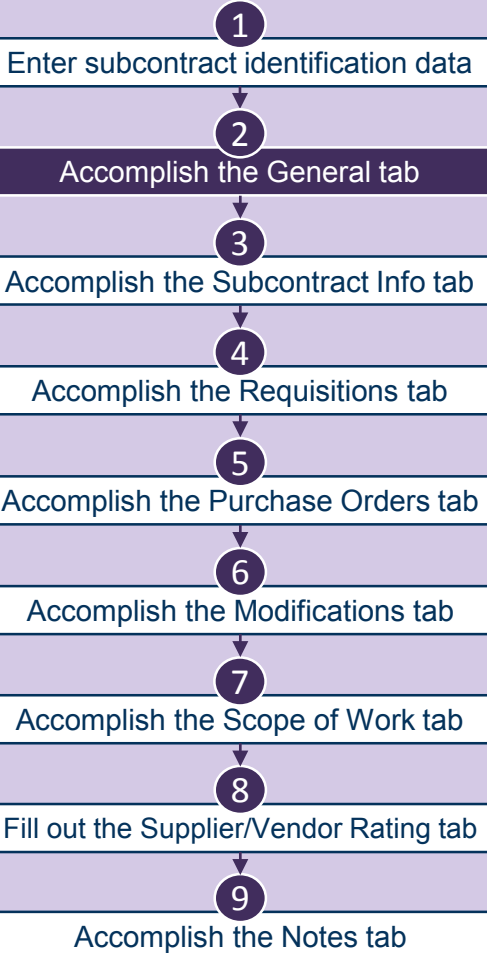
Subcontractor Administrator

Use this tab to enter, edit, or review general information about the subcontract.

You can enter basic information such as the subcontractor/vendor linked to the subcontract and the subcontractor administrator. You can specify the contract associated with the subcontract and view existing data for the contract, such as the contract value and contract start/end dates.

When you link a project to the subcontract, you can view general information and contract and funding values for the project. You can also view or print project reports for the project selected.

Prime Contract Information

Contract ID

Opportunity ID

Prime Contract No

Contract Task Order

Contract Start Date   Contract End Da___

Subcontract No

GSA Schedule

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

Subcontract Project Data

Subcontract Project ID

Short Description of Work

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

FILE   LINE   OPTIONS   PROCESS   HELP

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

→ **Identification**

New | Copy ▼ | Delete | ◄ ◄ | 1 of 1 New | ► ►| | Table | Query ▼

Subcontract ID [_____]   Subcontract Name * [_____]   ☐ Exclude from Reports

Agreement Type [_____]   Status [_____]

Subcontract Start Date [_____] 📅   Subcontract End Date [_____] 📅   Record Status * [Active ▼]

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontractor Information

Subcontractor/Vendor ID * [_____]   Name [_____]   ☐ NDA Received

Long Name [_____]   CAGE Code [_____]

Specialty [_____]   DUNS Number [_____]

Subcontractor Administrator [_____]   [_____]

Prime Contract Information

Contract ID [_____] [_____]   Contract Type [_____]

Opportunity ID [_____] [_____]   ract Value [_____]

Prime Contract No [_____] [_____]   Subcontract Value [0.00]

Contract Task Order [_____]   e of Total Contract [_____]

Contract Start Date [_____]   Contract End Date [_____]

Subcontract No [_____]

GSA Schedule [_____] 📝   SIN Number/Descripti [_____] 📝

(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.

Subcontract Project Data

Subcontract Project ID [_____] [_____]   Subcontract Project Type [_____]

Short Description of Work [_____] 📝

Project Manager   To view or print Project Reports for the Subcontract

Subcontracts Overview

1 — Enter subcontract identification data

2 — Accomplish the General tab

3 — Accomplish the Subcontract Info tab

4 — Accomplish the Requisitions tab

5 — Accomplish the Purchase Orders tab

6 — Accomplish the Modifications tab

7 — Accomplish the Scope of Work tab

8 — Fill out the Supplier/Vendor Rating tab

9 — Accomplish the Notes tab

Subcontract Start Date

Tabs: General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

Subcontractor Information

Subcontractor/Vendor ID *

Name

Long Name

Specialty

Subcontractor Administrator

☐ NDA Received

CAGE Code

DUNS Number

Prime Contract Information

Contract ID

Opportunity ID

Prime Contract No

Contract Task Order

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule

SIN Number/Description

Contract Type

Total Contract Value

Aggregate Subcontract Value   0.00

Percentage of Total Contract Value

Subcontract Project Data

Subcontract Project ID

Subcontract Project Type

Short Description of Work

Project Manager

Project Start Date   Project End Date

Project Funded Value   Project Contract Value

Total Su...

ITD Sub...
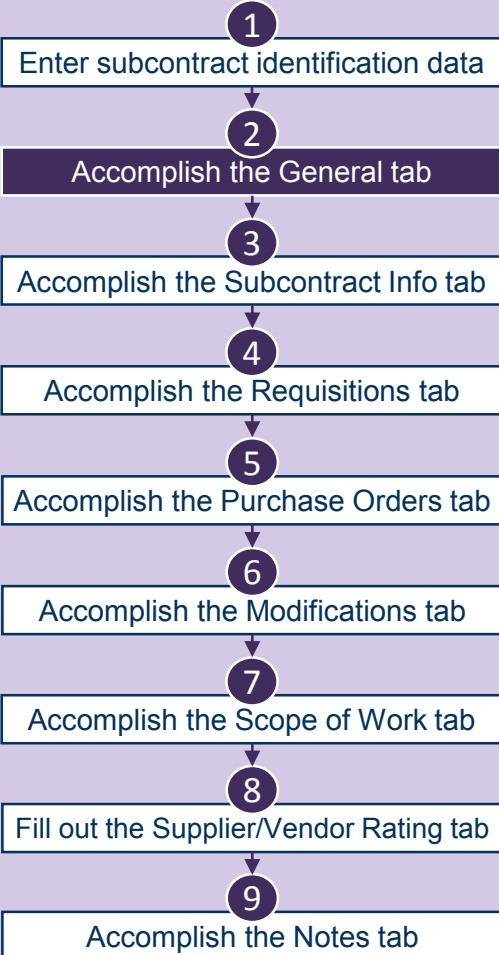
Remain...

Total Subcontract Contract Value   0.00

To view or print Project Reports for the Subcontract Project, click on the 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.

C — Click this link to open the Subcontractor Address/Contact Info subtask.

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info

Subcontracts Overview

Subcontractor Information

Subcontractor/Vendor ID *	Name	☐ NDA Received
Long Name		CAGE Code
Specialty		DUNS Number
Subcontractor Administrator		

Prime Contract Information

Contract ID		Contract Type	
Opportunity ID		Total Contract Value	
Prime Contract No		Aggregate Subcontract Value	0.00
Contract Task Order		Percentage of Total Contract Value	
Contract Start Date	Contract End Date		
Subcontract No			

General   Subcontract Info   Requisitions   Purchase Orders   Modifications   Scope of Work   Supplier/Vendor Rating   Notes

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Subcontractor Address/Contact Info

0 of 0 Existing   Table   Query ▼

D Enter field information on the subtask.

Address Code	Payment
Address Line 1	Phone
Address Line 2	Fax Number
Address Line 3	Other
City	Email A
State/Province Postal Code	
Country	

Use the Subcontractor Address/Contact Info subtask to view address and contact details of the subcontractor associated with the subcontract.

Contact and address information that display on this subtask are for the subcontractor entered in the **Subcontractor/Vendor ID** field on the General tab of Manage Subcontracts.

Contacts

Close

Subcontracts Overview

1. Enter subcontract identification data
2. **Accomplish the General tab**
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Subcontract Start Date

General Subcontract Info Requisitions Purchase Orders Modifications Scope of Work Supplier/Vendor Rating Notes

Subcontractor Information

Subcontractor/Vendor ID *

Name

☐ NDA Received

Long Name

CAGE Code

Specialty

DUNS Number

Subcontractor Administrator

Prime Contract Information

Contract ID

Contract Type

Opportunity ID

Total Contract Value

Prime Contract No

Aggregate Subcontract Value   0.00

Contract Task Order

Percentage of Total Contract Value

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule

SIN Number/Description

Subcontract Project Data

Subcontract Project ID

Subcontract Project Type

Short Description of Work

Project Manager

Project Start Date   Project End Date

To view or print Project Reports for the Subcontract Project, click on the 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.

Project Funded Value   Project Contract Value

Total Subcontract Funding   [Con]tract Value   0.00

Click this link to open the Vendor Employees subtask.

E

ITD Subcontractor Expenses

Remaining Funded Value

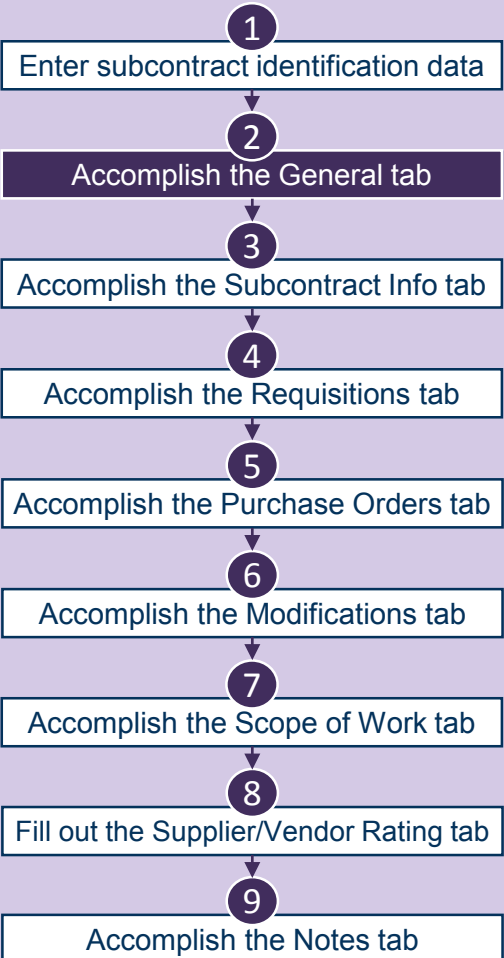Subcontractor Address/Contact Info   **Vendor Employees**   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info

Subcontracts Overview

Subcontract Start Date 06/01/2017

Deltek Costpoint

General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

1 — Enter subcontract identification data

Subcontractor Information

Subcontractor/Vendor ID *	V100013	Name	Balmar Consulting
Long Name	Balmar Consulting		
Specialty	CMS IT Services		
Subcontractor Administrator	1016	Page, Amy	

☑ NDA Received

CAGE Code 586452

DUNS Number 008016958

2 — Accomplish the General tab

3 — Accomplish the Subcontract Info tab

Prime Contract Information

Contract ID	CNTR-000000000000008	HHS IT Ops & Maint Srvs	Contract Type	Time & Materials
Opportunity ID	OPP-000000000000001	CIO-SP3-TO1-HHS IT O&M	Total Contract Value	23,706,449.63
Prime Contract No	HHSN847351200567W	NITAAC CIO-SP3	Aggregate Subcontract Value	0.00
Contra				0.00%
Contra		5/31/20		
Subco				
GSA				

4 — Accomplish the Requisitions tab

5 — Accomplish the Purchase Orders tab

6 — Accomplish the Modifications tab

7 — Accomplish the Scope of Work tab

8 — Fill out the Supplier/Vendor Rating tab

9 — Accomplish the Notes tab

F — Use the Vendor Employees subtask to view vendor employees of the subcontractor associated with the subcontract.
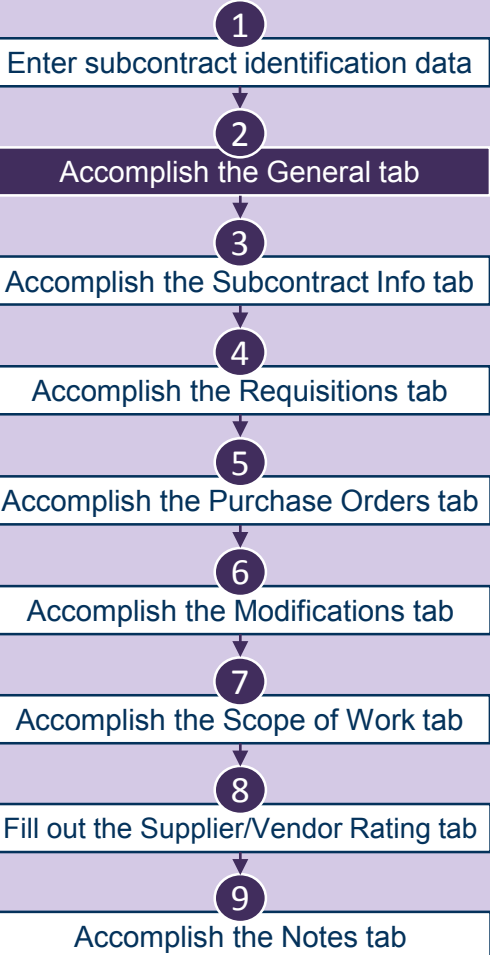
Vendor employees that display on this subtask are those linked to the subcontractor entered in the **Subcontractor/Vendor ID** field on the General tab of Manage Subcontracts.

Vendor Employees

Query ▼

✓	Vendor Employee ID	Vendor Employee Name	Title	Cell Phone	Office Phone	Email
	D-0001	Gus Davis	IT Developer	333-333-3333	111-111-1111	GusDavis@ATI.com
	D-0002	David Hall	IT- General			GusDavis@ATI.com
	D-0003	Betty White	IT Developer			GusDavis@ATI.com
	D-0005	Ness, Diane	All Hourly Positions			dianeness@ati.com
	D-0006	Goshe, Christopher	All Hourly Positions			
	D-0007	Beshaw, Leigh	All Hourly Positions			leighbeshaw@ati.com
	D-004	Todd Hernandez	IT Developer			ToddHernandez@ATI.com
	TEST	test	All Hourly Positions			

Close

Deltek Costpoint

General Subcontract Info Requisitions Purchase Orders Modifications Scope of Work Supplier/Vendor Rating Notes

Subcontractor Information

Subcontractor/Vendor ID *   Name   ☐ NDA Received

Long Name   CAGE Code

Specialty   DUNS Number

Subcontractor Administrator

Prime Contract Information

Contract ID   Contract Type

Opportunity ID   Total Contract Value

Prime Contract No   Aggregate Subcontract Value   0.00

Contract Task Order   Percentage of Total Contract Value

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

Project Manager   To view or print Project Reports for the Subcontract Project, click on the 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.

Project Start Date   Project End Date

Project Funded Value   Project Contract Value

Total Subcontract Funding   0.00   0.00

ITD Subcontractor Expenses

Remaining Funded Value

① Enter subcontract identification data

② Accomplish the General tab

③ Accomplish the Subcontract Info tab

④ Accomplish the Requisitions tab

⑤ Accomplish the Purchase Orders tab

⑥ Accomplish the Modifications tab

⑦ Accomplish the Scope of Work tab

⑧ Fill out the Supplier/Vendor Rating tab

⑨ Accomplish the Notes tab

Click this link to open the NDA subtask.

G

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info
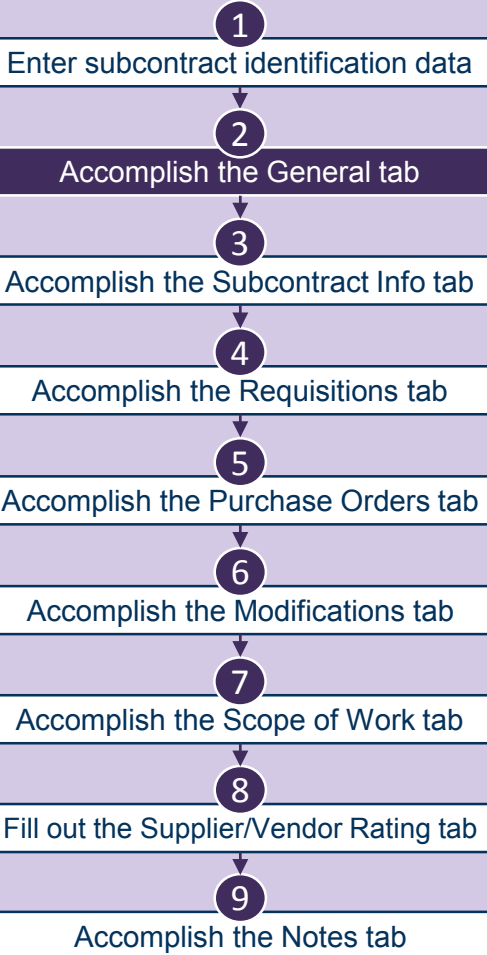
Subcontracts Overview

① Enter subcontract identification data

② Accomplish the General tab

③ Accomplish the Subcontract Info tab

④ Accomplish the Requisitions tab

⑤ Accomplish the Purchase Orders tab

⑥ Accomplish the Modifications tab

⑦ Accomplish the Scope of Work tab

⑧ Fill out the Supplier/Vendor Rating tab

⑨ Accomplish the Notes tab

Deltek Costpoint

Specialty

Subcontractor Administrator

DUNS Number

Prime Contract Information

Contract ID   Contract Type

Opportunity ID   Total Contract Value

Prime Contract No   Aggregate Subcontract Value   0.00

Contract Task Order   Percentage of Total Contract Value

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

Project Manager

To view or print Project Reports for the Subcontract Project, click on the 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.
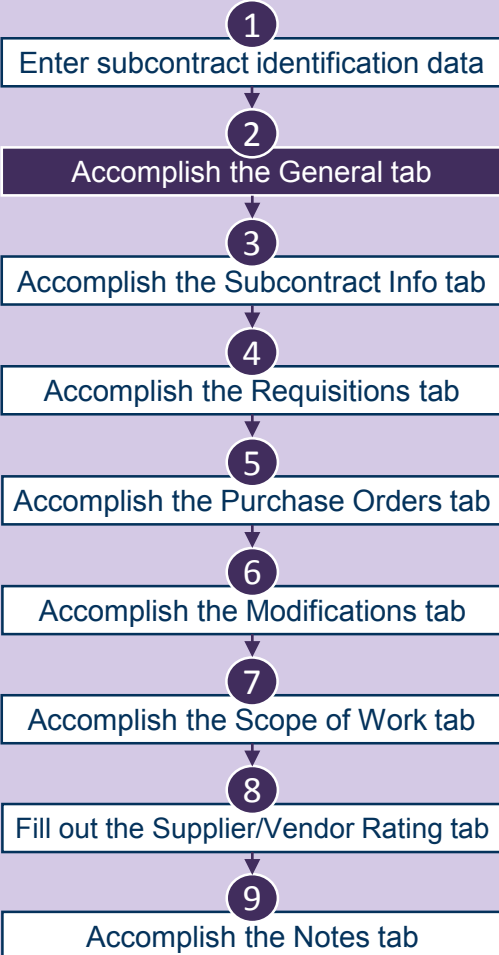
> Use the NDA subtask whenever you need to browse for, add, or launch non-disclosure agreement (NDA) documents from a network location, and associate them to subcontracts. You can also use this subtask to add pertinent notes about the NDA.

End Date

Contract Value

Subcontract Contract Value   0.00

> Click **New** to add a new line and enter field information.

Ⓗ

Subcontractor Address/Contact Info   Vendor   Contracts   Activities   Documents   User-Defined Info

Identification > NDA

New   Copy ▼   Delete   Query ▼

☑	Date Received	Details	Expiration Date	File Location	File Name

View NDA

Close

Subcontracts Overview

1. Enter subcontract identification data
2. **Accomplish the General tab**
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Subcontractor Administrator   1016   Pa

Prime Contract Information

Contract ID	CNTR-000000000000008	HHS IT Ops & Maint Srvs	Contract Type	Time & Materials
Opportunity ID	OPP-000000000000001	CIO-SP3-TO1-HHS IT O&M	Total Contract Value	23,706,449.63
Prime Contract No	HHSN847351200567W	NITAAC CIO-SP3	Aggregate Subcontract Value	0.00
Contract Task Order	HHSP233201700137W		Percentage of Total Contract Value	0.00%

Contract Start Date 06/01/2017   Contract End Date 05/31/2022

Subcontract No

GSA Schedule   SIN Number/Description

Subcontract Project Data

Subcontract Project ID	10370.IT	SLA MANAGEMENT	Subcontract Project Type	TECHNOLOGY
Short Description of Work	Architecture Development Support			
Project Manager	1065	Parker, Donald K		
Project Start Date	06/01/2010	Project End Date	12/31/2012	
Project Funded Value	2,145,135.06	Project Contract Value	2,145,135.06	
Total Subcontract Funding	0.00	Total Subcontract Contract Value	0.00	
ITD Subcontractor Expenses	0.00			
Remaining Funded Value	0.00			

To view or print Project Reports for the Subcontract Project, click on the 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.

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info
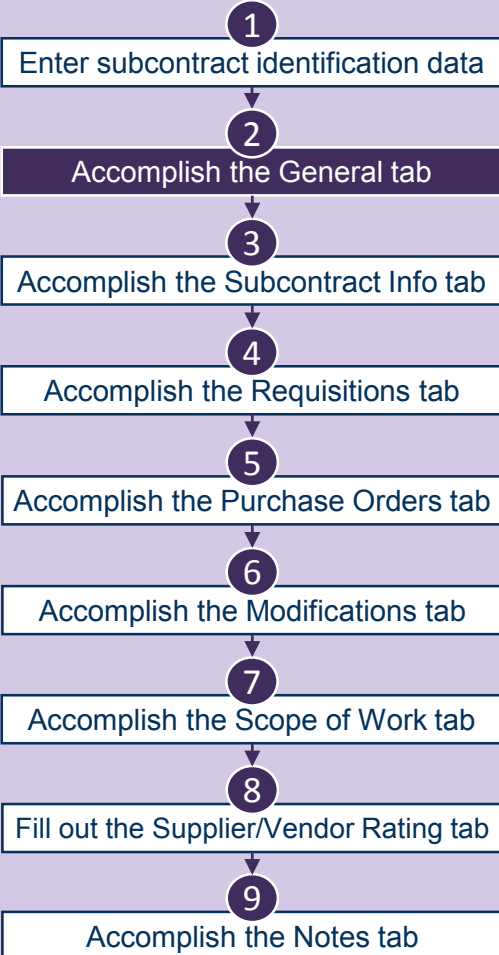
Identification > NDA   Query

☑	Date Received	Details	Expiration Da...	File Name
	05/02/2017	Only requested payment terms be changed from N45 to N30. Confir	05/31/2022	

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

I

View NDA

Close

Subcontracts Overview

Deltek Costpoint

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontractor Information

1 Enter subcontract identification data

Subcontractor/Vendor ID *

Name

☐ NDA Received

Long Name

CAGE Code

Specialty

DUNS Number

Subcontractor Administrator

2 Accomplish the General tab

Prime Contract Information

3 Accomplish the Subcontract Info tab

Contract ID

Contract Type

Opportunity ID

Total Contract Value

Prime Contract No

Aggregate Subcontract Value   0.00

4 Accomplish the Requisitions tab

Contract Task Order

Percentage of Total Contract Value

Contract Start Date   Contract End Date

Subcontract No

5 Accomplish the Purchase Orders tab

GSA Schedule

SIN Number/Description

Subcontract Project Data

6 Accomplish the Modifications tab

Subcontract Project ID

Subcontract Project Type

Short Description of Work

7 Accomplish the Scope of Work tab

Project Manager

To view or print Project Reports for the Subcontract Project, click on the 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.

Project Start Date   Project End Date

8 Fill out the Supplier/Vendor Rating tab

Project Funded Value   Project Contract Value

Total Subcontract Funding   0.00   Total Sub   0.00

Click this link to open the Additional Opportunities subtask.

9 Accomplish the Notes tab

ITD Subcontractor Expenses

J

Remaining Funded Value

Subcontractor Address/Contact Info   Vendor Employees   NDA   **Additional Opportunities**   Contracts   Activities   Documents   User-Defined Info

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Opportunity ID

Prime Contract No

Contract Task Order

Total Contract Value

Aggregate Subcontract Value　0.00

Percentage of Total Contract Value

er/Description

Subcontract Project Type

To view or print Project Reports for the Subcontract Project, click on the 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.

0.00

All fields on the Additional Opportunities subtask are optional except for **Costpoint Opportunity** and **Opportunity ID**.

If you set **Costpoint Opportunity** to **Y**, after you enter a Costpoint opportunity ID, Costpoint automatically populates the other fields with values for that opportunity. If you set **Costpoint Opportunity** to **N**, you can manually enter an opportunity ID and other opportunity information.

When you save the record, the opportunity ID displays as a hyperlink that you can click to open the Manage Opportunities screen. For a non-Costpoint opportunity, however, the screen displays a blank record that you can fill in with details for that opportunity.

Click **New** to begin adding contracts that you want to link to the subcontract.

Subcontractor Address/Contact Info　Vendor Employees　NDA　Addi　uments　User-Defined Info

→ **Identification > Additional Opportunities**

New　Copy　Delete　|◄　◄　1 of 1 New　►　►|　Table　Query

K

Costpoint Opportunity *	Y
Opportunity ID *	
Opportunity Name	
Master Contract No	
Our Value	
Primary Customer	

Opportunity Status　Active

Date Opened

Date Closed

Type

Close

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Subcontract Start Date

Deltek Costpoint

General   Subcontract Info   Requisitions   Purchase Orders   Modifications   Scope of Work   Supplier/Vendor Rating   Notes

Subcontractor Information

Subcontractor/Vendor ID *   Name   ☐ NDA Received

Long Name   CAGE Code

Specialty   DUNS Number

Subcontractor Administrator

Prime Contract Information

Contract ID   Contract Type

Opportunity ID   Total Contract Value

Prime Contract No   Aggregate Subcontract Value   0.00

Contract Task Order   Percentage of Total Contract Value

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

Project Manager   To view or print Project Reports for the Subcontract Project, click on the 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.

Project Start Date   Project End Date

Project Funded Value   Project Contract Value

Total Subcontract Funding   0.00   Total Subcontract Contract Valu...

ITD Subcontractor Expenses   Click this link to open the Contracts subtask.

Remaining Funded Value   **L**

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   **Contracts**   Activities   Documents   User-Defined Info

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Contract ID

Opportunity ID

Prime Contract No

Contract Task Order

Contract Start Date   Contract End Date

Total Contract Value

Aggregate Subcontract Value   0.00

Percentage of Total Contract Value

Deltek Costpoint
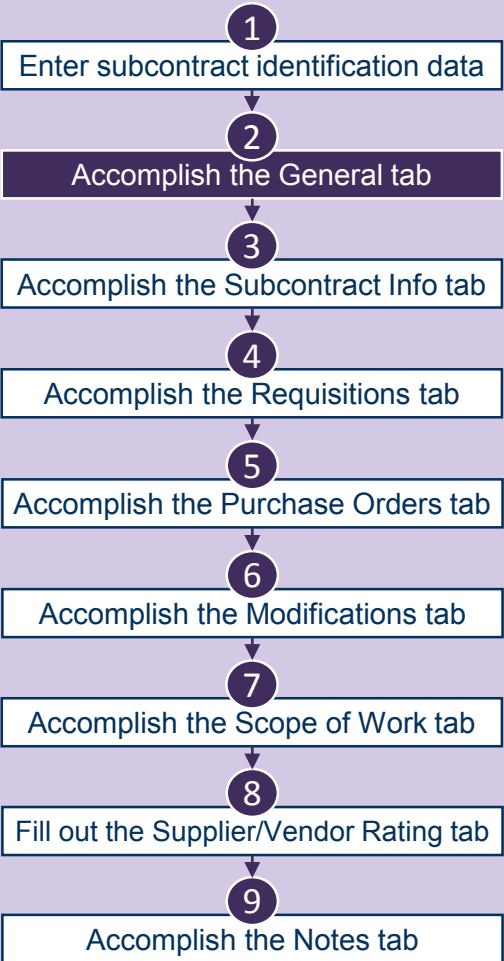
mber/Description

Subcontract Project Type

To view or print Project Reports for the Subcontract Project, click on the 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.

0.00

All fields on the Contracts subtask are optional except for **Costpoint Contract** and **Contract ID**.

If you set **Costpoint Contract** to **Y**, after you enter a Costpoint contract ID, Costpoint automatically populates the other fields with values for that contract. If you set **Costpoint Contract** to **N**, you can manually enter a contract ID and other contract information.

When you save the record, the contract ID displays as a hyperlink that you can click to open the Manage Contracts screen. For a non-Costpoint contract, however, the screen displays a blank record that you can fill in with details for that contract.

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

M

Subcontractor Address/Contact Info   Vendor Employees   NDA   Add   pportunities   Contracts   Documents   User-Defined Info

→ **Identification > Contracts**

New | Copy ▼ | Delete | ◄ ◄ 1 of 1 New ► ► | Table | Query

Costpoint Contract *   Y ▼

Contract ID *

Contract Name

Prime Contract No

Contract Status

Contract Type

Anticipated Contract Value

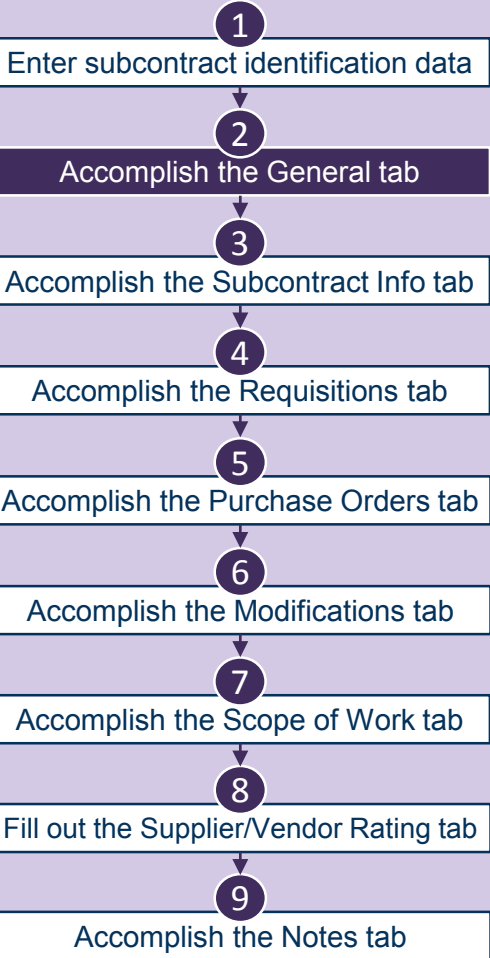Contract Award Date

Contract Start Date

Contract End Date

Close

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Subcontract Start Date ▢ 🗓

Deltek Costpoint

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontractor Information

Subcontractor/Vendor ID *   [_____]   Name [_____]

Long Name [_____]

Specialty [_____]

Subcontractor Administrator [_____] [_____]

☐ NDA Received

CAGE Code [_____]

DUNS Number [_____]

Prime Contract Information

Contract ID [_____] [_____]

Opportunity ID [_____] [_____]

Prime Contract No [_____] [_____]

Contract Task Order [_____]

Contract Start Date [_____]   Contract End Date [_____]

Subcontract No [_____]

GSA Schedule [_____] 🖉   SIN Number/Description [_____] 🖉

Contract Type [_____]

Total Contract Value [_____]

Aggregate Subcontract Value [_____ 0.00]

Percentage of Total Contract Value [_____]

Subcontract Project Data

Subcontract Project ID [_____] [_____]

Short Description of Work [_____] 🖉

Project Manager [_____] [_____]

Project Start Date [_____]   Project End Date [_____]

Project Funded Value [_____]   Project Contract Value [_____]

Total Subcontract Funding [____ 0.00]   Total Subcontract Contract Value [_____]

ITD Subcontractor Expenses [_____]

Remaining Funded Value [_____]

Subcontract Project Type [_____]

To view or print Project Reports for the Subcontract Project, click on the 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.

Click this link to open the Activities subtask.

N

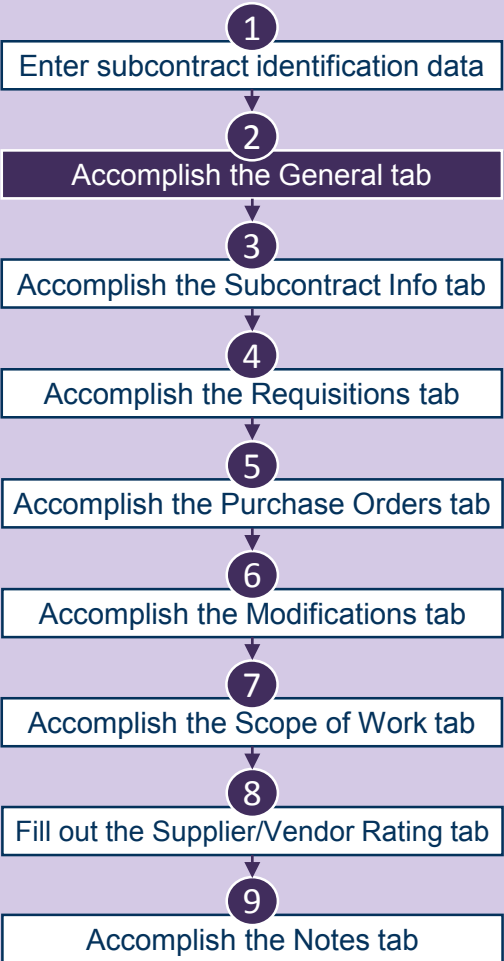Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Total Subcontract Funding   0.00

ITD Subcontractor Expenses

Remaining Funded Value

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info

➡ **Identification > Activities**

New   Copy ▼   Delete |◀ ◀   1 of 1 New   🔄 ▶ ▶| Table   Query ▼   ☐ 🗔 ▬ ✕

Activity

Activity ID

Subject

Location

Method

Activity Date 📅

☐ Completed

O Enter relevant information on this subtask.

Primary Contacts

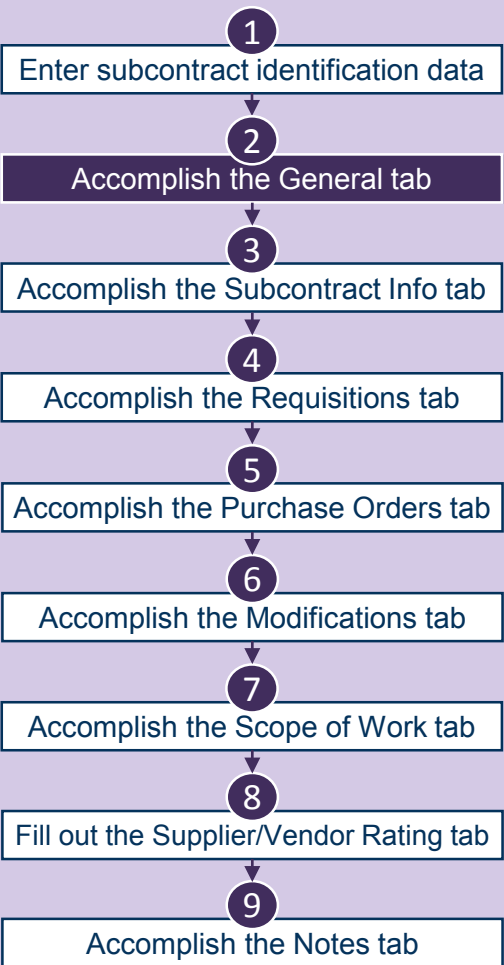Activity Owner

Vendor

Primary Contact

Business #

Other Attendees

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

Activity Notes

Close

Subcontracts Overview

① Enter subcontract identification data

② Accomplish the General tab

③ Accomplish the Subcontract Info tab

④ Accomplish the Requisitions tab

⑤ Accomplish the Purchase Orders tab

⑥ Accomplish the Modifications tab

⑦ Accomplish the Scope of Work tab

⑧ Fill out the Supplier/Vendor Rating tab

⑨ Accomplish the Notes tab

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info

→ **Identification > Activities**

New | Copy ▼ | Delete | |◄ ◄ 1 of 1 New ↻ ► ►| | Table | Query ▼

Activity

Activity ID

Subject

Location

Method

Activity Date

☐ Completed

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

Primary Contacts

Activity Owner
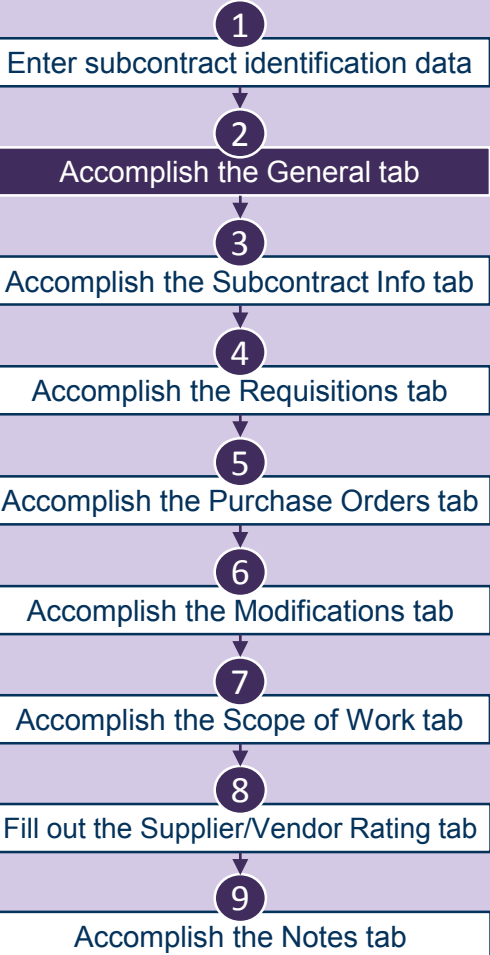
Vendor

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

Subcontracts Overview

Deltek Costpoint

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontractor Information

1. Enter subcontract identification data

2. Accomplish the General tab

Subcontractor/Vendor ID *   Name

Long Name   CAGE Code

Specialty   DUNS Number

Subcontractor Administrator

☐ NDA Received

Prime Contract Information

3. Accomplish the Subcontract Info tab

Contract ID   Contract Type

Opportunity ID   Total Contract Value

4. Accomplish the Requisitions tab

Prime Contract No   Aggregate Subcontract Value   0.00

Contract Task Order   Percentage of Total Contract Value

5. Accomplish the Purchase Orders tab

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

6. Accomplish the Modifications tab

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

7. Accomplish the Scope of Work tab

Short Description of Work

Project Manager

To view or print Project Reports for the Subcontract Project, click on the 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.

Project Start Date   Project End Date

8. Fill out the Supplier/Vendor Rating tab

Project Funded Value   Project Contract Value

Total Subcontract Funding   0.00   Total Subcontract Contract Value   0.

Click this link to open the Documents subtask.

9. Accomplish the Notes tab

ITD Subcontractor Expenses

Remaining Funded Value

Q

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   **Documents**   User-Defined Info

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Specialty

Subcontractor Administrator

Prime Contract Information

Contract ID

Opportunity ID

Prime Contract No

Contract Task Order

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Contract Type

Total Contract Value

Aggregate Subcontract Value   0.00

Percentage of Total Contract Value

Subcontract Project Data

Subcontract Project ID

Short Description of Work

Project Manager

Project Start Date   Project End Date

Project Funded Value   Project Contract Value

Total Subcontract Funding   0.00   Total Subcontract Contract Value   0.00

ITD Subcontractor Expenses

Subcontract Project Type

To view or print Project Reports for the Subcontract Project, click on the 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.

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

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

Address/Contact Info   Vendor Employees   Contracts   Activities   Documents   User-Defined Info

R

Identification > Documents

New   Copy   Delete   Query

✔	Document ID *	Date Received	Document Type	File Location	File Name

View Document

Close

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Specialty

Subcontractor Administrator

Prime Contract Information

Contract ID

Opportunity ID

Prime Contract No

Contract Task Order

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Contract Type

Total Contract Value

Aggregate Subcontract Value   0.00

Percentage of Total Contract Value

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

Project Manager

Project Start Date

Project Funded V

Total Subcontract   ract Value   0.00

ITD Subcontractor

Remaining Funde

To view or print Project Reports for the Subcontract Project, click on the 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.

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

Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info

Identification > Documents

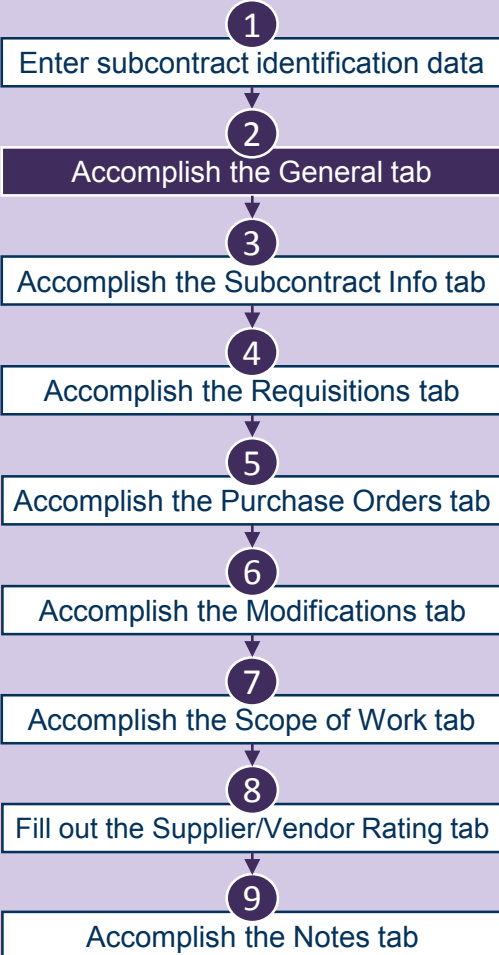New   Copy   ▼   Delete   Query   ▼

✔	Document ID *	Date Received	Document Type	File Location	File Name
→					

View Document

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

Prime Contract Information

Contract ID		
Opportunity ID		
Prime Contract No		
Contract Task Order		
Contract Start Date	Contract End Date	
Subcontract No		
GSA Schedule		SIN Number/Description

Contract Type

Total Contract Value

Aggregate Subcontract Value   0.00

Percentage of Total Contract Value

Subcontract Project Data

Subcontract Project ID		Subcontract Project Type
Short Description of Work		
Project Manager		
Project Start Date	Project End Date	
Project Funded Value	Project Contract Value	
Total Subcontract Funding 0.00	Total Subcontract Contract Value 0.00	
ITD Subcontractor Expenses		
Remaining Funded Value		

To view or print Project Reports for the Subcontract Project, click on the 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.

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional O...   User-Defined Info

Identification > Documents

☑	Document ID *	Date Received	Document Type	File Location
→	SUBCON1	📅	Teaming Agreement	CONTRACTMGMT

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.

T

View Document

Close

Subcontracts Overview

1 — Enter subcontract identification data

2 — Accomplish the General tab

3 — Accomplish the Subcontract Info tab

4 — Accomplish the Requisitions tab

5 — Accomplish the Purchase Orders tab

6 — Accomplish the Modifications tab

7 — Accomplish the Scope of Work tab

8 — Fill out the Supplier/Vendor Rating tab

9 — Accomplish the Notes tab

Deltek Costpoint

Subcontract Start Date

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontractor Information

Subcontractor/Vendor ID *   Name   ☐ NDA Received

Long Name   CAGE Code

Specialty   DUNS Number

Subcontractor Administrator

Prime Contract Information

Contract ID   Contract Type

Opportunity ID   Total Contract Value

Prime Contract No   Aggregate Subcontract Value   0.00

Contract Task Order   Percentage of Total Contract Value

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

Project Manager   To view or print Project Reports for the Subcontract Project, click on the 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.

Project Start Date   Project End Date

Project Funded Value   Project Contract Value

Total Subcontract Funding   0.00   Total Subcontract Contract Value   0.00

ITD Subcontractor Expenses

Remaining Funded Value

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

U

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info
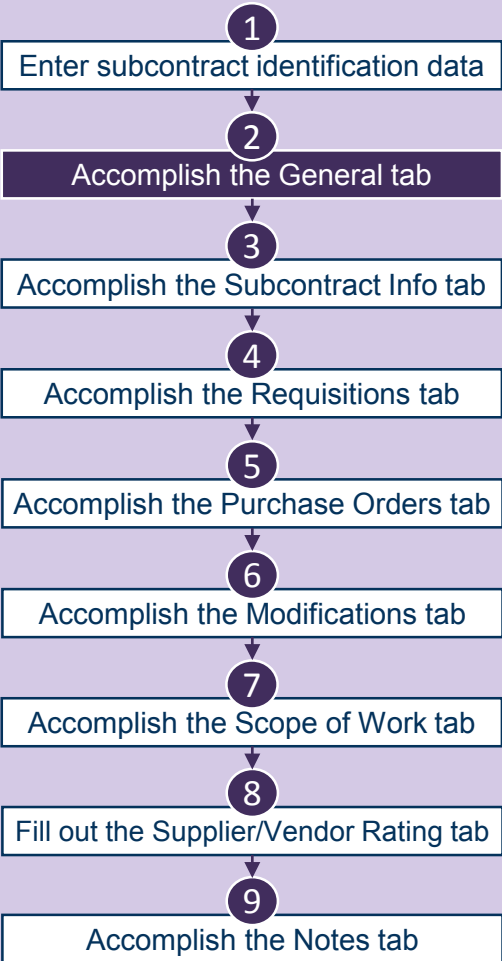
Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Specialty

Subcontractor Administrator

DUNS Number

Prime Contract Information

Contract ID

Opportunity ID

Prime Contract No

Contract Task Order

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Contract Type

Total Contract Value

Aggregate Subcontract Value   0.00

Percentage of Total Contract Value

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

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

End Date

Contract Value

bcontract Contract Value   0.00

ITD Subcontractor Expenses

Remaining Funded Value

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

V

Subcontractor Address/Contact Info   Vendor Employees   NDA   Additional Opportunities   Contracts   Activities   Documents   User-Defined Info

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

Subcontracts Overview

Subcontractor Administrator

Deltek Costpoint

Prime Contract Information

Contract ID

Contract Type

Opportunity ID

Total Contract Value

Prime Contract No

Aggregate Subcontract Value   0.00

Contract Task Order

Percentage of Total Contract Value

Contract Start Date   Contract End Date

Subcontract No

GSA Schedule   SIN Number/Description

Subcontract Project Data

Subcontract Project ID   Subcontract Project Type

Short Description of Work

Project Manager

Project Start Date   Project End Date

Project Funded Value   Project Contract Value

Total Subcontract Funding   0.00   Total Subcontract Contract Value   0.00

To view or print Project Reports for the Subcontract Project, click on the 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.

ITD Subco

Remaining

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.

W

Address   cuments   **User-Defined Info**

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

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. **Accomplish the Subcontract Info tab**
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

→ **Identification**

1 of 1 New   Table   Query ▼   ☐ ━ ✕
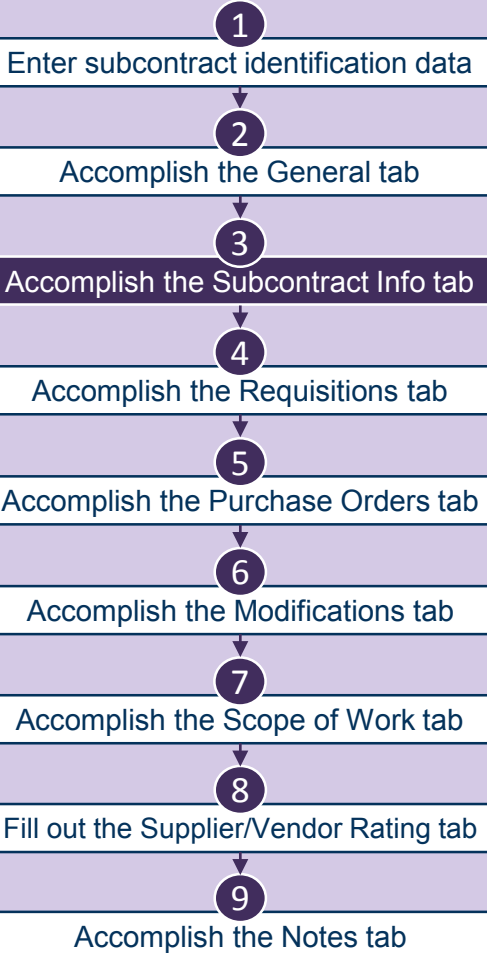
Subcontract ID

Enter relevant information on the Subcontract Info tab.

Use this tab to specify regulations and security and business requirements that apply to the subcontract.

☐ Exclude from Reports

Agreement Type

Subcontract Start Date   Ⓐ   📅

Record Status *   [Active ▼]

| General | **Subcontract Info** | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontract CAS Required? * [-Select- ▼]   Subcontract Reporting Required? * [-Select- ▼]   Is this a Commercial Contract? * [-Select- ▼]

Incurred Cost Submission Required? * [-Select- ▼]   Subcontract Plan Submitted? * [-Select- ▼]   Subcontract Type [_____] ✎

Incurred Cost Submission Date [_____]   Is this an 8A Contract? * [-Select- ▼]   OCI Mitigation Plan * [-Select- ▼]

Certification of Insurance Expiration Date [_____] 📅   Is the Service Contract Act Required? * [-Select- ▼]   Is the Davis Bacon Act Required? * [-Select- ▼]

DPAS Purchasing Rating

Security Requirements   Follow the steps on the next slides to accomplish the Subcontract Info tab.   Business Classification Requirements

☐ US Citizen

Size

ITAR Status   ○ Large   ● Small   ○ Non-Profit   ○ Foreign/Other

○ US Person Authorized for ITAR   ☐ Woman-Owned   ☐ Alaskan Native Corporation (ANC) and Indian Tribes

○ Foreign Person with U.S. Dept of State Authorization/Special Exemption   ☐ Disadvantaged (Include Minority Owned)   ☐ HUB Zone

○ Not Authorized   ☐ Veteran-Owned   ☐ Historical Black Colleges and Universities/Minority Institutions

● Not Applicable   ☐ Service-Disabled Veteran-Owned   ☐ Other [_____] ✎

NAICS Codes

NAICS (primary) [_____] [_____]

NAICS (secondary) [_____] [_____]

FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

Subcontracts Overview

1 **Enter subcontract identification data**

2 **Accomplish the General tab**

3 **Accomplish the Subcontract Info tab**

4 **Accomplish the Requisitions tab**

5 **Accomplish the Purchase Orders tab**

6 **Accomplish the Modifications tab**

7 **Accomplish the Scope of Work tab**

8 **Fill out the Supplier/Vendor Rating tab**

9 **Accomplish the Notes tab**

Deltek Costpoint

→ **Identification**

New | Copy ▼ | Delete | ◄ ◄ 1 of 1 New ⟳ ► ►| | Table | Query ▼

Subcontract ID [   ]

Agreement Type [   ]

Subcontract Start Date [   ] 📅

Subcontract Name * [   ]   ☐ Exclude from Reports

Status [   ]

Subcontract End Date [   ] 📅   Record Status * [Active ▼]

General | **Subcontract Info** | **Requisitions** | **Purchase Orders** | **Modifications** | **Scope of Work** | **Supplier/Vendor Rating** | **Notes**

Subcontract CAS Required? * [-Select- ▼]   Subcontract Reporting Required? * [-Select- ▼]   Is this a Commercial Contract? * [-Select- ▼]

Incurred Cost Submission Required? * [-Select- ▼]   Subcontract Plan Submitted? * [-Select- ▼]   Subcontract Type [   ] ✎

Incurred Cost Submission Date [   ]   Is this an 8A Contract? * [-Select- ▼]   OCI Mitigation Plan * [-Select- ▼]

Certification of Insurance Expiration Date [   ] 📅   Is the Service Contract Act Required? * [-Select- ▼]   Is the Davis Bacon Act Required? * [-Select- ▼]

DPAS Purchasing Rating [   ]

Security Requirements

☐ US Citizen

ITAR Status

○ US Person Authorized for ITAR

○ Foreign Person with U.S. Dept of State Authorization/Special Exemption
○ Not Authorized

◉ Not Applicable

Business Classification Requirements

Size

○ Large   ◉ Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned   ☐ Alaskan Native Corporation (ANC) and Indian Tribes

☐ Disadvantaged (Include Minority Owned)   ☐ HUB Zone

☐ Veteran-Owned   ☐ Historical Black Colleges and Universities/Minority Institutions

☐ Service-Disabled Veteran-Owned   ☐ Other [   ] ✎

NAICS Codes

NAICS (primary) [   ] [   ]

NAICS (secondary) [   ] [   ]

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

B

FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. **Accomplish the Subcontract Info tab**
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

Incurred Cost Submission Required? * -Select-

Incurred Cost Submission Date

Certification of Insurance Expiration Date

DPAS Purchasing Rating

Is this an 8A Contract? * -Select-

OCI Mitigation Plan * -Select-

Is the Service Contract Act Required? * -Select-

Is the Davis Bacon Act Required? -Select-

Security Requirements

☐ US Citizen

ITAR Status

○ US Person Authorized for ITAR

○

○

○

NAICS

NAIC

NAIC

Business Classification Requirements

Size

○ Large   ● Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned

☐ ...ude Minority Owned)

☐ ...teran-Owned

☐ Alaskan Native Corporation (ANC) and Indian Tribes

☐ HUB Zone

☐ Historical Black Colleges and Universities/Minority Institutions

☐ Other

C 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.

FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

FAR Clauses/Provisions

Load Options

Copy FAR Clauses/Provisions from   Contract ID   ☐ Load Predefined Rows

FAR Clauses/Provisions   Option -None-   Start   End   Autoload
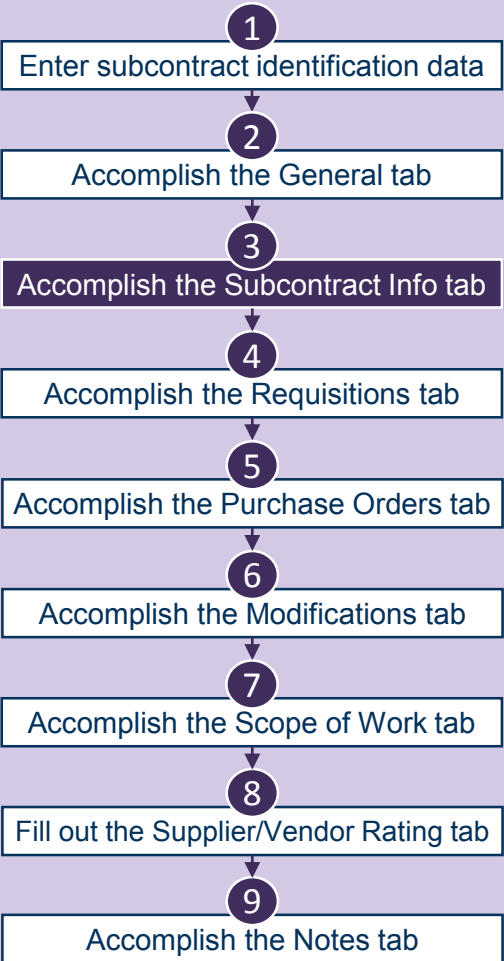
Identification > FAR Clauses/Provisions   New   Copy   Delete   Query

✔	Applicable to Subcontract	Send to PO	FAR Number	Title	Clause/Provision *	Description from Contract

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. **Accomplish the Subcontract Info tab**
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Incurred Cost Submission Required? * -Select- ▼

Incurred Cost Submission Date [   ]   Is this an 8A Contract? * -Select- ▼   OCI Mitigation Plan * -Select- ▼

Certification of Insurance Expiration Date [   ] 📅   Is the Service Contract Act Required? * -Select- ▼   Is the Davis Bacon Act Required? * -Select- ▼

DPAS Purchasing Rating [   ]

Security Requirements

☐ US Citizen

ITAR Status

○ US Person Authorized for ITAR

○ Foreign Person with U.S. Dept of State Authorization/Special Exemption

○ Not Authorized

◉ Not Applicable

Business Classification Requirements

Size

○ Large   ◉ Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned

☐ Disadvantaged (Include Minority Owned)

☐ Veteran-Owned

☐ Service-Disabled Veteran-Owned

☐ Alaskan Native Corporation (ANC) and Indian Tribes

☐ HUB Zone

☐ Historical Black Colleges and Universities/Minority Institutions

☐ Other [   ] ✎

NAICS Codes

NAICS (primary) [   ] [   ]

NAICS (secondary) [   ] [   ]

FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

FAR Clauses/Provisions   ☐ ▭ ▬ ▢ ✕

Load Options

Copy FAR Clauses/Provisions from   Contract ID [   ]   ☐ Load Predefined Rows

FAR Clauses/Provisions   Option [-None- ▼] [   ]   [Autoload]

Identification > FAR Clauses/Provisions   [New] ~~Py~~ ▼ Delete Query ▼ ▬

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

D

☑	Applicable to Subcontract	Send to PO	FAR Number	Title	Clause/Provision *	Description from Contract

◀ ▐▐▐ ▶

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Deltek Costpoint

Identification

New | Copy ▼ | Delete | 1 of 1 New | Table | Query ▼

Subcontract ID [ ]
Subcontract Name * [ ] ☐ Exclude from Reports

Agreement Type [ ]
Status [ ]

Subcontract Start Date [ ]
Subcontract End Date [ ]   Record Status * [Active ▼]

Tabs: General | **Subcontract Info** | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

Subcontract CAS Required? * [-Select- ▼]
Subcontract Reporting Required? * [-Select- ▼]
Is this a Commercial Contract? * [-Select- ▼]

Incurred Cost Submission Required? * [-Select- ▼]
Subcontract Plan Submitted? * [-Select- ▼]
Subcontract Type [ ] 📝

Incurred Cost Submission Date [ ]
Is this an 8A Contract? * [-Select- ▼]
OCI Mitigation Plan * [-Select- ▼]

Certification of Insurance Expiration Date [ ]
Is the Service Contract Act Required? * [-Select- ▼]
Is the Davis Bacon Act Required? * [-Select- ▼]

DPAS Purchasing Rating [ ]

Security Requirements

☐ US Citizen

ITAR Status

○ US Person Authorized for ITAR

○ Foreign Person with U.S. Dept of State Authorization/Special Exemption
○ Not Authorized

● Not Applicable

Business Classification Requirements

Size

○ Large   ● Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned
☐ Alaskan Native Corporation (ANC) and Indian Tribes

☐ Disadvantaged (Include Minority Owned)
☐ HUB Zone

☐ Veteran-Owned
☐ Historical Black Colleges and Universities/Minority Institutions

☐ Service-Disabled Veteran-Owned
☐ Other [ ] 📝

NAICS Codes

NAICS (primary) [ ] [ ]

NAICS (secondary) [ ] [ ]

Click this link to open the Supplemental Regulations subtask.

E

FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

→ Identification

| New | Copy | ▼ | Delete | | | 1 of 1 New | | | | Table | Query | ▼ | | — | X |

Subcontract ID _____

Agreement Type _____

Subcontract Start Date _____ 📅

Subcontract Name * _____ ☐ Exclude from Reports

Status _____

Subcontract End Date _____ 📅   Record Status * [Active ▼]

General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

Subcontract CAS Required? * [-Select- ▼]   Subcontract Reporting Required? * [-Select- ▼]   Is this a Commercial Contract? * [-Select- ▼]

Incurred Cost Submission Required? * [-Select- ▼]   Subcontract Plan Submitted? * [-Select- ▼]   Subcontract Type _____

Incurr...

Certif... Date DPAS...

Secur...

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

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.

○ Large   ● Small   ○ Non-Profit   ○ Foreign/Other

Supplemental Regulations   ☐ — ☐ X

Load Options

Contract ID

Copy Supplemental Regulations from _____

Supplemental Regulations [-None- ▼]   Start _____   End _____   [Autoload]

| New | Copy ▼ | Delete | Query ▼ | — |

☑	Applicable to Subcontract	Send to PO	Agency	Clause Number *	Title *	De

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. **Accomplish the Subcontract Info tab**
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

→ Identification

New | Copy ▼ | Delete | ◄◄ ◄ | 1 of 1 New | ↻ ► ►► | Table | Query ▼ | ☐ | ─ | ✕

Subcontract ID [ ]   Subcontract Name * [ ]   ☐ Exclude from Reports

Agreement Type [ ]   Status [ ]

Subcontract Start Date [ ] 📅   Subcontract End Date [ ] 📅   Record Status * [Active ▼]

General | **Subcontract Info** | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

Subcontract CAS Required? * [-Select- ▼]   Subcontract Reporting Required? * [-Select- ▼]   Is this a Commercial Contract? * [-Select- ▼]

Incurred Cost Submission Required? * [-Select- ▼]   Subcontract Plan Submitted? * [-Select- ▼]   Subcontract Type [ ] 🖉

Incurred Cost Submission Date [ ]   Is this an 8A Contract? * [-Select- ▼]   OCI Mitigation Plan * [-Select- ▼]

Certification of Insurance Expiration Date [ ] 📅   Is the Service Contract Act Required? * [-Select- ▼]   Is the Davis Bacon Act Required? * [-Select- ▼]

DPAS Purchasing Rating [ ]

Security Requirements

☐ US Citizen

ITAR Status

○ US Person Authorized for ITAR

○ Foreign Person with U.S. Dept of State Authorization/Special Exemption
○ Not Authorized

● Not Applicable

Business Classification Requirements

Size

○ Large   ● Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned   ☐ Alaskan Native Corporation (ANC) and Indian Tribes

☐ Disadvantaged (Include Minority Owned)   ☐ HUB Zone

☐ Veteran-Owned   ☐ Historical Black Colleges and Universities/Minority Institutions

☐ Service-Disabled Veteran-Owned   ☐ Other [ ] 🖉

NAICS Codes

NAICS (primary) [ ] [ ]

NAICS (secondary) [ ] [ ]

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

G

FAR Clauses/Provisions | Supplemental Regulations | **Import FAR/Supplemental Regulation Files**

Deltek Costpoint

Agreement Type

Subcontract Start Date

Subcontract End Date   Record Status *   Active

| General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes |

Subcontract CAS Required? *   -Select-
Incurred Cost Submission Required? *   -Select-
Incurred Cost Submission Date
Certification of Insurance Expiration Date
DPAS Purchasing Rating

Subcontract Reporting Required? *   -Select-
Subcontract Plan Submitted? *   -Select-
Is this an 8A Contract? *   -Select-
Is the Service Contract Act Required? *   -Select-

Is this a Commercial Contract? *   -Select-
Subcontract Type
OCI Mitigation Plan *   -Select-
Is the Davis Bacon Act Required? *   -Select-

Security Requirements

☐ US Citizen

ITAR Status

○ US Person Authorized for ITAR
○ Foreign Person with U.S. Dept of State Authorization/Special Exemption
○ Not Authorized
⦿ Not Applicable

Business Classification Requirements

Size

○ Large   ⦿ Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned
☐ Disadvantaged (Include Minority Owned)
☐ Veteran-Owned
☐ Service-Disabled Veteran-Owned

☐ Alaskan Native Corporation (ANC) and Indian Tribes
☐ HUB Zone
☐ Historical Black Colleges and Universities/Minority Institutions
☐ Other

NAICS Codes

NAICS (primary)
NAICS (secondary)

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

FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

H

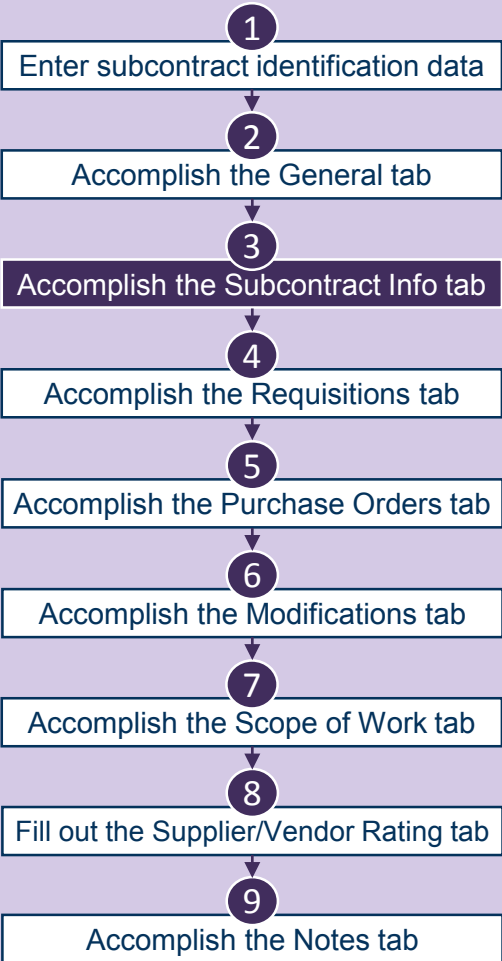**Identification > Import FAR/Supplemental Regulation Files**   New   Copy   Delete   Form   Query

☑	Regulation Type *	File ID *	Date Imported	Document Type	File Location	File Name *

View File   Import File

Close

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 **Accomplish the Subcontract Info tab**

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Agreement Type

Subcontract Start Date

Subcontract End Date   Record Status *   Active

Deltek Costpoint

Tabs: General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

Subcontract CAS Required? * -Select-   Subcontract Reporting Required? * -Select-   Is this a Commercial Contract? * -Select-

Incurred Cost Submission Required? * -Select-   Subcontract Plan Submitted? * -Select-   Subcontract Type

Incurred Cost Submission Date   Is this an 8A Contract? * -Select-   OCI Mitigation Plan * -Select-

Certification of Insurance Expiration Date   Is the Service Contract Act Required? * -Select-   Is the Davis Bacon Act Required? -Select-

DPAS Purchasing Rating

Security Requirements
☐ US Citizen

ITAR Status
○ US Person Authorized for ITAR
○ Foreign Person with U.S. Dept of State Authorization/Special Exemption
○ Not Authorized
◉ Not Applicable

Business Classification Requirements

Size
○ Large   ◉ Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned   ☐ Alaskan Native Corporation (ANC) and Indian Tribes
☐ Disadvantaged (Include Minority Owned)   ☐ HUB Zone
☐ Veteran-Owned   ☐ Historical Black Colleges and Universities/Minority Institutions
☐ Service-Disabled Veteran-Owned   ☐ Other

NAIC

I — 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.
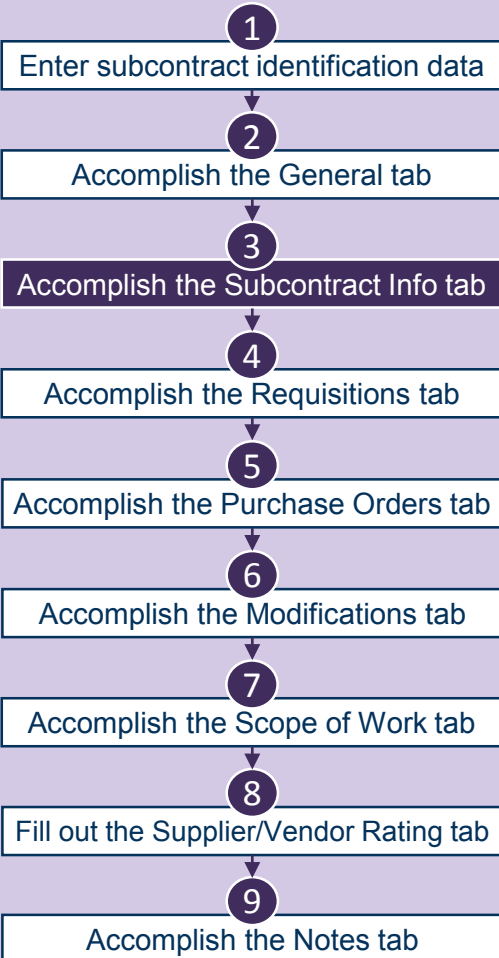
FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

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

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. **Accomplish the Subcontract Info tab**
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

General | Subcontract Info | Requisitions | Purchase Orders | Modifications | Scope of Work | Supplier/Vendor Rating | Notes

Subcontract CAS Required? * -Select-
Subcontract Reporting Required? * -Select-
Is this a Commercial Contract? * -Select-

Incurred Cost Submission Required? * -Select-
Subcontract Plan Submitted? * -Select-
Subcontract Type

Incurred Cost Submission Date
Is this an 8A Contract? * -Select-
OCI Mitigation Plan * -Select-

Certification of Insurance Expiration Date
Is the Service Contract Act Required? * -Select-
Is the Davis Bacon Act Required? * -Select-

DPAS Purchasing Rating

Security Requirements

☐ US Citizen

ITAR Status

○ US Person Authorized for ITAR
○ Foreign Person with U.S. Dept of State Authorization/Special Exemption
○ Not Authorized
● Not Applicable

Business Classification Requirements

Size

○ Large   ● Small   ○ Non-Profit   ○ Foreign/Other

☐ Woman-Owned
☐ Disadvantaged (Include Minority Owned)
☐ Veteran-Owned
☐ Service-Disabled Veteran-Owned

☐ Alaskan Native Corporation (ANC) and Indian Tribes
☐ HUB Zone
☐ Historical Black Colleges and Universities/Minority Institutions
☐ Other

NAICS Codes

NAICS (primary)
NAICS (secondary)

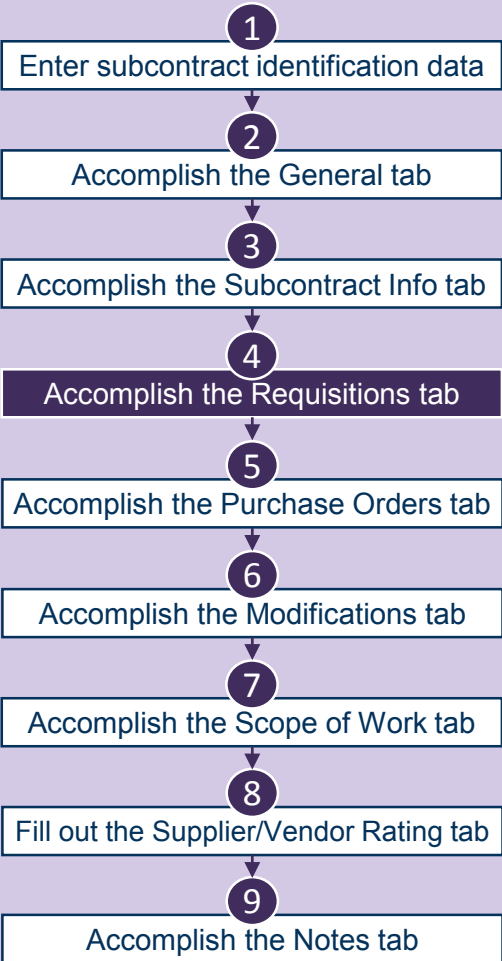FAR Clauses/Provisions   Supplemental Regulations   Import FAR/Supplemental Regulation Files

Identification > Import FAR/Supplemental Regulation Files   New | Copy

☑	Regulation Type *	File ID *	Date Imported	Document Type	File Location	
→	FAR Clause/Provision	SBCNTR1		CONTRACTMGMT	SBC...	

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

J

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

View File | Import File

Close

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. **Accomplish the Requisitions tab**
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

→ **Identification**

Subcontract ID

Agreement Type

Subcontract Start Date

ude from Reports

| Click the Requisitions tab. |
| A |

Use this tab to link requisitions to the subcontract. Only requisitions that exist in your Costpoint database are allowed for entry or selection on this tab.

General   Subcontract Info   **Requisitions**   Purchase Orders   Modifications   Scope of Work   Supplier/Vendor Rating   Notes

New | Copy ▼ | Delete | Query ▼

☑	Requisition ID *	Revision	Status	Requisition Date	Requisitioner Name
—	🔍				

B

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

C

Enter the ID of the requisition that will be linked to the subcontract. All the other fields are optional.

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. **Accomplish the Purchase Orders tab**
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

Identification

5 of 5 Existing

Subcontract ID   SUBC-000000000000002

A — Click the Purchase Orders tab.

t Name *   HHS-Premier-Subc-0001   Exclude from Reports

Agreement Type   Subcontractor Agreement   Awarded

Subcontract Start Date 06/01/2017   Subcontract End Date 05/31/2022   Record Status * Active

General   Subcontract Info   Requisitions   **Purchase Orders**   Modifications   Scope of Work   Supplier/Vendor Rating   Notes

Query ▼

☑	PO ID	Release	Change Order No	Order Date	Status	Procurement Type	PO Total

Work Assignments

B — Use this table window to view the POs associated with the subcontract, if existing. Only the POs that are linked to the subcontract through the Subcontract Information tab of the Manage Purchase Orders screen display on the table window.

C — Click this link to view the work assignments associated with the purchase order selected in the table window.

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

Identification

4 of 5 Existing

| Subcontract ID | SUBC-00000000000 | | Subcontract Name * | HHS-Balmar-Subc-0001 | ☐ Exclude from Reports |

Complete the Modifications tab. A

Agreement Type   Subcontractor Agreem

Status   Awarded

Subcontract Start Date   06/01/2017

Subcontract End Date   05/31/2022   Record Status *   Active ▼

General   Subcontract Info   Requisitions   Purchase Orders   **Modifications**   Scope of Work   Supplier/Vendor Rating   Notes

Delete   Query ▼

Collapse All   Expand All

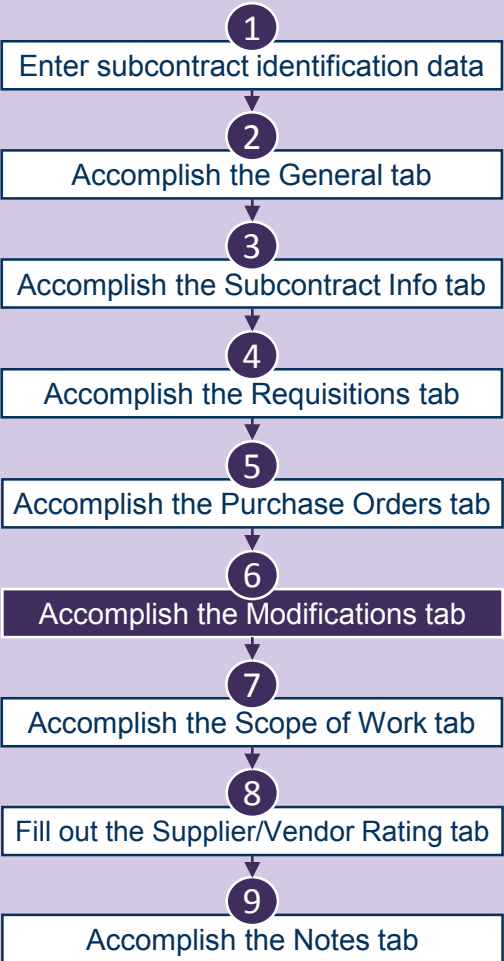| ✔	Project	Project Link	Name	Subcontract Mod ID	Project Mod ID	Modification Description	Effective Date	Start Date	End Date	Contract Value Modifications Amount	Contract Value Modifications Fee %	Contract Value Modifications Cost	Contr Modif
+	10820.01	10820.01	DESIGN							0.00		0.00	

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

Subcontract/Project Modifications

When you open this tab, the table window displays modifications for the projects linked to the subcontract record. No rows are displayed unless there are project modifications at or below the project linked to the subcontract record. The only exception is if there are rows manually entered on the Subcontract/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 Subcontract/Project Modifications subtask if these functionalities are enabled on the Configure Project Settings screen.

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. **Accomplish the Modifications tab**
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

Identification

4 of 5 Existing

Subcontract ID	SUBC-000000000000001
Agreement Type	Subcontractor Agreement
Subcontract Start Date	06/01/2017

Subcontract Name *	HHS-Balmar-Subc-0001
Status	Awarded
Subcontract End Date	05/31/2022
Record Status *	Active

☐ Exclude from Reports

General   Subcontract Info   Requisitions   Purchase Orders   **Modifications**   Scope of Work   Supplier/Vendor Rating   Notes
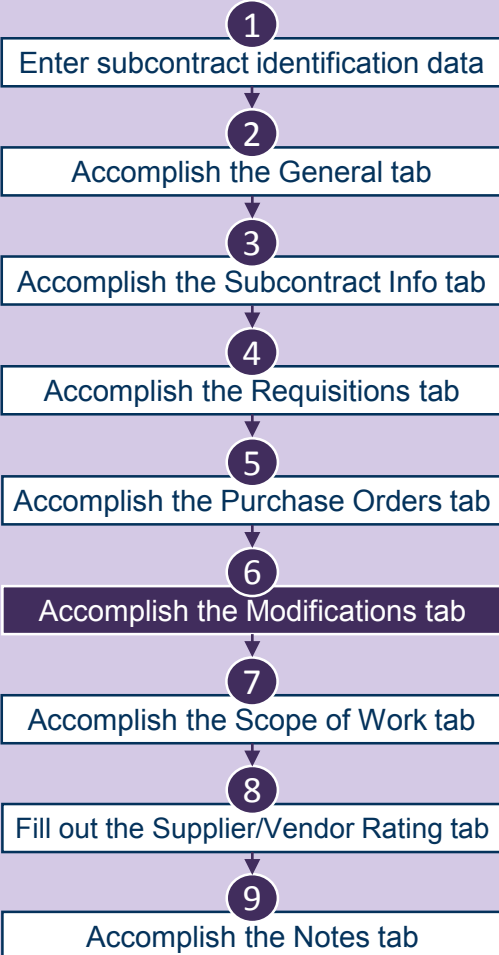
Delete   Query ▼

Collapse All   Expand All

☑	Project	Project Link	Name	Subcontract Mod ID	Project Mod ID	Modification Description	Effective Date	Start Date	End Date	Contract Value Modifications Amount	Contract Value Modifications Fee %	Contract Value Modifications Cost	Contr Modi
+	10820.01	10820.01	DESIGN							0.00		0.00	

Subcontract/Project Modifications

B Click this link to open the Subcontract/Project Modifications subtask.

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. **Accomplish the Modifications tab**
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

kc **Deltek** Costpoint

Subcontract ID	SUBC-000000000000001
Agreement Type	Subcontractor Agreement
Subcontract Start Date	06/01/2017

Status	Awarded
Subcontract End Date	05/31/2022	Record Status *	Active

General   Subcontract Info   Requisitions   Purchase Orders   **Modifications**   Scope of Work   Supplier/Vendor Rating   Notes

Delete   Query

Collapse All   Expand All

✓	Project	Project Link	Name	Subcontract Mod ID	Project Mod ID	Modification Description	Effective Date	Start Date	End Date	Contract Value Modifications Amount	Contract Value Modifications Fee %	Contract Value Modifications Cost	Cont Mod
+	10820.01	10820.01	DESIGN							0.00		0.00	

Subcontract/Project Modifications

Modifications > Identification

New   Copy   Delete   1 of 1 New   Table   Query

Pro...

Subco...

Project

Modificati...

Start D...   01/29/2019

End Da...

Value Modifications

Value

Fee%

Cost

Fee

Notes
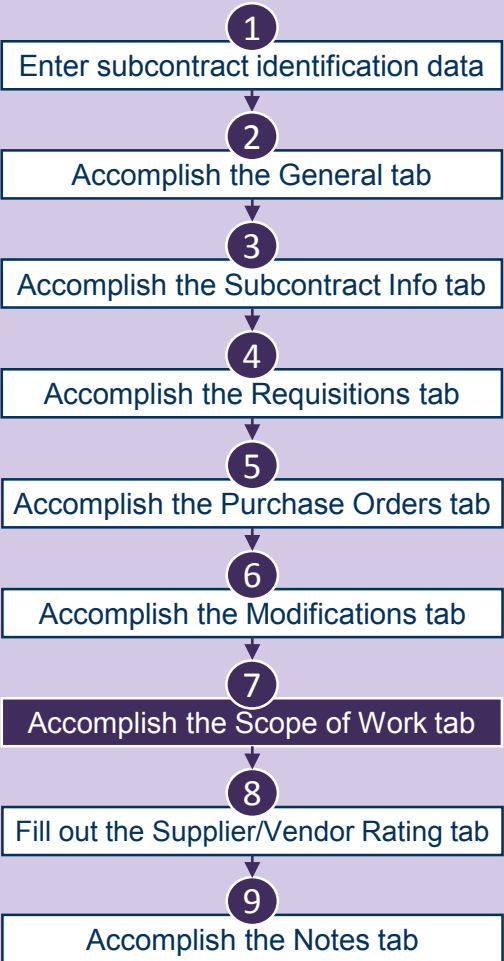
Project Name

Description *

☐ Create New Project Modifications

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

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.

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. **Accomplish the Scope of Work tab**
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

→ **Identification**

New | Copy ▼ | Delete | |◀ ◀ | 1 of 1 New | ▶ ▶| | Table | Query ▼ | ☐ ― ✕

Subcontract ID |

Agreement Type

Subcontract Start Date

Subcontract Name *

Status

Subcontract End Date   Record Status *   Active ▼

☐ Exclude from Reports

Click this tab and enter the scope of work for the subcontract.

A
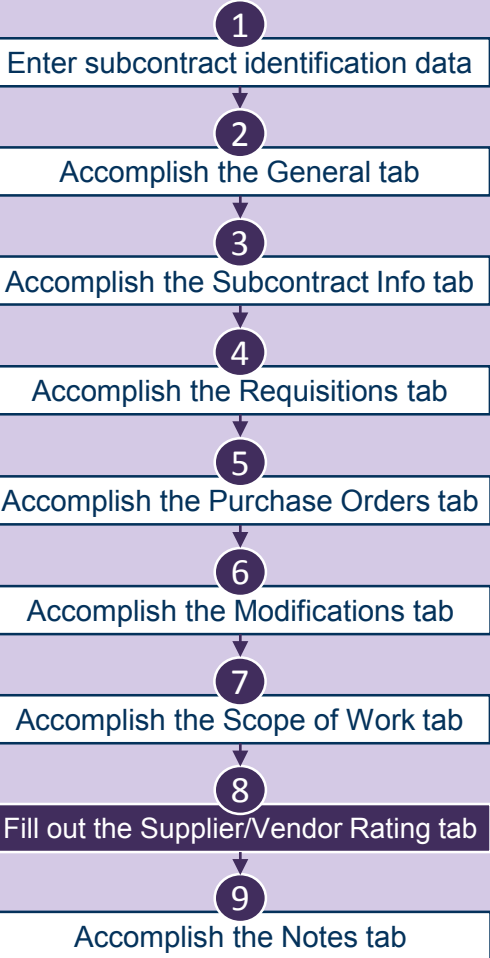
General   Subcontract Info   Requisitions   Purchase Orders   Modifications   **Scope of Work**   Supplier/Vendor Rating   Notes

Scope of Work

Subcontracts Overview

1 Enter subcontract identification data

2 Accomplish the General tab

3 Accomplish the Subcontract Info tab

4 Accomplish the Requisitions tab

5 Accomplish the Purchase Orders tab

6 Accomplish the Modifications tab

7 Accomplish the Scope of Work tab

8 Fill out the Supplier/Vendor Rating tab

9 Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

Identification

4 of 5 Existing

Subcontract ID   SUBC-000000000000001   HHS-Balmar-Subc-0001   ☐ Exclude from Reports

Agreement Type   Subcontractor Agreement   Awarded

Subcontract Start Date 06/01/2017   Subcontract End D... 5/31/2022   Record Status *   Active ▼

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

A

General   Subcontract Info   Requisitions   Purchase Orders   Modifications   Scope of Work   **Supplier/Vendor Rating**   Notes

New   Copy ▼   Delete   1 of 2 Existing   Table   Query ▼

Subcontractor/Vendor ID *   V100013   Balmar Consulting   Products/Services Provided

Project ID

Date Reviewed

Percent

Supplier/Vendor Rating
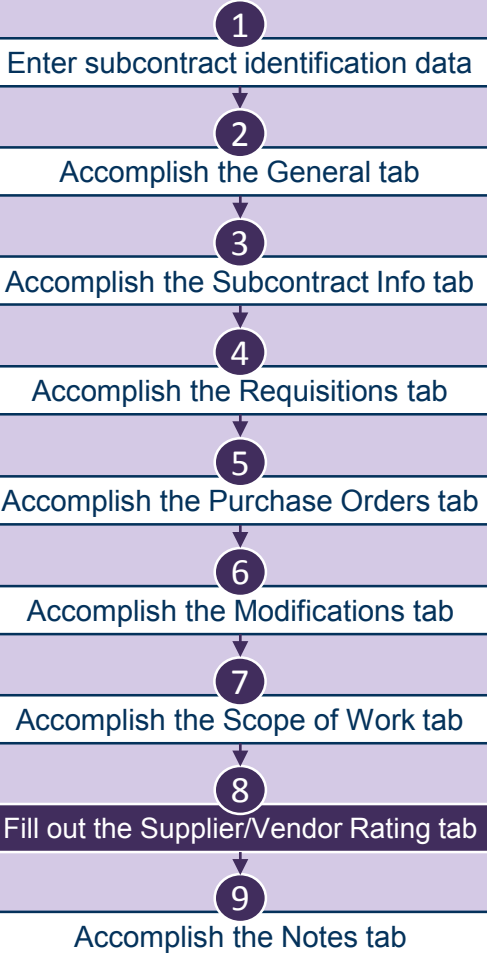
> Use this tab to assign or review ratings for the subcontractor associated with the subcontract. The subcontractor entered on the General tab defaults on this tab. You can enter multiple records for this subcontractor under one subcontract ID for different **Date Reviewed** values. However, the subcontractor/project/date reviewed combination must be unique for you to be able to save the record.
>
> 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.

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

Identification

4 of 5 Existing

Subcontract ID	SUBC-000000000000001
Agreement Type	Subcontractor Agreement
Subcontract Start Date	06/01/2017

Subcontract Name *	HHS-Balmar-Subc-0001
Status	Awarded
Subcontract End Date	05/31/2022
Record Status *	Active

Exclude from Reports

General   Subcontract Info   Requisitions   Purchase Orders   Modifications   Scope of Work   **Supplier/Vendor Rating**   Notes

New   Copy   Delete   1 of 2 Existing   Table   Query

Subcontractor/Vendor ID *	V100013	Balmar Consulting	
Project ID			
Date Reviewed			
	Percent 56%	Total Score 60	

Products/Services Provided

Supplier/Vendor Rating

B

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

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Identification

Deltek Costpoint

Subcontract ID: SUBC-000000000000001

Agreement Type: Subcontractor Agreement

Subcontract Start Date: 06/01/2017

Subcontract Name *: HHS-Balmar-Subc-0001   ☐ Exclude from Reports

Status: Awarded

Subcontract End Date: 05/31/2022   Record Status *: Active ▼

Tabs: Ge... | Orders | Modifications | Scope of Work | **Supplier/Vendor Rating** | Notes

New | Copy ▼ | Delete | ◀◀ ◀ | 1 of 2 Existing | ▶ ▶▶ | Table | Query ▼

Sub... ID * | ...nsulting   Products/Services Provided
Pro...
Dat...   60

C — Use this column to view the supplier/vendor rating descriptions as set up on the Manage Supplier Vendor Rating Descriptions screen. Rating descriptions are grouped into four categories, and each category has five rating descriptions that you can use to evaluate the subcontractor.

D — Enter the rating description in these fields. Valid values are only those that exist on the Manage Supplier Vendor Rating Codes screen.

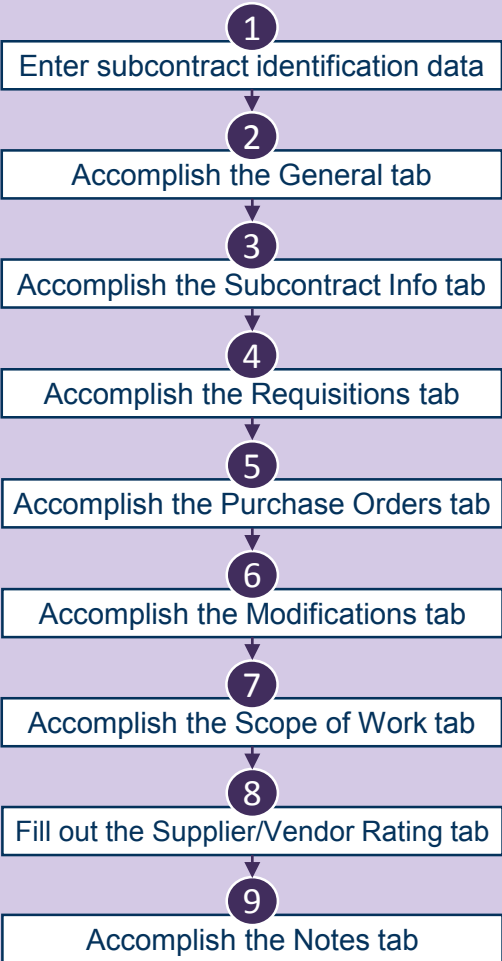**E** — Enter additional comments associated with the rating category for the subcontractor.

Supplier/Vendor Rating > Supplier/Vendor Rating

Delete | ◀◀ ◀ | 1 of 1 Existing | ▶ ▶▶ □ ▣ ━ ✕

Responsiveness/Innovation

	Rating
Vendor understands and complies with company's requirements	Fully Meets
Vendor contact is knowledgeable on products/services	Mostly Meets
Vendor communicates all relevant information efficiently	Meets Some
Company can easily find right vendor contract when needed	Barely Meets
Vendor provides "best in class" practices	Does Not Meet

Responsiveness and Innovation comments

Customer Service, Quality and Delivery

	Rating
Products/Services provided promptly and with proper documentation	Fully Meets
Products/Services are accurate/complete and free of defects	Fully Meets
Vendor handles concerns/issues appropriately	Fully Meets
Vendor meets services/support commitments	Fully Meets

Customer Service, Quality and Delivery comments

Subcontracts Overview

1. Enter subcontract identification data
2. Accomplish the General tab
3. Accomplish the Subcontract Info tab
4. Accomplish the Requisitions tab
5. Accomplish the Purchase Orders tab
6. Accomplish the Modifications tab
7. Accomplish the Scope of Work tab
8. Fill out the Supplier/Vendor Rating tab
9. Accomplish the Notes tab

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > **Manage Subcontracts**

➜ **Identification**

1 of 1 New   Table   Query ▼

Subcontract ID

☐ Exclude from Reports

Agreement Type

Subcontract Start Date

Subcontract End Date   Record Status *   Active ▼

A

Click this tab and enter notes and any other information about the subcontract.

General   Subcontract Info   Requisitions   Purchase Orders   Modifications   Scope of Work   Supplier/Vendor Rating   **Notes**

Subcontracts Overview

1. Enter subcontract identification data

2. Accomplish the General tab

3. Accomplish the Subcontract Info tab

4. Accomplish the Requisitions tab

5. Accomplish the Purchase Orders tab

6. Accomplish the Modifications tab

7. Accomplish the Scope of Work tab

8. Fill out the Supplier/Vendor Rating tab

9. Accomplish the Notes tab

Deltek Costpoint

Browse Applications > Contracts > Contracts > Subcontracts > Manage Subcontracts

→ Identification

| New | Copy ▼ | Delete | 1 of 1 New | Table | Query ▼ |

Subcontract ID

Subcontract Name *

Exclude from Reports

Agreement Type

Status

Subcontract Start Date

Active ▼

General   Subcontract Info   Requisitions

This concludes the
Subcontracts Overview click-thru.