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1.0 INTRODUCTION

This document is the User Manual for the enhanced Departmental Contracts Information System (DCIS) for the Department of Health and Human Services (HHS). DCIS provides a system for processing HHS contract actions, interactively and through Contract Writing Systems (CWSs), and reporting them to the Federal Procurement Data System (FPDS).

DCIS operations are conducted through the following program components:

- Web Page, Information and Documentation [dcis.hhs.gov]
- DCIS Support Team
- DCIS Application and Database
- Reports and Business Intelligence

The DCIS web site contains system documentation, announcements, guidance on specific data issues, contact information, and it provides access to the DCIS application.

The DCIS Support Team may be contacted for assistance in application operations, and data issues and clarifications. The Support Team also assists with report generation, FOIA requests, Congressional inquiries, and other items as needed.

The DCIS application provides a platform for data entry, data lookup and viewing, and generation of standard reports. The application supports web services and provides direct interfaces with acquisition systems and FPDS-NG. All contract actions entered in DCIS simultaneously stored in FPDS-NG.

DCIS provides access to and generation of standard reports. COGNOS is being implemented as the tool for generation of standard reports, ad hoc reports, and data analysis. Additionally custom SQL reports can be acquired through DCIS Support.

1.1 DCIS Mission

DCIS provides procurement data collection and reporting capabilities to enable the HHS Operating Divisions (OPDIVs) to comply with requirements under Public Law 93-400 and FAR Subpart 4.6 regarding the reporting of contract actions to the Federal Procurement Data System (FPDS).

DCIS provides a single system capability within HHS that collects, edits, and stores information on the individual procurement and contracting actions executed by Operating Divisions (OPDIVs) and other offices of HHS.
1.2  System Operations and Management Contacts

1.2.1  DCIS Support Contacts

**Hours:**  8:00 AM to 5:00 PM Eastern Standard Time, Monday through Friday, excluding Federal Holidays.

**Telephone:**  (888) 905-5767

**Email:**  dcis.support@swaintechs.com

To open a support ticket, call or send an email explaining the issue to the DCIS support email.
2.0 DCIS OVERVIEW

DCIS is made up of several components that work together with multiple Contract Writing Systems (CWSs) to view, retrieve, create, edit, delete, and update contracts which feed into, and are stored in and retrieved from the Federal Procurement Data System (FPDS). The DCIS System components are explained below and are illustrated in Figure 2-1.

The DCIS system consists of the following integrated components:

1. **Contract Writing Systems**: Multiple CWSs feed data into, and receive data from the DCIS system. The CWSs contain custom interfaces and information that may not be required by DCIS and FPDS, but are vital to OPDIV operations. The majority of DCIS users perform most if not all of their contract related duties within their individual Contract Writing Systems.

2. **DCIS**: DCIS is a single system capability within HHS that collects, edits, and stores information on individual procurement and contract actions executed by the Operating Divisions (OPDIVS) and other Offices. DCIS receives data from the CWSs as well as from FPDS. It coordinates the communications between them, performs data validation, stores HHS required information, and passes required information on to FPDS.

3. **DCIS Front Page**: The DCIS Front Page is the main user portal and hub. It contains DCIS news and alerts, and information links for users. It also contains direct links to the DCIS application and the DCIS Reporting systems (reporting system in development).

4. **DCIS Application**: The DCIS Application acts as a user interface where contracts can be viewed, created, updated, and deleted without the use of a CWS. It is accessed from the DCIS Front Page.

5. **DCIS Reporting/ Business Intelligence**: DCIS contains systems that provide automatic and on demand reports to OPDIVS and individual users. For user generated reports, DCIS is currently transitioning away from the older legacy reporting system, to a new reporting and Business Intelligence system that will be based outside of the main DCIS application. The DCIS Reports will be accessed directly from the DCIS Front Page. Additionally, custom reports are generated using SQL and are available from DCIS Support.

6. **FPDS**: DHHS and all other Federal agencies are required to report any contract estimated to be worth more than $3000 to the Federal Procurement Data System. Your individual OPDIVs or DHHS will let you know what needs to be reported under that threshold. DCIS is the primary system that handles the FPDS reporting for DHHS. DCIS applies and enforces the FPDS validation and formatting rules to HHS contracts during processing and before they are can be saved in FPDS.
3.0 Accessing the DCIS Front Page

The DCIS Front Page is the hub for DCIS user functionality and information.

1. In a browser, navigate to https://dcis.hhs.gov/.

2. The DCIS Front Page is the portal to the DCIS application and DCIS Web.
4.0 Logging in to DCIS

1. In a browser, navigate to [https://dcis.hhs.gov/](https://dcis.hhs.gov/).

2. On the DCIS Front Page, click the DCIS-HHS Login link.

3. On the next page, read the messages, and then click I AGREE.
4. In the **DCIS Login** window:
   - In the **Username** field, enter your DCIS username
   - In the **Password** field, enter your DCIS password
   - Click **Login**.
4.1 Setting a new DCIS Password on First Login

If this is the first login of a new DCIS account, you will be required to set a new password. If not, please continue to 4.2 Successful Login.

In the Change User Password window:

- In the Current Password textbox, enter the same password used to login.
- In the New Password textbox, enter a new password based on the following rules:
  - Cannot be the same as the Username
  - Cannot be the same as the current password
  - Must be at least eight characters long
  - Cannot contain spaces (do not hit the spacebar)
  - Must contain at least one letter, at least one number, and at least one special character.
- In the Re-type New Password textbox, reenter the password you just created.
- In the Email (Optional) textbox, enter your email, (or leave it blank).
- Click Submit.
### 4.2 Successful Login

Once an active Username and Password have been submitted correctly, the DCIS application should open with a Welcome (Username) message displayed.

If you have any questions or issues, please contact DCIS support by clicking the dcis.support@swaintechs.com link on any DCIS page, or call 888-905-5767.
5.0 DCIS View Tab

The DCIS View tab is accessible to all DCIS users, and provides search and view functionality for DCIS contracts as well as Contractor Information.

5.1 Accessing DCIS Views

1. Log into DCIS.
2. Click the View tab.

5.2 View Contract Information

The contract information screen is used to find and view completed DCIS contracts.

1. In the View tab, click the Contract Information button.
2. In the **View Contract Information** window fill out at least one of the fields:

   **Note:** Not all fields are required for a search; filling out more fields helps narrow the search.

   - **Contract Number:** Enter all or part of the Contract Number (if known)
   - **Order Number:** Enter all or part of the Order Number (if known)
   - **Procurement Instrument Identifier (PIID):** Enter all or part of the PIID (if known)
   - **Referenced PIID:** Enter all or part of the Referenced PIID (if known)
   - **Modification Number:** Enter all or part of the Modification number (if known)
   - **Agency Code:** The agency within which the search will return results (Most users will not be able to change this field)
   - **Office Code:** Select a value from this dropdown to list contracts created by a specific office

   **Note:** **Office Code** does not narrow down results from the **Contract Number** field. If you want results from a certain office, select the office from **Office Code**, and leave the **Contract Number** field blank. You can search using **Office Code** and any other field.

Click **Search**
3. In the **Results** list, click the **Contract Number** of the contract you would like to view.

![Contract Number Table](image)

4. The **View Contract Information** screen will display with the contract that was selected.

![View Contract Information](image)

5.2.1 **Printing Contract Information**

If a paper record of the contract is needed, or you would like to view the contract information as a form, the Print functionality can be used.

1. In the **View Contract Information** window, click the **Print** button.

![Print Contract](image)
2. The **DCIS Data Collection Sheet** will display, and is formatted to print to standard 8.5 X 11 sized sheets.

![Department of Health and Human Services DCIS Data Collection Sheet](image)

| 1A | Procurement Instrument Identifier (PIID) | HHSF2232014000001C |
| 1B | Modification Number                     | 0000               |
| 1C | Referenced PID                           | 000000000000000000 |
| 1D | Transaction Number                       | 0                  |
| 1E | Solicitation Identifier                  |                    |
| 1F | Agency Identifier                        | 7524               |
| 1G | Referenced IDV Modification Number       |                    |
| 1H | Referenced IDV Agency Identifier         |                    |
| 2A | Date Signed (YYYYMMDD)                  | 201406             |
| 2B | Effective Date (YYYYMMDD)               | 201406             |
| 2C | Current Completion Date (YYYYMMDD)      | 20150214           |
| 2D | Ultimate Completion Date (YYYYMMDD)     | 20150214           |
| 2E | Indefinite Delivery Vehicle Last Date to Order (YYYYMMDD) | | |
| 2F | Fiscal Year (YYYY)                      |                    |
| 3A | Base and All Options Value $             | 172,800            |
| 3B | Base and Exercised Options Value $       | 86,400             |
| 3C | Action Obligation $                      | 86,400             |
| 3D | Non Government Dollars $                 | 0                  |
| 4A | Contracting Agency Code                 | 7524               |
| 4B | Contracting Office Code                 | 00223              |
| 4C | Program/Funding Office - Code           | 7524               |
| 4D | Program/Funding Office - Code           | 00223              |
| 4F | Contract Full/Partially Funded by Foreign Government or International Organization (Y, N) | X |
| 5A | Web Site URL                            |                    |
| 5B | Who Can Use                             |                    |
|    | Only My Agency - Only the agency awarding the contract may place orders | |
|    | All Agencies - All Federal Government agencies may place orders against the contract | |
|    | Defense - Only Department of Defense agencies may place orders against the contract | |
|    | Civilian - Only civilian agencies may place orders against the contract | |
|    | Codes - Only the agencies with the FIPS 95 codes listed in a comma-separated list | |
|    | Other - Provide a text statement of which agencies may place orders against the contract | |
| 5C | Maximum Order Limit $                   | 0                  |
| 5D | Fee for Use of Service                  |                    |
|    | FIX - Fixed                             |                    |
|    | RVA - Range - Varies by Amount          |                    |
|    | RVO - Range - Varies by Other Factor    |                    |
|    | NO - No Fee                             |                    |
| 5E | Fixed Fee Value                         | 0                  |
| 5F | Fee Range Lower Value                   | 0                  |
| 5G | Fee Range Upper Value                   | 0                  |
| 5H | Ordering Procedure                      |                    |
5.3 View Contractor information

The Contractor information screen is used to lookup contractor/ vendor information pulled from the System for Award Management (SAM) and used in DCIS and FPDS.

1. In the View tab, click the Contractor information button.

2. In the Contractor Information window fill out at least one of the fields:

   Note: Not all fields are required for a search; filling out more fields helps narrow the search.

   - **Contractor Name**: Enter all or part of the Contractor/ Vendor name (if known)
   - **DUNS Number**: Enter all or part of part of the DUNS Number (if known)
   - **Street Address**: Enter all or part of the street address of mailing address of the vendor (if known)
   - **Referenced PIID**: Enter all or part of the Referenced PIID (if known)
   - **Contractor TIN**: Enter all or part of the Contractor’s Taxpayer Information Number (if known)
   - **City Name**: Enter all or part of the name of the city from the contractor/ vendor mailing address (if known)
   - **Zip Code**: Enter all or part of the zip code from the contractor/ vendor mailing address (if known)
   - **State Code**: Select the state from the contractor/ vendor mailing address (if known)
   - **Country Code**: Select the country the vendor/ contractor is located in (if known)

   Note: The following two fields are searchable, but are not displayed to maintain privacy.

   - **Owner’s Name**: Enter part or all of the company owner’s name (if known)
   - **Owner Phone**: Enter the first three digits (area code) or the entire 10 digit phone number of the company (if known)
Click **Search**

![Contractor Information Form](image)

A list of contractors/ vendors will be displayed based on the information entered in the search fields.

![Contractor Information Table](image)
6.0 DCIS CAR Tab

The DCIS CAR (Individual Contract Action Report) tab contains the tools needed to edit, create, validate, and save HHS contracts. Only users with the correct permissions can access this tab.

Note: If you feel you need access to this tab but do not, contact your supervisor or your OPDIV helpdesk. They will need to submit a request to dcis.support@swaintechs.com to have your permissions upgraded.

6.1 Accessing DCIS Contracts

1. Log into DCIS. The CAR tab is displayed by default.
   Or:

2. If you are already in DCIS, click the CAR tab.

6.2 Creating a New Contract

The New Contract Information window is used to create new Awards, IDVS, Orders, and Modifications.

1. In the CAR tab, click the New button.
2. In the **New Contract Information** window, select the type of action to be created from the IDV/AWARD Type dropdown menu.

<table>
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<th>IDV/Award Type</th>
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<tr>
<td>AWARD - BPA Call BPA Call</td>
</tr>
<tr>
<td>AWARD - DCA Definitive Contract Action</td>
</tr>
<tr>
<td>AWARD - DO Delivery Order</td>
</tr>
<tr>
<td>AWARD - PO &lt;= $25K Purchase Order Less Than Or Equal To $25,000</td>
</tr>
<tr>
<td>AWARD - PO &gt; $25K Purchase Order Greater Than $25,000</td>
</tr>
<tr>
<td>IDV - BOA Basic Ordering Agreement</td>
</tr>
<tr>
<td>IDV - BPA Blanket Purchase Agreement</td>
</tr>
<tr>
<td>IDV - BPA under FSS Blanket Purchase Agreement Under Federal Supply Schedule</td>
</tr>
<tr>
<td>IDV - GWAC Government-Wide Agency Contract</td>
</tr>
<tr>
<td>IDV - IDC Indefinite Delivery Contract</td>
</tr>
<tr>
<td>OT - AGREEMENT Other Transaction Agreement</td>
</tr>
<tr>
<td>OT - IDV Other Transaction IDV</td>
</tr>
<tr>
<td>OT - ORDER Other Transaction Order</td>
</tr>
<tr>
<td>Modification Modification</td>
</tr>
</tbody>
</table>

**Note:** If you are not sure what type of action you need to create, consult with your Contract Officer or Supervisor, or contact your OPDIV support desk.

**Award Types**

- **AWARD – BPA Call:** A call against an existing blanket purchase agreement to request a service or product provided under the established agreement.

- **AWARD – DCA Definitive Contract Action:** A mutually binding legal relationship obligating the seller to furnish the supplies or services (including construction) and the buyer to pay for them. It includes all types of commitments that obligate the Government to an expenditure of appropriated funds and that, except as otherwise authorized, are in writing.

- **AWARD – DO Delivery Order:** An order for supplies against an established contract.

- **AWARD – PO <= $25K Purchase Order Less Than Or Equal to $25,000:** An offer by the Government established to buy supplies or services, including construction and research and development, upon specified terms and conditions, using simplified acquisition procedures. Use this option for all Purchase Orders that are valued at $25,000 or less.

- **AWARD – PO > $25K Purchase Order Greater Than $25,000:** Same as above, but reserved for Purchase Orders valued at more than $25,000.
IDV Types

- **IDV – BOA Basic Ordering Agreement**: A written instrument of understanding, negotiated between an agency, contracting activity, or contracting office and a contractor, that contains (1) terms and clauses applying to future contracts (orders) between the parties during its term, (2) a description, as specific as practicable, of supplies or services to be provided, and (3) methods for pricing, issuing, and delivering future orders under the basic ordering agreement. A basic ordering agreement is not a contract.

- **IDV – BPA Blanket Purchase Agreement**: A simplified method of filling anticipated repetitive needs for services and products. BPAs are "charge accounts" that ordering offices establish with contractors to provide themselves with an easy ordering tool.

- **IDV-BPA under FSS Blanket Purchase Agreement Under Federal Supply Schedule**: A Blanket Purchase Agreement under Federal Supply Schedule is a BPA created against an existing Federal Supply Schedule Contract. "Ordering activities shall establish the BPA with the schedule contractor(s) that can provide the supply or service that represents the best value."

- **IDV – GWAC Government-Wide Agency Contract**: A task-order or delivery-order contract for information technology established by one agency for Government wide use that is operated (1) by an executive agent designated by the Office of Management and Budget pursuant to section 5112(e) of the Clinger-Cohen Act, 40 U.S.C. 1412(e); or (2) under a delegation of procurement authority issued by the General Services Administration (GSA) prior to August 7, 1996, under authority granted GSA by the Brooks Act, 40 U.S.C. 759 (repealed by Pub. L. 104-106). A GWAC is a pre-competitive, multiple-award, indefinite delivery, indefinite quantity (IDIQ) contract that agencies can use to buy total IT solutions.

- **IDV-IDC Indefinite Delivery Contract**: A vehicle that has been awarded to one or more vendors to facilitate the delivery of supply and service orders.

Other Transactions Types

- **OT- Agreement – Other Transaction Agreement**: A contract action made outside of the usual Federal procurement regulations. Can only be created by specially authorized users.

- **OT-IDV Other Transaction IDV**: A task order or delivery order based contract action made outside of the usual Federal procurement regulations. Can only be created by specially authorized users.

- **OT-Order Other Transaction Order**: Orders placed against internal or external OT-IDVs. Can only be created by specially authorized users.

 Modifications

- **Modification**: Created to document changes in contract terms and conditions to existing contract actions.
6.2.1 Creating an Award – BPA Call

BPA Calls are issued against an existing BPA IDV.

1. In the CAR tab, click New.

2. From the IDV/Award Type dropdown choose AWARD – BPA Call BPA Call.

3. The Contract Number field and the Procurement Instrument Identifier (PIID) field are used to search for the HHS IDV the BPA Call will be issued against. Fill out all or part of either field, and then click Search.

Note: If you are creating a BPA against a Non HHS FSS or GSA contract, enter the entire Contract Number, and then click Create BPA under FSS/BPA Call/GSA. Skip to step 5.

4. In the Results table, search for the IDV the BPA will be issued against, and click the link in the Contract Number field.
5. In the **New Contract Information** window:

   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field will be pre-selected for most users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - In the **Order Number** field, enter the order number
   - In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
   - In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the IDV. (This field is pre-populated if you used the **Search** button in step 2.

6. Click the **Create** Button.

![New Contract Information Window](image)

7. See section **6.3** for information on completing contracts.

### 6.2.2 Creating an Award – DCA Definitive Contract Action

A Definitive Contract is a mutually binding legal relationship obligating the seller to furnish the supplies or services (including construction) and the buyer to pay for them. It includes all types of commitments that obligate the Government to an expenditure of appropriated funds and that, except as otherwise authorized, are in writing.

1. In the **CAR** tab, click **New**.

![CAR Tab](image)
2. From the **IDV/Award Type** dropdown choose **AWARD – DCA Definitive Contract Action** and then click **Next**.

![New Contract Information](image)

3. In the **New Contract Information** window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
   - In the **Contract Number** field
     - Select the year the contract was awarded
     - Enter the contract number
   - (Optional) In the **Order Number** field, enter the order number if required
   - (Optional) In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank

4. Click the **Create** Button.

![New Contract Information](image)

5. See section **6.3** for information on completing contracts.
6.2.3 Creating an Award – DO Delivery Order

A Delivery Order is an order for supplies against an established contract.

1. In the CAR tab, click New.

2. In the New Contract Information window:
   - From the IDV/Award Type dropdown choose AWARD – DO Delivery Order
   - The Contract Number field and the Procurement Instrument Identifier (PIID) field are used to search for the contract the Delivery Order will be issued against. Fill out all or part of either field, and then click Search

   ![New Contract Information](image)

3. In the Results table, search for the contract the DO will be issued against, and click the link in the Contract Number field.

   ![Results Table](image)
4. In the **New Contract Information** window:

- From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field will be pre-selected for most users)
- From the **Office** dropdown, select your office number or the number of the office issuing the contract
- In the **Order Number** field, enter the order number
- In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
- In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the Contract. (This field is usually pre populated)

5. Click the **Create** Button.

6. See section **6.3** for information on completing contracts.
6.2.4 Creating an Award – Purchase Order

A Purchase Order is an offer by the Government established to buy supplies or services, including construction and research and development, upon specified terms and conditions, using simplified acquisition procedures.

1. In the CAR tab, click New.

2. From the IDV/Award Type dropdown:
   - Choose AWARD – PO <= $25K Purchase Order Less Than or Equal to $25,000 if the purchase order being created is for $25,000 or less
   - Choose AWARD – PO > $25K Purchase Order Greater Than $25,000 if the purchase order being created for more than $25,000

3. Click Next.
4. In the New Contract Information window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
   - In the **Contract Number** field
     - Select the year the contract was awarded
     - Enter the contract number

5. Click the **Create** Button.

![New Contract Information](image)

6. See section 6.3 for information on completing contracts.

### 6.2.5 Creating an IDV – Basic Ordering Agreement

A Basic Ordering Agreement is a written instrument of understanding, negotiated between an agency, contracting activity, or contracting office and a contractor, that contains (1) terms and clauses applying to future contracts (orders) between the parties during its term, (2) a description, as specific as practicable, of supplies or services to be provided, and (3) methods for pricing, issuing, and delivering future orders under the basic ordering agreement. A basic ordering agreement is not a contract.
1. In the CAR tab, click **New**.

2. From the **IDV/Award Type** dropdown choose **IDV – BOA Basic Ordering Agreement** and then click **Next**.

3. In the **New Contract Information** window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
   - In the **Contract Number** field
     - Select the year the contract was awarded
     - Enter the contract number

4. Click the **Create** Button.

5. See section **6.3** for information on completing contracts.
6.2.6 Creating an IDV – Blanket Purchase Agreement

A Blanket Purchase Agreement is a simplified method of filling anticipated repetitive needs for services and products. BPAs are "charge accounts" that ordering offices establish with contractors to provide themselves with an easy ordering tool.

1. In the CAR tab, click New.

2. From the IDV/Award Type dropdown choose IDV – BOA Blanket Purchase Agreement and then click Next.

3. In the New Contract Information window:
   - From the Agency dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
   - From the Office dropdown, select your office number or the number of the office issuing the contract
   - From the Type dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
   - In the Contract Number field
     - Select the year the contract was awarded
     - Enter the contract number

4. Click the Create Button.

5. See section 6.3 for information on completing contracts.
6.2.7 Creating an IDV – Blanket Purchase Agreement Under Federal Supply Schedule (BPA FSS)

A Blanket Purchase Agreement under Federal Supply Schedule is a BPA created against an existing Federal Supply Schedule Contract. “Ordering activities shall establish the BPA with the schedule contractor(s) that can provide the supply or service that represents the best value.”

1. In the CAR tab, click New.

2. From the IDV/Award Type dropdown choose IDV-BPA under FSS Blanket Purchase Agreement under Federal Supply Schedule.

3. The Contract Number field and the Procurement Instrument Identifier (PIID) field are used to search for the HHS FSS contract the BPA FSS will be based on. Fill out all or part of either field, and then click Search.

Note: If you are creating a BPA FSS against a Non HHS FSS or GSA contract, enter the entire Contract Number, and then click Create BPA under FSS/BPA Call/GSA. Skip to step 5.

4. In the Results table, search for the FSS contract the BPA FSS will be issued against, and click the link in the Contract Number field.
5. In the **New Contract Information** window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field will be pre-selected for most users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
   - In the **Contract Number** field
     - Select the year the contract was awarded
     - Enter the contract number
   - In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
   - In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the FSS contract. (This field is pre populated if you used the **Search** button in step 2.

6. Click the **Create** Button.

7. See section **6.3** for information on completing contracts.
6.2.8 Creating an IDV – GWAC Government Wide Agency Contract

A GWAC is a task-order or delivery-order contract for information technology established by one agency for Government wide use that is operated (1) by an executive agent designated by the Office of Management and Budget pursuant to section 5112(e) of the Clinger-Cohen Act, 40 U.S.C. 1412(e); or (2) under a delegation of procurement authority issued by the General Services Administration (GSA) prior to August 7, 1996, under authority granted GSA by the Brooks Act, 40 U.S.C. 759 (repealed by Pub. L. 104-106). A GWAC is a pre-competed, multiple-award, indefinite delivery, indefinite quantity (IDIQ) contract that agencies can use to buy total IT solutions.

1. In the CAR tab, click New.

2. From the IDV/Award Type dropdown choose IDV-GWAC Government-Wide Agency Contract and then click Next.
3. In the **New Contract Information** window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
   - In the **Contract Number** field
     - Select the year the contract was awarded
     - Enter the contract number
   - (Optional) In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank

4. Click the **Create** Button.

5. See section 6.3 for information on completing contracts.
6.2.9 Creating an IDV – IDC Indefinite Delivery Contract

An Indefinite Delivery contract is a vehicle that has been awarded to one or more vendors to facilitate the delivery of supply and service orders.

1. In the CAR tab, click **New**.

2. From the **IDV/Award Type** dropdown choose **IDV-IDC Indefinite Delivery Contract** and then click **Next**.

3. In the **New Contract Information** window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field will be pre-selected for most users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - From the **Type** dropdown, select the type of contract you are creating. (If you are not sure what to select, please consult with your supervisor, or your OPDIV Helpdesk)
   - In the **Contract Number** field:
     - Select the year the contract was awarded
     - Enter the contract number

4. Click the **Create** Button.

5. See section 6.3 for information on completing contracts.
6.2.10 Creating an OT Agreement – Other Transaction Agreement

An Other Transaction Agreement (OTA) is a contract action made outside of the usual Federal procurement regulations. OTAs can only be created by specially authorized users.

1. In the CAR tab, click New.

![CAR tab with New option highlighted]

2. From the IDV/Award Type dropdown choose OT – AGREEMENT Other Transaction Agreement and then click Next.

![New Contract Information window with OT option selected]

3. In the New Contract Information window:
   - From the Agency dropdown, select your agency name or the name of the agency issuing the contract (This field may be pre-selected for some users)
   - From the Office dropdown, select your office number or the number of the office issuing the contract
   - From the Type dropdown, select the type of contract you are creating. (For OTAs, choose the type of contract that comes closest to the OTA being issued. For IDVs see next section.)
   - In the Contract Number field:
     - Select the year the contract was awarded
     - Enter the contract number

4. Click the Create Button.

![New Contract Information window with fields populated]

5. See section 6.3 for information on completing contracts.
6.2.11 Creating an OT IDV – Other Transaction IDV

An Other Transaction IDV (OT-IDV) is a task order or delivery order based contract action made outside of the usual Federal procurement regulations. OT-IDVs can only be created by specially authorized users.

1. In the CAR tab, click **New**.

2. From the **IDV/Award Type** dropdown choose **OT – IDV Other Transaction IDV** and then click **Next**.

3. In the **New Contract Information** window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (This field may be pre-selected for some users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - From the **Type** dropdown, select the type of contract you are creating. (For OT-IDVs, choose the type of contract that comes closest to the IDV being issued. For contracts see the previous section.)
   - In the **Contract Number** field:
     - Select the year the contract was awarded
     - Enter the contract number

4. Click the **Create** Button.

5. See section 6.3 for information on completing contracts.
6.2.12 Creating an OT-Order Other Transaction Order

An Other Transaction Order (OTO) is an order placed against internal or external OT-IDVs. OTOs can only be created by specially authorized users.

1. In the CAR tab, click New.

![CAR tab](image)

2. From the IDV/Award Type dropdown choose OT-Order Other Transaction Order and then click Next.

![New Contract Information](image)

3. The Contract Number field and the Procurement Instrument Identifier (PIID) field are used to search for the HHS OT-IDV or contract the order will be based on. Fill out all or part of either field, and then click Search.

![Search and Create OTA Order](image)

**Note:** If you are creating a OTA Order against a Non HHS OT-IDV or GSA contract, enter the entire Contract Number, and then click Create OTA Order. Skip to step 5.

4. In the Results table, search for the OT-IDV or contract the OTA Order will be issued against, and click the link in the Contract Number field.

![Results table](image)
5. In the **New Contract Information** window:
   - From the **Agency** dropdown, select your agency name or the name of the agency issuing the contract (this field may be pre-selected for some users)
   - From the **Office** dropdown, select your office number or the number of the office issuing the contract
   - In the **Order Number** field, enter the order number
   - In the **Mod Number** field, enter the modification number if there is one. If not, leave it blank
   - In the **Referenced Agency ID** field, enter the 4 digit ID of the agency that issued the Contract. (This field is usually pre populated)

6. Click the **Create** Button.

7. See section **6.3** for information on completing contracts.
6.2.13 Creating a Modification

Modifications are changes to contracts that are created to document changes in contract terms and conditions to existing contract actions.

1. In the CAR tab, click New.

2. From the IDV/Award Type dropdown choose Modification.

The New Modification Search window will open.

3. In the New Modification Search window fill out at least one of the fields:

   Note: Not all fields are required for a search; filling out more fields helps narrow the search.

   - Contract Number: Enter all or part of the Contract Number (if known)
   - Order Number: Enter all or part of the Order Number (if known)
   - Procurement Instrument Identifier (PIID): Enter all or part of the PIID (if known)
   - Referenced PIID: Enter all or part of the Referenced PIID (if known)

   Click Search
4. In the **Results** list, select the radio button next to the contract you want to modify, and then click **Create**.

![Image of Results list with contract selection]

5. In the **Create New Modification** window, add a 4 digit **Modification Number**, and then click **Continue to Create**.

**Note:** Modification Numbers should be 4 digits. Use leading zeroes for any non 4 digit numbers. (Ex. 0001, 0016, 0035 and etc.)

![Image of Create New Modification window]

6. The information from the base contract will populate many of the fields in the **Modification**. See section 6.3 for information on completing contracts.
6.3 Completing Contracts

1. Once a base contract type (or modification) is selected, the New Contract Information/Modification window will open. The Contract Information screen is used to update, validate, save, print and delete DCIS contract actions. All contract data entry, verification and correction occurs on this screen.

![New Contract Information Screen]

2. In each appropriate field, enter the information for the contract that is being recorded.
   - Be careful to transcribe the information exactly.

3. Certain DCIS fields are greyed out. These fields are either not used for the type of contract that is being created, has information that is entered by the system or brought in from FPDS, or information that is inherited from the base contract or IDV.

   - All field 13 (13F-13SS) information is inherited from FPDS, and cannot be changed in DCIS.
   - If the information in a Greyed-Out field is incorrect, the Base document (contract or IDV) will have to be modified for the information to appear correctly in the Modification or Order you are working on.

4. Other fields may contain information that is inherited from the Base document that can be edited as needed.
5. As you fill out fields, you can click the Verify button to run checks on what was entered, and to let you know exactly which fields are required to be filled out for the contract you are creating or modifying.

6.3.1 Working through Validations

Validations are checks that are run against FPDS and HHS rules for contract creation. Validations are in place to make sure all required fields are filled out, and that what is entered in the fields meets Federal requirements. Contracts cannot be finalized in DCIS until all validation errors are corrected.

1. Validation checks are run when the Verify, Save, Save Unfinished Record or the FPDS-NG buttons are clicked. Certain validations also occur automatically while the contract fields are being updated. There are two types of validation messages that users will encounter:

- Pop-up validations will appear during validation checks and when certain fields are filled out incorrectly. They contain instructions about fields that must be filled out, or formatting errors within fields.

- Error Message table validations appear if there are errors after the Verify, Save, Save Unfinished Record or the FPDS-NG buttons are clicked. The blue links are errors within the contract. Red text in the Error Message column generally point to errors that have to be corrected outside of the contract.

<table>
<thead>
<tr>
<th>Item</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>9A</td>
<td>The value &quot;194231777&quot; for Data Element &quot;DUNS Number&quot; is invalid.</td>
</tr>
<tr>
<td>7D</td>
<td>Mandatory element: &quot;DavisBaconAct&quot; is missing for the Award.</td>
</tr>
<tr>
<td>10M</td>
<td>Mandatory element: &quot;solicitationProcedures&quot; is missing for the Award.</td>
</tr>
<tr>
<td>7B</td>
<td>Mandatory element: &quot;WalshHealyAct&quot; is missing for the Award.</td>
</tr>
<tr>
<td>8L</td>
<td>Mandatory element: &quot;recoveredMaterialClauses&quot; is missing for the Award.</td>
</tr>
</tbody>
</table>

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2. In the Error Message Table, clicking a blue link will focus the browser on the field that needs to be filled out or corrected (unless the field is not updateable in the contract).

3. Once the field is corrected, and one of the Verify, Save, Save Unfinished Record or the FPDS-NG buttons is clicked; the contract fields will be revalidated, and if it is acceptable, the validation error will no longer display.

4. The contact can be rechecked by clicking the Verify button. Once all errors are corrected, the “This action passes the validations.” message will appear. The contract can now be saved.

Note: If you do not know how to correct a validation, please consult a Contract Officer, your supervisor, your OPDIV helpdesk, or contact DCIS Support at dcis.support@swaintechs.com.
6.3.2 Saving Contract Actions

There are two ways to save a DCIS contract; Save /Update Unfinished and Save/Update. Both must pass a set of validations before the contract action can be saved in the DCIS system.

6.3.2.1 Save Unfinished/ Update Unfinished Record (Draft)

1. Clicking the Save Unfinished Record button will save a contract in unfinished status in DCIS, and Draft status in FPDS.

2. Clicking the Update Unfinished Record will save changes to an existing unfinished contract, without finalizing it in DCIS and FPDS.

   - Unfinished Contracts must pass a very basic set of validations, so if you are not sure about certain fields, saving an unfinished contract will allow you to preserve work without having to fix all of the validations that are required for a “fully” saved contract.

   - Saving Unfinished will also allow contracts to be partially created, and then completed later.

   - Only New contracts and unfinished contracts can be saved or updated as an unfinished contract.

3. To reopen a contract that was saved in unfinished form, see section 6.5 Accessing an Unfinished (Draft) Contract Action.
6.3.2.2  Save /Update Contract (Final)

1. Clicking the Save button will convert an unfinished record to “Final” status in DCIS and FPDS.

   ![New Contract Information](image)

   1. Clicking the Save button will convert an unfinished record to “Final” status in DCIS and FPDS.
   2. The Update button will save changes to a previously saved contract.

   ![Edit Contract Information](image)

   • Saving a contract in “Final” status triggers the complete set of validation checks.
     o All validation errors must be fixed before the contract can be finalized.
   • A contract can be saved in “Final” status from creation, as long as all validation errors are addressed.
   • A contract action does not move out of Draft status in FPDS until it has been Saved.

2. To reopen a contract that was saved in “final” form, see section 6.4 Accessing a Complete (Final) Contract Action.

6.3.3  Deleting Contract Actions

The Delete button can be used to delete a contract action from DCIS and FPDS.

1. In the Contract Information window of the contract you want to remove, click the Delete button.

   ![Contract Information](image)

   Note: There is no verification step once Delete is clicked. Be sure you want to completely remove the contract action from DCIS and FPDS before you click Delete.

2. The Delete Contract Action confirmation will appear. Click Close.
6.3.4 Printing Contract Information

If a paper record of the contract is needed, or you would like to view the contract information as a form, the Print functionality can be used.

1. In the Contract Information window, click the Print button.

2. The DCIS Data Collection Sheet will display, and is formatted to print to standard 8.5 X 11 sized sheets.

Note: Contracts are displayed as-is when the Print button is clicked. No validations are run when printing a contract.
6.3.5 Viewing FPDS-NG Information

The contact information can be viewed in FPDS by clicking the FPDS-NG button.

1. In the Contract Information window, click the FPDS-NG button.
   
   **Note:** All validations must be passed before the FPDS window will display. Clicking FPDS-NG checks and synchronizes DCIS and FPDS data for the contract.

![Contract Information Window](image1)

2. In the FPDS-NG Launch Page, check the FPDS information, and then click Close FPDS-NG.

![FPDS-NG Launch Page](image2)
### 6.3.6 Closing a Contract

Closing a contract releases it from being locked from being accessed by other users. It does not save the contract, and if the contract has not been saved, the information will be lost.

1. In the Contract Information window, click Close.

2. In the pop-up window, click OK.

**Note:** Using the Close button prevents contracts from being locked. If you lock yourself out of a contract, it will automatically unlock within 45 minutes. You can also contact DCIS support at dcis.support@swaintechs.com to have the contract unlocked faster.

### 6.4 Accessing a Complete (Final) contract action

Once a contract is saved and closed, it can be accessed by using the Change button in the CAR Tab.

1. In the CAR tab, click the Change button.
2. In the **Edit Contract Information** window fill out at least one of the fields:

**Note:** Not all fields are required for a search; filling out more fields helps narrow the search.

- **Contract Number**: Enter all or part of the Contract Number (if known)
- **Order Number**: Enter all or part of the Order Number (if known)
- **Procurement Instrument Identifier (PIID)**: Enter all or part of the PIID (if known)
- **Referenced PIID**: Enter all or part of the Referenced PIID (if known)
- **Modification Number**: Enter all or part of the Modification number (if known)
- **Agency Code**: The agency within which the search will return results (Most users will not be able to change this field)
- **Office Code**: Select a value from this dropdown to list contracts created by a specific office

**Note:** **Office Code** does not narrow down results from the **Contract Number** field. If you want results from a certain office, select the office from **Office Code**, and leave the **Contract Number** field blank.

- **Signed Date**: Enter the range of dates the contract you are searching for was signed within (if known)

Click **Search**
3. In the **Results** list, click the **Contract Number** of the contract you would like to view.

4. The **Edit Contract Information** screen will display with the contract that was selected.
6.5 Accessing an Unfinished (Draft) Contract action

Unfinished contracts can be accessed by using the Unfinished button in the CAR tab.

1. In the CAR tab, click the Change button.

2. In the Unfinished Contract Information window fill out at least one of the fields:

   Note: Not all fields are required for a search; filling out more fields helps narrow the search.

   - **Contract Number**: Enter all or part of the Contract Number (if known)
   - **Order Number**: Enter all or part of the Order Number (if known)
   - **Procurement Instrument Identifier (PIID)**: Enter all or part of the PIID (if known)
   - **Referenced PIID**: Enter all or part of the Referenced PIID (if known)
   - **Modification Number**: Enter all or part of the Modification number (if known)
   - **Agency Code**: The agency within which the search will return results (Most users will not be able to change this field)
   - **Office Code**: Select a value from this dropdown to list contracts created by a specific office

   Note: **Office Code** does not narrow down results from the **Contract Number** field. If you want results from a certain office, select the office from **Office Code**, and leave the **Contract Number** field blank.

Click Search
3. In the **Results** list, click the **Contract Number** of the contract you would like to view.

![Contract Number Table]

4. The **Unfinished Contract Information** screen will display with the contract that was selected.

![Unfinished Contract Information Screen]
7.0 DCIS User Profile Tab

The DCIS User Profile tab is accessible to all DCIS users, and is used to update the user profile, and change the user’s DCIS password.

7.1 Accessing DCIS User Profiles

1. Log into DCIS.
2. Click the User Profile tab.

7.2 Change Password

The Change Password screen allows DCIS users to change their password as desired.

1. In the User Profile tab, click the Change Password button.
2. In the **Change User Password** window:
   - In the **Current Password** textbox, enter your current DCIS password.
   - In the **New Password** textbox, enter a new password based on the following rules:
     - Cannot be the same as the Username
     - Cannot be the same as the current password
     - Must be at least eight characters long
     - Cannot contain spaces (do not hit the spacebar)
     - Must contain at least one letter, at least one number, and at least one special character
   - In the **Re-type New Password** textbox, reenter the password you just created.
   - Click **Submit**.

![Change User Password](image)

**GUIDELINE:**
- Password must not be the same as username.
- New password must not be the same as the old password.
- Password must contain at least 8 characters.
- Password must not contain space.
- Password must contain at least one alphabetic character, one numeric character and one special character.
7.3 Change Profile

The Change Profile screen allows users to update their DCIS user profile email and phone number.

1. In the User Profile tab, click the Change Profile button.

2. In the User Profile window, check the Email and Phone Number fields, and update as needed.
   - If you make any changes, click Submit.

8.0 DCIS Reporting/Business Intelligence

A new reporting system is being developed for DCIS, and will link directly from the DCIS Front Page. The current DCIS Report tab will be removed.

If you need DCIS reports, or have any other issues with DCIS, please contact DCIS Support at dcis.support@swaintechs.com or phone (888) 905-5767.