

OCI Overview

1

Enter OCI identification data

2

Set up POP and OCI clear dates

3

Select the conflict type

4

Enter the OCI review status and date

5

Enter key terms and confidential information

6

Accomplish the subtasks

FILE LINE OPTIONS PROCESS HELP

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI) New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name *

Project Number

Dates

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

CDSI

Key Terms

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Opportunities Projects Employees Subs/Vendors Activities Documents User-Defined Info

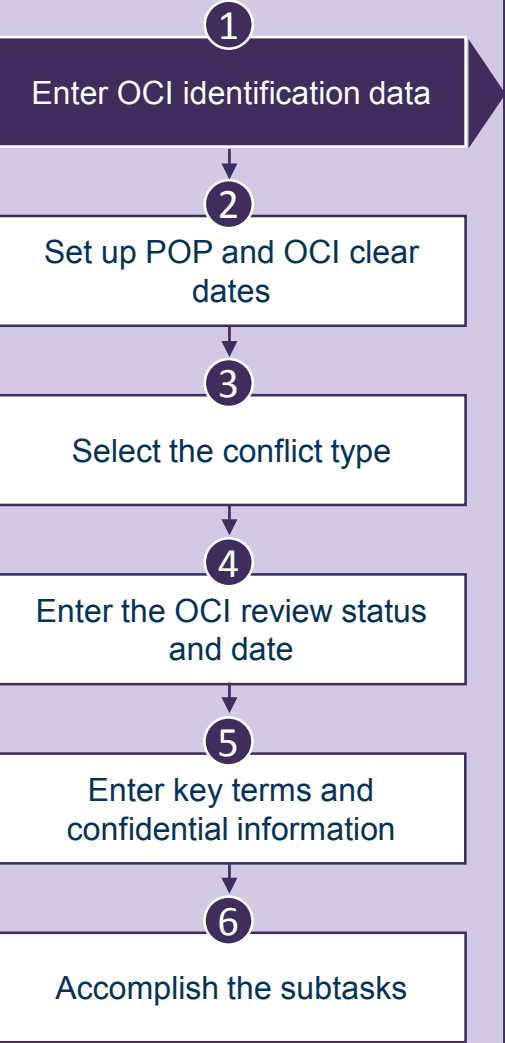
This click-thru introduces organizational conflict of interest (OCI) in Contract Management and shows you how to create a new OCI record.

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

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Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

OCI ID

OCI Name *

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type**

POP Start Date ☐ Unequal Access FAR 9.505-4

POP End Date ☐ Biased Groundrules FAR 9.505-1, 9.505-2

OCI Period (Months) ☐ Impaired Objectivity FAR 9.505-3

OCI Clear Date Interest FAR 52.203-16

CDSI

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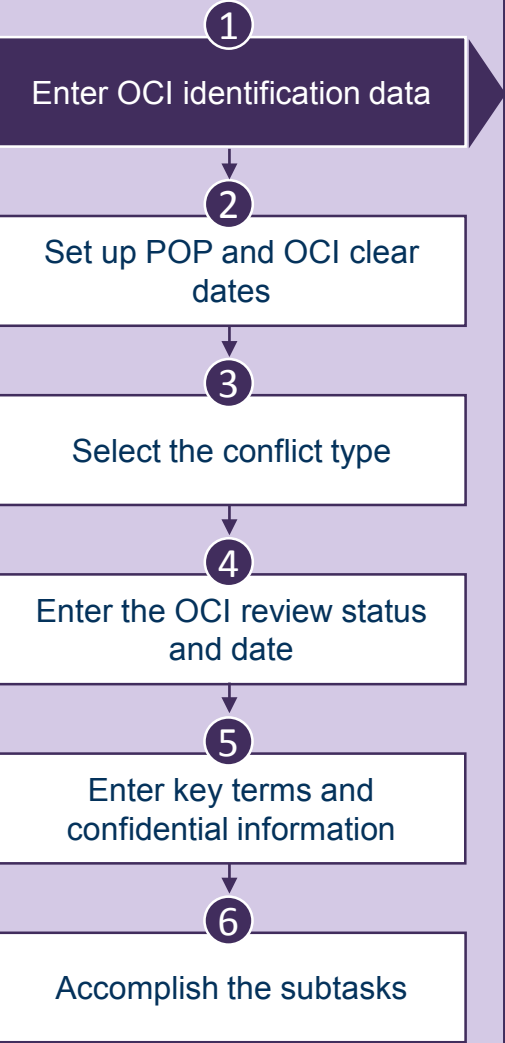
Opportunities Projects Employees Subs/Vendors Activities Documents User-Defined Info

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

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

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

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Manage Organizational Conflict of Interest (OCI) New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

B Enter the project number that you want to associate with the OCI.

C Select this check box to indicate if the OCI should be associated with all the project's lower levels.

Dates **Conflict Type**

POP Start Date Unequal Access FAR 9.505-4

POP End Date Biased Groundrules FAR 9.505-1, 9.505-2

OCI Period (Months) Impaired Objectivity FAR 9.505-3

OCI Clear Date ☐ Personal Conflict of Interest FAR 52.203-16

Reviewed By

Date

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HomeStar

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

UserHomePower

Manage Organizational Conflict of Interest (OCI)

NewCopyDelete1 of 1 NewTableQuery

OCI ID

OCI Name *

Project Number

Prime Contract No

Master Contract No

☐ Apply to All Lower Level Project

Dates

Conflict Type

Clear Date

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

☐ Unequal Access FAR 9.505-4

☐ Biased Groundrules FAR 9.505-1, 9.505-2

☐ Impaired Objectivity FAR 9.505-3

☐ Personal Conflict of Interest FAR 52.203-16

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Opportunities

Projects

Employees

Subs/Vendors

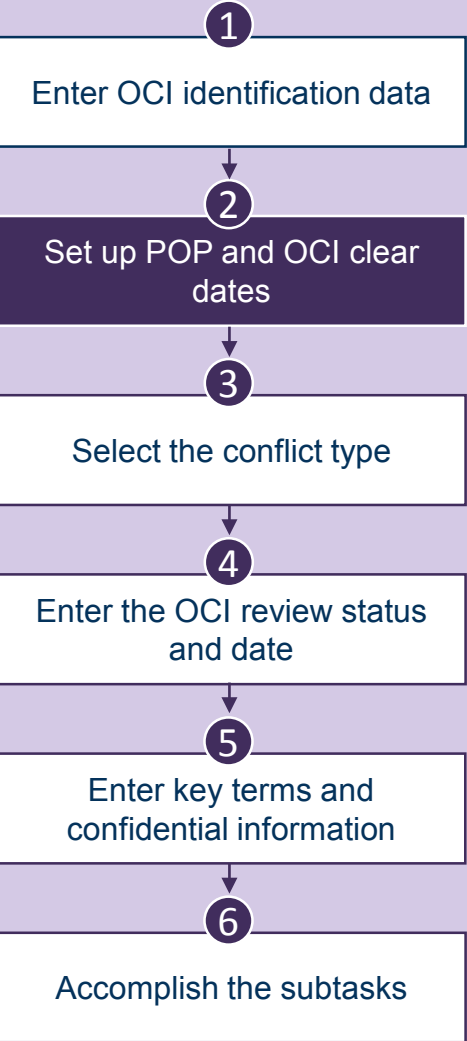
Activities

Documents

User-Defined Info

D
Enter the prime contract number and master contract number that you want to link to the OCI.

OCI Overview



FILE LINE OPTIONS PROCESS HELP

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date

OCI Period (Months)

OCI Clear Date

CDSI

Key Terms

Notes

Equal Access EAP 9.505.4

9.505-2

32.203-16

Status

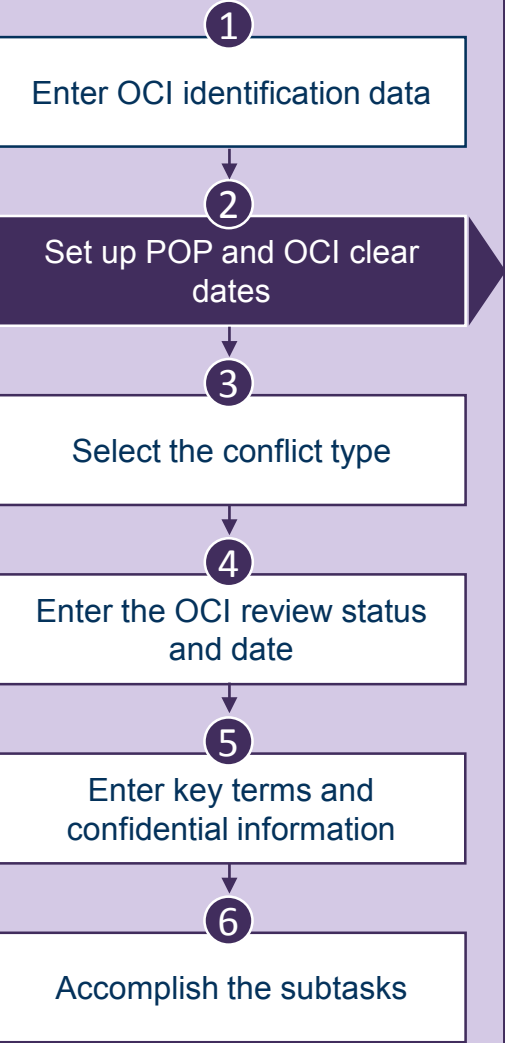
A Enter the period of performance (POP) for the OCI.

By default, the POP start and end dates come from the **Master Contract No**, if specified, or from the **Prime Contract No** if the **Master Contract No** is not specified. If both the prime and master contract numbers are not available, Costpoint pulls the dates from the project you entered.

Follow the steps on the next few slides to set up POP and OCI clear dates.

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OCI Overview



FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint Options

HomeStarClipboard

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

UserHomePower

Manage Organizational Conflict of Interest (OCI)

NewCopyDelete1 of 1 NewTableQuery

OCI IDPrime Contract No

OCI Name *Master Contract No

Project Number☐ Apply to All Lower Level Project

DatesConflict TypeClear Date Review

POP Start DatePOP End DateOCI Period (Months)OCI Clear Date

☐ Unequal Access FAR 9.505-4☐ Biased Groundrules FAR 9.505-1, 9.505-2

StatusReviewed ByDate

CDSI

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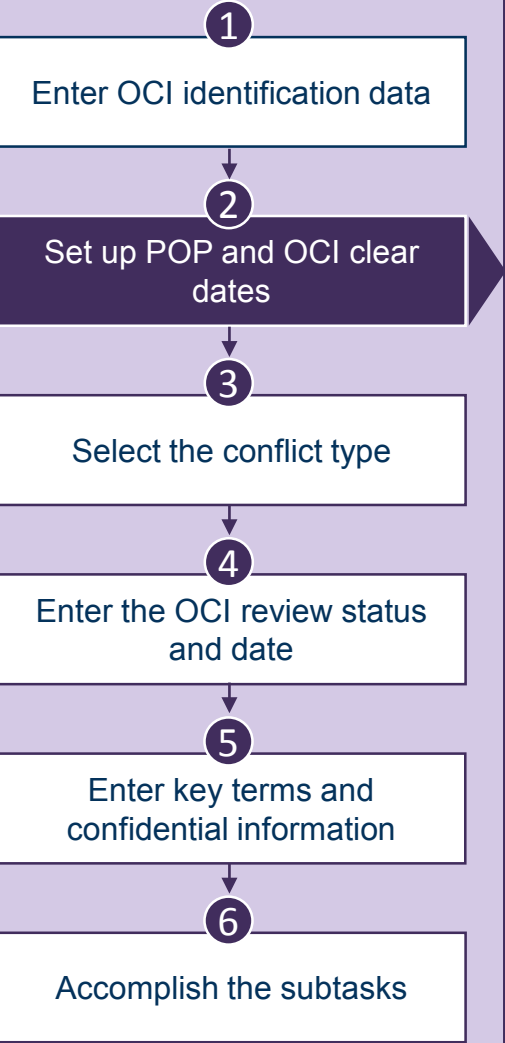
Notes

OpportunitiesProjectsEmployeesSubs/VendorsActivitiesDocumentsUser-Defined Info

B

Enter the number of months the OCI is in effect. After this number of months, the OCI record will need to be evaluated and its status selected.

OCI Overview



FILELINEOPTIONSPROCESSHELP

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HomeStarClipboard

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

UserHomePower

Manage Organizational Conflict of Interest (OCI)

NewCopyDelete1 of 1 NewTableQuery

OCI ID

OCI Name *

Project Number

Prime Contract No

Master Contract No

☐ Apply to All Lower Level Project

Dates

Conflict Type

Clear Date Review

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

☐ Unequal Access FAR 9.505-4

☐ Biased Groundrules FAR 9.505-1, 9.505-2

☐ Impaired Objectivity FAR 9.505-3

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Key Terms

Notes

This field is automatically populated by Costpoint, but you can modify it.

The OCI Clear Date is populated by the system using the POP End Date and the OCI Period (Months). For example, if you enter an end date of May 25, 2018 and an OCI period of 6 months, the OCI clear date will be November 25, 2018.

Opportunities

Projects

Employees

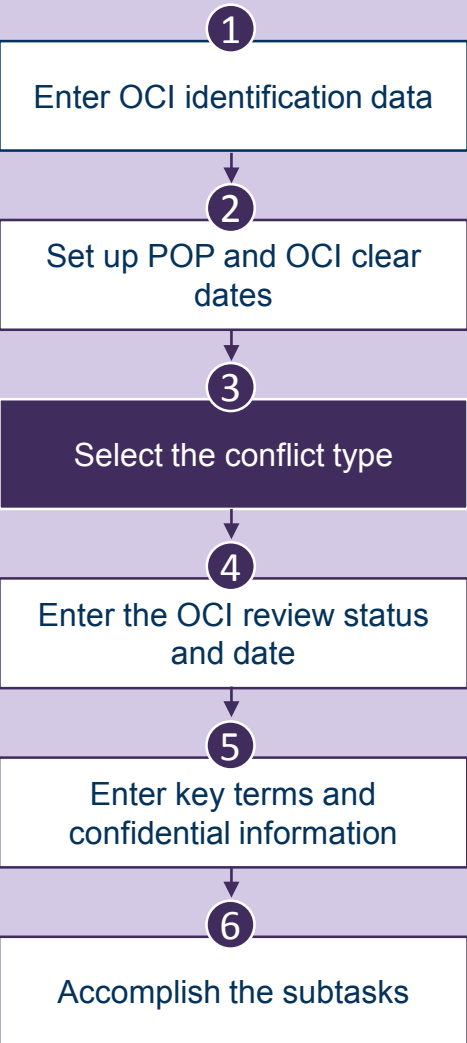
Subs/Vendors

Activities

Documents

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OCI Overview



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Manage Organizational Conflict of Interest (OCI)

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OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4
☐ Biased Groundrules FAR 9.505-1, 9.505-2
☐ Impaired Objectivity FAR 9.505-3
☐ Personal Conflict of Interest FAR 52.203-16

CDSI

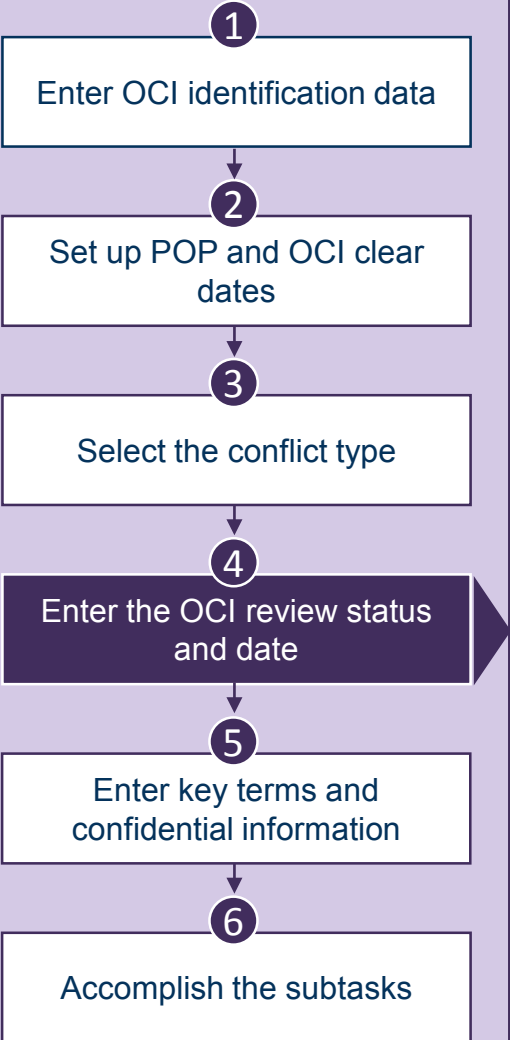
Key Terms

A

Select the option that best describes the type of conflict.

- **Unequal Access** — This arises when a contractor has access to information that is not available to other contractors.
- **Biased Groundrules** — This includes a contractor that may be involved in writing the statement of work or technical direction efforts, and then later seeks to submit a proposal to fulfill that requirement.
- **Impaired Objectivity** — This occurs when a support contractor performs duties that involve assessing or evaluating itself or a partner company.
- **Personal Conflict of Interest** — This includes contractor employees having financial interests on the government contract or having employment, financial, or other relationship with someone involved in the government contract. Gifts or services in exchange for honorariums are also a source of personal conflicts of interest.

OCI Overview



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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Ma

Project Number

Enter the status of the OCI record.

System statuses include **Cleared**, **Pending Review**, **Closed**, **Declined**, and **Open**, but you can set up additional OCI statuses on the Manage OCI Status screen.

Dates **Conflict Type** **Clear Date Review**

POP Start Date ☐ Unequal Access FAR 9.505-4 Status

POP End Date ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By

OCI Period (Months) ☐ Impaired Objectivity FAR 9.505-3 Date

OCI Clear Date ☐ Personal Conflict of Interest FAR 52.203-16

CDSI

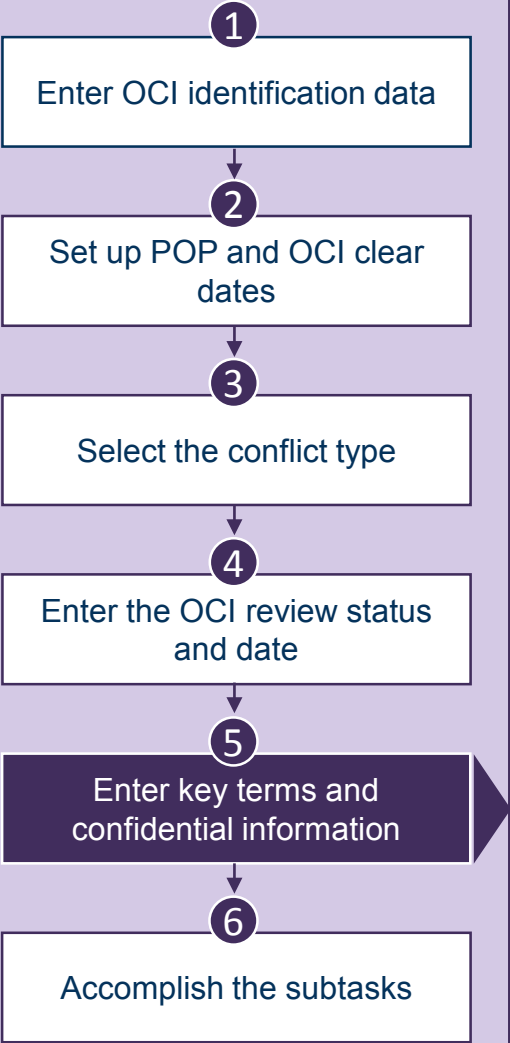
Key Terms

In these fields, enter the person who reviewed the OCI and the date on which the OCI was reviewed.

If any field in the **Clear Date Review** group box is entered, the other two fields will also be required.

On the Corporate Settings subtask of the Configure Contract Management Settings screen, there is an option to allow edit of OCI records after entry of **OCI Clear Review Date**. If this is not selected, and the clear date has been entered in this group box, you will not be able to edit existing fields. You will still be able to add new opportunities, projects, and activities, but will not be able to delete existing opportunities, projects, or activities in the OCI record.

OCI Overview



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Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates Conflict Type

POP Start Date POP End Date

OCI Period of Performance Required Objectivity FAR 9.505-3

OCI Clearance Required Conflict of Interest FAR 52.203-16

CDSI

Key Terms

Notes

Enter any confidential and sensitive information (CDSI) for the OCI.

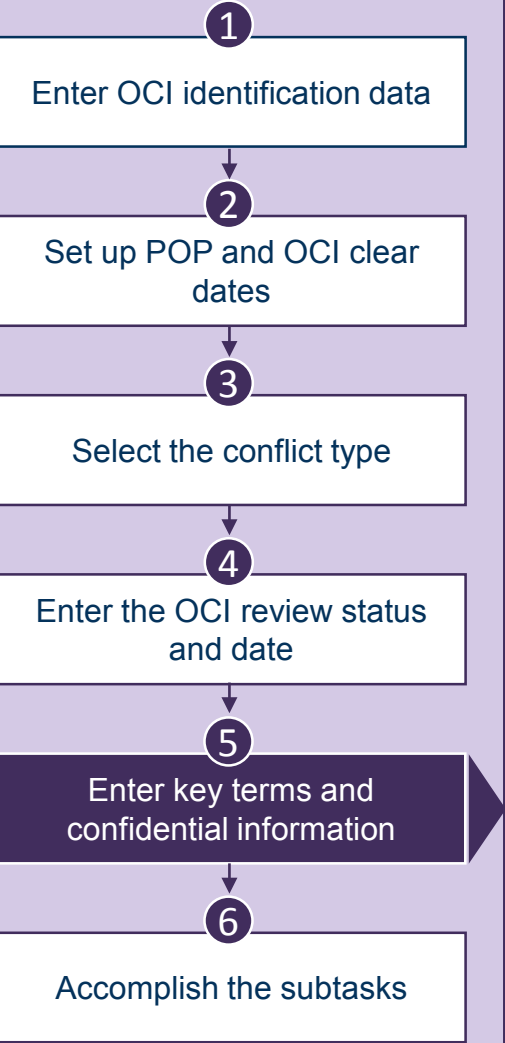
Enter key terms for the OCI record.

Enter any other relevant notes about the OCI record.

Opportunities Projects Employees Subs/Vendors Activities Documents User-Defined Info

You can assign specific key terms to a single OCI record or use the same terms within multiple OCI records. You can then use **Query** on these terms when searching for OCI records and filter record results.

OCI Overview



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Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest

Click **Save** or **Save & Continue** to save the record.

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 ☐ Impaired Objectivity FAR 9.505-3 ☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By Date

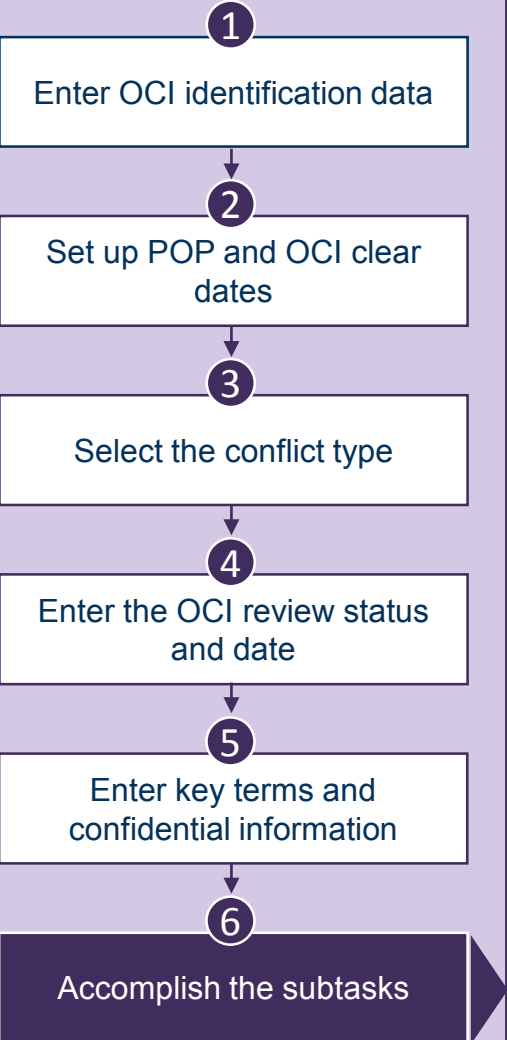
CDSI

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OCI Overview



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Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID		Prime Contract No	
OCI Name *		Master Contract No	
Project Number		<input type="checkbox"/> Apply to All Lower Level Project	

Dates

POP Start Date			
POP End Date			
OCI Period (Months)		<input type="checkbox"/> Impaired Objectivity FAR 9.505-3	
OCI Clear Date		<input type="checkbox"/> Personal Conflict of Interest FAR 52.203-16	

Clear Date Review

Status	
Reviewed By	
Date	

CDSI

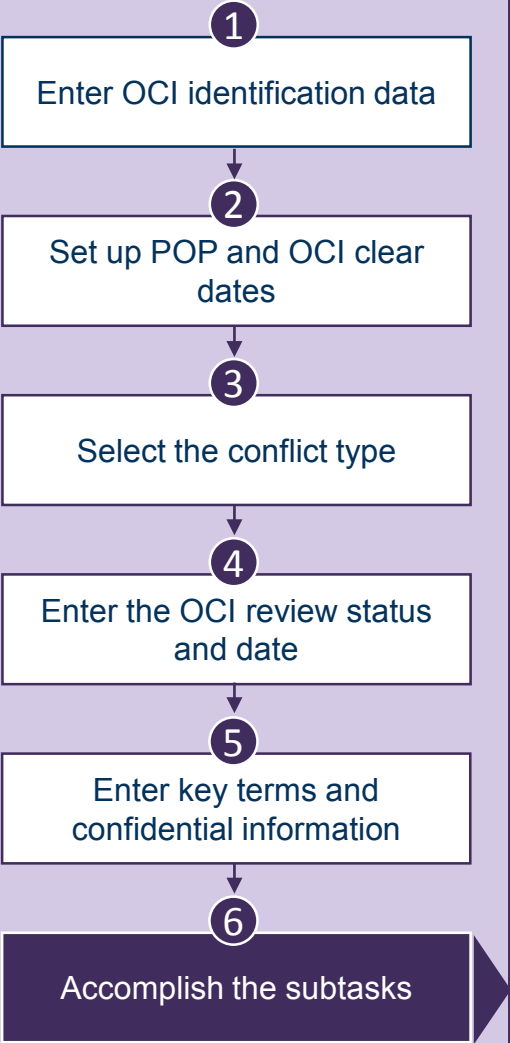
Key Terms

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Follow the steps on the next slides to accomplish the subtasks of the screen.

OCI Overview



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Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4
☐ Biased Groundrules FAR 9.505-1, 9.505-2
☐ Impaired Objectivity FAR 9.505-3
☐ Personal Conflict of Interest FAR 52.203-16

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CDSI

Key Terms

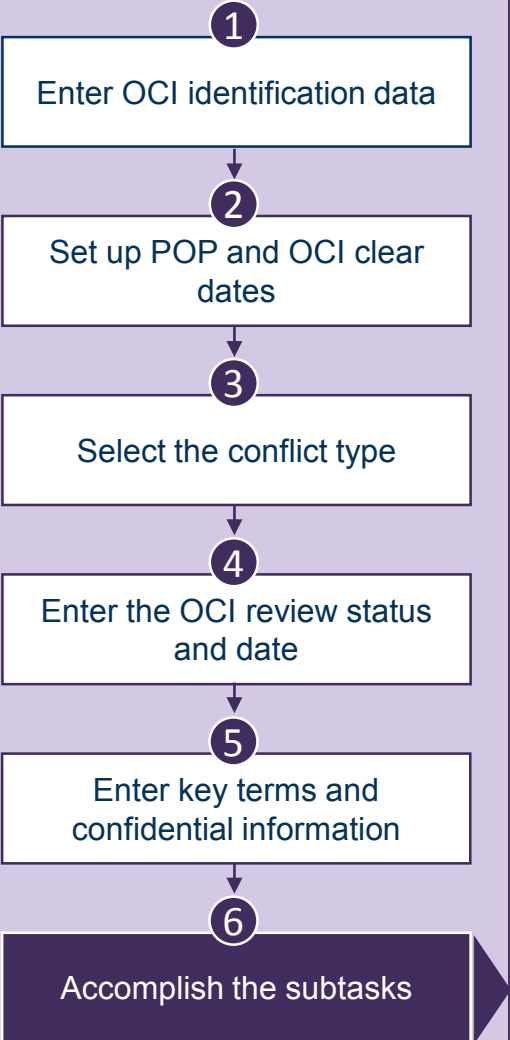
Notes

Click this link to open the Opportunities subtask.

A

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Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

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OCI IDPrime Contract No

OCI Name *Master Contract No

Project Number☐ Apply to All Lower Level Project

DatesConflict TypeClear Date Review

POP Start DatePOP End DateOCI Period (Months)OCI Clear Date

☐ Unequal Access FAR 9.505-4☐ Biased Groundrules FAR 9.505-1, 9.505-2☐ Impaired Objectivity FAR 9.505-3☐ Personal Conflict of Interest FAR 52.203-16

StatusReviewed ByDate

CDSIKey TermsNotes

OpportunitiesProjectsActivitiesDocumentsUser-Defined Info

Manage Organizational Conflict of Interest (OCI) > Opportunities

	Opportunity ID *	Opportunity Name	Company ID	Primary Customer	Date Opened	Date Closed	Opp

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

B

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1

Enter OCI identification data

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Set up POP and OCI clear dates

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Select the conflict type

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Enter the OCI review status and date

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Enter key terms and confidential information

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FILE LINE OPTIONS PROCESS HELP

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Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest

Manage Organizational Conflict of Interest

OCI ID: OCI-00000000 Prime Contract No: W56HZV-05-C-1112

OCI Name*: Impaired Objectivity Master Contract No:

Project Number: 10100.30 ☐ Apply to All Lower Level Project

D Click **Save** or **Save & Continue** to save the record.

Dates **Conflict Type** **Clear Date Review**

POP Start Date: 01/01/2006 ☐ Unequal Access FAR 9.505-4 Status:

POP End Date: 12/31/2012 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By:

OCI Period (Months): 12 ☒ Impaired Objectivity FAR 9.505-3 Date:

OCI Clear Date: 12/31/2013 ☐ Personal Conflict of Interest FAR 52.203-16

CDSI:

Key Terms:

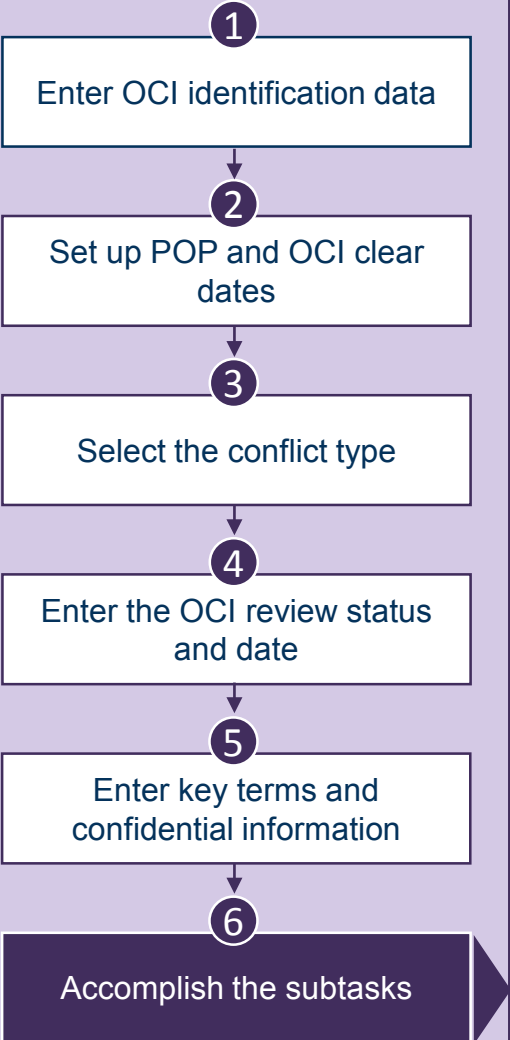
Notes:

After you save the record, the opportunity ID displays as a hyperlink. You can click this link to open the Manage Opportunities screen and view additional details about the opportunity. Note, however, that if the opportunity does not belong to the company you are currently logged in to or you do not have rights to the screen, Manage Opportunities displays a blank record.

Manage Opportunities

Opportunity ID *	Opportunity Name	Company ID	Primary Customer	Date Opened	Date Closed	Opportunity Status	OCI Status
OPP-0000000000000001	CIO-SP3-TO1-HHS IT O&M	10	HHS	01/06/2017	05/27/2017	Active	Reviewed/No Conflict

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Manage Organizational Conflict of Interest (OCI)

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OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4
☐ Biased Groundrules FAR 9.505-1, 9.505-2
☐ Impaired Objectivity FAR 9.505-3
☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By Date

CDSI

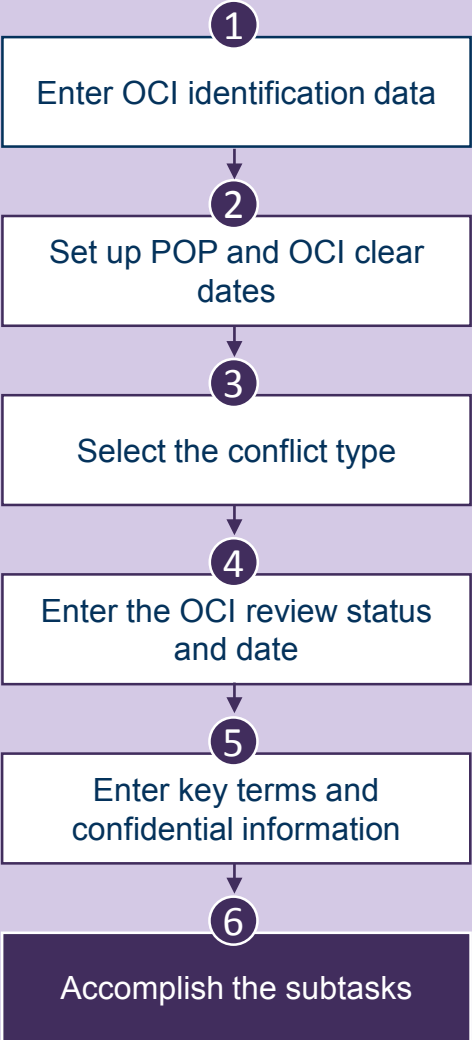
Key Terms

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Click this link to open the Projects subtask.

Opportunities **Projects** Employees Subs/Vendors Activities Documents User-Defined Info

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OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type**

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

☐ Unequal Access FAR 9.505-4

☐ Biased Groundrules FAR 9.505-1, 9.505-2

☐ Impaired Objectivity FAR 9.505-3

☐ Personal Conflict of Interest FAR 52.203-16

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The Load action populates the top-level project number as well as all the lower-level projects of the **Project Number you entered on the main screen if you selected the **Apply to All Lower Level Project** check box. If you did not enter a **Project Number** but entered a **Prime Contract No**, the Load button populates the top-level project number that have this **Prime Contract No** assigned to the project in Manage Project User Flow. If you selected the **Apply to All Lower Level Project** check box, the lower-level projects will also populate.**

F Click **New** to add a new line, or click **Load** to automatically populate the Projects subtask.

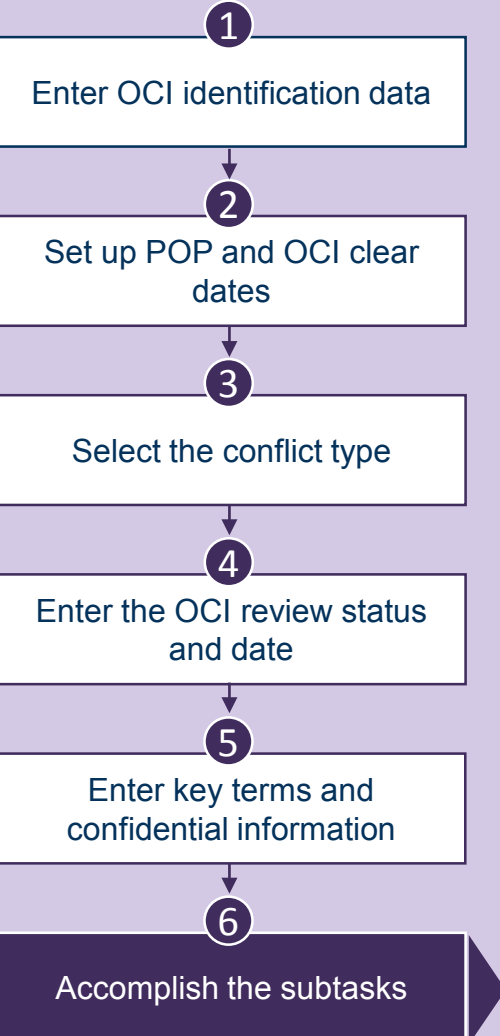
Manage Organizational Conflict of Interest (OCI) > Projects

Project *	Project Name	Company ID	Project Start Date	Project End Date	Active
<input checked="" type="checkbox"/>					

New Copy Delete Query

Load

OCI Overview



FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint OptionsPreview

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Manage Organizational Conflict of Interest (OCI)

NewCopyDelete1 of 1 NewTableQuery

OCI IDPrime Contract No

OCI Name *Master Contract No

Project Number☐ Apply to All Lower Level Project

DatesConflict TypeClear Date Review

POP Start DatePOP End DateOCI Period (Months)OCI Clear Date

☐ Unequal Access FAR 9.505-4☐ Biased Groundrules FAR 9.505-1, 9.505-2☐ Impaired Objectivity FAR 9.505-3☐ Personal Conflict of Interest FAR 52.203-16

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Manage Organizational Conflict of Interest

Project *	Project Name	Primary Customer	Company ID	Project Start Date	Project End Date	Active
→						<input type="checkbox"/>

If you click **New** instead of **Load**, enter or select the project ID that may be in conflict with another project or existing opportunities.

When you select or enter a project, Costpoint automatically populates the other fields with information available for that project.

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Enter key terms and confidential information

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Accomplish the subtasks

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest

Manage Organizational Conflict of Interest

OCI ID: OCI-00000000 Prime Contract No: W56HZV-05-C-1112

OCI Name: Impaired Objectivity Master Contract No:

Project Number: 10100.30 ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date: 01/01/2006 ☐ Unequal Access FAR 9.505-4 Status:

POP End Date: 12/31/2012 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By:

OCI Period (Months): 12 ☒ Impaired Objectivity FAR 9.505-3 Date:

OCI Clear Date: 12/31/2013 ☐ Personal Conflict of Interest FAR 52.203-16

CDSI:

Key Terms:

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Employees Subs/Vendors Activities Documents User-Defined Info

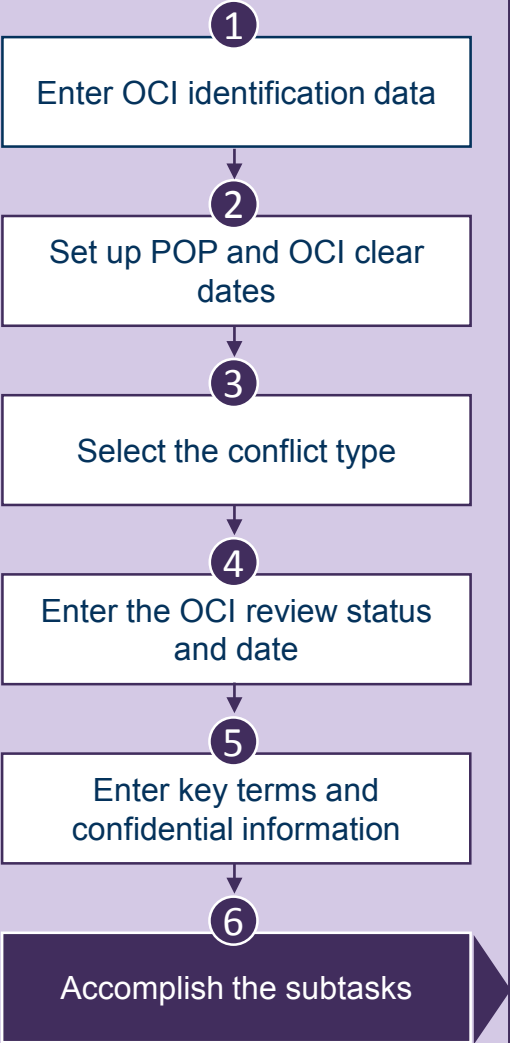
Manage Organizational Conflict of Interest

Project *	Project Name	Primary Customer	Company ID	Project Start Date	Project End Date	Active
10100.10.02	SCHEMATIC - ELECTRICAL	Clean Environment, Inc.	10			<input type="checkbox"/>

Click **Save** or **Save & Continue** to save the record.

After you save the record, the project ID displays as a hyperlink. You can click this link to open the Manage Project User Flow screen and know more about the project. Note, however, that if the project does not belong to the company you are currently logged in to or you do not have rights to the screen, Manage Project User Flow displays a blank record.

OCI Overview



FILE LINE OPTIONS PROCESS HELP

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4
☐ Biased Groundrules FAR 9.505-1, 9.505-2
☐ Impaired Objectivity FAR 9.505-3
☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By Date

CDSI

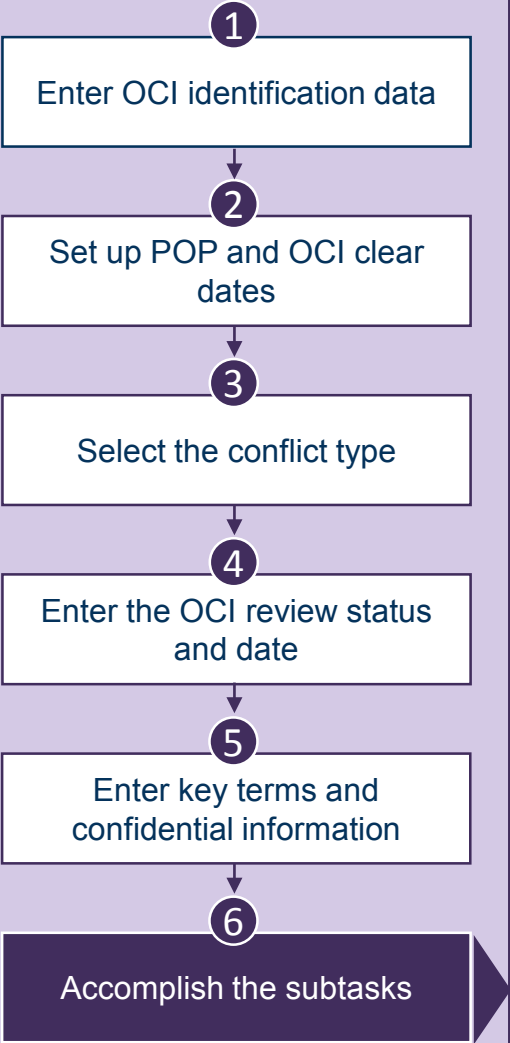
Key Terms

Notes

Click this link to open the Employees subtask.

[Opportunities](#) [Projects](#) **[Employees](#)** [Subs/Vendors](#) [Activities](#) [Documents](#) [User-Defined Info](#)

OCI Overview



Save Save & Continue Refresh Clone

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest...

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 ☐ Impaired Objectivity FAR 9.505-3 ☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By

CDSI

Key Terms

Notes

Employees

Manage Organizational Conflict of Interest (OCI) > Employees

Employee *	Employee Name	Description	Remarks

New Copy Delete Query

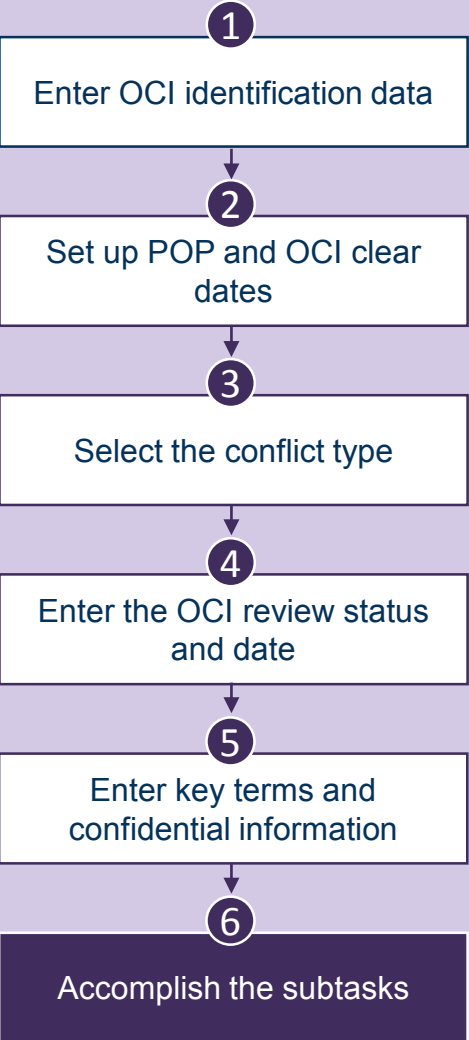
Load

Close

The same way you populate the Projects subtask, you can manually enter records on the Employees subtask by clicking **New**, or automatically load records by clicking **Load**. When you click **Load**, you will see in the table window the employees that have charged against all the project numbers listed on the Projects subtask.

J Click **New** to add a new line, or click **Load** to automatically load records.

OCI 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 > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest

✓ Manage Organizational Conflict of Interest

OCI ID: OCI-00000000 Prime Contract No: W56HZV-05-C-1112

OCI Name*: Impaired Objectivity Master Contract No:

Project Number: 10100.30 ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date: 01/01/2006 ☐ Unequal Access FAR 9.505-4 Status:

POP End Date: 12/31/2012 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By:

OCI Period (Months): 12 ☒ Impaired Objectivity FAR 9.505-3 Date:

OCI Clear Date: 12/31/2013 ☐ Personal Conflict of Interest FAR 52.203-16

CDSI:

Key Terms:

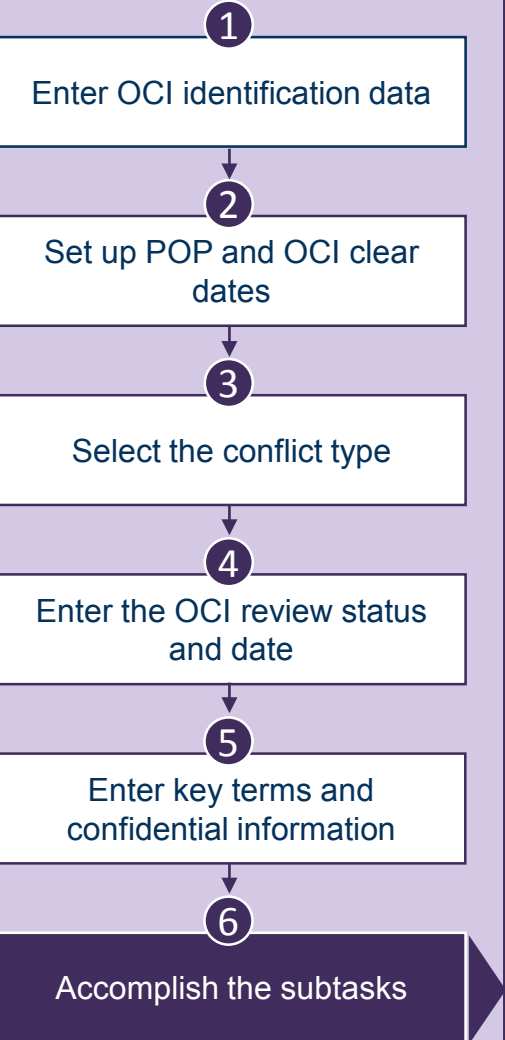
Notes:

When you save the record, the employee ID displays as a hyperlink. You can click this link to display the Manage Contract Management Employee Info screen and view additional information about the employee. Note, however, that if the employee does not belong to the company you are currently logged in to or you do not have rights to the screen, Manage Contract Management Employee Info displays a blank record.

[Employees](#) [Subs/Vendors](#) [Activities](#) [Documents](#) [User-Defined Info](#)

Employee *	Employee Name	U.S. Citizen	Role Description	Remarks
1029	Oswald, Gretchen	<input type="checkbox"/>	Workforce	Married to the contracting officer

OCI Overview



FILE LINE OPTIONS PROCESS HELP

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 ☐ Impaired Objectivity FAR 9.505-3 ☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By Date

CDSI

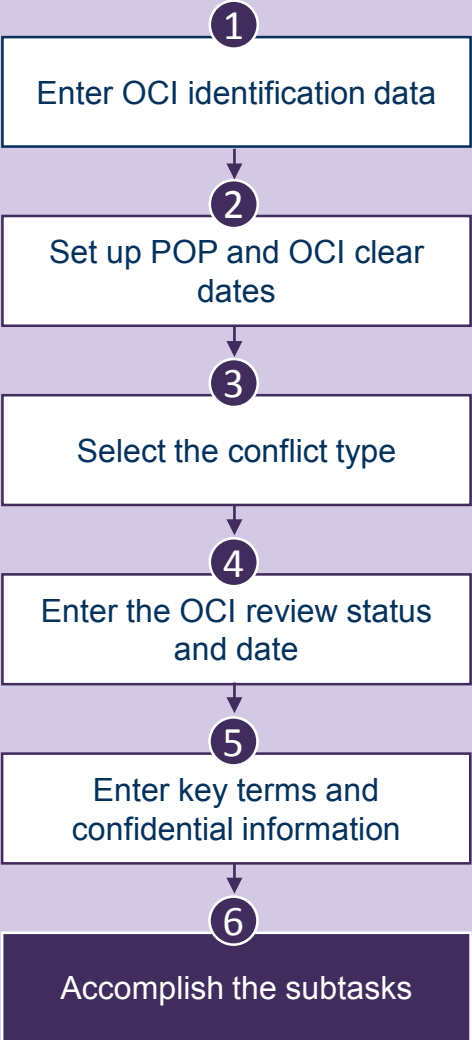
Key Terms

Notes

Click this link to open the Subs/Vendors subtask.

[Opportunities](#) [Projects](#) [Employees](#) **[Subs/Vendors](#)** [Activities](#) [Documents](#) [User-Defined Info](#)

OCI 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 > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 ☐ Impaired Objectivity FAR 9.505-3 ☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By

CDSI

Key Terms

Notes

Subs/Vendors

Manage Organizational Conflict of Interest (OCI) > Subs/Vendors

Click **New** to add a new line, or click **Load** to automatically load records.

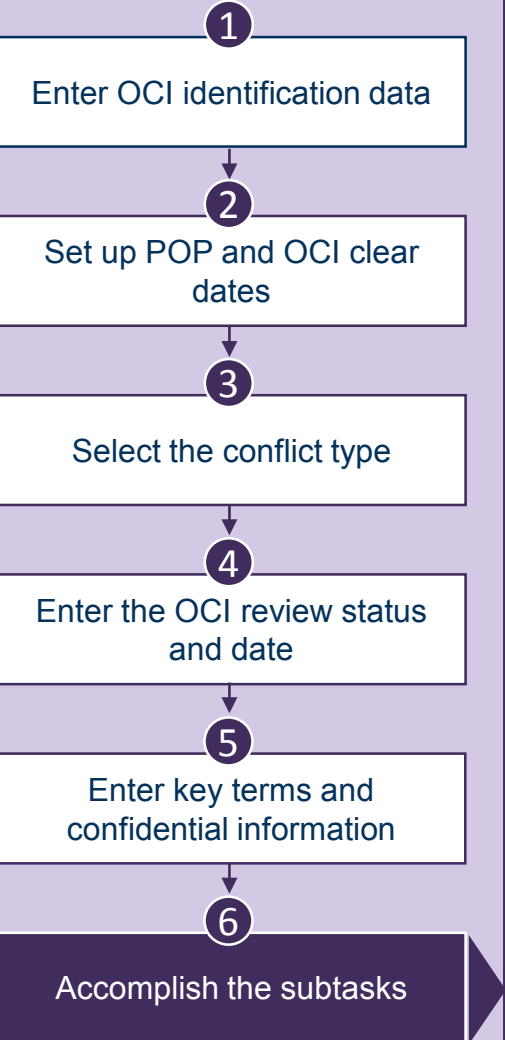
Vendor *	Vendor Name	Remarks

New Copy Delete Query

Load

The Subs/Vendors subtask works the same way as the Employees subtask. You indicate here the subcontractors or vendors that may have worked on conflicting projects or you can load those that have charged against the project numbers listed on the Projects subtask.

OCI 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 > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest

Manage Organizational Conflict of Interest

OCI ID: OCI-00000000 Prime Contract No: W56HZV-05-C-1112

OCI Name*: Impaired Objectivity Master Contract No:

Project Number: 10100.30 ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date: 01/01/2006 ☐ Unequal Access FAR 9.505-4 Status:

POP End Date: 12/31/2012 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By:

OCI Period (Months): 12 ☒ Impaired Objectivity FAR 9.505-3 Date:

OCI Clear Date: 12/31/2013 ☐ Personal Conflict of Interest FAR 52.203-16

CDSI:

Key Terms:

Notes:

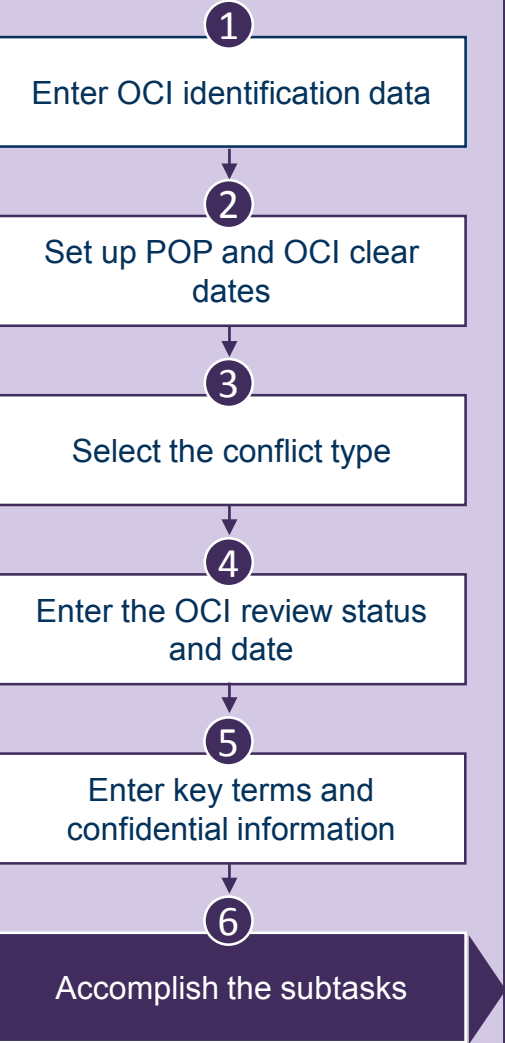
When you click the **Vendor hyperlink, you will see the Manage Contract Management Vendor Info screen, where you can view additional details about the vendor. Note, however, that if the vendor does not belong to the company you are currently logged in to or you do not have rights to the screen, Manage Contract Management Vendor Info displays a blank record.**

employees Subs/Vendors Activities Documents User-Defined Info

Manage Organizational Conflict of Interest

Vendor *	Vendor Name	Role Description	Remarks
V100013	Balmar Consulting		

OCI Overview



FILELINEOPTIONSPROCESSHELP

SaveSave & ContinueRefreshCloneLookupDefault ActionActions/ReportsExecutePage SetupPrint Options

HomeStarClipboard

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

UserHomePower

Manage Organizational Conflict of Interest (OCI)

NewCopyDelete1 of 1 NewTableQuery

OCI IDPrime Contract No

OCI Name *Master Contract No

Project Number☐ Apply to All Lower Level Project

DatesConflict TypeClear Date Review

POP Start DatePOP End DateOCI Period (Months)OCI Clear Date

☐ Unequal Access FAR 9.505-4☐ Biased Groundrules FAR 9.505-1, 9.505-2☐ Impaired Objectivity FAR 9.505-3☐ Personal Conflict of Interest FAR 52.203-16

StatusReviewed ByDate

CDSI

Key Terms

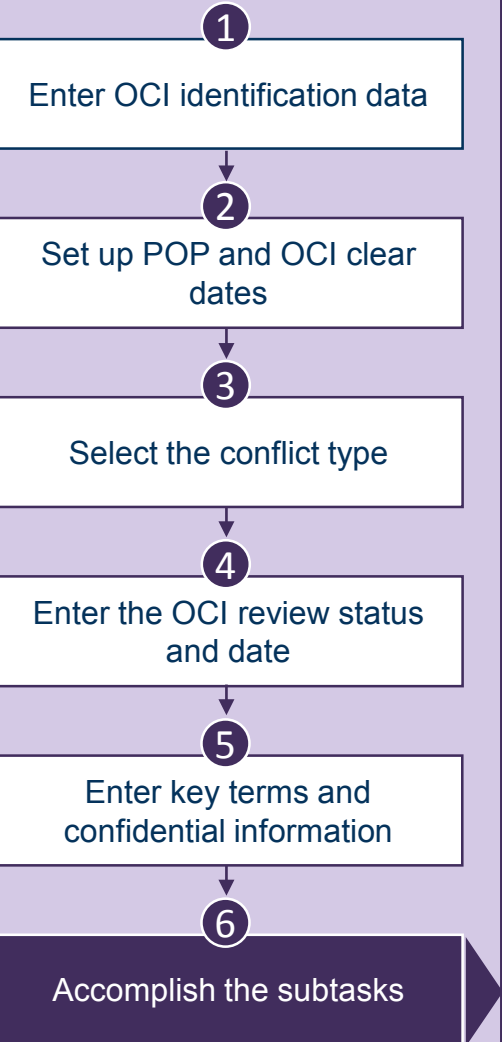
Notes

Click this link to open the Activities subtask.

0

OpportunitiesProjectsEmployeesSubs/VendorsActivitiesDocumentsUser-Defined Info

OCI Overview



Key Terms

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[Opportunities](#)
[Projects](#)
[Employees](#)
[Subs/Vendors](#)
[Activities](#)
[Documents](#)
[User-Defined Info](#)

[Manage Organizational Conflict of Interest \(OCI\) > Activities](#)

New Copy ▼ Delete ◀ ◯ 1 of 1 New ◂ ▸ ▸ Table Query ▾ □ ◻ − ×

Activity

Activity ID

Completed

Subject

Enter relevant information on this subtask.

Location

Method

Activity Date

Primary Contacts

Activity Owner

Customer

Primary Contact

Business #

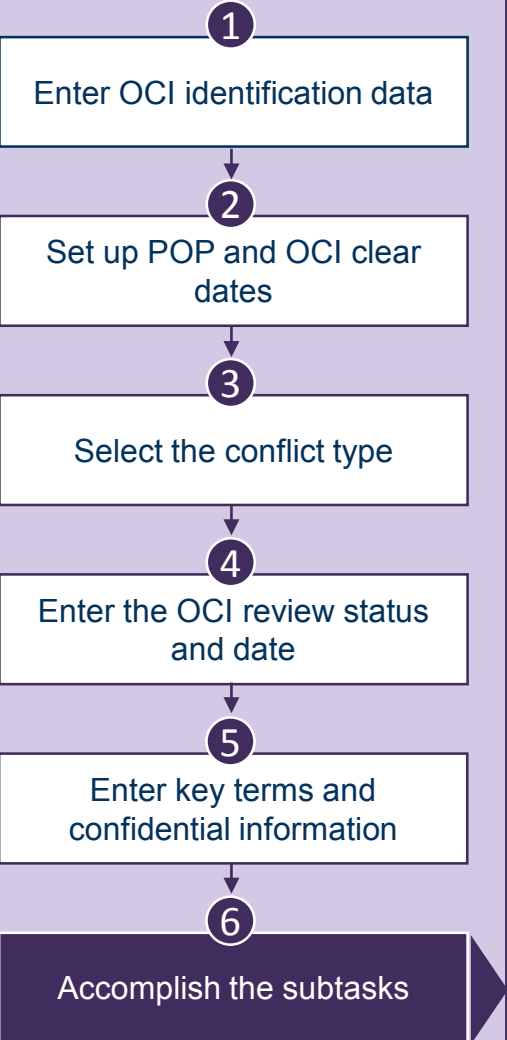
Other Attendees

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

Activity Notes

Close

OCI Overview



Key terms

Notes

Opportunities Projects Employees Subs/Vendors Activities Documents User-Defined Info

Manage Organizational Conflict of Interest (OCI) > Activities

New Copy Delete 1 of 1 New Table Query

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 #

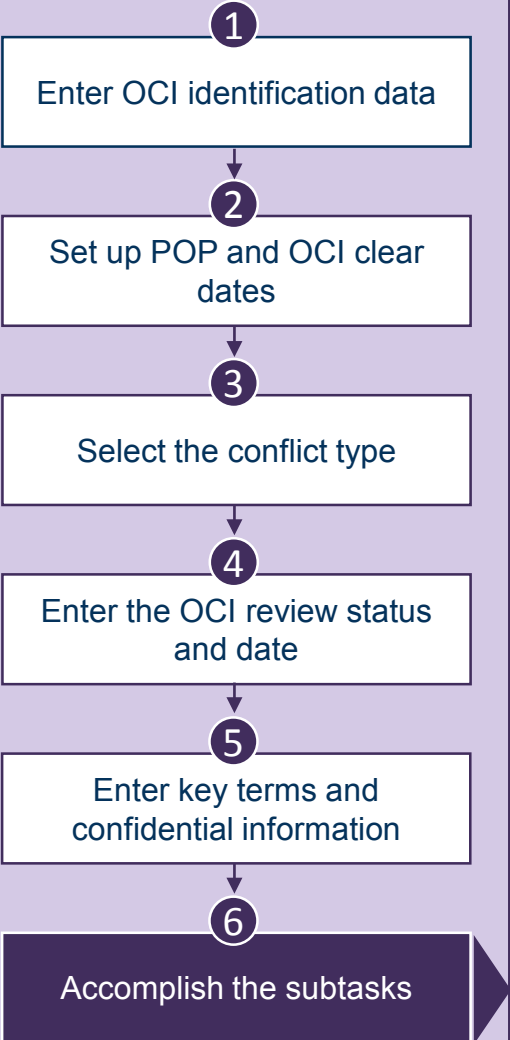
Other Attendees

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

OCI Overview



FILE LINE OPTIONS PROCESS HELP

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4
☐ Biased Groundrules FAR 9.505-1, 9.505-2
☐ Impaired Objectivity FAR 9.505-3
☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By Date

CDSI

Key Terms

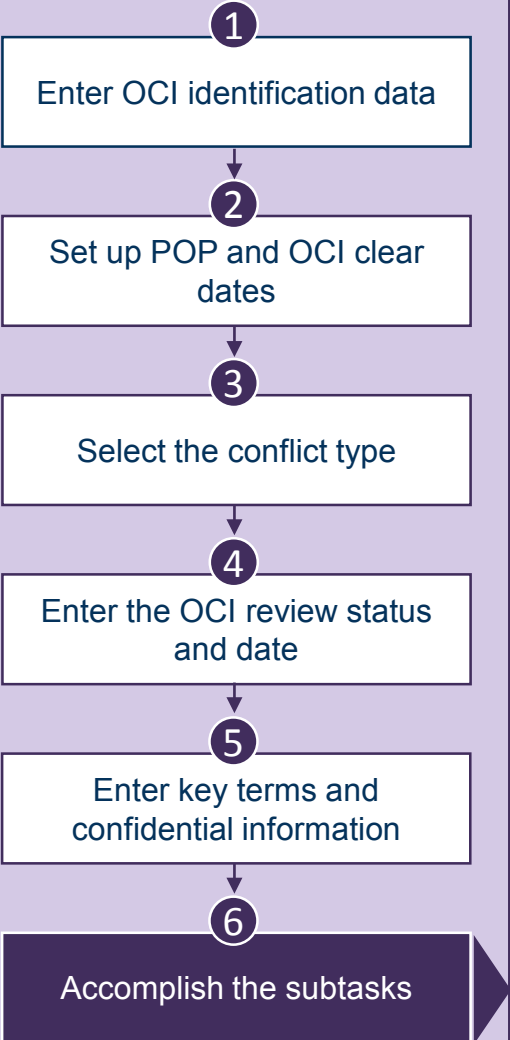
Notes

Click this link to open the Documents subtask.

R

[Opportunities](#) [Projects](#) [Employees](#) [Subs/Vendors](#) [Activities](#) **[Documents](#)** [User-Defined Info](#)

OCI Overview



Save

Save & Continue

Refresh

Clone

Home

Star

1

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

User

Home

Power

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID

OCI Name *

Project Number

Prime Contract No

Master Contract No

☐ Apply to All Lower Level Project

Dates

Conflict Type

Clear Date Review

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

☐ Unequal Access FAR 9.505-4

☐ Biased Groundrules FAR 9.505-1, 9.505-2

☐ Impaired Objectivity FAR 9.505-3

☐ Personal Conflict of Interest FAR 52.203-16

Status

Reviewed By

Date

CDSI

Key Terms

Notes

Opportunities

Subs/Vendors

Activities

Documents

User-Defined Info

Manage Organizational Conflict of Interest (OCI) > Documents

New Copy Delete Query

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

View Document

Close

Click New to add a new line.

S

OCI Overview

1

Enter OCI identification data

2

Set up POP and OCI clear dates

3

Select the conflict type

4

Enter the OCI review status and date

5

Enter key terms and confidential information

6

Accomplish the subtasks

Deltek Costpoint

→ Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID

OCI Name *

Project Number

Prime Contract No

Master Contract No

☐ Apply to All Lower Level Project

Dates

Conflict Type

Clear Date Review

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

☐ Unequal Access FAR 9.505-4

☐ Biased Groundrules FAR 9.505-1, 9.505-2

☐ Impaired Objectivity FAR 9.505-3

☐ Personal Conflict of Interest FAR 52.203-16

Status

Reviewed By

Date

CDSI

Key Terms

Notes

Enter a unique **Document ID** to identify the OCI document record. Also enter or select the **File Location** of the document you want to assign to the OCI. This is the alternate file location where the document is stored, and from where it will be retrieved. You can also specify the date the document was reviewed, the document type, file name, and document description.

Manage Org

Opportunities

Projects

Employees

Subs/Vendors

Activities

Documents

User-Defined Info

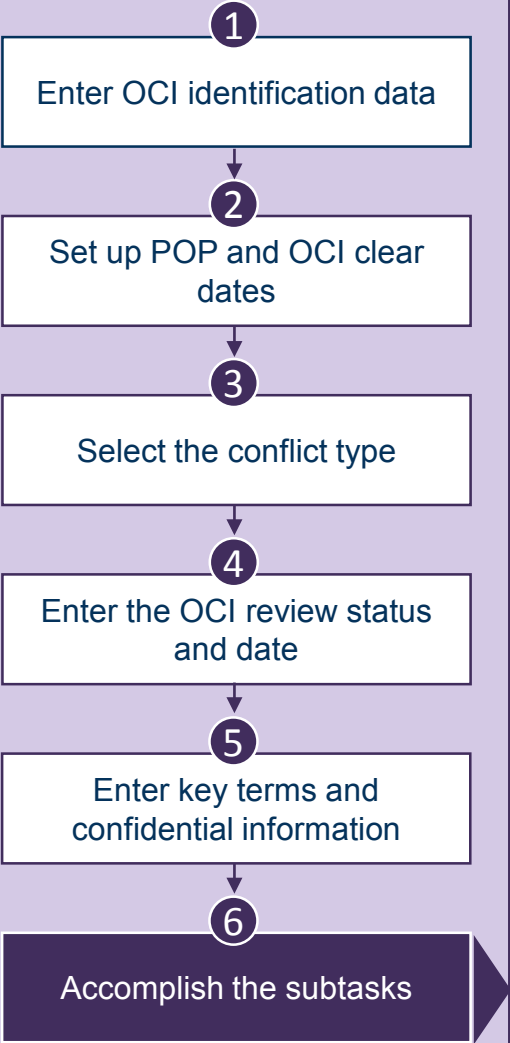
New Copy Delete Query

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

View Document

Close

OCI Overview



Manage Organizational Conflict of Interest (OCI)

NewCopyDelete2 of 8 ExistingTableQuery

OCI IDOCI-0000000000000008Prime Contract NoW56HZV-05-C-1112

OCI Name *Impaired ObjectivityMaster Contract No

Project Number10100.30☐ Apply to All Lower Level Project

Dates

POP Start Date01/01/2006POP End Date12/31/2012OCI Period (Months)12OCI Clear Date12/31/2013

Conflict Type

☐ Unequal Access FAR 9.505-4☐ Biased Groundrules FAR 9.505-1, 9.505-2☒ Impaired Objectivity FAR 9.505-3☐ Personal Conflict of Interest FAR 52.203-16

Clear Date Review

StatusReviewed ByDate

CDSI

Key Terms

Notes

OpportunitiesProjectsEmp

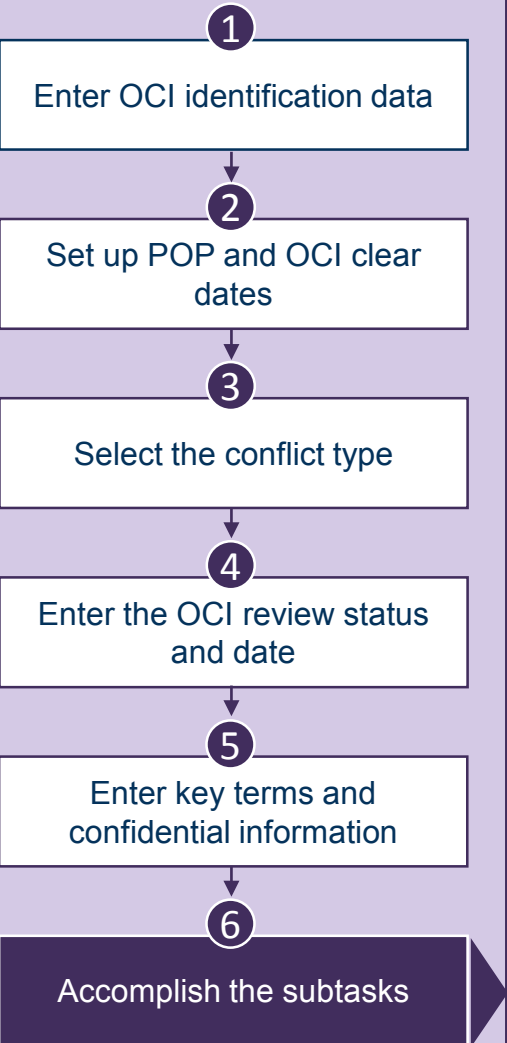
Manage Organizational Conflict of Interest (OCI) > Documents

	Document ID *	Date Received	Document Type	File Location	
<input checked="" type="checkbox"/>	OCI-001	01/25/2017		CCIMPORT	RFP OCI.pdf

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.

UView DocumentClose

OCI Overview



FILE LINE OPTIONS PROCESS HELP

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date POP End Date OCI Period (Months) OCI Clear Date

☐ Unequal Access FAR 9.505-4 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 ☐ Impaired Objectivity FAR 9.505-3 ☐ Personal Conflict of Interest FAR 52.203-16

Status Reviewed By Date

CDSI

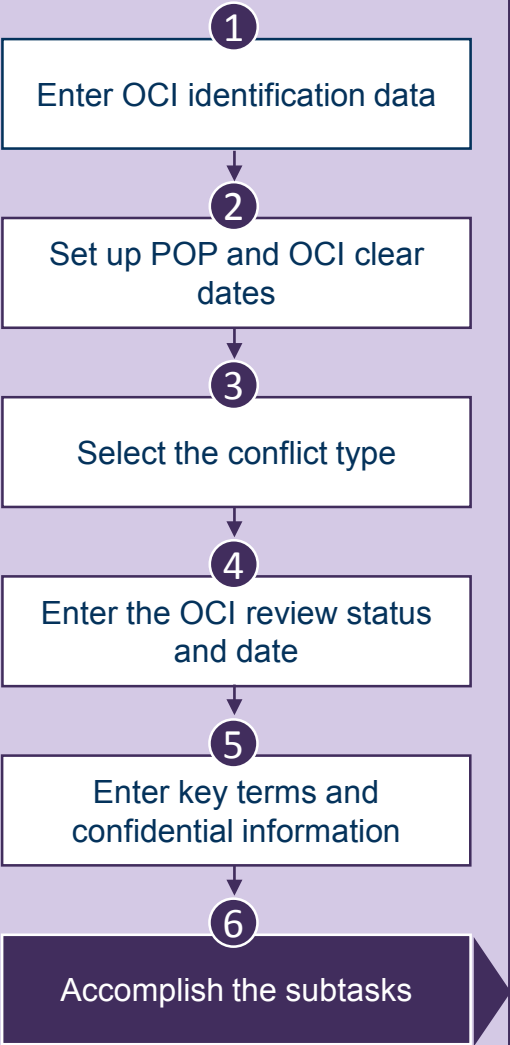
Key Terms

Notes

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

[User-Defined Info](#)

OCI Overview



Deltek Costpoint

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 1 of 1 New Table Query

OCI ID Prime Contract No

OCI Name * Master Contract No

Project Number ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date ☐ Unequal Access FAR 9.505-4 Status

POP End Date ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By

OCI Period (Months) ☐ Impaired Objectivity FAR 9.505-3 Date

OCI Clear Date FAR 52.203-16

CDSI

Key Terms

Notes

W You can use the User-Defined Info subtask to enter, edit, and view values for user-defined fields for an OCI record. These user-defined fields are set up on the Manage OCI User-Defined Labels screen.

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

Projects Employees Subs/Vendors Activities Documents User-Defined Info

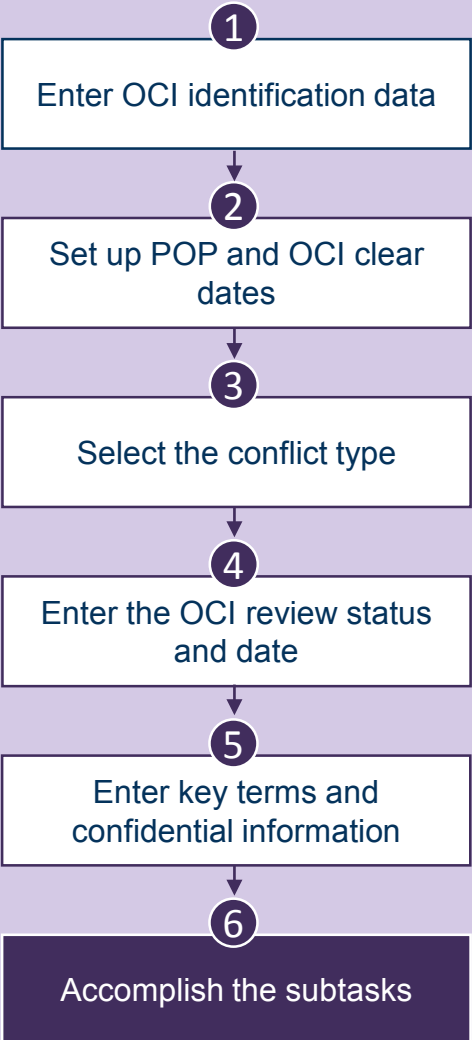
New Copy Delete Form Query

Date Value	Costpoint Validation Field	Validated Text	Required

Autoload

Close

Deltek Costpoint



Manage Organizational Conflict of Interest (OCI)

OCI ID: Prime Contract No:
 OCI Name*: Master Contract No:
 Project Number: ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date: ☐ Unequal Access FAR 9.505-4 Status:
 POP End Date: ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By:
 OCI Period (Months): ☐ Impaired Objectivity FAR 9.505-3 Date:
 OCI Clear Date: ☐ Personal Conflict of Interest FAR 52.203-16

CDSI:
 Key Terms:
 Notes:

Annotations:

- 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.

Manage Organizational Conflict of Interest (OCI) > User-Defined Info

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

Autoload **Close**

OCI Overview

1

Enter OCI identification data

2

Set up POP and OCI clear dates

3

Select the conflict type

4

Enter the OCI review status and date

5

Enter key terms and confidential information

6

Accomplish the subtasks

FILE LINE OPTIONS PROCESS HELP

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

Browse Applications > Contracts > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest (OCI)

Click **Save** to save the record.

OCI ID: 008 Prime Contract No: W56HZV-05-C-1112

OCI Name: Impaired Objectivity Master Contract No:

Project Number: 10100.30 ☐ Apply to All Lower Level Project

Dates **Conflict Type** **Clear Date Review**

POP Start Date: 01/01/2006 ☐ Unequal Access FAR 9.505-4 Status:

POP End Date: 12/31/2012 ☐ Biased Groundrules FAR 9.505-1, 9.505-2 Reviewed By:

OCI Period (Months): 12 ☒ Impaired Objectivity FAR 9.505-3 Date:

OCI Clear Date: 12/31/2013 ☐ Personal Conflict of Interest FAR 52.203-16

CDSI:

Key Terms:

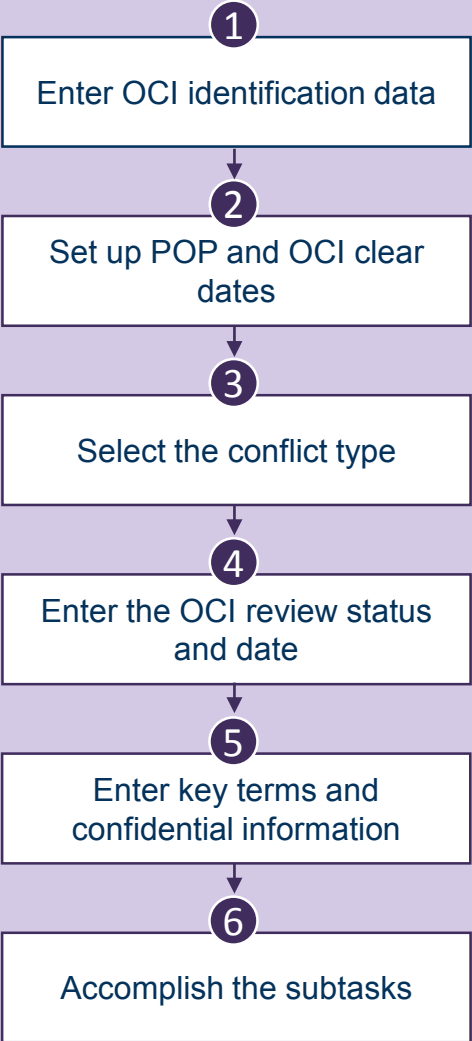
Notes:

[Opportunities](#) [Projects](#) [Employees](#) [Subs/Vendors](#) [Activities](#) [Documents](#) [User-Defined Info](#)

Manage Organizational Conflict of Interest (OCI) > User-Defined Info

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

OCI 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 > Opportunities > Organizational Conflict of Interest (OCI) > Manage Organizational Conflict of Interest...

Manage Organizational Conflict of Interest (OCI)

New Copy Delete 2 of 8 Existing Table Query

OCI ID: OCI-0000000000000008 Prime Contract No: W56HZV-05-C-1112

OCI Name*: Impaired Objectivity Master Contract No:

Project Number: 10100.30

Dates

POP Start Date: 01/01/2006

POP End Date: 12/31/2012

OCI Period (Months): 12

OCI Clear Date: 12/31/2013

CDSI:

Key Terms:

Notes:

[Opportunities](#) [Projects](#) [Employees](#) [Subs/Vendors](#) [Activities](#) [Documents](#) [User-Defined Info](#)

Manage Organizational Conflict of Interest (OCI) > User-Defined Info

New Copy Delete Form Query

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

This concludes the OCI Overview click-thru.