

MDO CS Create ARZ Modification

Reference Guide

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MDO Application

MDO

Create

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Columns: 14

Roles	<p>The role(s) required to Create an ARZ Modification Document submitted for review by an MDO – Contracting Officer in the Modification and Delivery Orders (MDO) application:</p> <ul style="list-style-type: none"> • MDO - Contract Specialist
Creating an ARZ Modification Document	<p>This guide provides an overview of how an MDO – Contract Specialist user Creates an ARZ Modification document in the Modification and Delivery Orders (MDO) application for review by an assigned MDO – Contracting Officer.</p> <p>Log in to PIEE as an MDO - Contract Specialist and access the MDO module. In the MDO module go to MDO > Create.</p>
Two Create Options	<p>There are two ways to create an ARZ Modification Document:</p> <ul style="list-style-type: none"> • Manual Data Entry • ARZ Modification Excel/CSV Import (Refer to section ARZ Modification Document – Excel/CSV Import at the end of this document for further instructions.) <p>The Excel/CSV template is available on the WBT under MDO > Getting Started in MDO > Sample Files > Master ARZ Template and is also available for download while logged in to PIEE as an MDO – CO or CS user during ARZ Modification Create (MDO > Create > Import > Import Items > Master ARZ Template).</p>
Create Search Criteria	<p>MDO – Create ARZ MOD/Modification/Order page displays and the remainder of this guide explains the "Manual Data Entry" process for creating ARZ modifications. Enter the Contract/Order Information for the contracts that are being modified.</p> <p>Contract Information:</p> <ul style="list-style-type: none"> • Contract Number (<i>parameters: Starts With / Equal to / Is Null / Not Null</i>) • Order Number (<i>parameters: Starts With / Equal to / Is Null / Not Null</i>) • Issue Office DoDAAC • Admin Office DoDAAC • Pay DoDAAC • Contractor CAGE Code • BPA, IDC, and BOA Only (<i>Checkbox</i>)

Buttons:

- Search
- Import (*Import ARZ Template*)

NOTE: At least one search criterion is required to perform a search.

After entering search criteria click the **Search** button. The search results display on the same page.

Search Results display below the Search Criteria and allow new searches without leaving the page. Users Can find the Contract(s)/Order(s) quickly and easily.

Search Results Columns:

- Checkbox
- Contract Number
- Order Number
- Issue DoDAAC
- Admin DoDAAC
- Pay DoDAAC
- CAGE

NOTE: The search result displays only the Award data. The latest Pay Office, Admin and CAGE codes will be populated upon creation of the document.

Buttons:

- Create – ARZ MOD/Modification
- Create - Order
- Cancel

From the search results, check the checkbox for all applicable Contract(s)/Order(s) that need to be modified. Click the **Create – ARZ MOD/Modification** button. When only one contract is modified, a question displays to determine if it is an ARZ MOD or a Modification.

ARZ Modification

Will this modification -

Search Results

- Change a Contractor's address
- Change a Contractor's CAGE code or UEI
- Change a Contractor's name
- Implement a novation, change-of-name, conversion, or restructure agreement or general order
- Change administration or payment office
- Adjust or realign workload

Answering **No**, redirects the user to the MOD Creation screen instead of the ARZ MOD screen. Refer to [MDO – CS Create Modification](#) training for more information located on the **WBT > MDO > How To – MDO Documents > Modification > MDO – Contract Specialist**.

Answering **Yes**, the create process continues to the ARZ MOD Create Document screen.

Click the '**X**' button in the top right corner to cancel the modal. This closes the pop-up and returns the user to the MDO Create Search screen.

The ARZ MOD Creation screen displays and information for the ARZ Modification is entered on the tabs below.

ARZ MOD Creation tabs:

- ARZ Modification
- Associated Contracts
- Attachments
- History

ARZ MOD Creation tabs buttons:

- Submit for Review
- Save
- Back
- Cancel
- View PDF

*NOTE: The **Save** button is available at all points during the ARZ Modification workflow process. The button saves all information currently input. Take note of the Document ID at the top of the page; this ID may be used to locate the saved document via the MDO Search page. Refer to the [Save](#) training available on the MDO WBT under [General Functions](#) link for more details.*

ARZ Modification Tab

The ARZ Modification Tab presents the user with Yes/No questions that display additional questions depending on the answers chosen for each Yes/No question. Not all Yes/No questions display, only those required based on the initiator's answers.

Follow-up questions vary, including but not limited to:

- Yes/No
- Names
- Address
- DoDAACs
- Dates

NOTE: All fields and questions displayed are mandatory on the ARZ Modification Tab.

ARZ Modification Questions:

The first question displayed is:

Will this modification implement a workload realignment? **Yes/No**

The answer chosen populates different questions and the sections below have been separated based on the answer to the first question and is indicated with "Workload Realignment (Yes/No) Answer Route".

Workload Realignment 'No' Answer Route:

Will this modification implement a workload realignment? **NO Route**

Contractor's CAGE

Will this modification serve to implement a Novation, Change-of-Name, Conversion, or Restructure Agreement, under FAR Subpart 42.12?

Yes/No

Will this modification cause a change to the Contractor's CAGE Code? **Yes/No**

Contractor's previous CAGE

Contractor's new CAGE

Contractor's UEI

Will this modification cause a change to the Contractor's UEI? **Yes/No**

Contractor's previous UEI

Contractor's new UEI

Contractor's Name

Will this modification cause a change to the Contractor's name? **Yes/No**

Has the Contractor already updated its name in System for Award Management (SAM)? **Yes/No**

Contractor's previous name

Contractor's new name

Is the Contractor's name change applicable to the hard copy check remittance address? **Yes/No**

Contractor's new name for remittance purposes

Agreement

What is the date of the DACO/ACO/AGO Signature on the Agreement?

Is the Agreement attached? **Yes/No**

Address

(Fields display when "No" is selected in the "Will this modification serve to implement a Novation, Change-of-Name, Conversion, or Restructure Agreement, under FAR Subpart 42.12?" field)

Will this modification cause a change to the Contractor's physical address? **Yes/No**

Has the Contractor already updated its physical address in System for Award Management(SAM)? **Yes/No**

(Fields display when "Yes" is selected in the above field)

Physical Address

Address	Old Address	New Address
---------	-------------	-------------

Address Line 1	(Old Address information will be pre-populated from EDA/SDW)	
Address Line 2		
Address Line 3		
City		
State (<i>drop-down</i>)		
Zip+4		
Country (<i>drop-down</i>)		

Is the Contractor's address change applicable to the hard copy check remittance address? **Yes/No**

Remittance Address

Address	Old Address	New Address
Address Line 1	(Old Address information will be pre-populated from EDA/SDW)	
Address Line 2		
Address Line 3		
City		
State (<i>drop-down</i>)		
Zip+4		
Country (<i>drop-down</i>)		

Will this modification add clause(s) to the included contracts/orders? **Yes/No**

Clauses

Buttons:

Add Clause

Add Clause Fields:

Regulation URL

Regulation or Supplement (*drop-down*)

Clause Number

Clause Title

Effective Date

Section of the Uniform Contract Format (UCF) (*drop-down*)

Buttons:

Save Clause

Cancel

Clauses Table Columns:

Regulation URL

Regulation or Supplement

Clause Number

Clause Title

Effective Date

Section of the Uniform Contract Format (UCF)

Action

- View (*Edit*)
- Delete

Admin Office

(Fields display when ("No" is selected in "Will this modification serve to implement a Novation..." AND "Yes" in the "Will this modification cause a change to the Contractor's physical address?") OR ("Yes" is selected in "Will this modification serve to implement a Novation..."))

Will this modification cause a change to the administration office? **Yes/No**

(Fields display when "Yes" is selected in the above field)

DoDAAC of losing (old) administration office (*The losing CMO Address source will be the Award or latest P-Mod/A-Mod/ARZ Mod based on the effective date. If more than one Mod was entered on the same date, default to the DFARs for prioritization.*)

DoDAAC of gaining (new) administration office

Pay Office

Will this modification cause a change to the payment office? **Yes/No**

DoDAAC of losing (old) pay office

DoDAAC of gaining (new) pay office

Workload Realignment 'Yes' Answer Route:

Will this modification implement a workload realignment? **Yes Route**

General Order

Is this workload realignment a result of a General Order? **Yes/No**

General Order Number

Effective date of General Order

CMO Disestablished

Is a CMO being disestablished? **Yes/No**

Disestablished CMO DoDAAC

CMO Established

Is a CMO being established? **Yes/No**

Newly Established CMO DoDAAC

	<p><i>Admin Office</i></p> <p>Will this modification cause a change to the administration office? Yes/No</p> <p><i>(Fields display when “Yes” is selected in the above field)</i></p> <p>DoDAAC of losing (old) administration office (<i>The losing CMO Address source will be the Award or latest P-Mod/A-Mod/ARZ Mod based on the effective date. If more than one Mod was entered on the same date, default to the DFARs for prioritization.</i>)</p> <p>DoDAAC of gaining (new) administration office</p> <p><i>Pay Office</i></p> <p>Will this modification cause a change to the payment office? Yes/No</p> <p>DoDAAC of losing (old) pay office</p> <p>DoDAAC of gaining (new) pay office</p> <p><i>Comments</i></p> <p>Text field provided to users to enter information for the ARZ Modification. This field is mandatory when all answers selected are ‘No’.</p>
<p>Associated Contracts Tab</p>	<p>The Associated Contracts tab allows the user to add/remove Contract(s)/Order(s) to/from the ARZ Modification document. This tab is optional and is available to make changes to the selected Contract(s)/Order(s) without the need to return to the previous search screen of the ARZ Modification creation process.</p> <p>Search Results display below the Search Criteria on the left. The returned search results may be added to the Selected area on the right.</p> <p>Selected Contract(s)/Order(s) for the ARZ Modification display below the Search Criteria on the right. Contract(s)/Order(s) may be removed from this list.</p> <p>The Contract(s)/Order(s) may be dragged back and forth to add and remove. Alternatively, there are arrow buttons between the two tables to aide in moving selected Contract(s)/Order(s) between the two tables.</p> <p>Search Criteria:</p> <ul style="list-style-type: none">Contract Number (<i>parameters: Starts With / Equal to / Is Null / Not Null</i>)

- Order Number (*parameters: Starts With / Equal to / Is Null / Not Null*)
- Issue Office DoDAAC
- Admin Office DoDAAC
- Pay DoDAAC
- Contractor CAGE Code
- BPA, IDC, and BOA Only (*Checkbox*)

Buttons:

- Search
- Download data as Excel
- Arrow buttons (*Move Contract(s)/Order(s) from the left or right tables*)

NOTE: At least one search criterion is required to perform a search.

Search Results:

- Search Results (*Field populates with a numerical count of the returned results*)
- Selected (*Field populates with a numerical count of the selected results*)

Buttons:

- Download Data as an Excel
- Search

NOTE: Upon document submission, the application will automatically remove any duplicate contracts added to the selected list.

Attachments Tab

Attachments are conditionally mandatory before the modifications are released; if there are no attachments on the ARZ Modification, they will be required to **Sign/Release** the document in the final step of the workflow if either of the two question scenarios outlined below are met.

Attachments are mandatory only when these question scenarios are met:

First Scenario

Will this modification implement a workload realignment? **No**

New questions appear

Will this modification serve to implement a Novation, Change-of-Name, Conversion, or Restructure Agreement, under FAR Subpart 42.12?

Yes

New questions appear

What is the date of the DACO/ACO/AGO Signature on the Agreement?

Is the Agreement attached? **Yes**

Second Scenario

Will this modification implement a workload realignment? **Yes**

New questions appear

Is this workload realignment a result of a General Order? **Yes**

Adding Attachments

To begin adding attachments click the **Choose** button. Select all necessary attachments in a PDF format. All attachments selected display below where they may be deleted or added.

After confirming all attachments are correct click the **Upload** button. After a successful upload, attachments display below on the document. Uploaded attachments may be deleted.

The **Cancel** button next to the Upload button cancels the uploading of chosen attachments.

Buttons:

- Choose
- Upload
- Cancel

Files being Uploaded section:

- File Name
- File Size (KB/MB)
- Delete

Files that have been Uploaded section:

- File Name (*Special characters are removed*)
- File Type (PDF)
- File Size (MB)
- Upload Date
- Name (*Uploader's First/Last Name*)
- Actions
 - Delete

During the initial create process this page is blank until an action is taken.

The History tab displays all actions taken on an ARZ Modification, separated by role and action.

History tab entries:

History Tab

- Role
- Action Taken
- Action Date
- Status
- First Name
- Last Name
- Email
- Title
- Commercial Telephone
- DSN Telephone
- Comments

<p>Submit to Contracting Officer for Review</p>	<p>After the information is input, the document is ready for submission. Click the Submit to Contracting Officer for Review button to continue the workflow process. The Comments field is mandatory if the user answers No to all questions on the ARZ Modification tab. Document validation runs displaying soft warnings/errors on a modal pop-up; make necessary corrections before submitting. An optional Comments box is available on the pop-up. The User's DoDAAC(s) displays along with a Contracting Officer drop-down menu. Users with multiple DoDAACs may select a different DoDAAC to submit the ARZ Modification. The Contracting Officer drop-down populates with all active Contracting Officers available for the chosen User's DoDAAC. Select a Contracting Officer from the drop-down to review the ARZ Modification. Click the Submit to Contracting Officer for Review button to continue.</p>
<p>Submit Success</p>	<p>Successfully Submitting an ARZ Modification directs the user to a Success screen with the information for the document. The document is in the 'Pending Contracting Officer Review' status and assigned to the selected MDO – Contracting Officer. An email is sent to the users associated with the document, informing them the document has been submitted by an MDO – Contract Specialist.</p> <p>Information provided on the Success screen:</p> <ul style="list-style-type: none"> • Document ID • Document Type • Status • Action Taken • Action Date • Submitted By <p><i>Buttons:</i></p> <ul style="list-style-type: none"> • Home
<p>Excel/CSV Import</p>	<p>The Excel/CSV template is available on the WBT under MDO > Getting Started in MDO > Sample Files > Master ARZ Template and is also available for download while logged into PEE as an MDO – CO or CS user during ARZ Modification Create (MDO > Create > Import > Import Items > Master ARZ Template).</p> <p>The template will download and be available to open to fill out the information on the ARZ Modification template.</p> <p><i>There is one tab within the Excel/CSV file with columns:</i></p> <ul style="list-style-type: none"> • Contract Number • Order Number • CAGE

- Pay Office

The template is used to add up to **20000 rows** of Contract(s)/Order(s) Numbers to allow an alternative ARZ Modification creation process.

After the information is input on the Excel/CSV template the user may use it to upload the information into the MDO application for ARZ Modification create.

From the **MDO - Create ARZ MOD/Modification/Order** screen click the **Import** button.

Click the **Upload** button, on the pop-up the user will browse to the location of the [Master ARZ Template](#) file in Excel (.xlsx) or CSV (.csv) formats with the information for the ARZ Modification Document that needs to be uploaded. After locating the correct file, click the **“Upload”** button.

NOTE: Upon document submission, the application will automatically remove any duplicate contracts added to the selected list.

NOTE: No spaces or special characters are allowed in the file names.

The file will upload and display Success/Warning/Error messages. The Results may be printed out for review to aide in correcting issues. Click the **Print Results** button to download a PDF with each message outlined.

Import Results List columns:

- Severity
- Column
- Row
- Message

If there are no Errors, an **Apply** button is present; click the **Apply** button to continue to the **ARZ MOD Create** screen.

Information input on the ARZ Modification Excel/CSV template is automatically input into the MDO ARZ Modification Document on the Associated Contracts tab.

Columns:

- Contract Number
- Order Number
- CAGE
- Admin DoDAAC
- Pay DoDAAC
- MOD Number
- Award Status
- PDS Status
- Attachments
- FPDS Status

Refer to the [Associated Contracts Tab](#) information section outlined above for more information.

