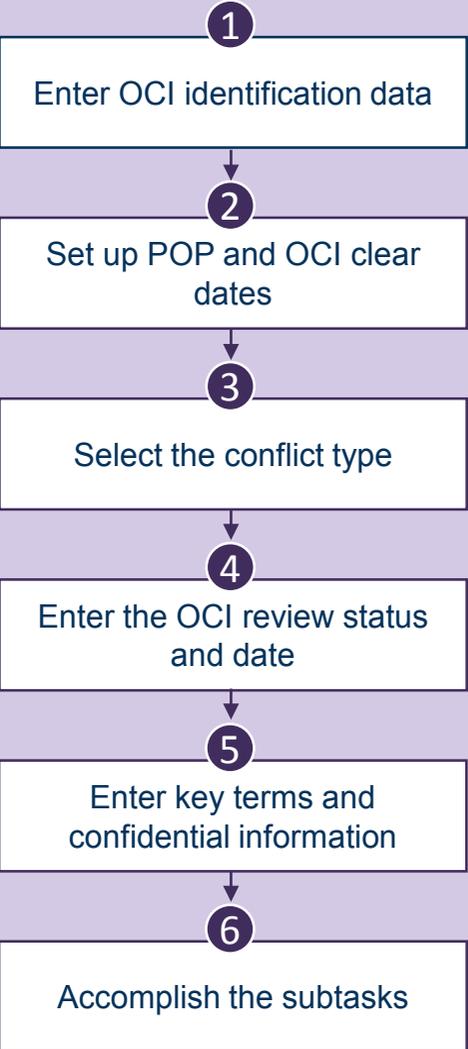


# OCI Overview



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 \*

Project Number

Dates

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

CDSI

Key Terms

Notes

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.

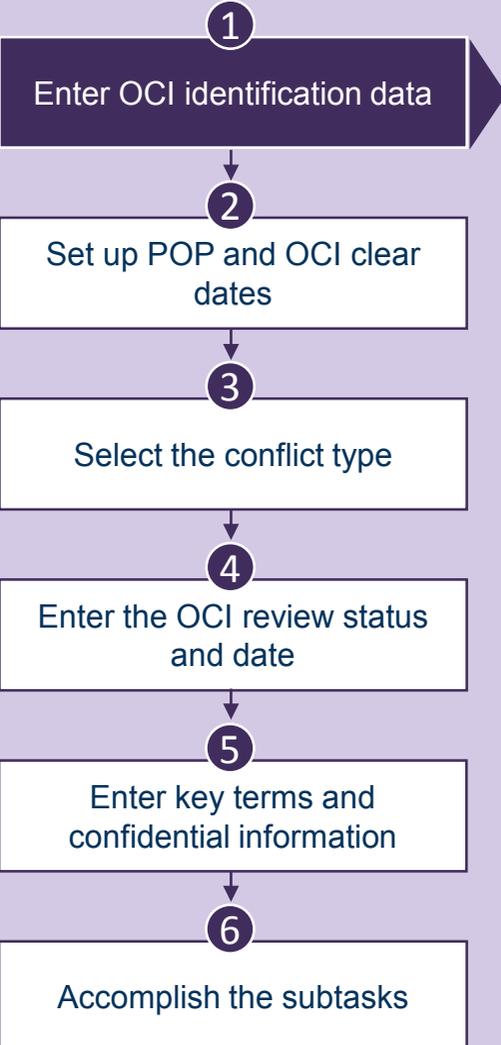
Click the numbered circles on the left to move to the first step in each phase.

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

**Begin**

Best viewed in IE or Adobe PDF Reader.

# 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

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

Key Terms

Notes

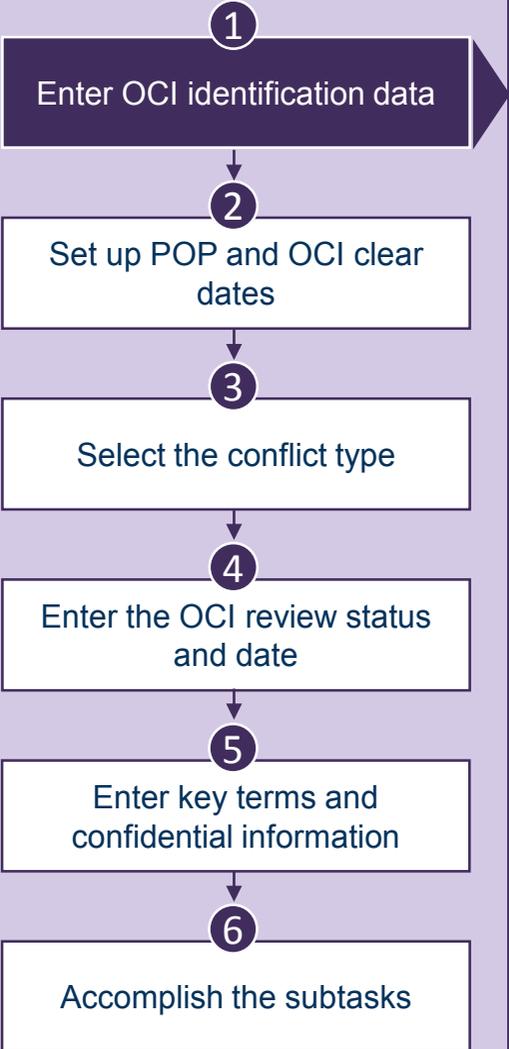
[Opportunities](#) [Projects](#) [Employees](#) [Subs/Vendors](#) [Activities](#) [Documents](#) [User-Defined Info](#)

**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.

# OCI Overview



FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

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

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

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

**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

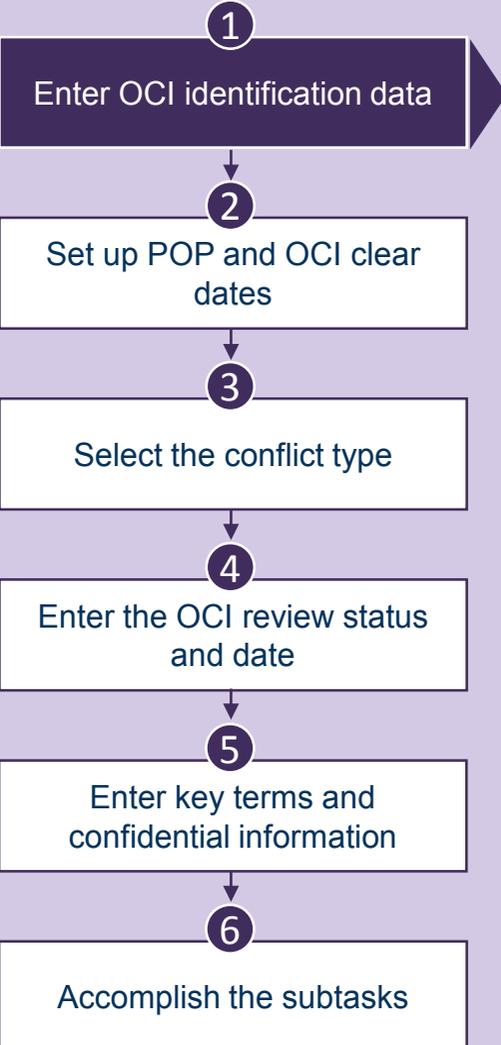
CDSI

Key Terms

Notes

[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

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

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

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

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

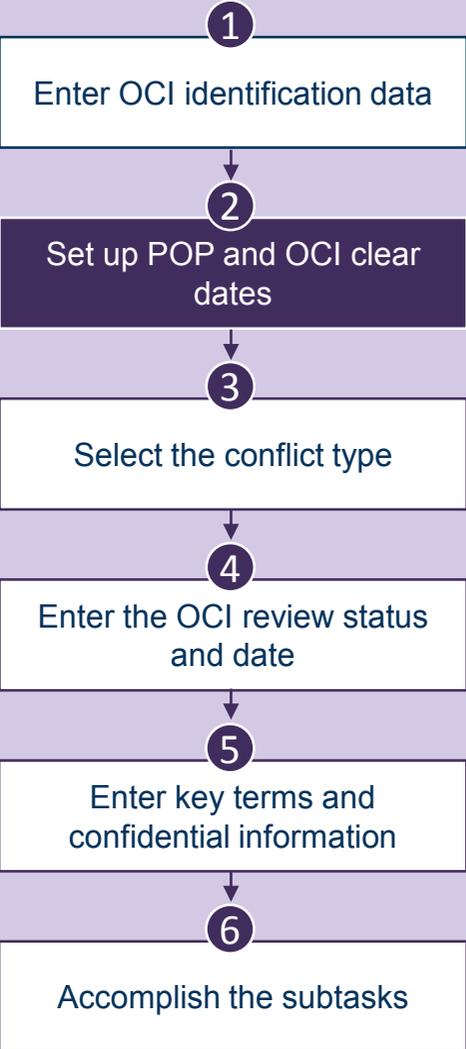
CDSI

Key Terms

Notes

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

# OCI Overview



FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

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

**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.

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

# OCI Overview



FILE LINE OPTIONS PROCESS HELP Deltek Costpoint

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     Unequal Access FAR 9.505-4 Status

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

OCI Period (Months)   Unusual OCI FAR 9.505-2 Date

OCI Clear Date

CDSI

Key Terms

Notes

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



FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

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

CDSI

Key Terms

Notes

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](#) [User-Defined Info](#)

# OCI Overview



FILE LINE OPTIONS PROCESS HELP Deltek Costpoint

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

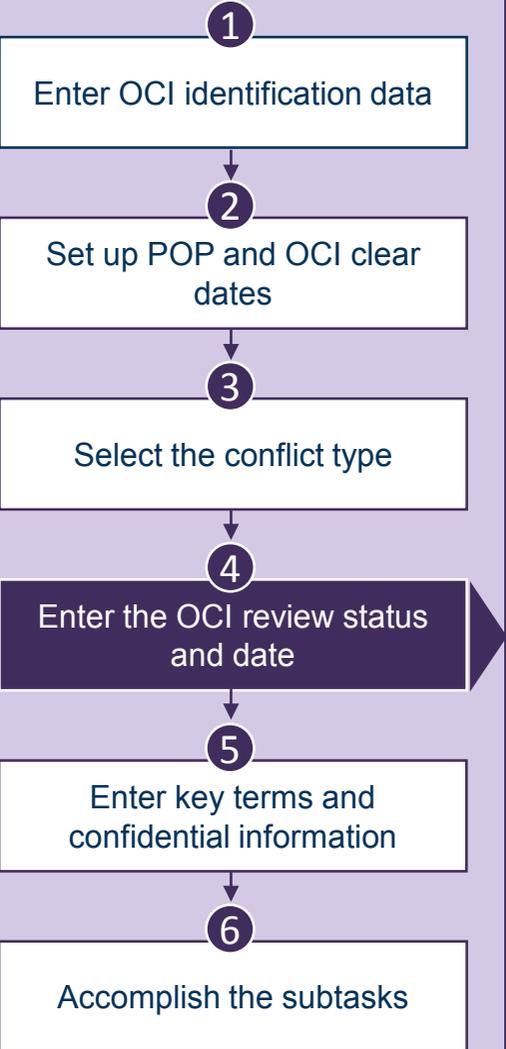
CDSI

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



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)

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

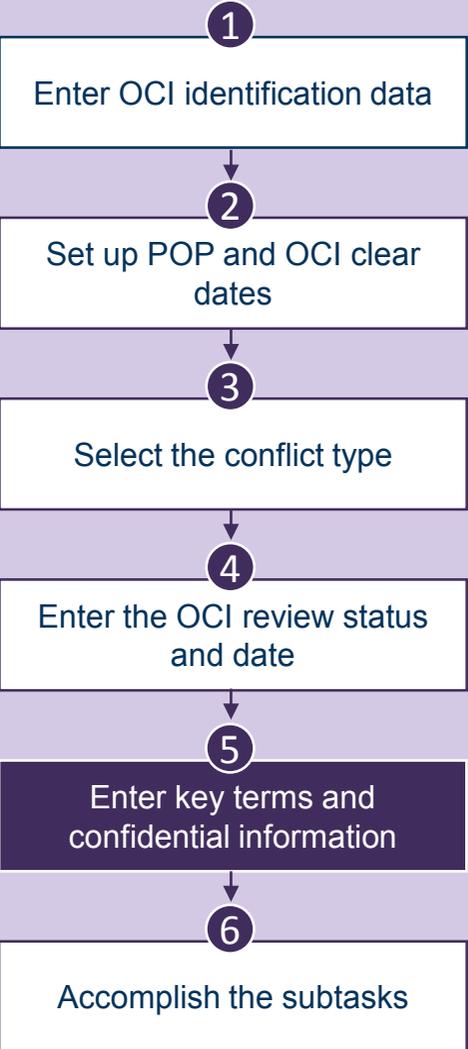
In these fields, enter the person who reviewed the OCI and the date on which the OCI was reviewed.

Key Terms

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



### 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    Unequal Access FAR 9.505-4

POP End Date    Biased Groundrules FAR 9.505-1, 9

OCI Period    Required Objectivity FAR 9.505-3

OCI Clear    Organizational Conflict of Interest FAR 52.203-16

CDSI

Key Terms

Notes

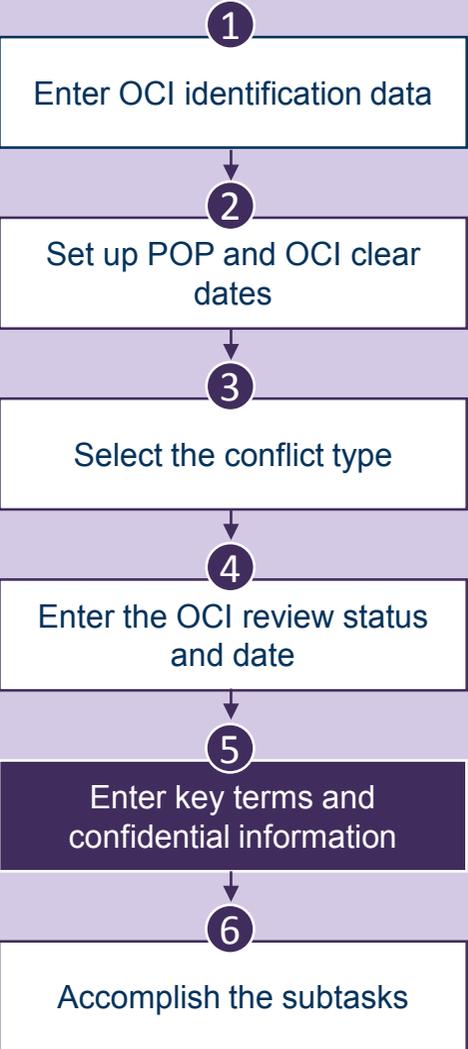
You can assign specific key terms to a single OCI record or use the same terms within multiple OCI records. You can then use **Query** on these terms when searching for OCI records and filter record results.

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

**B** Enter key terms for the OCI record.

**C** Enter any other relevant notes about the OCI 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

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

Manage Organizational Conflict of Interest

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

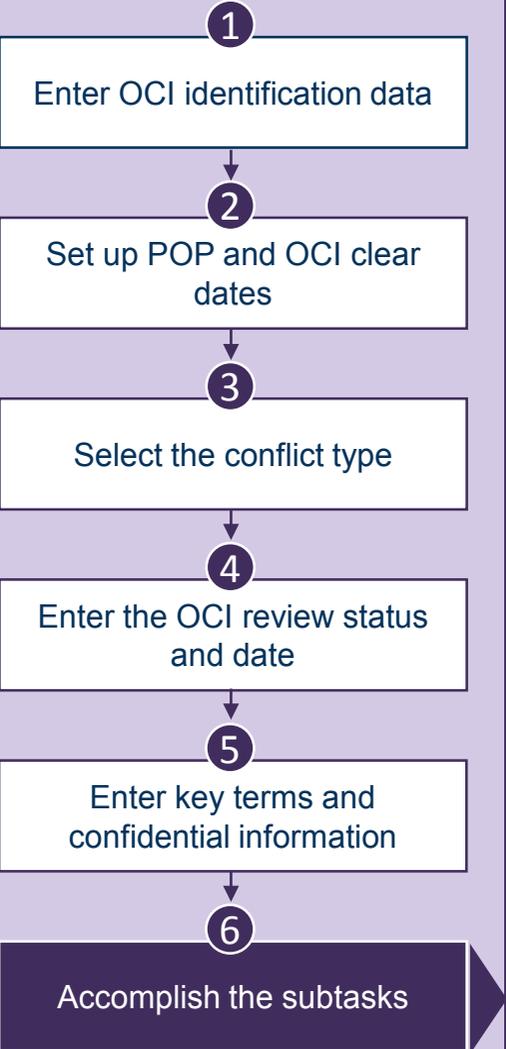
CDSI

Key Terms

Notes

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

# OCI Overview



FILE LINE OPTIONS PROCESS HELP Deltek Costpoint

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**

POP Start Date

POP End Date

OCI Period (Months)

OCI Clear Date

Impaired Objectivity FAR 9.505-3

Personal Conflict of Interest FAR 52.203-16

**Clear Date Review**

Status

Reviewed By

Date

CDSI

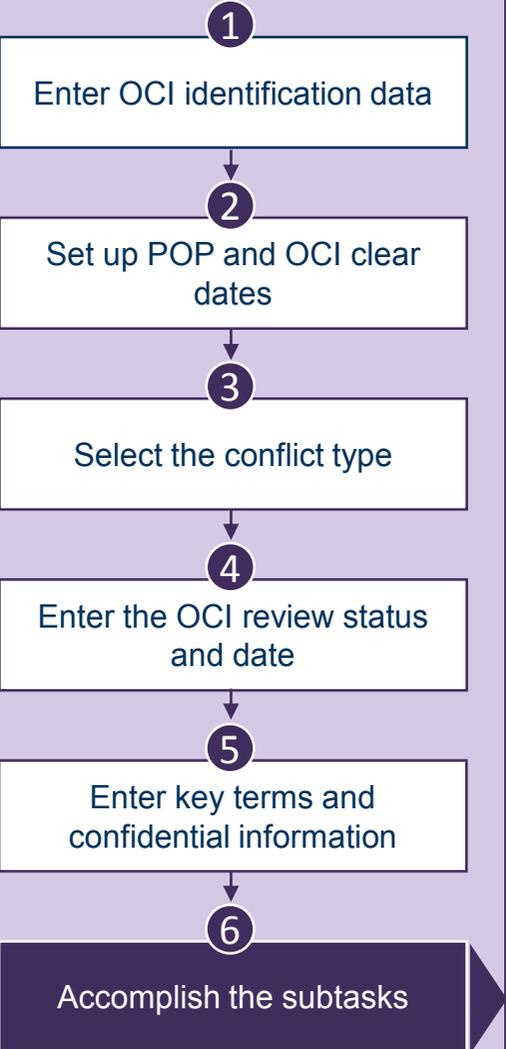
Key Terms

Notes

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

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

# OCI Overview



FILE LINE OPTIONS PROCESS HELP Deltek Costpoint

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    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

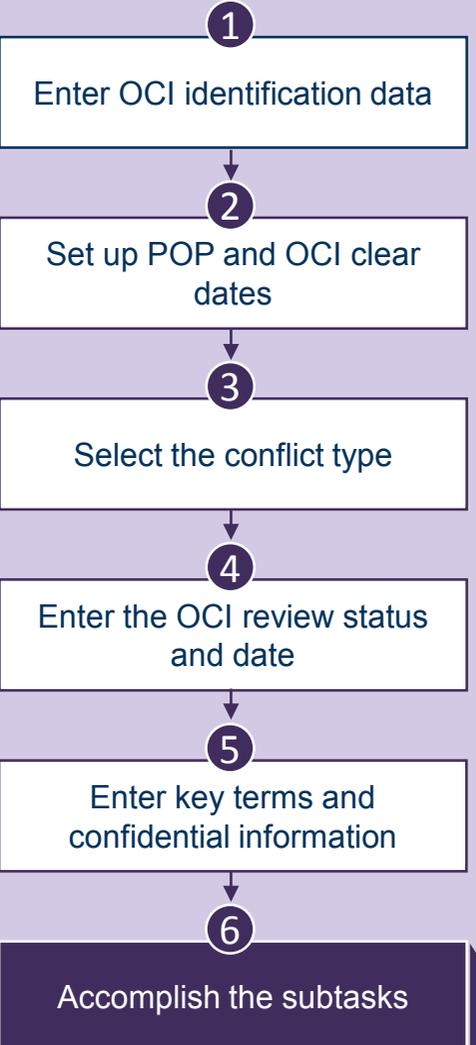
Key Terms

Notes

**A** Click this link to open the Opportunities 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...

### 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   Personal Conflict of Interest FAR 52.203-16

CDSI

Key Terms

Notes

[Opportunities](#) [Projects](#) [Activities](#) [Documents](#) [User-Defined Info](#)

Manage Organizational Conflict of Interest (OCI) > Opportunities

	Opportunity ID*	Opportunity Name	Company ID	Primary Customer	Date Opened	Date Closed	Opp
<input checked="" type="checkbox"/>							

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

# 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 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

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

Manage Organizational Conflict of Interest  New  Delete  Query

<input checked="" type="checkbox"/>	Opportunity ID*	Opportunity Name	Company ID	Primary Customer	Date Opened	Date Closed	Opp
<input type="text"/>	<input type="text"/>						

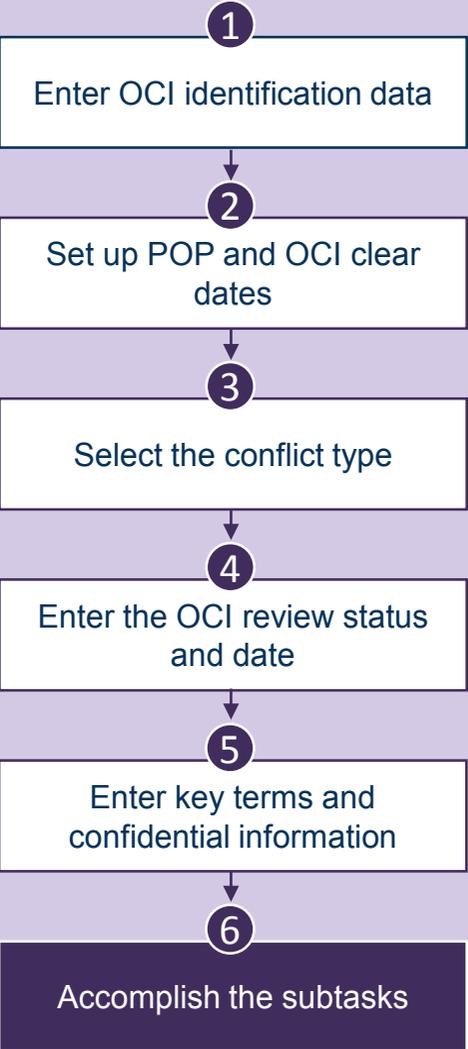
Close

This opportunity may be in conflict with another opportunity or an existing project. When you select or enter an opportunity, Costpoint automatically populates the other fields with information available for that opportunity.

Enter or select the opportunity ID that you want to associate with the OCI record.

C

# 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

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

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:

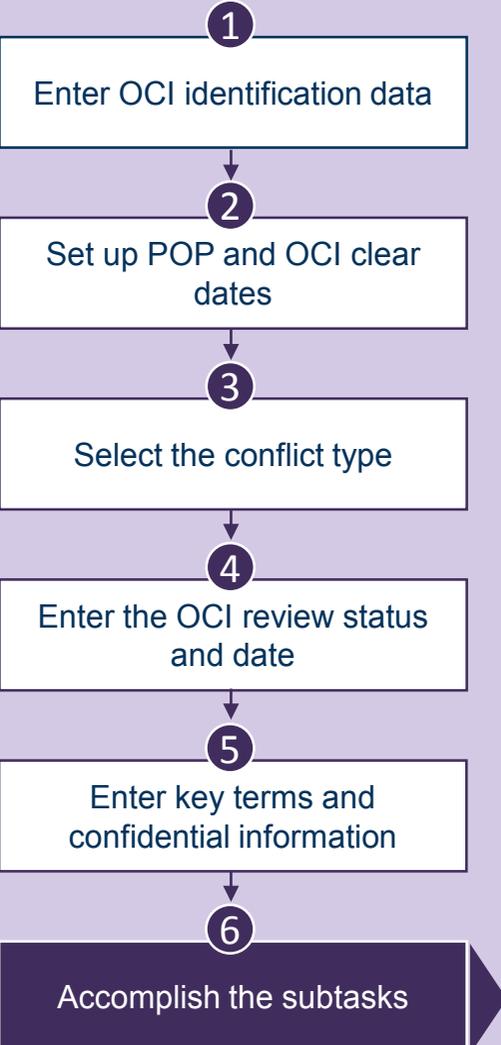
Notes:

Employees Subs/Vendors Activities Documents User-Defined Info

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

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.

# OCI Overview



FILE LINE OPTIONS PROCESS HELP Deltek Costpoint

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    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

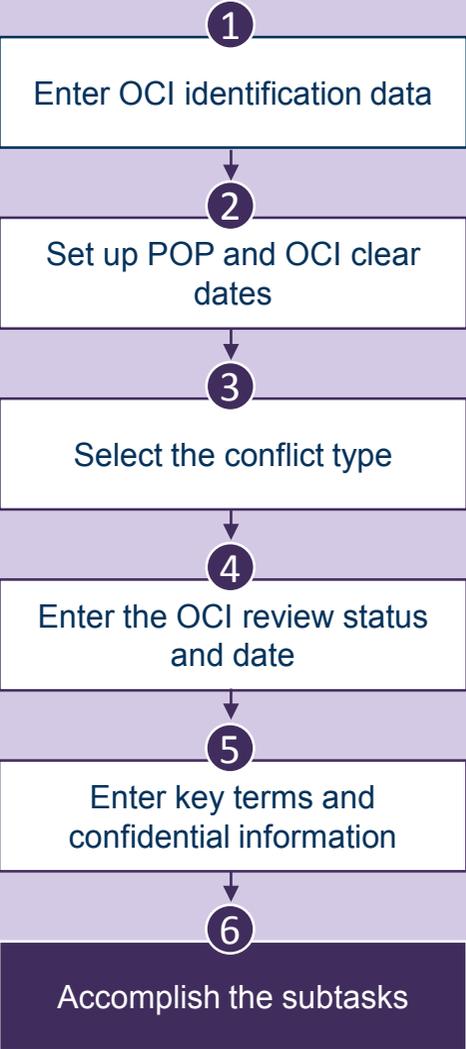
Key Terms

Notes

Click this link to open the Projects 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...

### 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   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

CDSI

Key Terms

Notes

Projects Employees Subs/Vendors Activities Documents User-Defined Info

Manage Organizational Conflict of Interest (OCI) > Projects

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

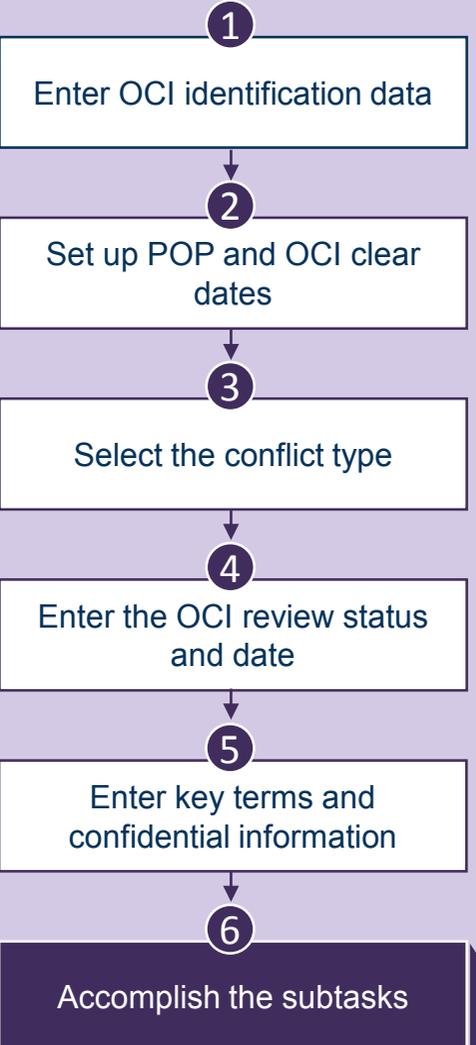
New Copy Delete Query

Load

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

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.

# 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 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   Personal Conflict of Interest FAR 52.203-16

CDSI

Key Terms

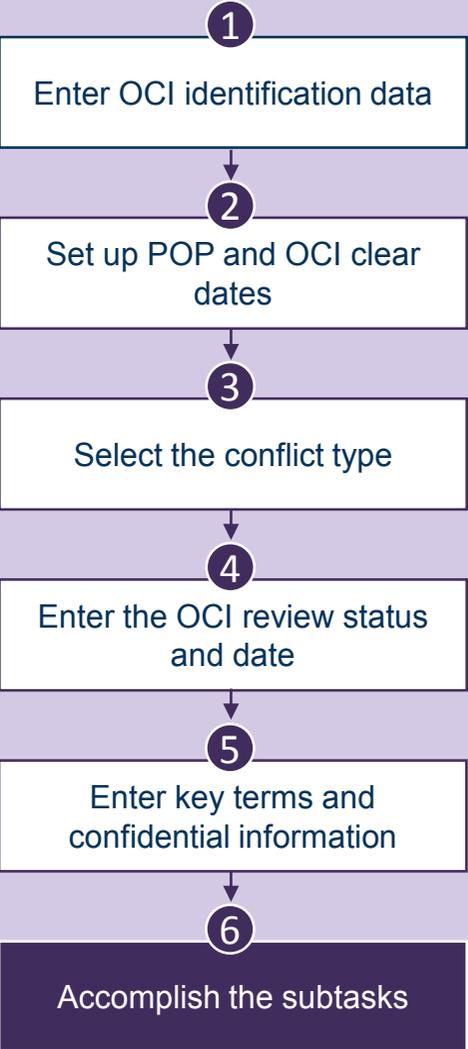
Notes

**G** 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.

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

# 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

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

Manage Organizational Conflict of Interest

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

OCI Name\*: Impaired Object 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:

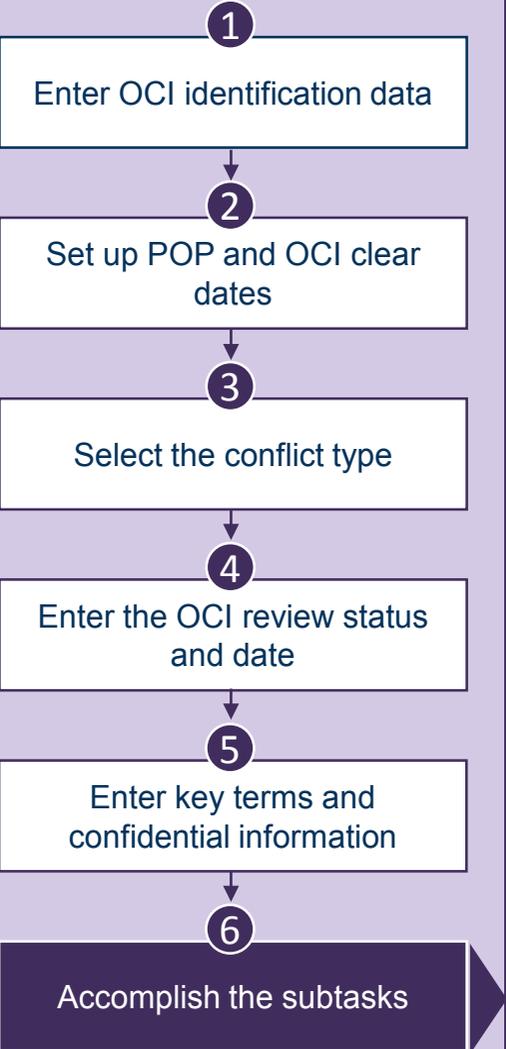
Notes:

Employees Subs/Vendors Activities Documents User-Defined Info

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

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

Deltek Costpoint

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   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

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

Click this link to open the Employees subtask.

# 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

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    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

OCI Clear Date    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) > Employees

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

New Copy Delete Query

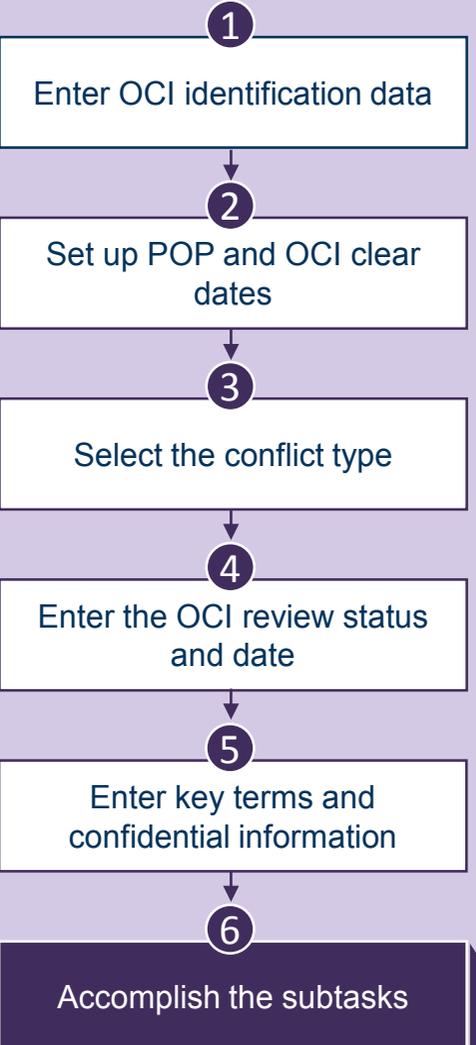
Load

Close

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

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.

# 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...

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

**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

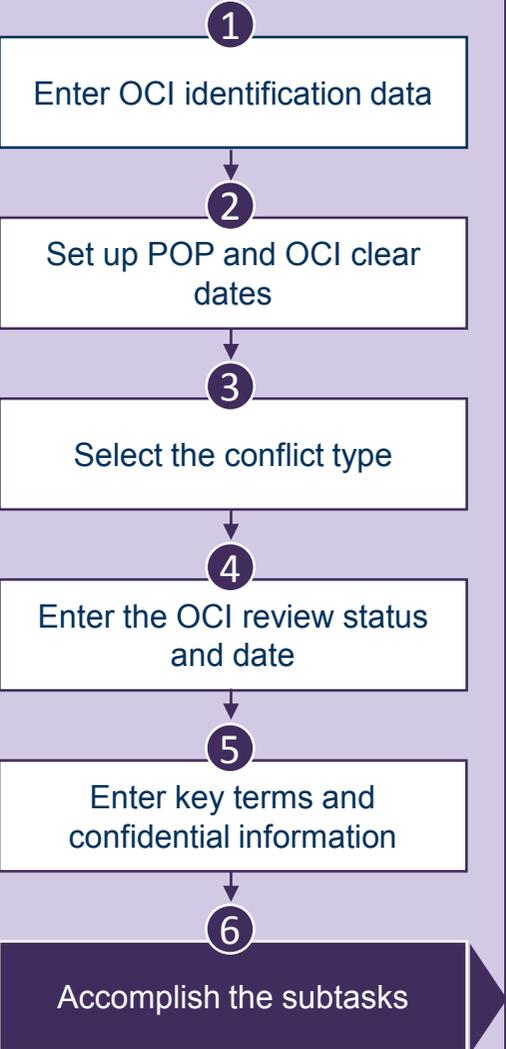
CDSI:   
Key Terms:   
Notes:   
[Employees](#) [Subs/Vendors](#) [Activities](#) [Documents](#) [User-Defined Info](#)

**Manage Organizational Conflict of Interest**

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

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.

# OCI Overview



FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

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   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

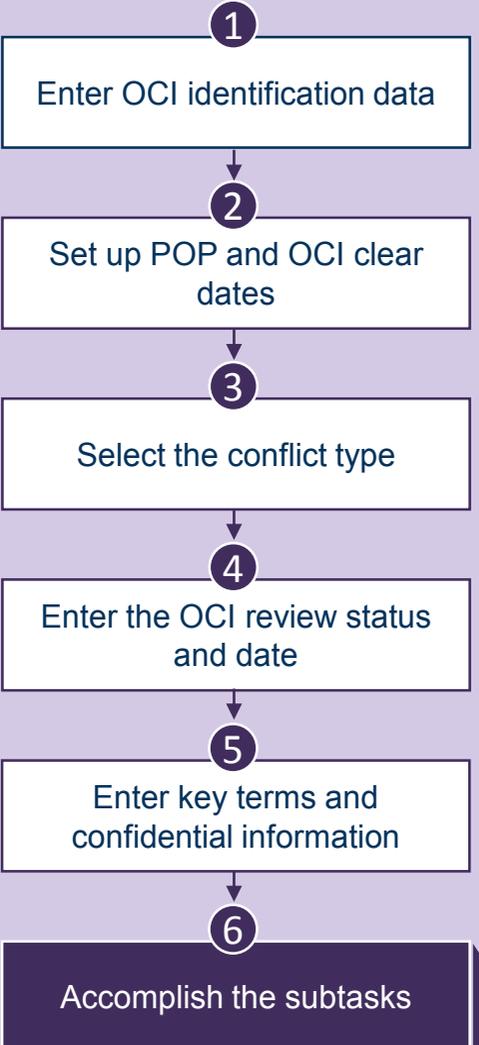
Notes

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

Click this link to open the Subs/Vendors subtask.

L

# 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 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

OCI Clear Date   Personal Conflict of Interest FAR 52.203-16

CDSI

Key Terms

Notes

Manage Organizational Conflict of Interest (OCI) > **Subs/V** [Projects](#) [Employees](#) [Subs/Vendors](#) [Activities](#) [Documents](#) [User-Defined Info](#)

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

<input checked="" type="checkbox"/>	Vendor *	Vendor Name	Remarks

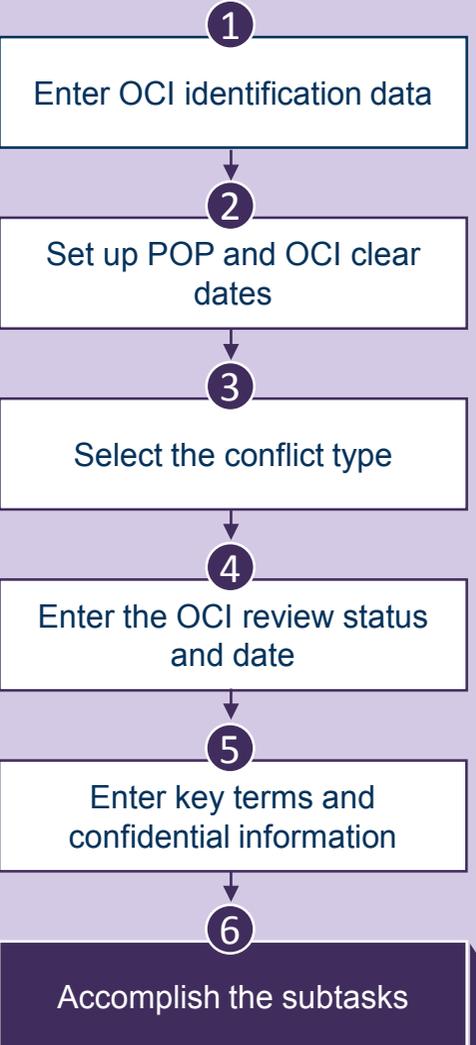
New Copy Delete Query

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.

M 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:

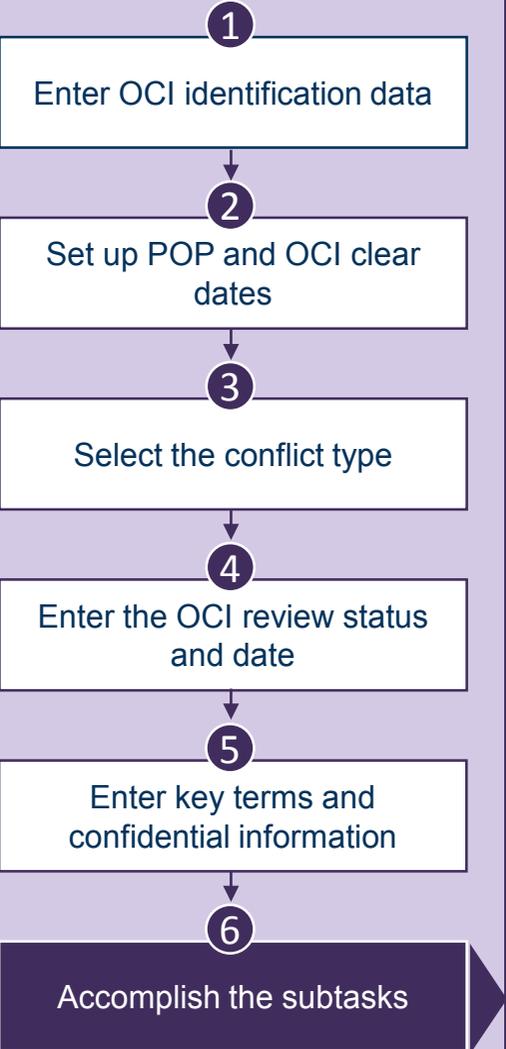
[Employees](#)   [Subs/Vendors](#)   [Activities](#)   [Documents](#)   [User-Defined Info](#)

Vendor *	Vendor Name	Role Description	Remarks
<a href="#">V100013</a>	Balmar Consulting		

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

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.

# OCI Overview



FILE LINE OPTIONS PROCESS HELP

Deltek Costpoint

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   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

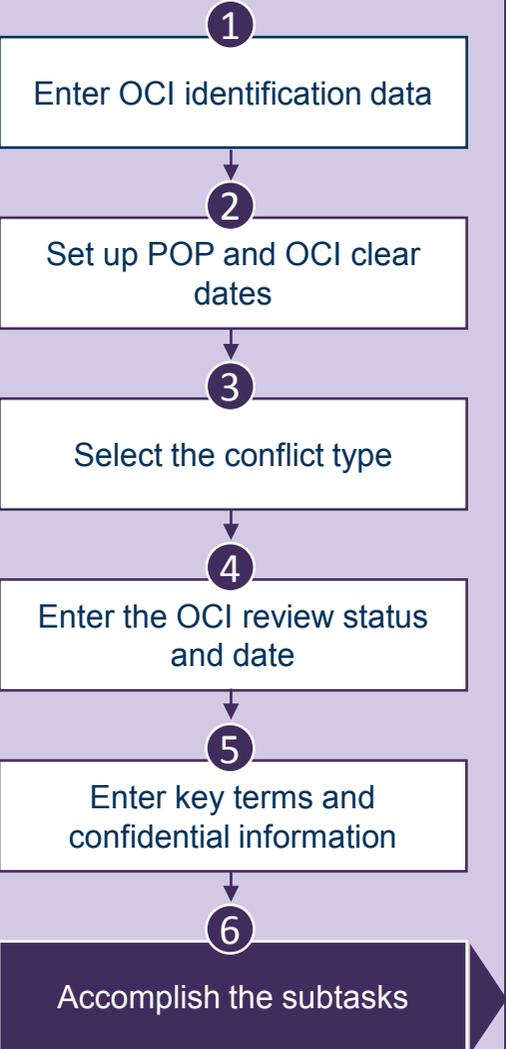
Notes

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

Click this link to open the Activities subtask.

0

# 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 ▾ □ ☰ - X

- Activity

Activity ID

Subject

Location

Method

Activity Date

Completed

P Enter relevant information on this subtask.

- Primary Contacts

Activity Owner

Customer

Primary Contact

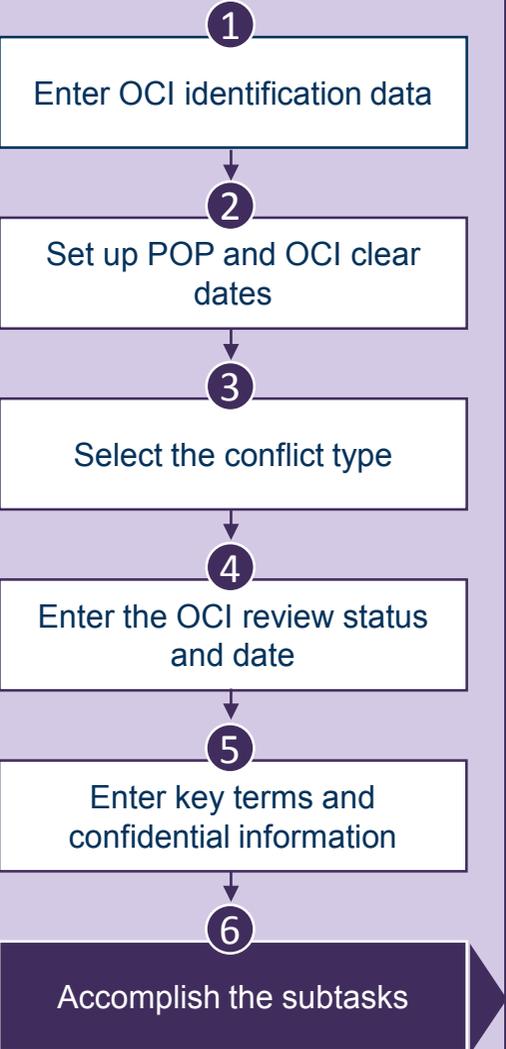
Business #

Other Attendees

Activity Notes

Close

# OCI Overview



Key terms

Notes

Deltek Costpoint

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

Subject

Location

Method

Activity Date

Completed

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

- Primary Contacts

Activity Owner

Customer

Primary Contact

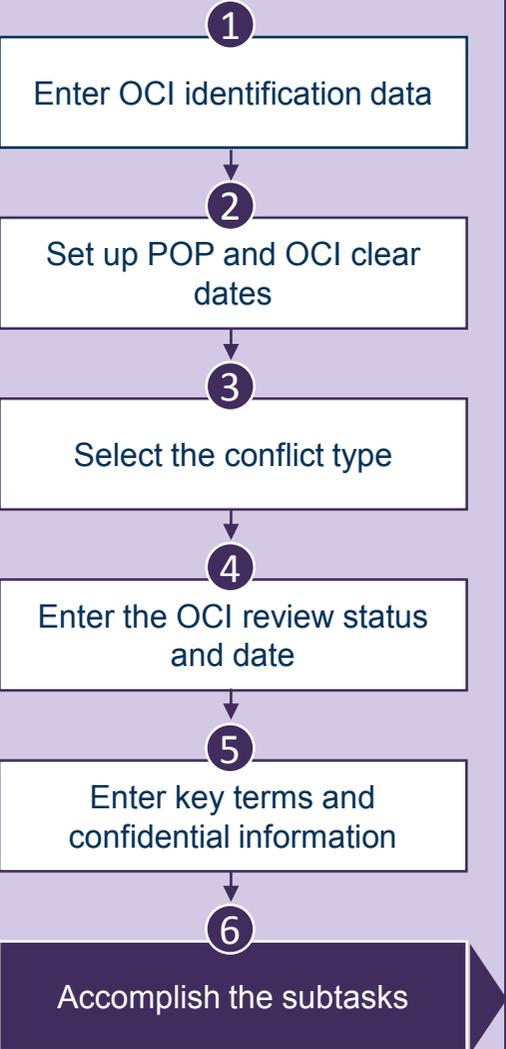
Business #

Other Attendees

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   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

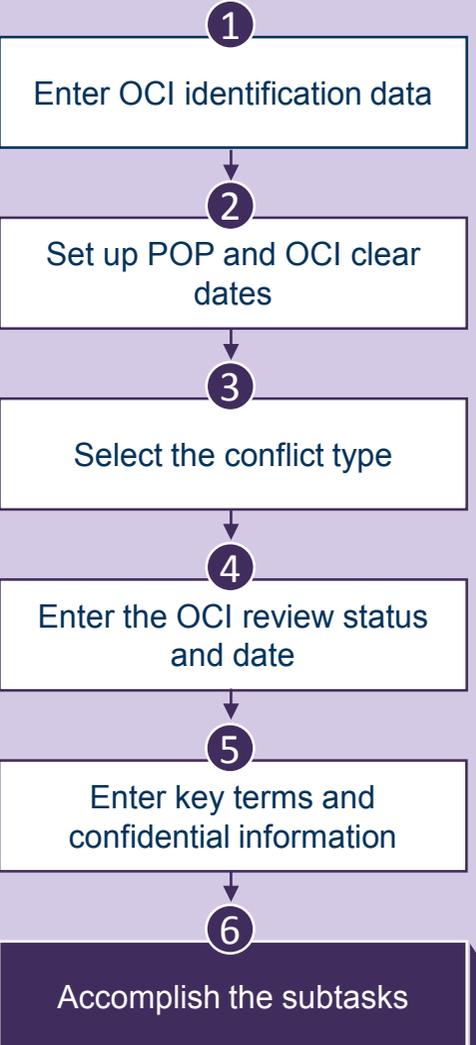
Key Terms

Notes

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

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    Personal Conflict of Interest FAR 52.203-16

CDSI

Key Terms

Notes

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

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

### Manage Organizational Conflict of Interest (OCI) > Documents

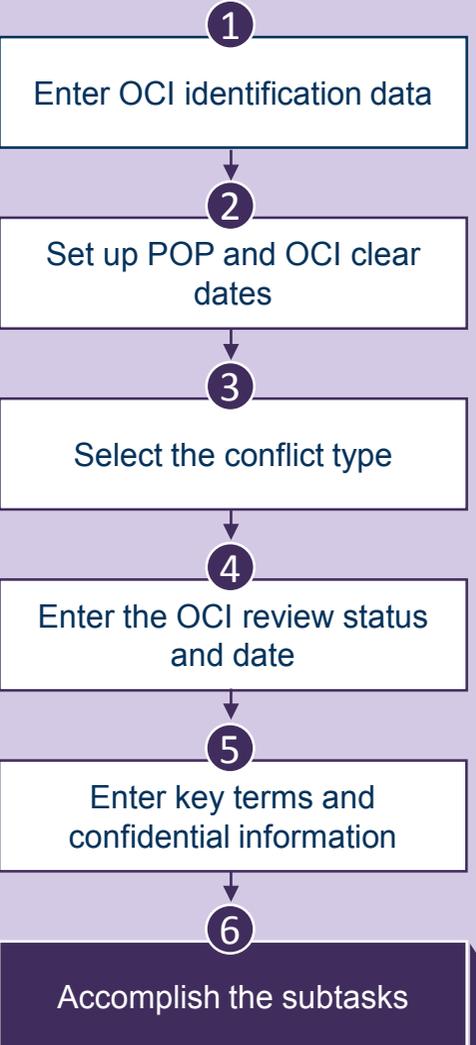
New Copy Delete Query

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

View Document  
Close



# OCI Overview



**Manage Organizational Conflict of Interest (OCI)**

OCI ID: OCI-0000000000000008 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](#) [Emplo](#) [User-Defined Info](#)

**Manage Organizational Conflict of Interest (OCI) > Documents**

Document ID*	Date Received	Document Type	File Location	
OCI-001	01/25/2017		CCIMPORT	RFP OCI.pdf

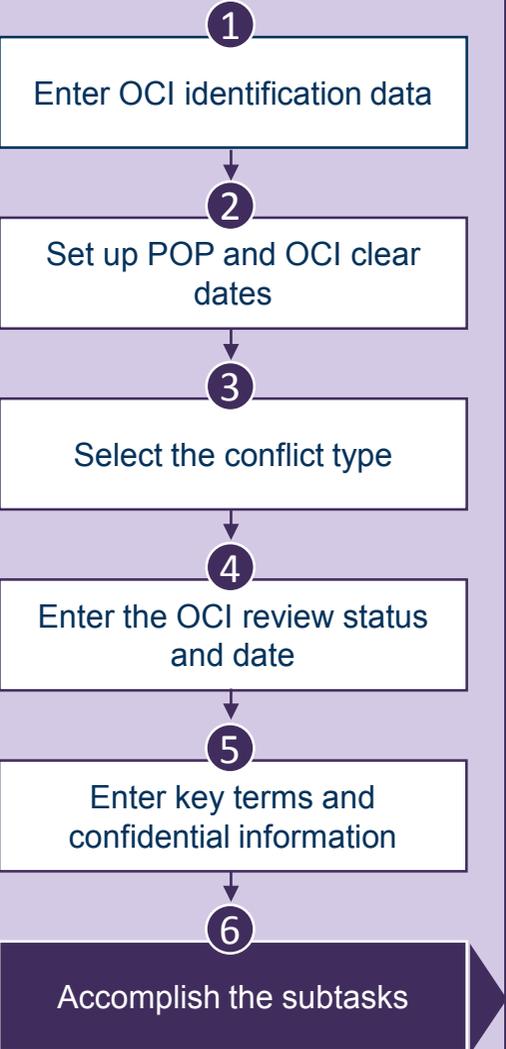
Click **View Document** to download the document. Upon clicking this button, you will see a prompt asking if you want to open or save the document.

**U**

**View Document**

Close

# OCI Overview



FILE LINE OPTIONS PROCESS HELP Deltek Costpoint

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    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

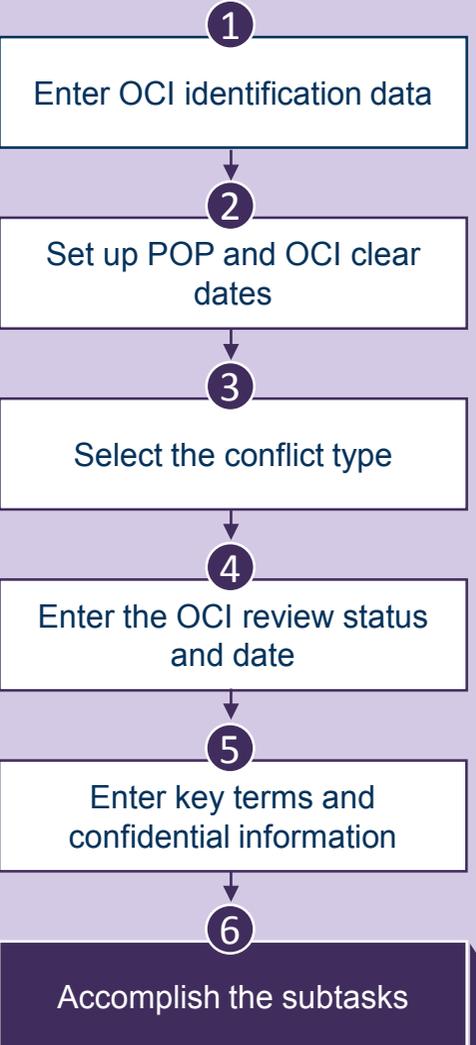
Key Terms

Notes

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

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

# 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

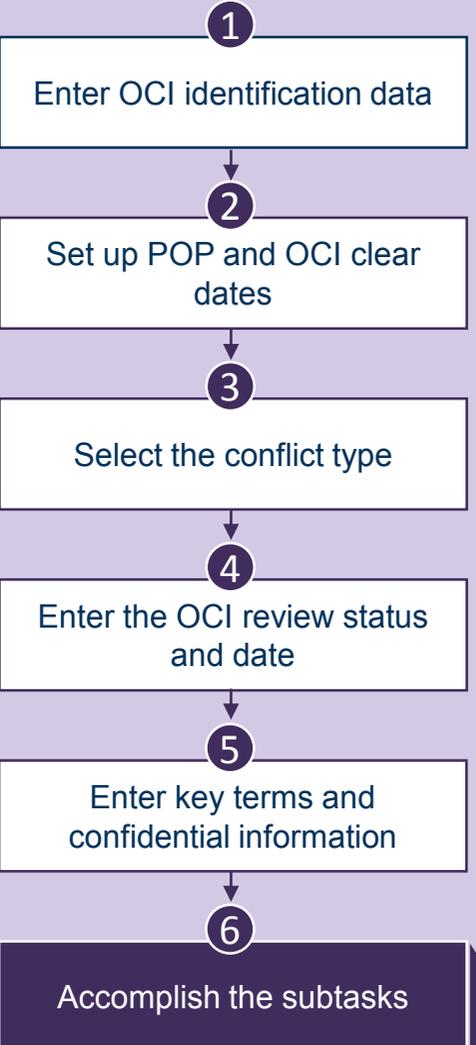
**5** Enter key terms and confidential information

**6** Accomplish the subtasks

**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.

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.

# OCI Overview



**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:

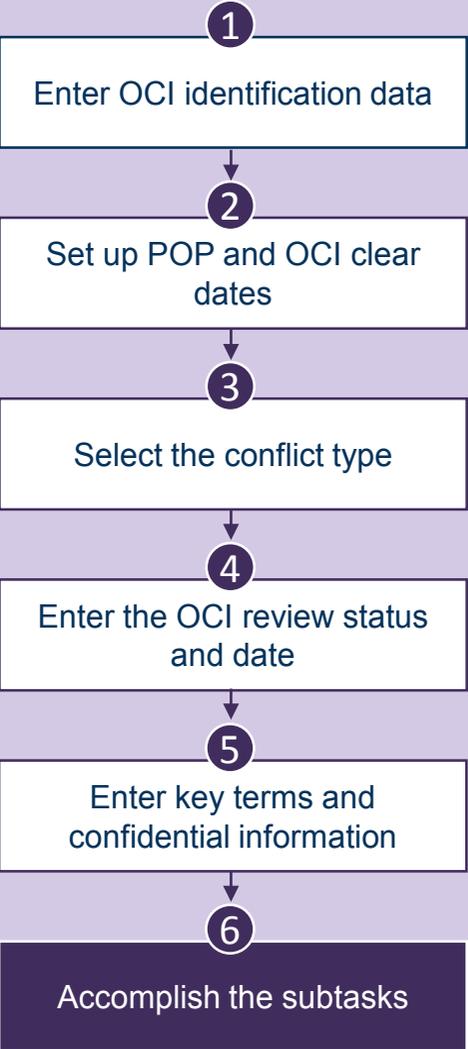
**User-Defined Info**

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

**Annotations:**

- X** 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.

# 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...

Y Click **Save** to save the record.

Interest (OCI)

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:

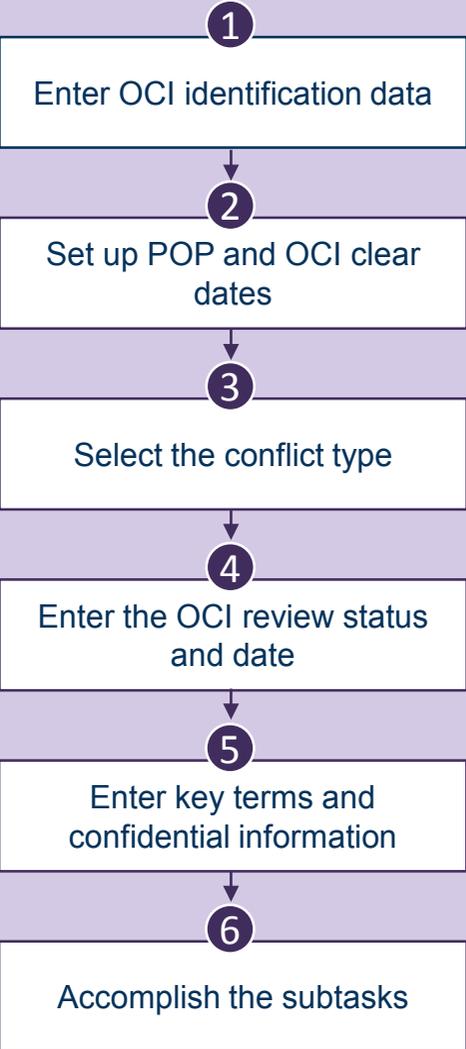
Notes:

[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)

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

	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.