Create Communications and Award Entry Sheet

Reference Guide

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Overview

The Create Communications and Award Entry Sheet functionality allows DSM users to enter award-specific data in an Award Entry Sheet to drive data deliverable reporting.

Role Access

DSM roles with access to Create Communications and Award Entry Sheet:

- DSM Admin Office
- DSM Issuing/Pay Office

Search

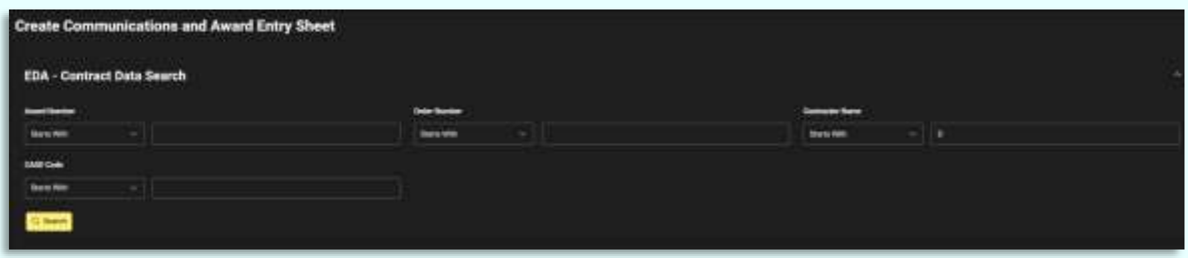
On the Create Communications and Award Entry Sheet page, enter search criteria and select the **Search** button to retrieve desired data.

EDA – Contract Data Search

- Award Number (***with parameters: Starts With / Equal To / Is Null / Not Null***)
- Order Number (***with parameters: Starts With / Equal To / Is Null / Not Null***)
- Contractor Name (***with parameters: Starts With / Equal To***)
- CAGE Code (***with parameters: Starts With / Equal To / Is Null***)

Buttons:

- Search



Search Modifiers

Search Modifiers may be used to limit results returned for a search criterion. They are defined as follows:

- **Starts With**: The data entered in the field will return results that begin with the entered characters.
- **Equal To**: The data entered in the field will return results that are equal to the entered characters.
- **Is Null**: The data search will return only results that have no value for the search criterion.
- **Not Null**: The data search will return only results with a value for the search criterion.

Search Results

Upon submitting search criteria, the Create Communications and Award Entry Sheet search results are returned.

Search Results Columns:

- Award Number

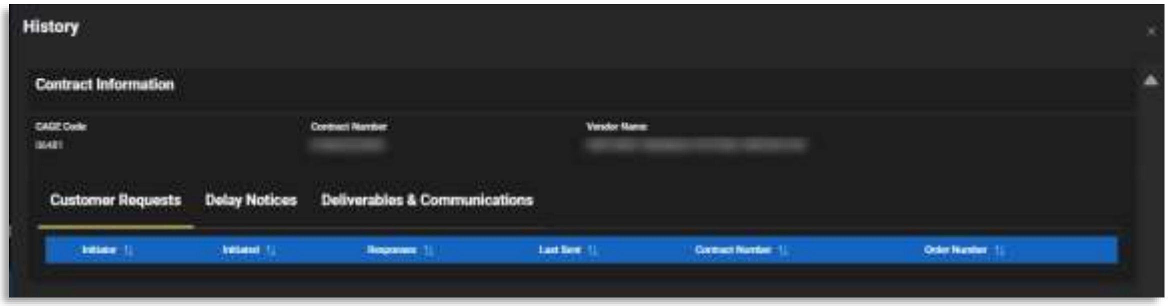
- Order Number
- Contractor Name
- CAGE Code
- Admin By DoDAAC
- Issue By DoDAAC
- Contract DSM History
    - View
- Create Communication
- Create/Update Award Entry Sheet

View Contract DSM History

Select the **View** link in the Contract DSM History column to view all actions taken on the Customer Request for the Award in DSM. Customer Requests, Delay Notices, and Deliverables & Communications data associated with the contract displays on a History tab pop-up screen.

History

- Contract Information
- Customer Requests
    - Initiator
    - Initiated
    - Responses
    - Last Sent
    - Contract Number
    - Order Number
- Delay Notices
    - Initiator
    - Initiated
    - Responses
    - Last Sent
    - Contract Number
    - Order Number
- Deliverables & Communications
    - Initiator
    - Initiated
    - Responses
    - Last Sent
    - Contract Number
    - Order Number



Create Communication

To create a Communication, select the **Create** button in the Create Communication column of the applicable Award in the search results.

Contract Data:

(***Fields populate with information associated with the selected contract***)

- Award Number
- Order Number
- Admin By
- Issue By
- CAGE

Deliverable & Communication – Create

Enter data into the applicable fields.

Communication Screen:

- Award Number (***field is a link, select the Award Number to see additional information***)
- Order Number (***field populates with information pulled from the contract***)
- Contractor Name (***field is a link, select the Contractor Name to see additional information***)
- CAGE Code (***field populates with information pulled from the contract***)
- Admin By DoDAAC (***field populates with information pulled from the contract***)
- Issue By DoDAAC (***field populates with information pulled from the contract***)
- Initiator (***field populates with information pulled from the contract***)
- Submission Type *
    - Communication
    - Request Final Report(s)
    - Request Interim Report(s)
- Reminder Date Follow Up *
- Reminder Date *
- Due Date Follow Up *
- Due Date *

Communication:

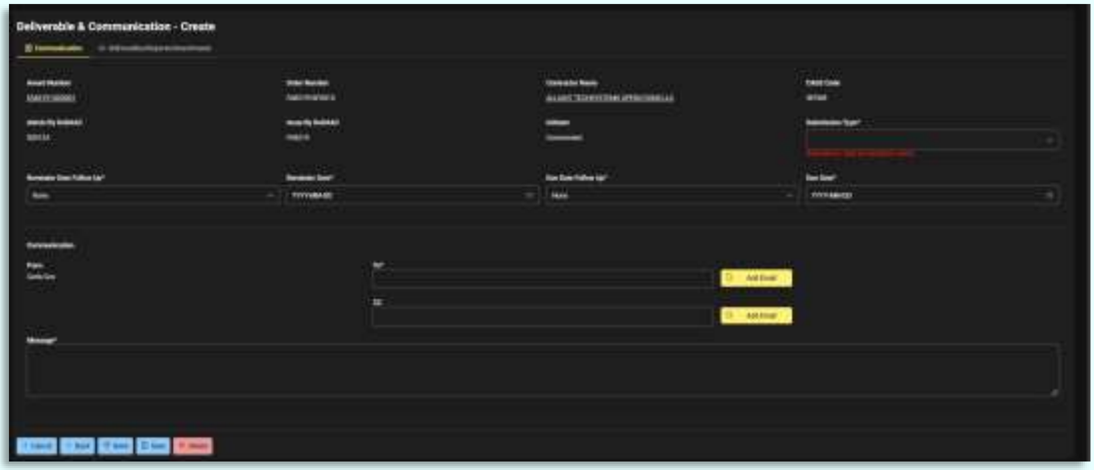
- From (***field pre-populates with the user's ID***)
- To * (***select the Add Email button to populate an email lookup screen***)
- CC (***select the Add Email button to populate an email lookup screen***)
- Message *

Add Email:

- Select One or More User Emails (***field is a dropdown and a search***)

Button(s):

- Add
- Cancel



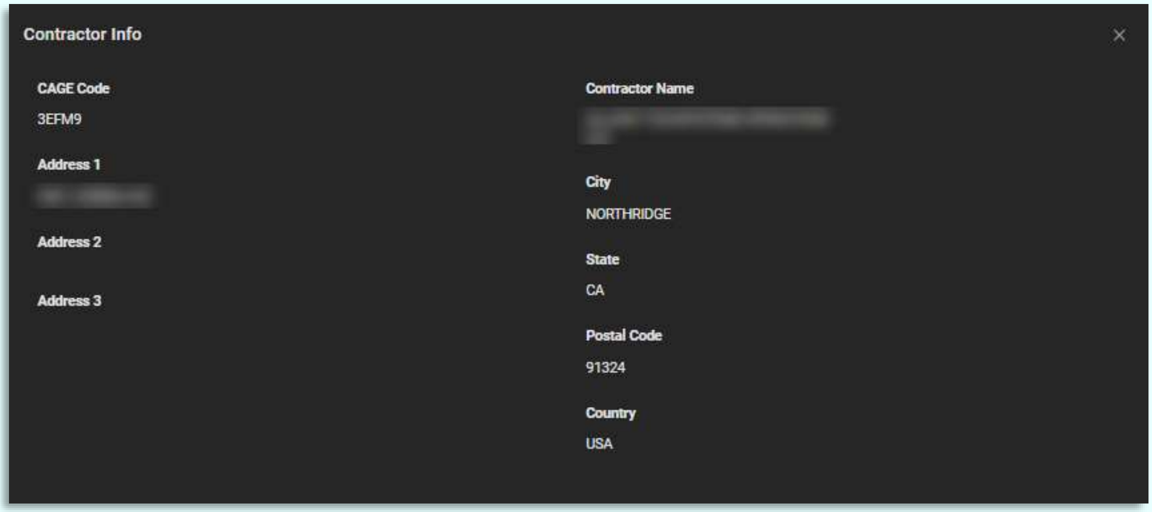
Contract Information Pop-Up Screen:

- Contract
    - Contract Number
    - Delivery Order Number
    - Contractor
    - Administered By
    - Final Delivery Date
    - Payment Office
    - Kind of Contract
    - Inspection
    - Remittance Address
    - USD Total Contract Amount
    - USD Obligated Amount
    - USD ULO Amount
    - ACO
    - DMS Rating
    - Facility Code
    - Type of Contract
    - Acceptance
    - Discount 1
    - Discount 2
    - Foreign Total Contract Amount
    - Foreign Obligated Amount
    - Foreign ULO Amount
    - Currency Indicator
    - Effective Date
    - MOCAS Section
    - MOCAS Part
    - Production Surveillance Code
    - Criticality Designator
    - R9 Remarks
- ACRN(s)
- Special Provisions
- Line Item(s)
    - CLIN
    - Noun
    - Order Quantity
    - Purchase Unit
    - USD Unit Price
    - Foreign Unit Price
    - USD Total Line Item Amount

    - Foreign Total Item Amount
- Schedule(s)
    - CLIN
    - NSN
    - Ship To
    - Mark For
    - Scheduled Quantity
    - Delivery Date
- Contract MOD(s)
    - Date
    - Contract MOD
    - Mod Type
    - Obligated Amount Change
    - Cumulative Obligated Amount
- Remarks/Closeout Info
    - ACO Remarks
    - Closeout Dates
- Shipments
    - CLIN
    - Shipment Number
    - Shipment Date
    - Shipment Qty
    - Mark For
    - ACO
    - Scheduled Qty
    - Milstrip Number

Contractor Information Pop-Up Screen:

- CAGE Code
- Contractor Name
- Address 1
- City
- Address 2
- State
- Address 3
- Postal Code
- Country



Deliverables/Reports/Attachments

On the Deliverables/Reports/Attachments tab, one or more files may be attached to the Communication. Select the **Choose** button to select files from the local directory for attachment to the Communication. Upon upload completion, the file details will be displayed in the table.

NOTE: The application will automatically strip out unwanted special characters from the file name.

File Details:

- File Name
- File Type
- File Size
- Attachment Type
- Submission Type
- Notes
- Upload Date
- Name
- Action

To delete attached files, select the **Delete** icon in the Action column.

Buttons:

- The **Cancel** button at the bottom of the page will close the Communication without saving changes.
- The **Back** button at the bottom of the page will navigate the user back to the previous page.
- The **Send** button at the bottom of the page will submit the Communication.
- The **Save** button at the bottom of the page will save all entered data and submit the Award Entry Sheet.
- The **Delete** button at the bottom of the page will delete the Communication.

Update Award Entry Sheet

To update an Award Entry Sheet, select the **Update** button in the Create/Update Award Entry Sheet column of the applicable Award in the Create Communications and Award Entry Sheet search results. The Contract Award Entry Sheet page displays.

Award Details Fields:

- Award Number (***field is populated with information entered during the Award Entry Sheet creation***)
- Order Number (***field is populated with information entered during the Award Entry Sheet creation***)
- Contractor Name (***field is populated with information entered during the Award Entry Sheet creation***)
- Cage Code (***field is populated with information entered during the Award Entry Sheet creation***)
- UEI
- Start Date * (***field is populated with information entered during the Award Entry Sheet creation***)
- End Date * (***field is populated with information entered during the Award Entry Sheet creation***)
- Type of Instrument (***field is populated with information entered during the Award Entry Sheet creation***)

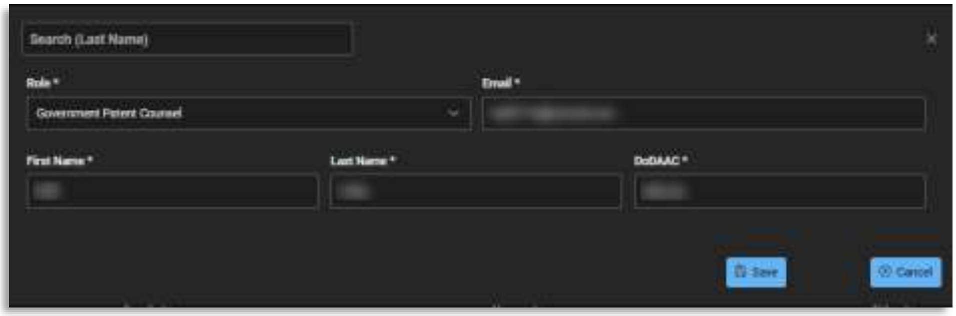
Points of Contact

The user may add Government and/or Awardee points of contact. Any existing points of contact and their details will be displayed in the Points of Contact tables. To edit these entries, select the **Edit** button in the Action column.

Edit Government Point of Contact Fields:

- Search (Last Name)
- Role * (***fields are populated with user information***)
- Email * (***fields are populated with user information***)
- First Name * (***fields are populated with user information***)

- Last Name * (***fields are populated with user information***)
- DoDAAC * (***fields are populated with user information***)



Add Government Point of Contact

Select the **Add Government Point of Contact** button. The Add Point of Contact modal will display. Use the **Search** field to locate existing points of contact by last name. If the contact cannot be found in the Search field, manually enter the contact information.

Add Government Point of Contact Modal Fields:

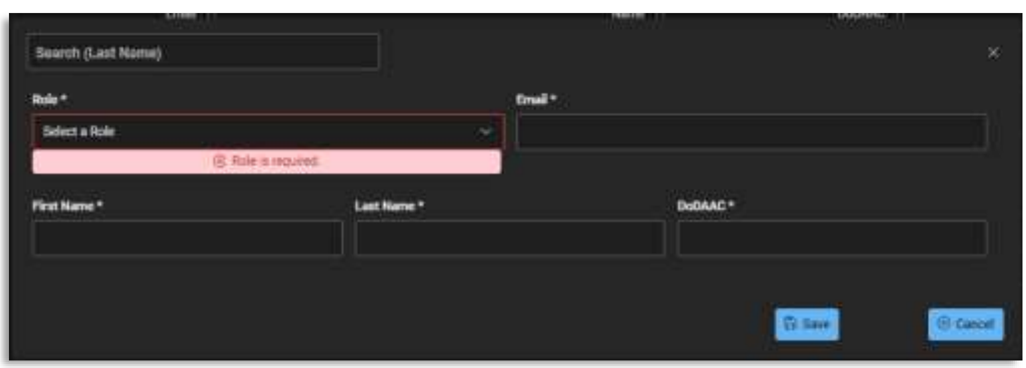
- Search (Last Name)
- Role*
- Email *
- First Name *
- Last Name *
- DoDAAC *

Button(s):

- Save
- Cancel

Select the **Save** button to save the Point of Contact information to the table.

NOTE: A Government POC may be added more than once, as long as Role, DoDAAC, and Email are not the same.



Government Point of Contact Fields:

- Role
- Email

- Name
- DoDAAC
- Action
    - Edit
    - Delete

If deleting an existing Government POC that is listed as an Acceptor for a Report Due or CDRL, a new Acceptor must be assigned for the applicable Report/CDRL. To delete these entries, select the **Delete** button in the Action column and select **Yes** on the confirmation dialogue.

Edit Awardee Point of Contact Fields:

- Search (Last Name)
- Awardee * (***Fields are populated with user information***)
- Email * (***Fields are populated with user information***)
- First Name * (***Fields are populated with user information***)
- Last Name * (***Fields are populated with user information***)
- Title * (***Fields are populated with user information***)

Add Awardee Point of Contact

Select the **Add Awardee Point of Contact** button. The Add Point of Contact modal will display. Use the **Search** field to locate existing points of contact by last name. If the contact cannot be found in the Search field, manually enter the contact information.

Add Awardee Point of Contact Modal Fields:

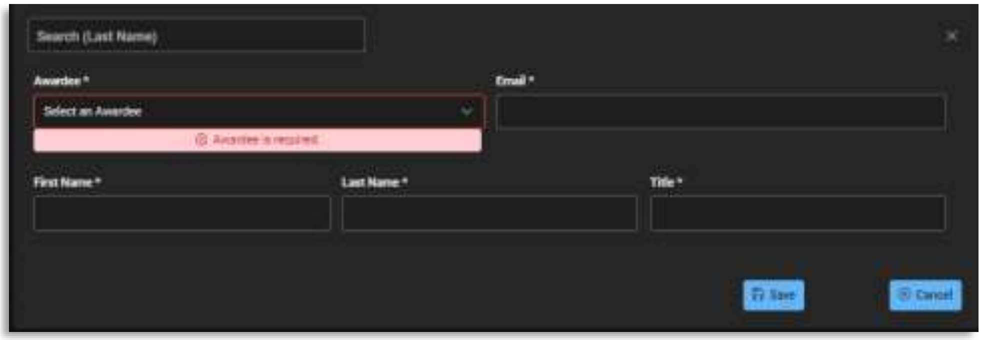
- Search (Last Name)
- Awardee *
- Email *
- First Name *
- Last Name *
- Title *

Button(s):

- Save
- Cancel

Select the **Save** button to save the Point of Contact information to the table.

NOTE: Users cannot edit PIEE user emails that were previously populated; emails can be edited if the user does not exist in PIEE.



Awardee Point of Contact Fields:

- Awardee
- Email
- Name
- Title
- Action
    - Edit
    - Delete

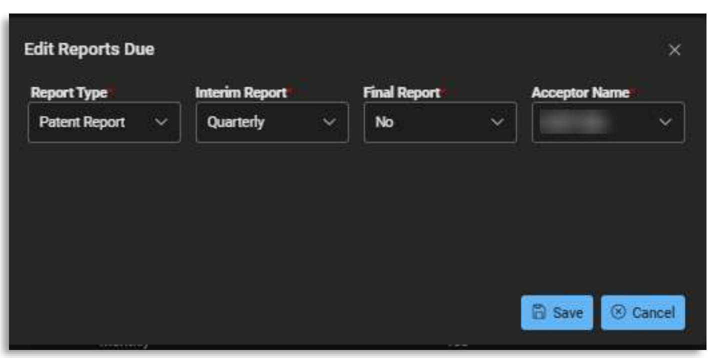
To delete these entries, select the **Delete** button in the Action column and select **Yes** on the confirmation dialogue.

Reports Due

The user may add a list of Reports Due and CDRL information related to the reports for an Award. Any existing reports due will be displayed in the Reports Due tables. To edit these entries, select the **Edit** button in the Action column.

Edit Reports Due Fields:

- Report Type * (***field is populated with information entered during the Award Entry Sheet creation***)
- Interim Report * (***field is populated with information entered during the Award Entry Sheet creation***)
- Final Report * (***field is populated with information entered during the Award Entry Sheet creation***)
- Acceptor Name * (***field is populated with information entered during the Award Entry Sheet creation***)



Add Reports Due

Select the **Add Reports Due** button. The Add Reports Due modal will display. Enter in information to the applicable fields.

Add Reports Due Modal Fields:

- Report Type *
  - Cost Report
  - Patent Report
  - Property Report
  - Technical/Performance Report
  - Security Report
  - Subcontract Report
  - Other
- Interim Report *
  - Monthly
  - Annually
  - Quarterly
  - Other
  - No
- Final Report *
  - Yes
  - No
- Acceptor Name *

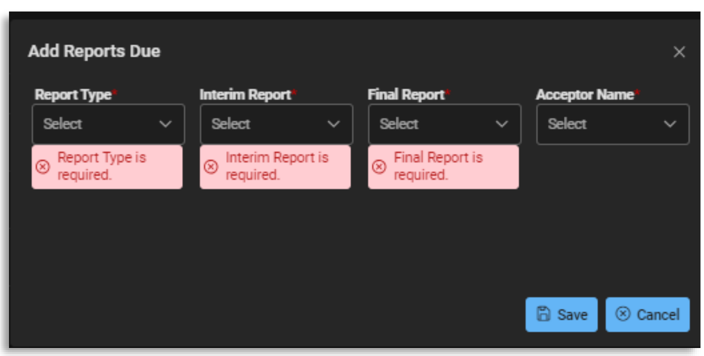
Button(s):

- Save
- Cancel

Select the **Save** button to save the Reports Due information to the table.

NOTE: Report Types aside from 'Other' may not be entered more than once on an Award Entry Sheet.

NOTE: Any changes made to an existing Government POC (last name or email) within the Award Entry Sheet will be reflected in any existing Reports Due record.



Reports Due Fields:

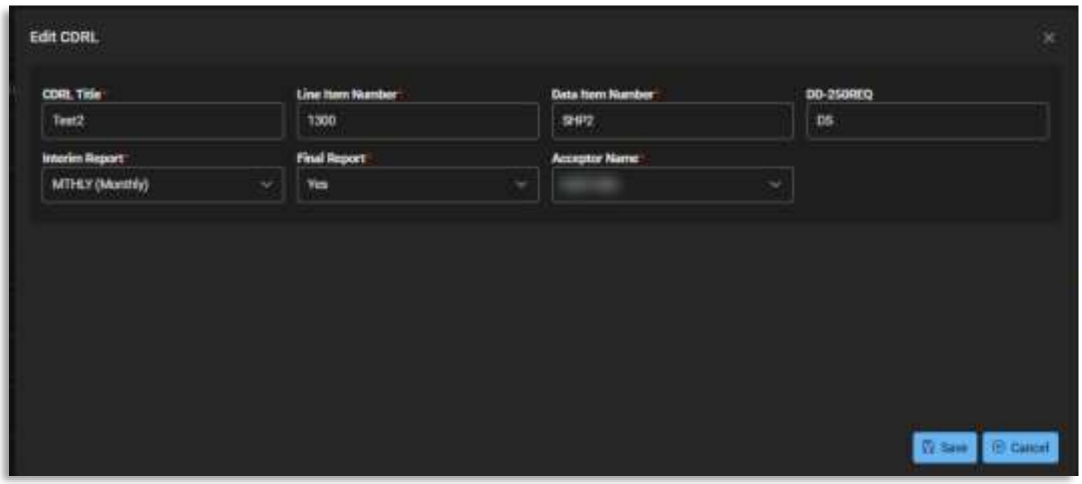
- Report Type
- Other Report Type
- Interim Report
- Final Report
- Acceptor Name

- Action
  - Edit
  - Delete

To delete the Award Report, select the **Delete** button in the Action column and select **Yes** on the confirmation dialogue.

Edit CDRL Fields:

- CDRL Title * (***field is populated with information entered during the Award Entry Sheet creation***)
- Line Item Number * (***field is populated with information entered during the Award Entry Sheet creation***)
- Data Item Number * (***field is populated with information entered during the Award Entry Sheet creation***)
- DD-250REQ (***field is populated with information entered during the Award Entry Sheet creation***)
- Interim Report * (***field is populated with information entered during the Award Entry Sheet creation***)
- Final Report * (***field is populated with information entered during the Award Entry Sheet creation***)
- Acceptor Name * (***field is populated with information entered during the Award Entry Sheet creation***)



Add CDRL

Select the **Add CDRL** button. The Add CDRL modal will display. Enter in information to the applicable fields.

Add CDRL Modal Fields:

- CDRL Title *
- Line Item Number *
- Data Item Number *
- DD-250REQ
- Interim Report *
  - ANNLY (Annually)
  - ASGEN (As generated)
  - ASREQ (As required)
  - BI-MO (Every 2 months
  - BI-WE (Every 2 weeks)
  - DAILY (Daily)
  - DFDEL (Deferred Delivery)
  - MTHLY (Monthly)
  - ONE/P (One Preliminary)
  - ONE/R (One time with revisions)
  - QRTLY (Quarterly)
  - R/ASR (Revision as required)
  - SEMIA (Every 6 months)
  - WEKLY (Weekly)

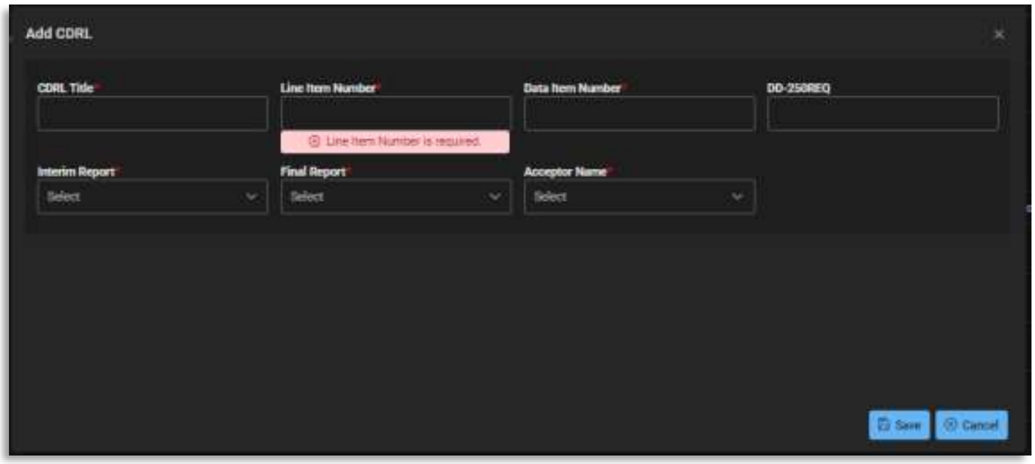
- XTIME
- No

- Final Report *
    - Yes
    - No
- Acceptor Name *

Button(s):

- Save
- Cancel

Select the **Save** button to save the Reports Due information to the table.



CDRL Fields:

- CDRL Title
- Line Item Number
- Data Item Number
- DD-250REQ
- Interim Report
- Final Report
- Acceptor Name
- Number of Times
- Remarks
- Action
    - Edit
    - Delete

To delete the Award Report, select the **Delete** button in the Action column and select **Yes** on the confirmation dialogue.

Interim Reports Due

The Interim Reports Due table displays the due dates of all Reports Due in the Contract which are auto populated upon addition of any Interim Report.

In the **First Due Date** fields, enter the first due date of each Interim Report. The remaining due dates (if any) will be populated based on the first due date and selected interval.

NOTE: If 'Other' is selected from the Interim Report dropdown under Reports Due, then only the First Due Date column will populate in the Interim Reports Due table for that report.

Interim Reports Due Fields:

- Report Type/CDRL Title
- First Due Date
- Due Date
- Due Date
- Due Date
- Due Date
- Due Date
- Due Date

Final Reports Due

The Final Reports Due table displays the due dates of all Reports Due in the Contract which are auto populated upon addition of any Final Report.

Final Reports Due Fields:

- Report Type/CDRL Title
- Due Date

Action Buttons

- The **Back** button at the bottom of the page will close the Award Entry Sheet without saving changes and navigate the user to the Create Communications and Award Entry Sheet search page.
- The **Save** button at the bottom of the page will save all entered data and submit the Award Entry Sheet.
- The **Cancel** button at the bottom of the page will close the Award Entry Sheet without saving changes and navigate the user to the Dashboard.

Create Award Entry Sheet

To create an Award Entry Sheet, select the **Create** button in the Create/Update Award Entry Sheet column of the applicable Award in the Create Communications and Award Entry Sheet search results. The Contract Award Entry Sheet page displays.

When creating an Award Entry Sheet in DSM, award-specific details will be prepopulated from EDA. Only one Award Entry Sheet per Contract Number/Order Number/CAGE code is allowed.

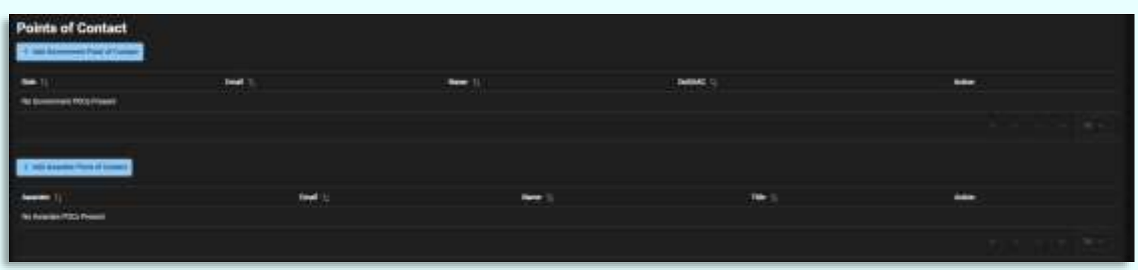
Saved Award Entry Sheets may be viewed by locating an Award via the Create Communications and Award Entry Sheet search page and selecting the **Update** button in the Create/Update Award Entry Sheet column.

Award Details Fields:

- Award Number (***Field is pre-populated with information from the contract***)
- Order Number (***Field is pre-populated with information from the contract***)
- Contractor Name (***Field is pre-populated with information from the contract***)
- Cage Code (***Field is pre-populated with information from the contract***)
- UEI
- Start Date *
- End Date *
- Type of Instrument *
    - DoD Contract (FAR)
    - DoD Contract (Non-FAR)
    - DoD Cooperative Agreement
    - DoD Grant
    - DoD Other Non-Procurement Instrument
    - DoD Transactions for Prototype
    - Non-DoD Contract (FAR)
    - Non-DoD Contract (Non-FAR)
    - Non-DoD Grant/Agreement

Points of Contact

The user may add Government and/or Awardee points of contact. Any existing points of contact and their details will be displayed in the Points of Contact tables.



Add Government Point of Contact

Select the **Add Government Point of Contact** button. The Add Point of Contact modal will display. Use the **Search** field to locate existing points of contact by last name. If the contact cannot be found in the Search field, manually enter the contact information.

Add Government Point of Contact Modal Fields:

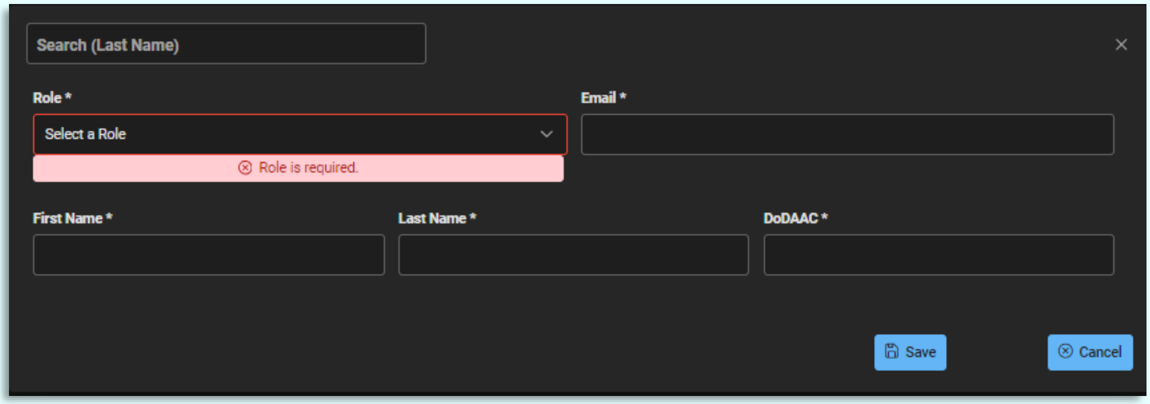
- Search (Last Name)
- Role*
- Email *
- First Name *
- Last Name *
- DoDAAC *

Button(s):

- Save
- Cancel

Select the **Save** button to save the Point of Contact information to the table.

NOTE: A Government POC may be added more than once, as long as Role, DoDAAC, and Email are not the same.



Government Point of Contact Fields:

- Role
- Email
- Name
- DoDAAC
- Action

Add Awardee Point of Contact

Select the **Add Awardee Point of Contact** button. The Add Point of Contact modal will display. Use the **Search** field to locate existing points of contact by last name. If the contact cannot be found in the Search field, manually enter the contact information.

Add Awardee Point of Contact Modal Fields:

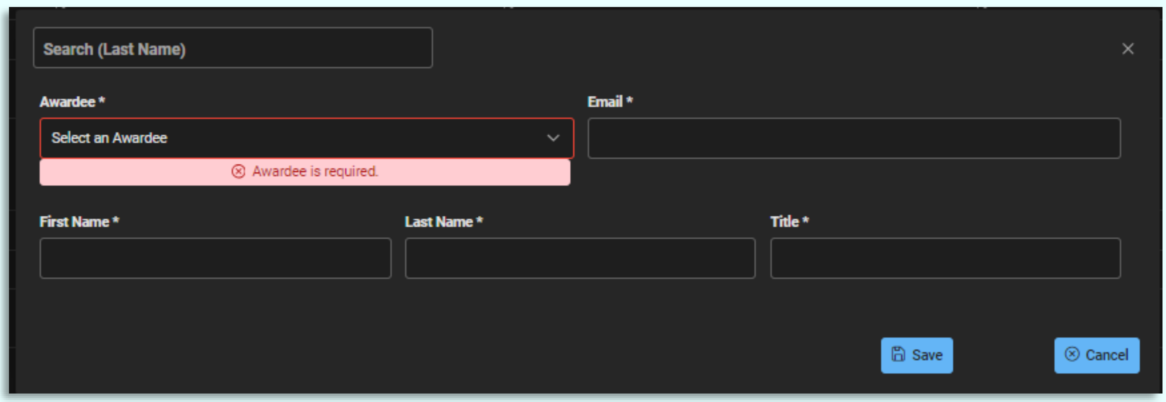
- Search (Last Name)
- Awardee *
- Email *
- First Name *
- Last Name *
- Title *

Button(s):

- Save
- Cancel

Select the **Save** button to save the Point of Contact information to the table.

NOTE: Users cannot edit PIEE user emails that were previously populated; emails can be edited if the user does not exist in PIEE.



Awardee Point of Contact Fields:

- Awardee
- Email
- Name
- Title
- Action

Reports Due

The user may add a list of Reports Due and CDRL information related to the reports for an Award.

Add Reports Due

Select the **Add Reports Due** button. The Add Reports Due modal will display. Enter in information to the applicable fields.

Add Reports Due Modal Fields:

- Report Type *
    - Cost Report
    - Patent Report
    - Property Report
    - Technical/Performance Report
    - Security Report
    - Subcontract Report
    - Other
- Interim Report *
    - Monthly
    - Annually
    - Quarterly
    - Other
    - No
- Final Report *
    - Yes
    - No
- Acceptor Name *

Button(s):

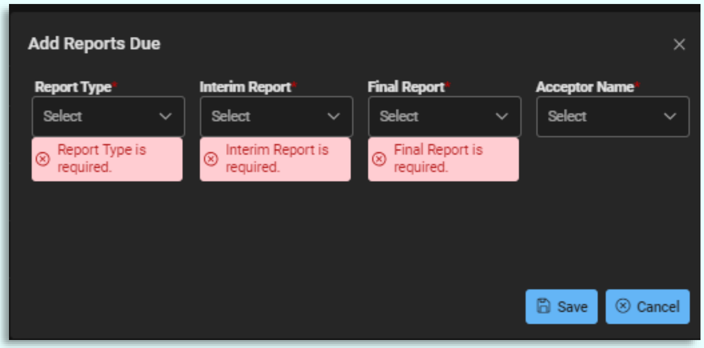
- Save
- Cancel

Select the **Save** button to save the Reports Due information to the table.

NOTE: The Government Point of Contact and Award Details are required before a Reports Due entry can be added.

NOTE: Report Types aside from 'Other' may not be entered more than once on an Award Entry Sheet.

NOTE: Any changes made to an existing Government POC (last name or email) within the Award Entry Sheet will be reflected in any existing Reports Due record.



Reports Due Fields:

- Report Type
- Other Report Type
- Interim Report
- Final Report
- Acceptor Name
- Action

Add CDRL

Select the **Add CDRL** button. The Add CDRL modal will display. Enter in information to the applicable fields.

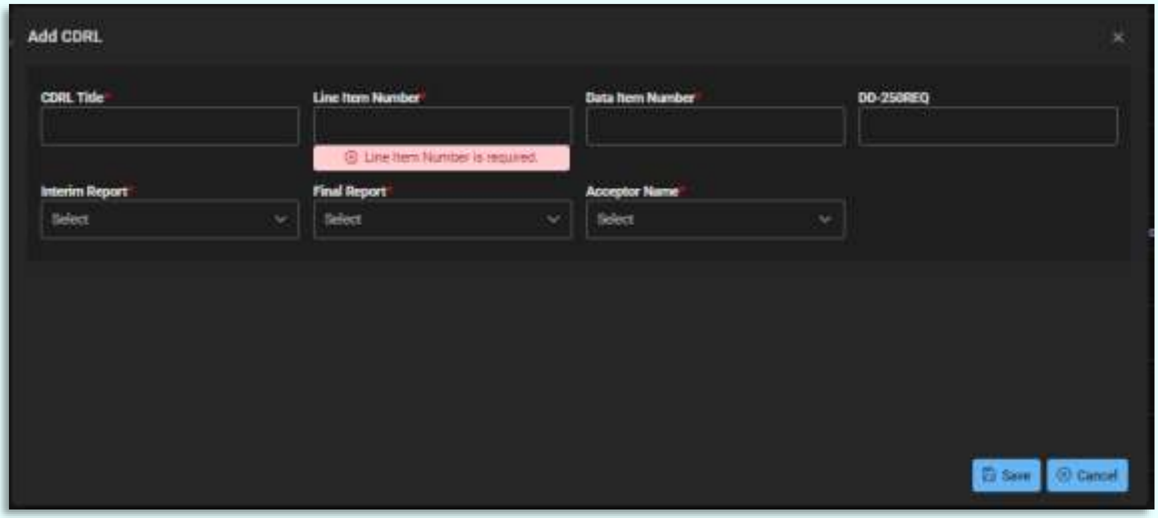
Add CDRL Modal Fields:

- CDRL Title *
- Line Item Number *
- Data Item Number *
- DD-250REQ
- Interim Report *
    - ANNLY (Annually)
    - ASGEN (As generated)
    - ASREQ (As required)
    - BI-MO (Every 2 months
    - BI-WE (Every 2 weeks)
    - DAILY (Daily)
    - DFDEL (Deferred Delivery)
    - MTHLY (Monthly)
    - ONE/P (One Preliminary)
    - ONE/R (One time with revisions)
    - QRTLY (Quarterly)
    - R/ASR (Revision as required)
    - SEMIA (Every 6 months)
    - WEKLY (Weekly)
    - XTIME
    - No
- Final Report *
    - Yes
    - No
- Acceptor Name *

Button(s):

- Save
- Cancel

Select the **Save** button to save the Reports Due information to the table.



CDRL Fields:

- CDRL Title
- Line Item Number
- Data Item Number
- DD-250REQ
- Interim Report
- Final Report
- Acceptor Name
- Number of Times
- Remarks
- Action
  - Edit
  - Delete

To delete the Award Report, select the **Delete** button in the Action column and select **Yes** on the confirmation dialogue.

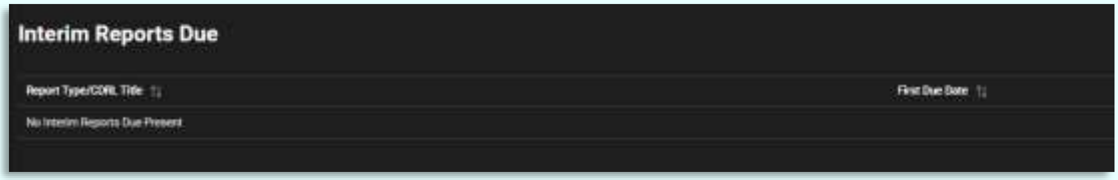
Interim Reports Due

The Interim Reports Due table displays the due dates of all Reports Due in the Contract which are auto populated upon addition of any Interim Report. If reports are added to the CDRL's table, those CDRL reports appear in the Interim Reports Due table.

NOTE: If 'Other' is selected from the Interim Report dropdown under Reports Due, then only the First Due Date column will populate in the Interim Reports Due table for that report.

Interim Reports Due Fields:

- Report Type/CDRL Title
- First Due Date * (***field is required to be manually entered***)



NOTE: If the Interim Report entered in the ADD CDRLs table is XTIME, each XTIME displays on its own line in the table based on the number entered in the Number of Times to Submit field

NOTE: All XTIME Due Dates are optional and must be manually entered.

Final Reports Due

The Final Reports Due table displays the due dates of all Reports Due in the Contract which are auto populated upon addition of any Final Report. If reports are added to the CDRL's table, those CDRL reports appear in the Final Reports Due table.

Final Reports Due Fields:

- Report Type/CDRL Title
- Due Date

NOTE: The Report Type Due Date is populated based on the Award End Date and can be manually overwritten.

Action Buttons

- The **Back** button at the bottom of the page will close the Award Entry Sheet without saving changes and navigate the user to the Create Communications and Award Entry Sheet search page.
- The **Save** button at the bottom of the page will save all entered data and submit the Award Entry Sheet.
- The **Cancel** button at the bottom of the page will close the Award Entry Sheet without saving changes and navigate the user to the Dashboard.