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NASA Shared Services Center Process Work Instruction

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Simplified Acquisition Threshold - FOR NSSC INTERNAL USE ONLY -


Responsible Office: Procurement

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1.0 Purpose

The purpose of this Work Instruction (WI) is to give guidance to Simplified Acquisition Threshold (SAT) Team who will process use the Simplified Acquisition request received at the NASA Shared Services Center (NSSC).

2.0 Authority

This activity is performed within the Procurement Department under the Simplified Acquisition Branch and the Procurement Service Office.

3.0 Applicable Documents and References

FAR (Federal Acquisition Regulations), the NASA FAR Supplements, the NASA Procurement Notices (PNs), the NASA Procurement Information Circulars (PICs), and the NASA Procurement Class Deviations (PCDs) will assist in determining if the procurement should be SAT (Simplified Acquisition Threshold), business and industry size standards and classifications with special terms and conditions, and if the NSSC should process the award.

The following are applicable documents and references:

- FAR (Federal Acquisition Regulations), 48 Code of Federal Regulations (C.F.R.), Chapter 1
 - FAR Part 5 – Publicizing Contract Actions
 - FAR Part 8 – Required Sources of Supplies and Services
 - FAR Part 12 – Acquisition of Commercial Items
 - FAR Part 13 – Simplified Acquisition Procedures
 - FAR Part 16 – Types of Contracts
 - FAR Part 19 – Small Business Programs
 - FAR Part 25.103 - Buy American Act-Supplies: Non-Availability Determination
 - FAR Part 52.212-5 - Contract Terms and Conditions Required To Implement Statutes or Executive Orders — Commercial Items (May 2015)
- NASA FAR Supplement, 48 Code of Federal Regulations (C.F.R.), Chapter 18
 - 1804.7103 - Numbering scheme for awards
 - 1819.202 - Specific policies. Use of the NF (NASA Form) 1787 for Small Business Concerns.
- NASA Procurement Notice (PN)
 - PN 15-01, dated October 5, 2015 REVISION OF 1819.202 SPECIFIC POLICIES REGARDING THE REQUIREMENT FOR THE NASA FORM (NF) 1787, SMALL BUSINESS COORDINATION, *PURPOSE:* To revise NASA FAR Supplement (NFS)

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1819.202, *Specific policies*, regarding the requirement for the NASA Form (NF) 1787, *Small Business Coordination*.

- PN 15-10, dated December 4, 2015 NFS 1812.470—Unacceptable Commercial Items Terms and Conditions

- Trade Act Agreement (TAA) – 19 U.S.C. 2501
- Buy America Act, 41 U.S.C. Chapter 83
- NASA Procedural Requirements (NPR) 1441.1E – NASA Records Management Program Requirements
- NASA Policy Directive (NPD) 1000.5B – Policy for NASA Acquisition
- NSSC Simplified Acquisition Threshold Customer Guide

4.0 Process

4.1 Basics of Simplified Acquisitions

Simplified Acquisition is a term used by federal procurement personnel to describe the policies and procedures used to acquire commodities and services, including research and development, and commercial items. The individual acquisition value for most of these actions does not exceed the threshold of \$250,000 (higher thresholds exist for certain types of SAT purchases). For the purposes of this Simplified Acquisition Threshold Work Instructions only actions valued above the micro-purchase threshold of \$10,000 and at or below \$250,000 are included and, hereinafter, are referred to as SAT purchases.

Procedures and processes can vary by contract value:

- Acquisitions below \$10,000 are considered “micro-purchases”. Micro-purchases can be purchased without soliciting competitive quotations, as long as the price is reasonable. Micro-purchases are made with government commercial purchase cards by the technical community. The Center must follow their center’s Government Commercial Purchase Card procedures. Some Centers have their own unique procedures requiring that some micro-purchases for identified products be purchased using a purchase order instead of the government commercial purchase card;
- Acquisitions between \$10,000 and \$25,000 require either an oral or written quotations and usually require agency buyers to obtain quotations from at least three sources to make sure the price is reasonable; and
- Acquisitions between \$25,000 and \$250,000 generally require the publication of a synopsis on the Federal Business Opportunities (FedBizOpps) web site with some exceptions of an order against a contract that was previously synopsized, unusual and compelling urgency, etc.

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Response and repetitive purchase procedures:

- Agencies typically issue a purchase order in response to a vendor's oral or written quotation that is the lowest technical accepted quote received. The purchase order contains everything the buyer and vendor must know to complete the transaction, including pricing, delivery, and applicable terms and conditions. The purchase order is not a binding contract unless the seller accepts the order or performs the required work;
- Blanket Purchase Agreements further streamline the simplified acquisition process. A federal contracting office typically issues these agreements when an agency wants to make repetitive purchases from a seller over a set period of time. BPAs cut down on paperwork for contracts and allow for speedy processing.

4.2 Process Initiation

Once determined to be within the scope of a NSSC SAT, a requisition package shall be sent to the NSSC via SAP. A complete requisition package must be received before work commences on the SAT acquisition request. To be considered a complete package customers shall use the NSSC SAT Request Checklist located in Appendix B to determine the applicable documents to be included in the requisition package.

In addition to a complete package, the customer shall submit new SAT acquisition requests to the NSSC by either; 1) Accessing the NSSC Simplified Acquisition Customer Portal (SACP) via ServiceNow (see section 4.0 Simplified Acquisition Customer Portal (SACP) of the SAT Customer Guide) or 2) Completing the Simplified Acquisition Request Template (SART) in SAP with the PR package submittal (see section 5.0 Simplified Acquisition Request Template (SART) of the SAT Customer Guide).

4.3 How to process a SAT Acquisition Request to Award

The NSSC SAT team will receive simplified acquisition request from the centers in two ways:

- 1) A New Simplified Acquisition Request submitted using the Simplified Acquisition Customer Portal (SACP);
- 2) A Simplified Acquisition Request Template (SART) attached to the PR in SAP.

When a PR is released with a SART and no SATPC ticket is available, then use the information on the SART to go through the SACP to create a ticket. The PR release process will be addressed below in the Release a PR and Create a Milestone Plan.

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When a request is submitted through the SACP it will create a SAT Procurement Ticket (SATPC). The ticket will be unassigned in the Assigned Group is 'PR – SAT REVIEW – L2'. The Service Provider SAT Lead/Back up Lead/or other designated team member will review unassigned ticket(s) and assign to appropriate SAT team member for Stage 1 – Purchase Requisition(s) Released and Stage 2 – Procurement Review.

Below are some highlights of the Simplified Acquisition Service Catalog back end form.

Understanding Task State

Throughout the process SAT team members will change the State of the current task(s) assigned or unassigned for SATPC. The following chart lists the possible **State** of a task. Do not mark any task Closed Incomplete or Closed Cancelled unless the order is cancelled. This action will completely shut down the workflow without a way to undo the action.

Closed Incomplete	Order is Cancelled. If this state is selected it will completely end the workflow for a SATPC. Should never be used, unless an order has been cancelled.
Closed Complete	Task is Complete
Closed Skipped	N/A this choice should not be used
Pending	Task is placed in pending. A change order has been received.
Work in Progress	The task is in work in progress and cannot be placed in pending.
Open	Default. Task is active

Figure 1 *State of Task List*

Task Table

The State of a task should change at the task level on the task table, not the Stage level, unless the customer requests a change order to a current in process SAT acquisition. When that occurs select "Changed due to modification request" from the stage level, while the change is assessed. Warning: Using the Task table will not provide warnings when the status is accidentally changed to 'Closed Incomplete', or 'Closed Canceled'.

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Tasks for SAT Procurement C...									
Item for SAT Procurement Co...									
Related Assistance Requests									
Related Modification Requests									
Tasks for SAT Procurement Contract									
Go to Number Search									
Catalog Tasks									
Number Request item Requested for Priority State Short description Name Assignment Group Assigned to									
<input type="checkbox"/>	TASK0125554	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Open	Procurement Review	NSSC SAT Acquisition Request	PR - SAT REVIEW - L2	
<input type="checkbox"/>	TASK0125553	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Open	Purchase Requisition(s) Released	NSSC SAT Acquisition Request	PR - SAT REVIEW - L2	TestUser SAT REVIEW - L2
Actions on selected rows...									

Figure 2 *ServiceNow Task Table*

Acquisition Stages

This tab allows an overview of each Stage.

Acquisition Request	Acquisition Stages	Pre Award	Procurement Award	Other	Deliverable & Invoices	Processing Notes
<div> <div> <h3>Stage 1</h3> <div> Purchase Requisition(s) Released: <input type="text" value="Is Active"/> </div> <div> PR Worked By: <input type="text" value="TestUser SAT REVIEW - L2"/> </div> <div> PR Closed By: <input type="text"/> </div> <div> PR Closed On: <input type="text"/> </div> </div> <div> <h3>Stage 2</h3> <div> Procurement Review: <input type="text" value="Is Active"/> </div> <div> PR Review Status: <input type="text" value="-- None --"/> </div> <div> PR Review Worked By: <input type="text"/> </div> <div> PR Review Closed By: <input type="text"/> </div> <div> PR Review Closed On: <input type="text"/> </div> </div> <div> <h3>Stage 3</h3> <div> Posting/Solicit Quotes: <input type="text" value="Has not begun"/> </div> <div> Quotes Worked By: <input type="text"/> </div> <div> Quotes Closed By: <input type="text"/> </div> <div> Quotes Closed On: <input type="text"/> </div> <div> Anticipated Days: <input type="text"/> </div> </div> </div> <div> <div> <h3>Stage 6</h3> <div> Contract Awarded: <input type="text" value="Has not begun"/> </div> </div> <div> <h3>Stage 6a</h3> <div> SAT Acquisition Worked By: <input type="text"/> </div> <div> SAT Acquisition Closed By: <input type="text"/> </div> <div> SAT Acquisition Closed On: <input type="text"/> </div> </div> <div> <h3>Stage 6b</h3> <div> CO Review Worked By: <input type="text"/> </div> <div> CO Review Closed By: <input type="text"/> </div> <div> CO Review Closed On: <input type="text"/> </div> </div> <div> <h3>Stage 6c</h3> <div> Distribution Worked By: <input type="text"/> </div> <div> Distribution Closed By: <input type="text"/> </div> <div> Distribution Closed On: <input type="text"/> </div> </div> <div> <h3>Stage 7</h3> <div> Product or Service Received: <input type="text" value="Has not begun"/> </div> <div> Product Worked By: <input type="text"/> </div> <div> Product Closed By: <input type="text"/> </div> </div> </div>						

Figure 3 *Acquisition Stages Tab*

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Insert and Insert and Stay

Do not hit “Insert” or “Insert and Stay” on any screen.

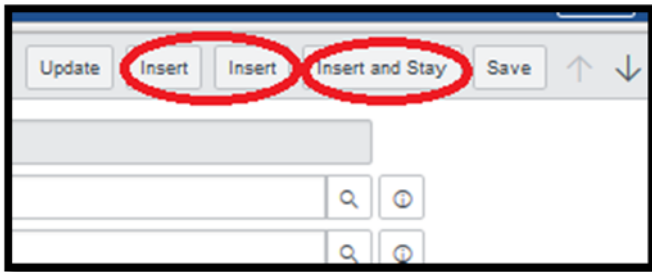


Figure 4 *Insert and Stay*

4.3.1 Stages 1 and 2 – Assignment

Step 1: To assign tasks, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column and lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on ‘**Open Acquisition Ticket**’. Look for tickets in the Assigned Group ‘**PR – SAT REVIEW – L2**’ with a blank Assigned Processor. To open the ticket, click on the underlined SATPC Number.

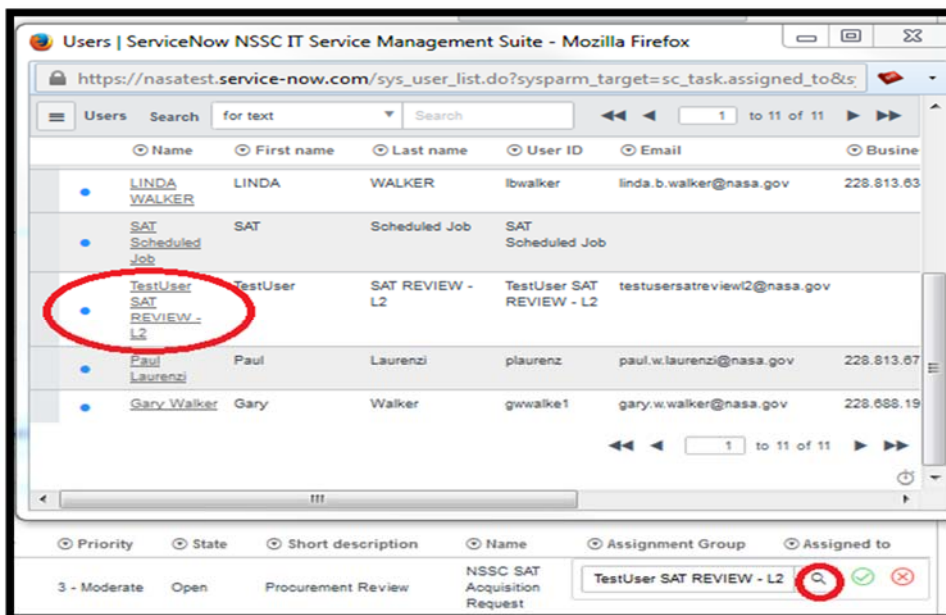


Figure 5 *ServiceNow Open Acquisition Ticket – SATPC Number*

Step 2: Go to the **Acquisition Steps** tab. Scroll down to **Tasks for SAT Procurement Contract** located under the Stages. For Task **Purchase Requisition Released** and **Procurement Review** double-click in the field under the column ‘Assigned To’ to select a name. Click the search icon. Click on the name to assign the task. Click the Green check to save the selection. Click **Save** at the top of the form. Exit the ticket to go to the next ticket.

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4.3.2 Stage 1 and 2 - Task Assigned to You:

Step 1: To open a task assigned to you, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column that lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on **Tasks Assigned to me** under section ‘**SAT Tasks**’.

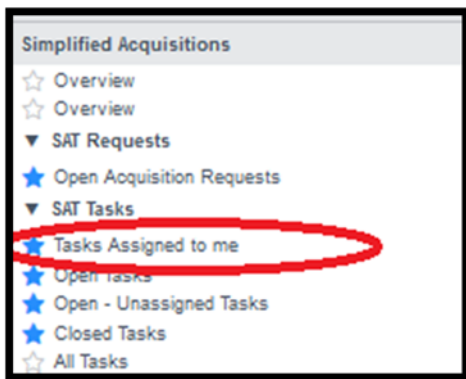


Figure 6 *ServiceNow Tasks Assigned to me*

Step 2: Click on **SATPC** Number in the second column to open up the SAT Procurement Ticket.

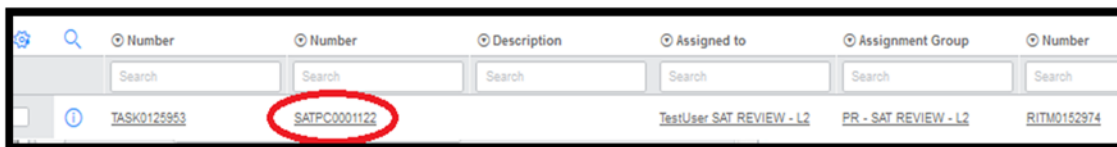


Figure 7 *ServiceNow SATPC Number*

OR Click on the **Task Number** to open the task.

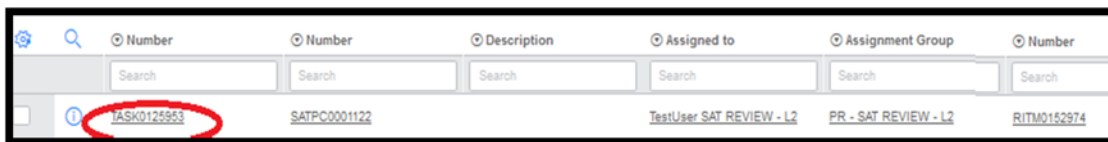


Figure 8 *ServiceNow Task number*

To go to the SATPC ticket click on the ‘**SAT Acquisition Request for T...**’ tab at the bottom of the Task. Click on the SATPC in the Procurement Contracts Table.

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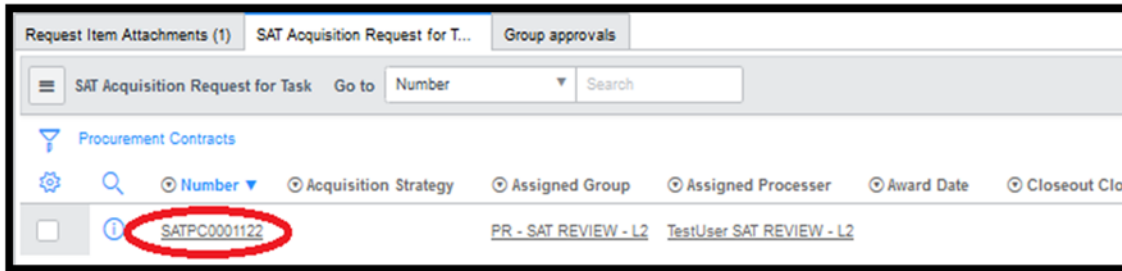


Figure 9 *ServiceNow SATPC in the Procurement Contracts Table*

Step 3: Start with the **Acquisition Request** tab and do a quick review of the information. For the First Stage – ‘**Purchase Requisition(s) Released**’, focus on the Purchase Requisition Section of the **Acquisition Request** tab. Check the **Purchase Requisition (PR)** associated with the request (if applicable). The request may not have the associated PR. Check to see if the PR has been released to the NSSC or if already in-house using the PR number provided. If no PR is provided, then check other key information to see if there is one in-house that matches the requirements. If No PR is found it shall be addressed to the Requestor/Initiator/Technical End User after Procurement Review under stage 2 has been conducted.

- If a PR is released, update the Purchase Requisition (PR) table under the tab Acquisition Request with PR amount, and **PR Release Date**. Double-click in the fields to enter information and to update table. Click Save. Review the PR for correctness before the marking task ‘**Closed Completed**’.
- Place the Purchase Requests received and released in PPS on the N drive in the following location: SAT Acquisitions > Current FY Folder > 1 – PR Staging. Place the PDF version and attachments of PRs released in PPS on the N Drive. At the time of release, PR review for correctness does not take place until someone is assigned to Stage 1 task.

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4.3.2.1 Reserved

4.3.2.2 How to Create a Milestone Plan for the PR in PPS

Step 1: Logon to PPS > Click on the Procurement Tab > Click Strategic Sourcing > Click Milestone Plan

Step 2: Click on “PRE” > Click Continue

Step 3: Change the Milestone Plan name to the PR – MP example 4200619353 – MP

Milestone Plan: *

Step 4: Select Template > NASA_SIMPLE > Click OK

Milestone Plan: *

Milestone Plan Type:

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)

Responsible Person:

Template:

All Values: Milestone Plan Template

Results List: 1 results found for Template

MP Template	Description
NASA_SIMPLE	Simple two-step milestone plan

Milestone Events						
Details Add Event Add Custom Event Copy Paste Delete Duplicate Reverse Date Calculation Date Calculation						
EP	Line Item	Event Description	Event ID	Dependency	Duration	Plan Date
	1	Purchase Requisition Released Date	PR_RELEASED			06/13/2017
	2	Purchase Order Signed On Date	PO_SIGNED	PR_RELEASED	30	07/26/2017

Step 5: The end date will be pulled from the template. Make sure that the end date is 30 days out from the start date.

Step 6: Click Release. Do not click “Save” before clicking “Release”.

- Keep note of the MP Transaction ID. When you receive a MP Transaction ID, enter the Transaction ID number into your internal work notes. This number will be needed to link your MP to your PO/DO/TO/Call later.
- The Milestone Plan will automatically release but you have to exit the plan first.

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4.3.2.3 How to Print a Copy of the PR from PPS

Step 1: Log into PPS and Begin from the home screen.

Step 2: Select the Procurement Tab

Step 3: Select “Workload Redistribution”.

Step 4: Clear the “Purchasing Group” field > Enter PR number in the Document Number field > Select “Search”

Step 5: Click on the Document Number to open the PR. (might show multiple records if the PR has multiple lines.)

Document Number	Item Description	Status	Purchasing Organization	Purchasing Group
4200618447.1	297T Purple Cat7a	Completed	NASA Shared Services Center	USA - NSSC
4200618447.2	297T Purple Cat7a	In Process	NASA Shared Services Center	USA - NSSC
4200618447.3	297T Red Cat7a	In Process	NASA Shared Services Center	USA - NSSC
4200618447.4	297T Red Cat7a	In Process	NASA Shared Services Center	USA - NSSC
4200618447.5	10 meter U.S. to SI GREEN Singlemode Duplex	In Process	NASA Shared Services Center	USA - NSSC
4200618447.6	1 meter OM4 Plenum LC/LC 50/125	In Process	NASA Shared Services Center	USA - NSSC
4200618447.7	3 meter Apple OM4 Plenum LC/LC 50/125	In Process	NASA Shared Services Center	USA - NSSC
4200618447.8	14FT Yellow Cat7a	In Process	NASA Shared Services Center	USA - NSSC
4200618447.9	14FT Yellow Cat7a	In Process	NASA Shared Services Center	USA - NSSC
4200618447.10	Coming Direct Connector Housing (CDH)	In Process	NASA Shared Services Center	USA - NSSC

Step 6: Click Print Preview once. There may be a delay. Follow the prompt and save the PR to your file. The print out will be a Procurement version of the PR. The official PR is kept in SAP. Select “Enlarge” next to the “Note to Supplier” field. Add all text in the “Note to Supplier” field to the PR printout saved in the file.

Display Purchase Requisition

Print Preview Close Refresh

Number: 4200618447 Status: Created On: 04/10/2017 07:09:19 Created By: Maria Lenox Erin Birchmeier

General Data

Folders Management: [Display](#)

Document Changes: [Display](#)

Milestone Plan: [Display](#)

Document Type:

Document Type Description:

Agency ID (TP):

Estimated Value:

Approval Note: [Enlarge](#)

Note to Supplier: [Enlarge](#)

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Step 7: Enter the “Created on date” and “Estimated amount” into ServiceNow. Use the “Created on” date as the release date, as this is the date capture when the PR is sent to PPS.

- This will be the preferred method of printing the PR for your file.

4.3.2.4 Reserved

4.3.2.5 Purchase Request (PR) Review

Review the PR(s) to verify correctness of the information.

Step 1: First, look for the PR and attachments in the 1 – PR Staging Area folder on the N Drive. Move the PR from the Staging Area folder to the folder designated for the appropriate Center.

Step 2: Log-in to SAP from bReady. Click on My Systems. Click on Financial. Click SAP R/3 (PC). If a pop-up appears, click on open.

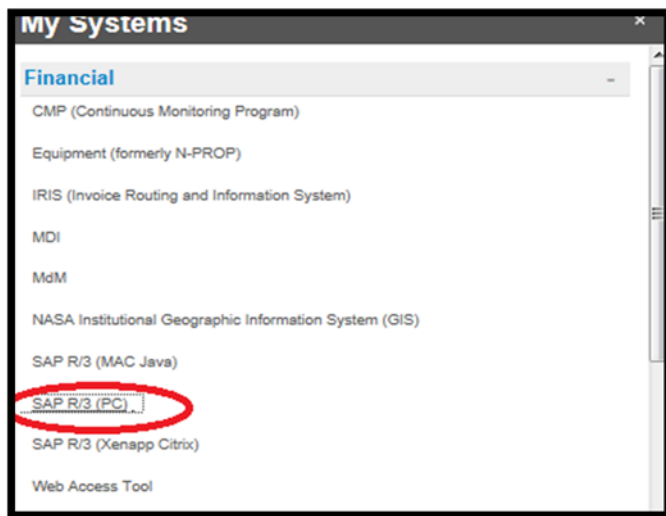


Figure 10 *bReady, My Systems, SAP R/3 (PC)*

Step 3: Enter ME53N in the fillable field. Click the green enter button or hit enter.



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Figure 11 *bReady, field and button*

Step 4: Click on the Other Purchase Requisition icon.

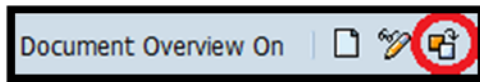


Figure 12 *bReady, Document Overview On*

Step 5: Enter the Purchase Requisition Number in the text field box. Click on ‘**Other Document**’

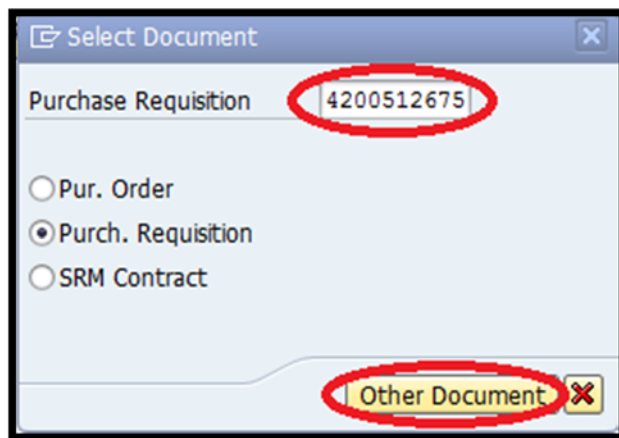


Figure 13 *bReady, Select Document, Purchase Requisition*

Step 6: Check to see if the PR has gone through all of the approvals of the **Release strategy** with the Procurement Office last. Click on the ‘**Release Strategy**’ Tab. The Code ‘PO’ should have a green check mark for status.

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Code	Description	Processor	St...
BA	Branch Approver	Position for Org C...	✓
IT	IT Approver	Position for IT Ap...	✓
FN	Finance (REQ)	Position for REQ	✓
PO	Procurement Office	Position for PO	✓

Figure 14 *bReady, Release Strategy*

Step 7: Check the PGroup. Expand 'Item Overview.' Scroll all the way over to the right. The Purchasing Org (POrg) must indicate NASA. The PGroup (PGr) indicates the PR assignment to NSSC as determined by the center submitting the request.

Status	Proc...	Item	Qua...	Unit	C	Delivery Date	Agreement	Item	Created by	Requirn...	Trackn...	Plant	Stor. Loc	POrg	PGr	Estimated total val.
		1	1	JOB	D	10/07/2015			GS074933	545		Goddard ...	Goddard	NASA	GXA	30,000.00

Figure 15 *bReady, Item Overview*

<u>PGroup - Center</u>	<u>PGroup - Center</u>
AXA – ARC	KXA – KSC
CXA – GRC	LXA – LaRC
DXA – AFRC	MXA – MSFC
GXA – GSFC	NXA – NMO
HXA – HQ	SXA – SSC
JXA – JSC	

Figure 16 *bReady, PGroup chart*

Step 8: Expand the 'Header.' Check the **Texts** tab information to verify the Acquisition Request matches the PR Texts and does not list any changes or special requirements.

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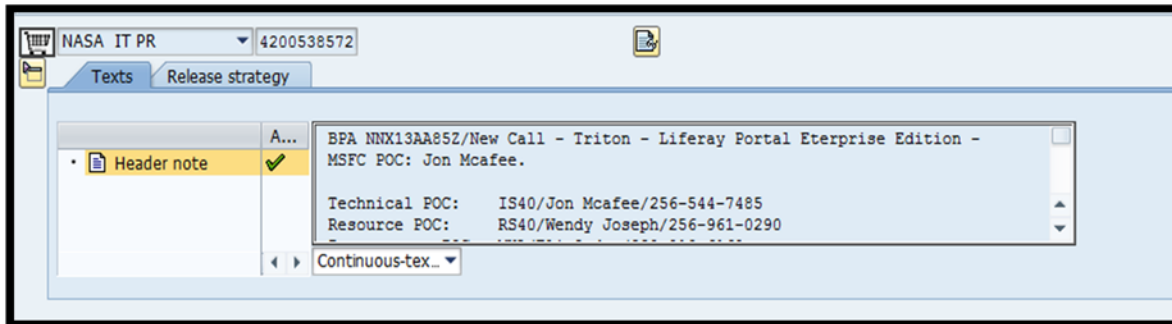


Figure 17 *bReady, Header Texts Tab*

Step 9: Check the attached attachments. Go to the '**Services for Object**' button. Click on the little arrow. Click on Attachment list.

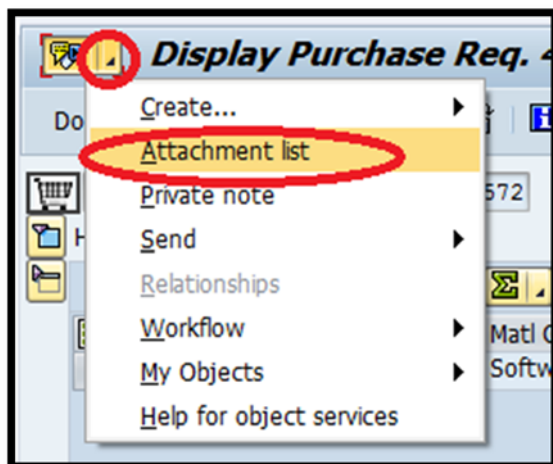


Figure 18 *bReady, Services for Object, Attachment list*



Figure 19 *bReady, Service Attachment list*

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Step 10: Check the 'Material Group' under the 'Material Data' tab under 'Item' to ensure that each line item has an assigned group. Use the drop down box to switch between items. Compare the selected 'Material Group' to the purchase item.

The screenshot shows the 'LiferPortal Enterprise Edition' interface. The 'Material Data' tab is selected. The 'Material Group' field is circled in red and contains the value 'D311'. The 'Short Text' field contains 'Software Operations'. The 'Material' field contains 'LiferPortal Enterprise'.

Figure 20 *bReady, Material Data, Material Group*

The below table provides examples of the more common Material Groups.

Material Groups with Description and Some Examples

<u>Matl Group</u>	<u>Material Group Description</u>	<u>*Examples</u>
10	Weapons	Miscellaneous Weapons
11	Nuclear Ordnance	
12	Fire Control Equipment	
13	Ammunition and Explosives	
14	Guided Missiles	
15A	Aerospace Craft (only complete aerospace vehicles)	
15B	Airframe Structural Components	
16	Aerospace Craft Components and Accessories	Propellers, Landing Gear and Rotor Blades
17	Aerospace Craft Launching, Landing and Ground Handling Equipment	
19	Ships, Small Craft, Pontoons and Floating Docks	
20	Ship and Marine Equipment	
22	Railway Equipment	
23	Ground Effect Vehicles, Motor Vehicles, Trailers and Cycles	
24	Tractors	
25	Vehicular Parts and Components	
26	Tires and Tubes	
28	Engines, Turbines and Components	Gas Turbines and Jet Engines
29	Engine Accessories	Miscellaneous Engine Accessories

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<u>Matl Group</u>	<u>Material Group Description</u>	<u>*Examples</u>
30	Mechanical Power Transmission Equipment	Gears, Belting, Drive Belts, Fan Belts and Accessories
31	Bearings	Bearings, Plain and Unmounted
32	Woodworking Machinery and Equipment	
34	Metalworking Machinery	Gas Welding and Heat Cutting
35	Service and Trade Equipment	Vending and Coin Operated Machines
36	Special Industry Machinery	Gas Generating, Dispensing System and CNC Machines
37	Agricultural Machinery and Equipment	Soil Preparation Equipment
38	Construction, Mining, Excavating & Highway Maintenance Equipment	Miscellaneous Construction Equipment
39	Materials Handling Equipment	Winches, Hoists, Cranes and Derricks
40	Rope, Cable, Chain & Fittings	Fiber Rope, Cordage and Twine
41	Refrigeration, Air Conditioning & Air Circulating Equipment	Refrigeration and Air Conditioning Components
42A	FireFightingRescueSafetyEqmt&EnviroProtection Equipment	Fire Fighting Equipment
42B	FireFightingRescueSafetySupp&EnviroProtection Supplies	
43	Pumps and Compressors	
44	Furnace, Steam Plant, and Drying Equipment; & Nuclear Reactors	Industrial Boilers
45	Plumbing, Heating, and Sanitation Equipment	Plumbing Fixtures and Accessories
46	Water Purification and Sewage Treatment Equipment	
47	Pipe, Tubing, Hose, and Fittings	
48	Valves	
49	Maintenance and Repair Shop Equipment	
51	Hand Tools	
52	Measuring Tools	
53	Hardware and Abrasives	Nuts and Bolts
54	Prefabricated Structures and Scaffolding	
55	Lumber, Millwork, Plywood and Veneer	
56	Building Materials and Supplies	
58	Communication, Detection and Coherent Radiation Equipment	Miscellaneous Communication Equipment
5805	IT Equipment	Hardware: Stand-alone/functional units that operate on their own; modems, signaling, telephone equipment, computers, servers, printers, monitors, scanners, IPADs
59	Electrical and Electronic Parts and Components	TV and Amplifiers
60	Fiber Optics Materials, Components, Assemblies & Accessories	
61	Power and Distribution Equipment	Motors and Electric Wire, battery chargers, batteries

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<u>Matl Group</u>	<u>Material Group Description</u>	<u>*Examples</u>
62	Lighting Fixtures and Lamps	
63	Alarm, Signal, and Security Detection Systems	
65A	Medical, Dental, and Veterinary Equipment	
65B	Medical, Dental, and Veterinary Supplies	
66A	Instruments and Laboratory Equipment	
66B	Laboratory Supplies	
67A	Photographic Equipment	Cameras
67B	Photographic Supplies	
68	Chemicals and Chemical Products	
69	Training Materials and Supplies	Training Aids and Models
69A	Training Equipment for Civil Servants	
69B	Training Supplies for Civil Servants	
7020	IT Central Processing Unit (CPU, Computer), Analog	
7021	Reserved	
7022	Reserved	
7025	Reserved	
7030	Reserved	
7045	IT Supplies	Hardware: Manuals, schematics, data storage media (CD-ROM, flash drive, memory modules/board), toner cartridge for printer/fax machine, A/C adapter, circuit boards Should not be used for software
71	Furniture	File Cabinets and Storage
72	Household and Commercial Furnishings and Appliances	
73	Food Preparation and Serving Equipment	Kitchen Appliances
74	Office Machines, Text Processing Sys & Visible Record Equipment	
75	Office Supplies	Awards and Trophies
76	Books, Maps and Other Publications	Subscriptions (Hard Copy and Electronic)
77	Musical Instruments, Phonographs and Home-Type Radios	
78	Recreational and Athletic Equipment	
79A	Cleaning Equipment	Floor Polishers and Vacuum Cleaners
79B	Cleaning Supplies	Cleaning, Polishing Compounds and Preparations
80	Brushes, Paints, Sealers and Adhesives	
81A	Reusable Specialized Shipping and Storage Containers	
81B	Packaging and Packing Supplies	
83	Textile, Leather, Furs, Apparel & Shoe Findings, Tent & Flags	
84	Clothing, Indiv Equip, Insignia & Jewelry Items	Safety Shoes

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<u>Matl Group</u>	<u>Material Group Description</u>	<u>*Examples</u>
85	Toiletries	
87	Agricultural Supplies	Fertilizers
88	Live Animals	
89	Subsistence	Food
91	Fuels, Lubricants, Oils and Waxes	
93	Nonmetallic Fabricated Materials	Wafers/Coupons
94	Nonmetallic Crude Materials	
95	Metal Bars, Sheets and Shapes	
96	Ores, Minerals and Their Primary Products	
99	Miscellaneous	Shipping/Handling
A	Research and Development	Basic/ Advanced Scientific Research including experimentation, investigations and analyses. Development of a product, prototype, etc. Commercialization of a product (bringing it to market) Cooperative Agreements with commercial entities
B	Professional Services/Program Mgmt-Studies and Analyses	Non R&D Studies, Environmental Studies, Economic Analyses
C	Architect and Engineering Services - Construction	
D301	IT Operation and Maintenance of Equipment	Hardware: Operation, repair, or maintenance of computers, modems, etc. Should not be used for software maintenance, which should be charged to material group D311 Note: Material group J – <i>Equipment Repair and Maintenance</i> should not be used for IT equipment
D302	Software Planning/Requ Dev/ Blueprinting/Formulati	
D308	Software Development/Implementation	<u>Initial</u> purchase of a software license or commercial, off-the shelf (COTS) software For development and implementation of software Should not be used for electronic access/subscriptions to reference materials, which should be charged to material group 76 (item category = D) --- This would not be an IT PR.
D311	Software Operations(data conversn, training, maint)	Software <u>renewals</u> (reinstatements), upgrades, updates, and maintenance agreements
E	Purchase of Structures and Facilities	
F	Natural Resources Management	Tree Trimming
H	Quality Control, Testing and Inspection Services	Safety Inspection and Calibrations
IA	Federal Interagency Agreements for Goods and Services	All Interagency Agreements except Federal IT Interagency Agreements for Goods/Services

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<u>Matl Group</u>	<u>Material Group Description</u>	<u>*Examples</u>
IAIT	Federal IT Interagency Agreements for Goods/Services	All Interagency Agreements except Federal Interagency Agreements for Goods and Services
IB	Other Goods & Services from Government Accounts - Interagency	
IC	Grants, Subsidies, and Contributions	Cooperative Agreements with non-commercial entities – IC Cooperative Agreements with commercial entities - A
ID	Training Provided under Grants and Cooperative Agreements	
J	Maintenance and Repair of Equipment	Warranty After Initial Purchase
K	Modification of Equipment-	Enhancement and/or Added Capability, includes coating services and machining
L	Technical Representative Services	Technical Advisory/Consulting
M	Operation of Government-Owned Facilities	
N	Installation of Equipment	
P	Salvage Services	
Q	Medical Services	
R4	Professional, Advisory, and Assistance Services	Audits (except for Paragon Contract NNX06AA23C), Consulting, Patents and Non-technical speakers
R408	Professional, Advisory and Assistance Services IT	Services will generally be IT support activities such as studies, evaluations, project monitoring, and data collection Should not be used for contracts where the principal purpose is design, development, operation, and/or maintenance of hardware or software
R475	Special personal services payments - IPA	
R67	Administrative and Other Support Services	Fees for awards, SEWP Fee and Wings of Excellence
S11	Telephone and Other Utilities	
S111	Gas Services	
S112	Electric Services	
S113	IT Communications, Utilities & Misc. Charges	IT-related utility charges such as data plans for mobile devices and notification system fees
S114	Water Services	
S2	Housekeeping Services	
T	Photographic, Mapping, Printing and Publication Services	Physical work of Photographic, Mapping, Printing and Publication Services (Creating Tangible Materials)
T1	Printing & Repro for Training Civil Servants	
U	Education and Training Services	
U1	Advisory and Assistance Services-Training	Contractor Support for Training Activities (i.e. Scheduling/Set-up), Conference, Sponsorship, Membership
U2	Training for Civil Servants	All training (Including Contractors)

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<u>Matl Group</u>	<u>Material Group Description</u>	<u>*Examples</u>
V1	Transportation of Things	Only for orders placed directly with a shipping company
V3	Relocation Services	
W1	Rental of Equipment	
W2	Lease-Purchase of Equipment	
X1	Lease or Rental of GSA Facilities	
X2	Lease or Rental of Other Facilities	
X3	Lease or Rental of IT Equip for Communication, Util and Misc.	Hardware: Costs related to rental or lease of IT equipment; includes any hardware or software, interconnected system or subsystem of equipment that is used in the automatic acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information, such as mainframe, mid-tier, and workstation computers
X4	Rentals related to Training of Civil Servants	
Y	Construction and Modification of Structures and Facilities	Building Improvements and New Construction
Z	Maintenance or Repair of Real Property	Maintenance of Facilities / Buildings and Utility Shutoff (Isolation)

Step 11: Enter the Material Group on the ServiceNow Request. On the SATPC ticket, enter the Material Group with the biggest percentage or dollar amount. To determine the more predominant Material Group, select the '**Procurement Award**' tab, and go to the field 'Material Group' and click the search button.

Figure 21 *Procurement Award, Material Group search*

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Step 12: If listed, click on the ‘**Material Group**’ to insert it into the SATPC ticket.

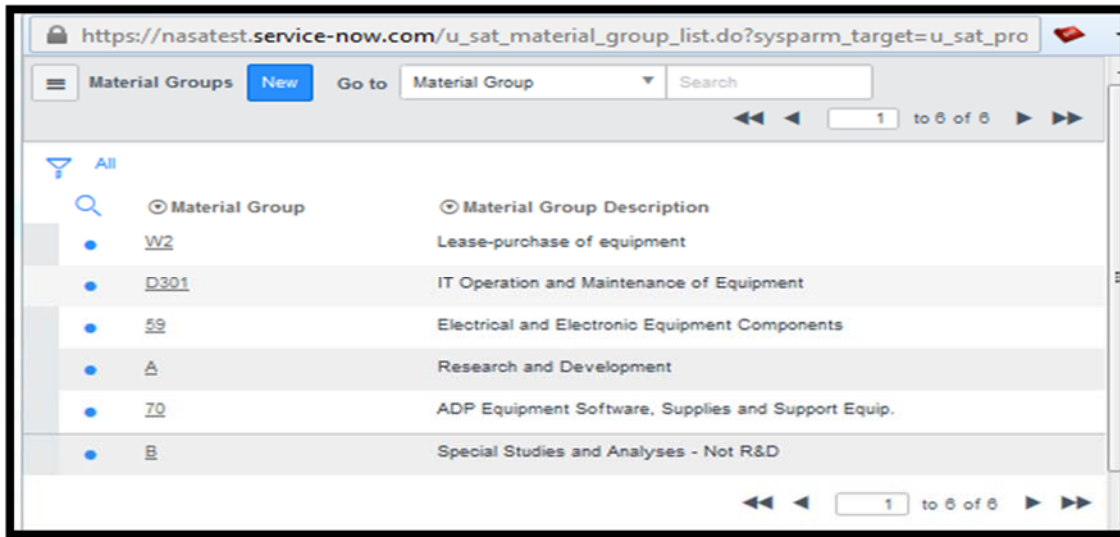


Figure 22 *Insert Material Group into SATPC ticket*

- If not listed, click ‘New’ to enter the Material Group and the Material Group Description as on the table above. Click on ‘Save’.

Figure 23 *Enter Material Group and Material Group Description from Table*

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- Do not hit ‘Insert’ or ‘Insert and Stay’ as this will create a second record. Click the back arrow at the top of the record.

Figure 24 *Click the Back Arrow*

Step 13: Select it from the list to add it to the SATPC record. Remember to click ‘Save’ on the record.

Figure 25 *Material Groups*

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4.3.2.6 How To Find Out the PR Document Type in SAP

Step 1: Click on the icon next to the shopping cart in the upper left corner.

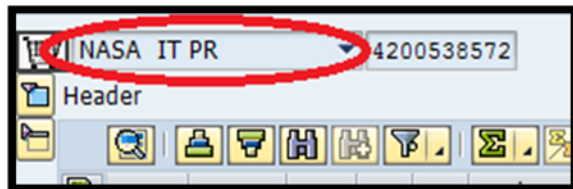


Figure 26 , *PR Document Type Dropdown*

NOTE: The PR document type routes the PR to a designated group of approvers set at the Center level. Stage 2 – Procurement Review – refinement of package, will address incorrect PR Doc Types. Centers sometimes go outside the system to capture the needed approvals for a particular PR Doc Type; however, identifying those needed approval people in the process can prove difficult. Without approvals, the Center will need to discard and redo the PR.

Step 2: Always check to ensure that the type is correct when applicable to SAT Acquisitions attributes such as NASA IT PR, NASA Construct/AE PR, NASA Hazardous PR, NASA PR or NASA QualSensitive PR which determines the Center's PR approvals required in the PR Release Strategy.

SAP Definition ID	Document Description
ZA	NASA PR
ZB	NASA Hazardous PR
ZC	NASA Construct/AE PR
ZD	NASA IT PR
ZE	NASA Quality Sensitive PR

Figure 27 *SAP Definition ID chart*

SAP Definition ID – Document Descriptions:

1) NASA PR: The default document type in SAP. Only use this document type if none of the other document types apply to the purchase.

2) NASA Hazardous PR: Use this document type for all purchases of hazardous materials and any other purchases that require safety review (see NPR 1800.1, *NASA Occupational Health Program Procedures*). This includes the purchase of chemicals for commercial, industrial or research activities, commonly used in laboratories, facility maintenance applications, and custodial/grounds maintenance:

- Liquid;
- Gases;
- Solids (powders, granules, etc.); and
- Nanoparticulates and biological agents such as bacteria, virus, or tissue cultures.

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Additional purchases under this category include:

- Radioactive materials;
- Equipment that can contain radiation sources;
- Items that emit Radiofrequency (RF), Ultraviolet (UV) or Infrared (IF)R radiation;
- Any Class 3b or Class 4 lasers; and
- Items producing ionizing and nonionizing radiation.

3) NASA Construction/AE PR: Use this document type for the purchase of construction and architectural & engineering services. Common product service codes associated with these services include (*NOTE: This PR Doc Type is out of scope of the NSSC*):

- C1 - Architect and Engineering – Construction;
- C2 - Architect and Engineering – General;
- Y - Construction of Structures/Facilities; and
- Z - Maintenance, Repair, Alteration of Structures/Facilities.

4) NASA IT PR: Use this document type for all Electronic and Information Technology (EIT) purchases (see FAR 2.101, originating from Clinger-Cohen Act of 1996). EIT has the same meaning as “IT” except EIT also includes any equipment or interconnected system or subsystem of equipment used in the:

- Creation, conversion, or duplication of data or information;
- Automatic acquisition, storage, analysis, evaluation, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information.

This definition excludes imbedded IT that is used as an integral part of non-IT product. Examples of EIT include:

- Computer workstation;
- Mass Spectrometer;
- Microscope;
- Data Acquisition System;
- Oscilloscope;
- Vibrometer; and
- Contracts handling NASA information.

5) NASA Quality Sensitive PR: Use this document type for all purchases of quality sensitive hardware or services requiring higher level quality standards and reviews (see NPR 8735.2, *Management of Government Quality Assurance Functions for NASA Contracts*). Examples of quality sensitive purchases include:

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- Flight hardware/software;
- Qualification hardware/software;
- Prototype, engineering units, or developmental hardware/software that may become flight or flight test equipment or potentially used for qualification;
- Associated flight support equipment or software such as ground or field support equipment, lab or test equipment; and
- Changes to existing contracts or previous PR's involving any of the above items.

NOTE: Any changes will require resetting/revising and re-releasing the PR through the approval process. An incorrect PR Document Type requires cancellation of the existing PR and creation of a new PR. Contact the person who wrote the PR (Requisitioner or Budget Analyst) to ensure the PR matches the Acquisition requirements and contains the correct PR Document Type.

Step 3: Enter the PR amount and PR release date on the PR table on the SATPC record. Go to the **'Acquisition Request'** tab. Locate the PR table near the bottom of the request information table. If the PR number appears already entered, enter the **'PR Amount'** and the **'PR Release Date'**. Double-click in the field to enter the data. Click the green check to save entry into the field. Click Save on the SATPC record after entering the data. For the **'PR Amount'** enter commas. Do not enter dollar signs. Double-click the **'PR Release Date'** and chose the data from the calendar widget. Click off of the Release Date field for the Date to populate.

The screenshot shows a web interface with two input fields: "PR Amount" and "PR Release Date". The "PR Amount" field contains the value "15,000". The "PR Release Date" field is open, displaying a calendar for February 2016. The calendar shows days of the week (S, M, T, W, T, F, S) and dates from 1 to 28. The date 28 is highlighted. At the bottom of the calendar widget is a button labeled "Go to Today".

Figure 28 *PR Release Date Calendar Widget*

Step 4: If no record exists in the table, double-click in the Purchase Requisition field to enter the PR number. Enter the complete PR number. Click the green check to save entry. Also enter the **'PR Amount'** and **'PR Release Date'**. Do not enter anything in the **'Number'** field or the **'SAT Procurement Contract'** Field. Click Save.

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Purchase Requisitions (PR)					
⚙	⊙ Number	⊙ PR Amount	⊙ PR Release Date	⊙ Purchase Requisition	⊙ SAT Procurement Contract
✖	SATPR0002086	15,000	2018-02-26	4200512675	

Figure 29 *Purchase Requisitions (PR)*

Step 5: After reviewing the PR and documents provided by the center, and the adding PR Amount and PR Release Date information to the fields on the Acquisition Request tab, complete **Stage 1** of the process related to the 1st Task: Short Description **Purchase Requisition Released**. Review Stages checklist to ensure the PR Stage 1 has met all of the requirements/criteria. Scroll down to the Task for SAT Procurement Co... to the 1st Task 'Short Description' **Purchase Requisition Released**. Double-click on the State field and choose **'Closed Completed'**. Click on the green check box to make the change to 'Closed Completed' then click Save. Move on to **Stage 2** and the **2nd Task – Procurement Review**. The system allows concurrent work on Stage 2 and Stage 1; however, but does not allow marking Stage 2 **'Closed Completed'** before marking Stage 1 **'Closed Completed'**.

Tasks for SAT Procurement C...

Item for SAT Procurement Co...

Related Assistance Requests

Related Modification Requests

Tasks for SAT Procurement Contract

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Catalog Tasks

	Number	Request item	Requested for	Priority	State	Short description	Name	Assignment Group	Assigned to
<input type="checkbox"/>	TASK0125954	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Open	Procurement Review	NSSC SAT Acquisition Request	PR - SAT REVIEW - L2	TestUser SAT REVIEW - L2
<input type="checkbox"/>	TASK0125953	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Closed Complete		NSSC SAT Acquisition Request	PR - SAT REVIEW - L2	TestUser SAT REVIEW - L2

Actions on selected rows...

1 to 2 of 2

Figure 30 *Tasks for SAT Procurement, Closed Complete*

Note: Refinement or correction on the Purchase Request requires completion of review of the completed submitted package to find any other refinement needs. Place incorrect PRs in the **'Purchase Requisition Released'** pending by scrolling down to the task and double-clicking on the State. Select **'Pending'** from the drop down. Click on the green check. Click on **Save**.

4.3.2.7 Acquisition Request Tab

Step 1: Start with the **Acquisition Request** tab to review the submission. Review the POC information section.

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Acquisition Request | Acquisition Steps | Pre Award | Procurement Award | Other | Deliverable & Invoices | Processing Notes

SAT Requestor POC Info

Name	Sislyn Barrett	Business phone	301.285.3294
Email	sislyn.p.barrett@nasa.gov	Center Abbrv	GSFC
Title	SUPERVISORY CONTRACT SPECIALIST	NASA Org Code	210S

SAT Technical End-User POC Info

Name	Ferzan Jaeger	Business phone	301.614.5795
Email	ferzan.jaeger@nasa.gov	Center Abbrv	GSFC
Title	AST, AEROSPACE FLIGHT SYSTEMS	NASA Org Code	4901

SAT Alternate POC Info

Name	KATHERYN THOMAS	Business phone	301.285.4563
Email	katheryn.a.thomas@nasa.gov	Center Abbrv	GSFC
Title	PURCHASING AGENT	NASA Org Code	210Y

Figure 31 *Acquisition Request*

Step 2: Verify the Acquisition Request Details. Pay special attention to whether the requestor provided the package and Purchase Requisition (PR) as an attachment to the RITM or attached in SAP.

Acquisition Request Details

* Estimate Acquisition Value	\$25,000-\$150,000
* Brief Descr/Item# /Model#/QTY of Product/Service	Martin System Solutions to provide systems engineering support to the MOMA-MS project.
* Commercial/Non-Commercial	Commercial Service
* Categorization of Product/Service	Support - Professional

Figure 32 *Acquisition Request Details*

Step 3: Check **Applies to Request** to see if any Special Conditions or other specific requirements apply, such as Hazardous, etc. These types of applicable items may require the award processor to add the specific terms and conditions based on the Center's requirements.

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Applies to Request

Quality Sensitive	<input checked="" type="checkbox"/>	Government Furnished Information	<input checked="" type="checkbox"/>
Hazardous	<input checked="" type="checkbox"/>	Description of GFI	<input type="text"/>
Center Specific Terms or Conditions	<input type="checkbox"/>	Contains Options for Additional Periods of Perform	<input type="checkbox"/>
Foreign Purchase	<input type="checkbox"/>	Software – Renewal Anticipated	<input type="checkbox"/>
Government Furnished Equipment or Property	<input checked="" type="checkbox"/>	Special Delivery Marking Requirements	<input type="checkbox"/>
Description of GFE/GFP	<input type="text"/>	Sole Source or Brand Name	<input type="checkbox"/>
ELMT Coordination	<input checked="" type="checkbox"/>		
Has this software requirement been coordinated with ELMT?	<input checked="" type="checkbox"/>		

Figure 33 *Applies to Request*

Step 4: Check the **Ship to or Service Location Details** for the specifics on how and where to ship to. Apply any deviations to the Center's normal shipping process to the award.

Ship To or Service Location Details

* Shipment/Service Location Requirement: Center's Standard Shipping and Receiving (Selected in SAP)

Additional Shipment Information:

Figure 34 *Ship To or Service Location Details*

Step 5: Review the Need By Date.

Acquisition Strategy

Need By Date: 2016-04-20

Figure 35 *Acquisition Strategy, Need By Date*

Step 6: Check the **Purchase Requisition (PR)** associated with the request and check to see if the acquisition needs to be **Expedited**. Expedited acquisitions require special approvals and justification if the answer is 'Yes'.

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Expedited

Expedited Request

No

Figure 36 *Expedited Request*

Step 7: Check the **Comments/Special Instructions** for additional requirements applicable to the acquisition. This section may contain information that needs attention prior to making award and also information that requires incorporation to the terms and conditions of the award.

Comments/Special Instructions

Figure 37 *Comments/Special Instructions*

NOTE: Remember to ‘Save’ OFTEN. On the SATPC ticket, click ‘SAVE’ at the bottom and the upper right hand corner.

4.3.2.8 Printing the ServiceNow RITM (Request Item):

Step 1: Print RITM record for the award file using “**Print to PDF**”. For the field ‘**Request Item**’ click the information icon to open up the RITM record. Hovering will only display the information; go into the record to print a copy.

Procurement Contract - SATPC0001122

Update Create Vendor Insert Insert and Stay Save Delete

Manage Attachments (1): SoleSource software.docx [rename] [view]

Number SATPC0001122

Request Item RITM0152974

URL for this Acquisition Request

https://nasatest.service-now.com/redirector/nav_to.do?url=nav_sat_procurement_contract.do?sys_id=4f3305856fb152000624d15ee3ee4a1

Figure 38 *Procurement Contract Request Item Information*

Step 2: While in the RITM record, click the toggle/gear icon to edit user preference and print.

Logout

Update Cancel SAT Request Modify SAT Request Save

Figure 39 *RITM record, edit user preference and print*

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Step 3: Click on 'Printer friendly version'

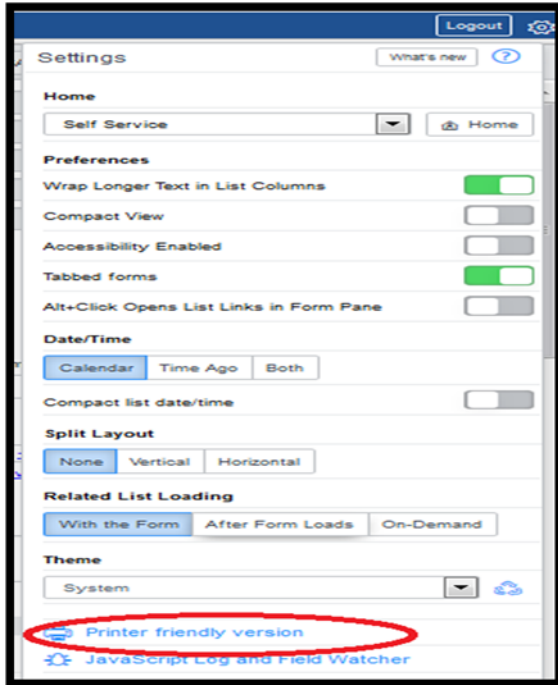


Figure 40 *Settings, Printer Friendly version*

Step 4: Review the printer friendly version. Any text box make sure all the text is viewable. Click the plus button to expand a text box. From the printer friendly version click the '**Click to Print**' button.



Figure 41 *Click to Print button*

Step 5: Change the Printer name to '**Adobe PDF**'. Click '**OK**'.

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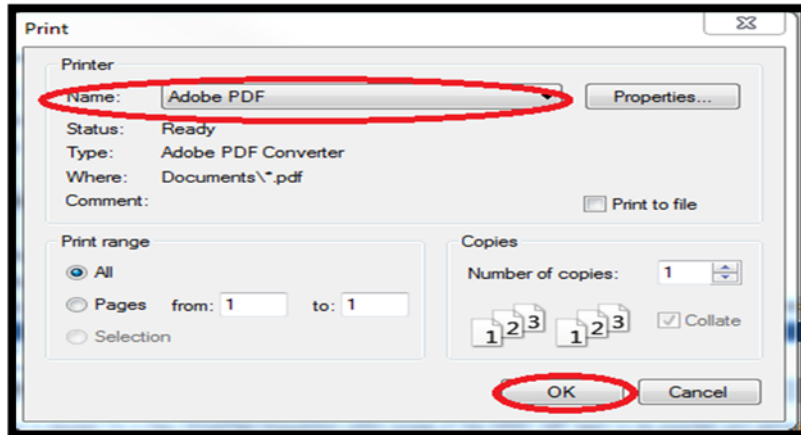


Figure 42 *Printer Name, Adobe PDF*

Step 6: Browse to folder on the N Drive and 'Save' file. Close printer friendly version.

Step 7: Download any attachments listed in the Manage Attachments by clicking on the document. Save file to the folder on the N Drive.

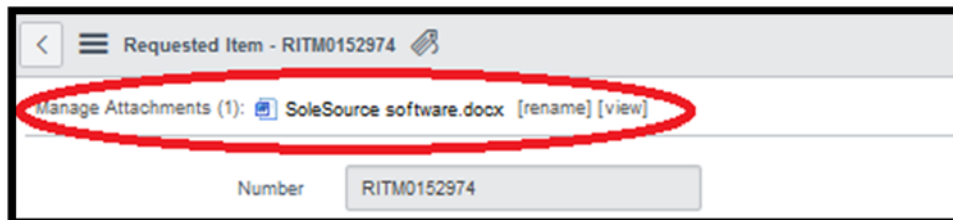


Figure 43 *Download Attachments*

Step 8: Click the arrow to go back to the SATPC record.

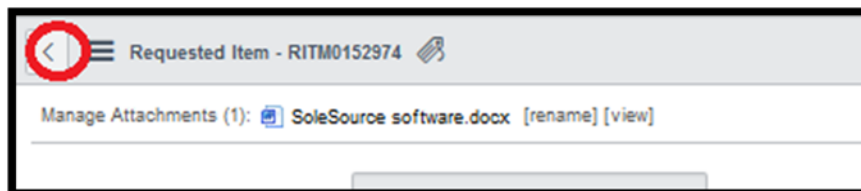


Figure 44 *Back Arrow to SATPC record*

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4.3.3 Stage 2: Procurement Review

The award process cannot move forward without all the crucial acquisition requirements. The NSSC metric time clock starts the minute you mark Stage 2 - Procurement Review **'Closed Completed'**.

Procurement Requirement Package should include the following:

1. **Released PR** (reviewed in Stage 1).
2. **NF 1707:** Special Approvals and Affirmations of Requisitions. GRC and LaRC have their own version of the NF 1707 and the overprint version should be used for those centers in place of the NASA version.
 - A NASA Form (NF) 1707, Special Approvals and Affirmations for Requisitions, is required by the NASA Federal Acquisition Regulation Supplement section (NFS) 1804.7301, which states that a NASA form (NF) 1707 is required for New Procurement Requests (PR). It is also needed for New Work Modification to existing awards, for they require additional coordination at the Agency level and sometimes at the center level and, in some cases, approval of several stakeholders before the order can be sent for action. The initiator of the requisition is responsible for obtaining additional coordination. This form must be used to document any additional coordination.

The completed NF 1707 and any additional special approvals or affirmations required must be electronically attached to the requisition in CF and must include the name of the approver and date approved. The contracting officer must include a hard copy in the contract file, or a link to the electronic copy. The Procurement office will not accept a requisition until all the required coordination has been documented.

- The initiator of the requisition is responsible for obtaining additional coordination and signs the form affirming that all of the coordination have been completed.
- Review the NF 1707 or overprint version for completeness.

3. Government Specifications:

- a. Vendor Quote or catalog description cannot be used as Government Specifications. Procurements have been protested when one vendor's product description was used as government specifications. The claim was that the requirement was too restrictive and only the original vendor could provide it.
- b. A good requirements document sets forth actual needs, not what the government would ideally like to have. If the requirements document reflects needs that will be more difficult to achieve, then the document may unnecessarily restrict competitive base and could increase cost of acquisition

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- c. Requirements should be clear, unambiguous, and precise language, leaving little room for suppliers to interpret requirement on their own.
- d. Requirements should not be written in a manner that requires supplies to provide a particular brand name, product, or a feature of a product, peculiar to one manufacturer, reducing competition. Brand Name Justification is needed for those acquisition requiring brand name.
- e. Statement of Work (SOW) or Performance Work Statement (PWS) is used for acquiring service. PWS should answer the following: What needs to be done, When (and sometimes where) should it be done, what should the final deliverable/output consist of, How will the final output/deliverable be inspected/accepted? It should give a precise statement of objectives, identify the scope of work to be performed, contain detailed work requirements, state reporting or other progress/compliance requirements.
- f. Statement of Objectives (SOO) states to overall performance objectives for services. SOO must include the purpose, scope or mission, period and place of performance, background, performance objectives, and operating constraints. Provides more flexibility.

4. Additional Center documentations (if applicable).

5. Justifications (if applicable):

- a. Sole Source – Only one source is reasonable available (e.g. urgency, exclusive licensing agreements, compatibility of parts, limited data rights, patents, proprietary knowledge, warranty coverage). A Recommendation and Determination for Soliciting only one Source (RDSS) shall be prepared by the center. (See FAR Subpart 13.106, *Soliciting competition, evaluation of quotations or offers, award and documentation*, and NFS 1813.106.)
- b. Brand Name Description – Specification that calls for a particular brand-name product, or feature of a product, that is peculiar to one manufacturer, and does not permit the offer or delivery of something equal.

6. Center Specific Terms and Conditions.

7. Quality Documentation (if applicable).

8. Answers to all the required questions on the SAT Acquisition Request through SACP or SART.

4.3.3.1 Update the SATPC Record During Your Review

Step 1: In the SATPC Ticket update the record regarding the NF 1707 located on the 'Pre Award' tab.

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Step 2: A complete document package requires the NF 1707. Select '**completed**' for '**NF 1707 (Special Approvals & Affirmations of Reqs)**'. Enter '**NF 1707 Date**' by using the calendar widget.

The screenshot shows a form with several fields. The 'NF 1707 (Special Approvals & Affirmations of Reqs)' field has a dropdown menu set to 'Completed'. The 'NF 1707 Date' field is empty. The 'NF 1787 (Small Business Coordination)' field has a dropdown menu set to 'NA'. The 'NF 1787 Date' field is empty. The 'NF 1823 (Request for Investigation)' field has a dropdown menu set to 'NA'. The 'NF 1823 Date' field is empty. The 'LSJ/RDSS' field has a dropdown menu set to 'NA'. A calendar widget is open, showing February 2016. The calendar has a header with '<< February 2016 >>'. The days of the week are listed as S, M, T, W, T, F, S. The dates are arranged in a grid. The date 28 is highlighted. A 'Go to Today' button is at the bottom of the calendar.

Figure 45 *NF 1707 Calendar Widget*

Step 3: If a copy arrives with the Procurement Requirement Package unsigned or not completed correctly, change the status to '**WIP**'. Do not enter a date.

Step 4: If brand name or sole source request justification has been reviewed and determined complete for the field '**LSJ/RDSS**', change the drop down box to 'Completed' and select the determination date from the calendar widget for '**LSJ/RDSS Date**'. If the justification needs refinement, then select from the drop down box '**WIP**'.

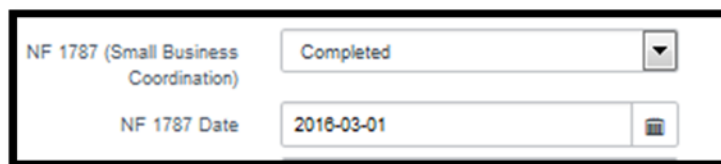
The screenshot shows a form with several fields. The 'LSJ/RDSS' field has a dropdown menu set to 'Completed'. The 'LSJ/RDSS Date' field is set to '2016-03-01'. The 'VPATS' field has a dropdown menu set to 'NA'. The 'VPATS Date' field is empty. A calendar widget is open, showing March 2016. The calendar has a header with '<< March 2016 >>'. The days of the week are listed as S, M, T, W, T, F, S. The dates are arranged in a grid. The date 1 is highlighted. A 'Go to Today' button is at the bottom of the calendar.

Figure 46 *LSJ/RDSS Date Widget*

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Step 5: Awards at \$250,000 if not set aside for small business require NF 1787 for SAT. Follow the Small Business Coordination NASA Shared Services Center Work Instruction for acquisitions requiring NF 1787.

- Update the SATPC record of when it is in WIP or Completed for awards requiring NF 1787. Go to '**Pre Award**' Tab. Go to Field '**NF 1787 (Small Business Coordination)**'. Use the drop down box to make selection. When Completed use the calendar widget to selected date of completion.



The screenshot shows a web form with two main fields. The first field is labeled 'NF 1787 (Small Business Coordination)' and has a dropdown menu currently set to 'Completed'. The second field is labeled 'NF 1787 Date' and has a date picker set to '2018-03-01'.

Figure 47 *NF1787 Date Widget*

4.3.3.2 IT Purchases:

What is Electronic and Information Technology (EIT)?

Electronic and information technology (EIT) products procured, developed, maintained, or used by a Federal agency, including products that store, process, transmit, convert, duplicate, or receive electronic information. Anything IT, services as well as supplies (examples: copiers, computers, fax machines, software, hardware, websites, telephones). It is important to review the NF 1707 for information concerning the IT Purchase such as how are they completing the applicable sections of the NF 1707:

- Section 1 Part I – for software should always have the 2nd box checked;
- Section 1 Part II – If the 2nd box is checked then they should also have one of the other AND/OR boxes checked which also may include attached documentation such as IPv6 capabilities or a waiver (NF 1835);
- Section 1 Part IV – is for 508 compliance and if the 2nd box is checked then they must check one of the other AND/OR boxes which may also include attached documentation.

NF 1823 (Request for Investigation)

To determine if a NF1823 is required, if the software being purchased is new (not renewals) then you have to check the Assessed and Cleared List for the manufacturer. If the center can provide information that the new software is being used by others at the center then it can be treated like a renewal and won't need a NF1823 since the form is not required for renewals. Otherwise, if the manufacturer is not on the Assessed and Cleared list then a NF1823 is required.

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This is the link for the Assessed and Cleared List (if the manufacturer is on the list it is good for any products even if they aren't listed):

<https://teams.share.nasa.gov/hq/ocio/security/itscommunity/GRC/Lists/Assessed%20and%20Cleared%20List%20ACL/AllItems.aspx>

If a NF 1823 is determined to be required, then request that the center submit the form which goes through approvals at their center as well as HQ. It can take as long as a few weeks to go through the approvals.

'Consolidated and Further Continuing Appropriations Act, 2013'

<http://www.gpo.gov/fdsys/pkg/BILLS-113hr933enr/pdf/BILLS-113hr933enr.pdf>.

SEC. 516. (a) None of the funds appropriated or otherwise made available under this Act may be used by the Departments of Commerce and Justice, the National Aeronautics and Space Administration, or the National Science Foundation to acquire an information technology system unless the head of the entity involved, in consultation with the Federal Bureau of Investigation or other appropriate Federal entity, has made an assessment of any associated risk of cyber-espionage or sabotage associated with the acquisition of such system, including any risk associated with such system being produced, manufactured or assembled by one or more entities that are owned, directed or subsidized by the People's Republic of China. (b) None of the funds appropriated or otherwise made available under this Act may be used to acquire an information technology system described in an assessment required by subsection (a) and produced, manufactured or assembled by one or more entities that are owned, directed or subsidized by the People's Republic of China unless the head of the assessing entity described in subsection (a) determines, and reports that determination to the Committees on Appropriations of the House of Representatives and the Senate, that the acquisition of such system is in the national interest of the United States.

SEC. 535. (a) None of the funds made available by this Act may be used for the National Aeronautics and Space Administration (NASA) or the Office of Science and Technology Policy (OSTP) to develop, design, plan, promulgate implement, or execute a bilateral policy, program, order, or contract of any kind to participate, collaborate, or coordinate bilaterally in any way with China or any Chinese-owned company unless such activities are specifically authorized by a law enacted after the date of enactment of this Act. (b) The limitation in subsection (a) shall also apply to any funds used to effectuate the hosting of official Chinese visitors at facilities belonging to or utilized by NASA. (c) The limitations described in subsections (a) and (b) shall not apply to activities which NASA or OSTP has certified -- (1) pose no risk of resulting in the transfer of technology, data, or other information with national security or economic security implications to China or a Chinese-owned company; and (2) will not involve knowing interactions with officials who have been determined by the United States to have direct involvement with violations of human rights. (d) Any certification made under subsection (c) shall be submitted to the Committees on Appropriations of the House of Representatives and the Senate no later than 30

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days prior to the activity in question and shall include a description of the purpose of the activity, its agenda, its major participants, and its location and timing.

508 Compliance

For all software procurements request a Voluntary Product Accessibility Template (VPAT) or 508 Compliance Letter from the manufacturer. The manufacturer provides that information for their product. This will be needed before an award can be made but is not required before soliciting quotes. When manufacturer is known, use sample 508/VAPT email template and attached sample compliance letter to obtain VPAT or 508 Compliance Letter.

Under Section 508, agencies must give disabled employees and members of the public access to information that is comparable to access available to others. Specific criteria must be met when procuring EIT that is 508 compliant. This EIT includes: software applications and operating systems, web based information or applications, telecommunications functions, video or multi-media products, self-contained or closed products, desktop and portable computers. Agencies are not required to fundamentally alter their needs in order to comply with Section 508. If no commercial items are available that meet each of the applicable Access Board standards in time to meet the delivery date, the standards that can't be met are considered "nonavailable." Agencies can apply an exception to Section 508's requirements by determining the procurement would cause "undue burden." To determine if the undue burden exception applies, any Agency must consider all Agency resources available to the program or component for which the product is being developed, procured, maintained, or used.

An undue burden determination must be applied on a case-by-case basis. Center's Legal Counsel must concur on any undue burden determination. If an agency invokes the undue burden exception, it must document in writing the basis for the decision and provide documentation for inclusion in the contract file. What should be documented: The applicable technical provisions of the Access Board's standards. The market research performed to locate commercial items that meet the applicable technical provisions. The specific provisions that cannot be met as a result of undue burden. The expected cost of acquiring EIT that meets the applicable technical provisions along with an explanation of how costs were estimated, and a description of all the funds available to the program or component for which the supply or service is being acquired.

Exception: Fundamental Alteration: Applies to a change in the fundamental characteristic or purpose of the product or service, not merely a cosmetic or aesthetic change. Examples would include: A Center intends to procure pocket-sized pagers for employees working field assignments. Adding a large display to a small pager may fundamentally alter the device by significantly changing its size to such an extent that it no longer meets the purpose for which it was intended, that is to provide a communication device which fits in a shirt or jacket pocket. Procuring the development of a software application which would be used in an aircraft cockpit. Because this application would inherently require sight, no comparable 508 accessible version is required.

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Internet Protocol Version Six (IPv6)

The center may have to provide supporting documentation or an IPv6 Waiver (NF1835) if indicated on the NF1707 that the procurement includes items that will use IP networking.

Internet Protocol version 6 (IPv6) is the most recent version of the [Internet Protocol](#) (IP), the [communications protocol](#) that provides an identification and location system for computers on networks and routes traffic across the [Internet](#). National Institute of Standards and Technology (NIST) to develop the technical infrastructure (standards and testing) necessary to support wide scale adoption of IPv6 in the US Government (USG). In response NIST developed a technical standards profile to assist acquisition of IPv6 capabilities in Hosts, Routers, and Network Protection Devices. The Host and Router profile includes a forward looking set of RFCs published by the Internet Engineering Task Force (IETF), encompassing basic IPv6 functionality, and specific requirements and key optional capabilities for routing, security, multicasting, mobility, network management, and quality of service. The Network Protection Device profile contains a NIST established set of capability requirements for IPv6-aware firewalls and intrusion detection systems. In addition to the profiles, a testing program has been established to enable products to be tested for compliance with the profile by accredited laboratories.

Step 1: For IT purchases, update the SATPC record for NF 1823, VPATS, and IPV6 (if applicable). Selecting 'Completed' when obtained and using the Calendar widget for date when completed. Selected WIP, if trying to obtain the 1823, VPATs/508, and IPV6.

Figure 48 *NF 1823, VPATS, IPV6*

Step 2: Remember to click 'Save'.

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4.3.3.3 Procurement Requirement Package Complete, Out of Scope, or Needs Refinement

Review of the Procurement Requirement package produce three possible results.

- Procurement Requirement Package is Complete;
- Request Out of Scope of the NSSC SAT Team:
 - The following are Out of Scope. Check the BPA/IDIQ spreadsheet on the SharePoint:
 - New awards with a potential value over \$250,000;
 - Purchases made with a P-Card (Purchase-Card);
 - New Indefinite Delivery, Indefinite Quantity (IDIQ) contracts or Blanket Purchase Agreements (BPAs) that permit the award of orders with a potential value over \$250,000;
 - Orders under \$250,000 issued against an IDIQ contract or BPA retained by the Center (this does not include orders issued against any of the Solutions for Enterprise-Wide Procurement (SEWP) contracts);
 - Interagency Agreements (IAAs);
 - Small Business Innovation Research (SBIR) Phase III contracts that are retained by the NASA Center;
 - Grants that are retained by the Center;
 - Orders for construction, facility repair or A&E services, or Long Term Leases (material groups "C1", "C2", "Y", and "Z"); and
 - Purchases made by institutional support contractors (Center contracts with scope that provides for these contractors to make certain purchases on behalf of the Center.)
- Refinement is Needed – Procurement Requirement Package is not completed.

Step 1: Open the SATPC record. Go to '**Acquisition Steps**'. Go to '**Stage 2**' – Procurement Review. Click on the drop down box for '**PR Review Status**'.

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Acquisition Request | Acquisition Steps | Pre Award | Procurement Award | Other

Stage 1

Purchase Requisition(s) Released: Is Completed

PR Worked By: TestUser SAT REVIEW - L2

PR Closed By: TestUser SAT REVIEW - L2

PR Closed On: 2018-02-24 16:39:42

Stage 2

Procurement Review: Is Active

PR Review Status: -- None --

PR Review Worked By: TestUser SAT REVIEW - L2

PR Review Closed By:

PR Review Closed On:

Figure 49 SATPC Record, Acquisition Steps, Stage 2

Step 2: Choose **Package Complete – Placed in WIP** if the procurement package is complete, then select from the drop down box '**Reviewed – place in WIP**'. Click '**Save**'. This will start the NSSC metric clock.

Procurement Contract - SATPC0001122

Update | Create Vendor | Insert | Insert and Stay | **Save** | Delete

Stage 2

Procurement Review: Is Active

PR Review Status: Reviewed – placed in WIP

PR Review Worked By: TestUser SAT REVIEW - L2

PR Review Closed By:

PR Review Closed On:

Stage 6b

CO Review Worked By:

CO Review Closed By:

CO Review Closed On:

Stage 6c

Figure 50 Stage 2, PR Review Status

This Task must be closed at the Stage level and not from the task table. The system will not send out the WIP email, if **Procurement Review** task is closed at the task table. Click '**Save**'. Click '**OK**'.

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Stage 2

Procurement Review: Is Completed

PR Review Status: Reviewed – placed in WIP

PR Review Worked By: Desiree Oliver

PR Review Closed By:

PR Review Closed On:

Figure 51 *Stage 2, Not Within Scope*

Step 3: If the procurement package is out of scope, then select from the drop down box '**Not within scope**'. Enter the reason why in the text box for the field '**Refinement/Out of Scope Reason**'. Make it very clear. Check spelling. The reason written in this box goes to the Center.

Stage 2

Procurement Review: Is Active

PR Review Status: Not within scope

* Refinement/Out of Scope Reason: The request is for construction, and is one of the exceptions of the NSSC SAT Team.

PR Review Worked By: TestUser SAT REVIEW - L2

Figure 52 *Stage 2, Not Within Scope*

- Click '**Save**'.

Update Create Vendor Insert Insert and Stay **Save** Delete

Figure 53 *Save button*

- Click '**OK**'. This will send an email to everyone listed in the POC sections under Acquisition Request.

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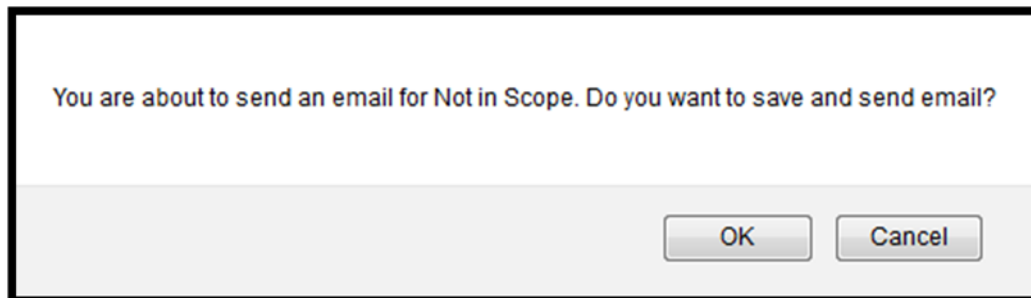


Figure 54 *Send email OK*

- Place task in pending. Scroll down to the bottom to the task table. Double-click in the State field to change to '**Pending**' for the task with the short description '**Procurement Review**'. Click the green check to save entry into the table. Click '**Save**'.



Figure 55 *State, Pending*

Step 4: If the procurement package needs refinement, select from the drop down box '**Refinement Needed**'. Enter in the text box for the field '**Refinement/Out of Scope Reason**' what needs refinement. Make it very clear. Check spelling. The reason written in this box goes to the Center.

Figure 56 *Stage 2, Refinement Needed*

- Click '**Save**'.

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Figure 57 **Save button**

- Click OK. This will send an email to everyone on the list.

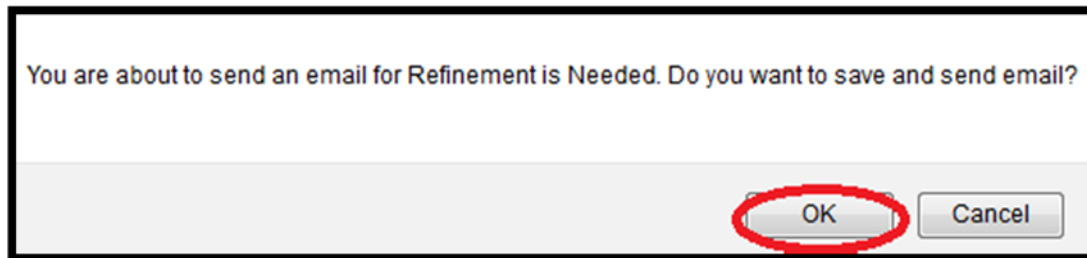


Figure 58 **Send email OK**

- Place task in pending. Scroll down to the bottom to the task table. Double-click in the State field to change to '**Pending**' for the task with the short description '**Procurement Review**'. Click the green check to save entry into the table. Click '**Save**'.



Figure 59 **State, Pending**

Important Note: Attempt Follow up communication every 3-5 business days until issue resolution. Request any missing requirements, documents or required approvals via email to the Requestor and/or Technical End User. If requested by phone, use a dated Memorandum for Record to document the request. After three attempts, to obtain a complete package from the Center, including at least one phone call, the review team will engage the Contracting Officer for assistance.

The “Submitted Complete Package” field located on the “Pre Award” tab should either stay “yes” if the package is complete or be changed to “no” if package is incomplete. If package is not complete, briefly state what is missing. Examples “1707”, “RDSS”, “product description”, “GSFC Safety form signed”.

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Submitted Complete Package
No

* Package Missing?
1707

This field should not be changed after a receipt of a complete package after additional information has been requested. This field is to help capture the percentage of packages received that are not complete and what usually missing.

4.3.3.4 Reserved

4.3.4 Stage 3: Posting/Solicit Quotes Assignment

Step 1: To assign tasks, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column and lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on ‘**Open – Unassigned Tasks**’.

Step 2: Look for tickets in the Assigned Group ‘**PR – SAT PROCESSING – L2**’ and Assigned Processor is blank. To open the ticket click on the underlined SATPC Number.

Step 3: To filter to a particular Assigned Group click the search icon.

All > Active = true > Assigned to is empty > Item Name starts with NSSC SAT

Number State Number Number Number Number SAT Award Order #

Figure 60 *ServiceNow Simplified Acquisitions Search*

Step 3: Under ‘**Assignment Group**’ type in the field ‘**PR – SAT PROCESSING – L2**’. Hit **Enter** on your keyboard.

Number	Number	Number	SAT Award Order #	Short description	Name	Assignment Group	As
Search	Search	Search	Search	Search	NSSC S	PR - SAT PROCESSIN	Se
SATPC0001075	(empty)	(empty)		Received and Reviewed Quotes	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	
SATPC0001048	(empty)	(empty)	NNJ16HD03P	SAT Acquisition	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	
SATPC0001071	(empty)	(empty)		Posting/Solicit Quotes	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	
SATPC0001122	(empty)	(empty)		Posting/Solicit Quotes	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	

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Figure 61 *Assignment Group PR - SAT Processing – L2*

Step 4: The ‘Assigned To’ is blank and the short description reads ‘Posting/Solicit Quotes’.

Number	SAT Award Order #	Short description	Name	Assignment Group	Assigned to
SATPC0001075	(empty)	Received and Reviewed Quotes	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	
SATPC0001048	(empty)	SAT Acquisition	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	
SATPC0001071	(empty)	Posting/Solicit Quotes	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	
SATPC0001122	(empty)	Posting/Solicit Quotes	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	

Figure 62 *Assignment Group PR - SAT Processing – L2, Assigned To blank, Short Description Posting/Soliciting Quotes*

Step 5: Click on the SATPC number to open up the record. Go to the **Acquisition Steps** tab. Scroll down to **Tasks for SAT Procurement Contract** located under the Stages. For Task ‘Posting/Solicit Quotes’ double-click in the field under the column ‘Assigned To’ to select a name. Click the search icon. Select desired name.

Short description	Name	Assignment Group	Assigned to
Posting/Solicit Quotes	NSSC SAT Acquisition Request	PR - L2	<input type="text" value=""/>

Figure 63 *Posting/Solicit Quotes*

Step 6: Instead of clicking the search icon, use the form’s built-in autofill feature by typing the beginning of an authorized name. Click the Green check to save the selection. Click **Save** at the top pf the form. Exit the ticket to go to the next ticket.

Assignment Group	Assigned to
TestUser SAT PROCESSIN	<input type="text" value=""/>

Figure 64 *Posting/Solicit Quotes, autofill name*

4.3.5 Stage 3: Posting/Solicit Quotes

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Step 1: To open a task assigned to you, you must be logged into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name, if you are not automatically brought into the main console. Scroll down to the **Simplified Acquisitions** section which is in the left column and reflects **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on **Tasks Assigned to me** under section ‘**SAT Tasks**’.

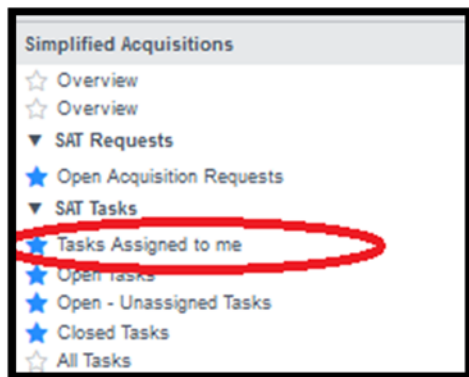


Figure 65 *Simplified Acquisitions, Tasks Assigned to Me*

Step 2: Click on **SATPC** number in the second column to open up the SAT Procurement Ticket.

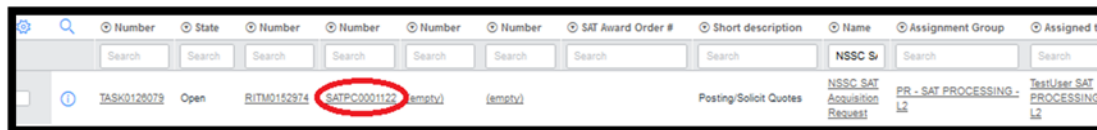


Figure 66 *Open SAT Procurement Ticket using SATPC Number*

Or click on the **Task Number** to open the task.



Figure 67 *Open SAT Procurement Ticket using Task Number*

Step 3: To go to the SATPC ticket click on the ‘**SAT Acquisition Request for T...**’ tab at the bottom of the Task. Click on the SATPC in the Procurement Contracts Table.

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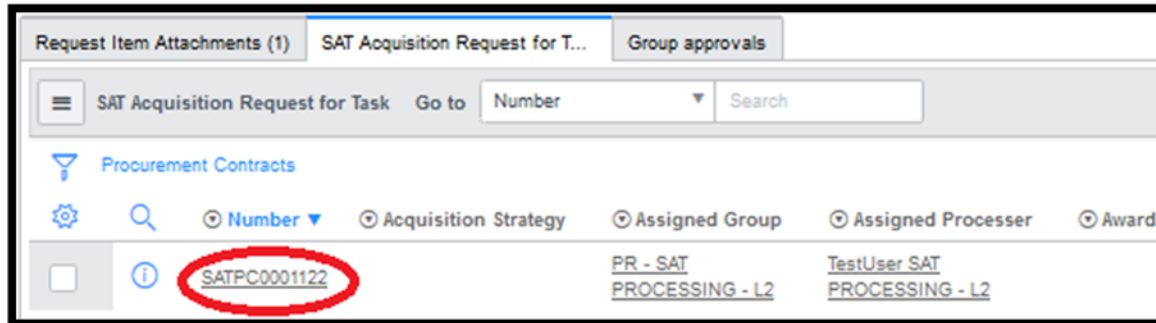


Figure 68 SAT Acquisition Request for T... Tab

Step 4: Review the Procurement Requirement Package and Purchase Requisition.

- Requests marked as **expedited** receive consideration for forward placement in the work queue. Expedited requests must include a justification for project needs. The justification should include project need and risk. Be mindful of things in the work queue that the WIP days are near to metric date.

Step 5: Determine Selection Factors by reviewing the package. If the Technical End User/Customer wanted to use Best Value procurement, then the package should include evaluation factors:

- Lowest Price Technically Acceptable
- Tradeoff process/Best Value
- Sole Source Simplified Acquisition

Step 6: Determine Acquisition Strategy. In determining the proper source of supply for the goods or services, give priority to sources prescribed by the FAR and previously established sources of supply. Obtaining supplies and services through purchases from open-market commercial sources occurs only after all established sources of supply have been considered and none can provide the requirement within the required time constraints.

4.3.5.1 Priorities for the Use of Sources (FAR 8.002)

Supplies:

- Inventories of requiring agency.**
- Excess from other agencies:**
 - Check GSA nationwide inventory of excess and surplus property at <http://gsaxcess.gov>.
- UNICOR/Federal Prison Industries, Inc.** - UNICOR is a wholly owned Government corporation chartered in 1934. Its function is to provide training and employment for prisoners in Federal penal and correctional institutions. Items manufactured or assembled pursuant to

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this program are listed at website address <http://unicor.gov/>. Items listed are sold only to the Federal Government and conform to Federal specifications:

- a. Must conduct market research before purchasing from UNICOR to determine whether the UNICOR product is comparable to products available from the private sector that best meet the government's needs in terms of price, quality, and time of delivery;
- b. If UNICOR is not comparable, then include them in solicitation process, and consider any timely offer submitted;
- c. UNICOR is not mandatory and waiver is not required if:
 - i. Not comparable and was included in the solicitation;
 - ii. Public exigency requires immediate delivery or performance;
 - iii. Suitable used or excess supplies are available;
 - iv. Use outside the US;
 - v. Total \$3,000 or less.

4. Supplies on the procurement list maintained by the Committee for Purchase from People Who Are Blind or Severely Disabled. FAR subpart 8.7 is directed to acquisition from nonprofit agencies employing people who are blind or severely disabled. The Committee for Purchase from People Who Are Blind or Severely Disabled statute requires all federal departments, agencies, and activities to purchase their requirements for selected supplies and services that are on the procurement list maintained by the Committee for Purchase from People Who Are Blind or Severely Disabled:

- a. Procurement List located – www.abilityone.org/work_with_us/procurement.html;
- b. Purchase products from:
 - i. www.abilityone.com;
 - ii. GSA is the primary distributor for AbilityOne;
 - iii. NIB Associated Agency Listing: Contains a geographical listing of National Industries for the Blind (NIB) associate agencies: <http://www.nib.org>.

5. Wholesale supply sources, such as GSA stock program, Defense Logistics Agency (DLA), and Department of Veterans Affairs (VA).

Services:

- 1. Services on the procurement list maintained by the Committee for Purchase from People Who Are Blind or;**
- 2. Severely Disabled.**

If requirements cannot be satisfied by a required sources then consider the following:

Supplies:

- NSSC held IDIQ/BPA
- SEWP (<http://www.sewp.nasa.gov/>)

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- GSA Schedules
- Governmentwide Acquisition Contracts

Services:

- NSSC held Agency Contracts
- GSA Schedules
- Government-wide Acquisition Contracts

4.3.5.2 Small Business Set Asides

A set-aside for small business is the reserving of an acquisition exclusively to a small business concern.

“Small business concern” means a concern, including its affiliates that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria and size standards in 13 CFR part 121 (see [19.102](#)). The size standards by NAICS code are published by SBA.

All procurements over the micro-purchase threshold and up to \$250,000 are reserved exclusively for small business concerns.

FAR 13.003 (b)(1) Acquisitions of supplies or services that have an anticipated dollar value **exceeding \$10,000** (\$20,000 for acquisitions as described in [13.201\(g\)\(1\)](#)) **but not exceeding \$250,000** (\$300,000 for acquisitions described in paragraph (1) of the simplified acquisition threshold definition at [2.101](#)) **are reserved exclusively for small business concerns and shall be set aside** (see [19.000](#), [19.203](#), and subpart [19.5](#)).

FAR 13.003 (b) (2) The contracting officer may make an award to a small business concern under the—

- (i) 8(a) Program (see subpart [19.8](#));
- (ii) Historically Underutilized Business Zone (HUBZone) Program (but see [19.1305](#) and [19.1306\(a\)\(4\)](#));
- (iii) Service-Disabled Veteran-Owned Small Business (SDVOSB) Program (see subpart [19.14](#)); or
- (iv) Women-Owned Small Business (WOSB) Program (see [subpart 19.15](#)).

FAR 13.003 (b) (3) The following contracting officer’s decisions for acquisitions at or below the simplified acquisition threshold are not subject to review under subpart [19.4](#):

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- (i) A decision not to make an award under the 8(a) Program.
- (ii) A decision not to set aside an acquisition for HUBZone small business concerns, service-disabled veteran-owned small business concerns, or EDWOSB concerns and WOSB concerns eligible under the WOSB Program.

FAR 13.003 (b) (4) Each written solicitation under a set-aside shall contain the appropriate provisions prescribed by part [19](#). If the solicitation is oral, however, information substantially identical to that in the provision shall be given to potential quoters.

4.3.5.3 Publication of SAT Requirements

- For requirements actions \$15,000 or less in estimated value, formal publication of the procurement opportunity is not required.
- For SAT requirements action expected to exceed \$15,000, but not expected to exceed \$25,000, information must be disseminate by displaying in a public place or appropriate electronic means. The information must be posted not later than the date the solicitation is issued and must remain posted for at least 10 days or until after quotations have been opened, whichever is later. (FAR 5.101)

Exceptions are: disclosure would compromise national security, contract action are required by a statute to be made through another government agency (8(a) program, committee for the Purchase from People who are Blind or Severely Disabled, utility service and only one source available, order is placed under an indefinite-delivery contract, proposed contract action is made under the terms of an existing contract that was previously synopsized in sufficient details with respect to current proposed contract action (FAR 5.101, 5.202) (example: GSA, SEWP), the use of oral solicitation, or posting on FedBizOpps.

Open market acquisitions are between \$15K-\$25K to be fulfilled via an oral quote to satisfy the requirement of FAR 5.101(a)(2)(ii). The SP or CO will add a Memo for Record or add to the bid abstract logging the three individuals that they spoke to regarding the acquisition. Follow-up emails or documentation to support the verbal quotes will be added to the award documentation.

- For SAT requirement actions estimated in excess of \$25,000, must be publicized by synopsizing in FedBizOpps (FAR 5.101). Combination synopsis/solicitation notice shall be used whenever feasible.

Exceptions are: disclosure would compromise national security, made under conditions of unusual and compelling that preclude competition to the maximum extent practicable, and the government would be seriously injured if the agency complies with time periods set out, expressly authorized or required by a statute to be made through another government agency or from a specific source, order is placed under an indefinite-delivery contract, and proposed

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contract action is made under the terms of an existing contract that was previously synopsized in sufficient details with respect to current proposed contract action (FAR 5.207) (example: GSA, SEWP). See FAR subpart 5.202 for additional exceptions.

Note: Using the information and documentation provided, try to complete as much information as possible on the **Pre Award**, **Procurement Award** and **Other** tabs before going to the **Acquisition Step** tab.

4.3.5.4 Pre Award Tab

Step 1: On the SATPC record go to the '**Pre Award**' tab.

Step 2: Select a starting point for the '**Acquisition Strategy**' by using the drop down box. Choices are: NASA SEWP, General Services Administration (GSA), Fed Bid, Veterans Affairs (VA), Defense Logistics Agency (DLA), Library of Congress (LOC), Federal Prison Industries Inc. (UNICOR), Other Required Source, or Open Market. Updated when a new acquisition strategy is determined.

Step 3: Select a '**Selection Factor**' by using the drop down box. Choices include: Lowest Price Technically Acceptable, Tradeoff Process/Best Value, or Sole Source.

Step 4: From the drop down '**Synopsis Required**' select '**No**' if synopsis is not required or select '**Yes**' if synopsis is required. This can be changed later if the Acquisition Strategy changed to open market and one of the exceptions was not met.

Figure 69 *Pre Award*

Step 5: If the request is limiting competition selected from the drop down box, the one that closely matches the reason why. Choices are: Brand Name, Compatibility of Parts/Replacement Part, Continuation of Previous Effort, Exclusive Licensing Agreement, Limited Data Rights (Source Code), Patents/Copyrights, Proprietary Knowledge, Unique Subject Matter Expertise, Warranty Coverage, or Other. If you select Other, enter a general description of reason why.

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Step 6: If you know that the request is already not going to a Small Business, select from the drop down box for the field '**Reason Not Awarded to Small Business**'. Choices are: Sole Source, SB Nonresponsive, Other Required Source, or Other. If '**Other**' is selected enter a description of the reason.



The screenshot shows two dropdown menus. The first is labeled 'Reason for Limiting Competition' and has 'Proprietary Knowledge' selected. The second is labeled 'Reason Not Awarded to Small Business' and has 'Sole Source' selected.

Figure 70 *Reason Not Awarded to Small Business*

- **Note:** If any of the information related to the other fields on the Pre Award tab has changed, please make sure to update fields accordingly. When making changes in ServiceNow remember to Save Often.

4.3.5.5 Procurement Award Tab

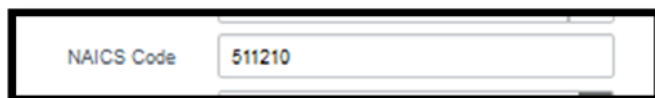
Step 1: For the field '**State**' change the drop down box to '**In Progress**'.



The screenshot shows a dropdown menu labeled 'State' with 'In Progress' selected.

Figure 71 *State, In Progress*

Step 2: For the field '**NAICS Code**' enter the main NAICS code associated with this request. NAICS code should match up closely with the material group description.



The screenshot shows a text input field labeled 'NAICS Code' with the value '511210' entered.

Figure 72 *NAICS Code*

Step 3: For the field '**Complexity**' the choices include low, medium, or high. Based on of the estimated dollar threshold, acquisition strategy, selection factor, and if the request is quality sensitive or highly unique (may include hazardous requirements). Find the scenario that best fits the request, and change the drop down box accordingly.

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Step 4: Still under the 'Procurement Award' tab, for '**Secondary POC Proc (SP)**' select your name by typing it slowly or using the search icon. If you use the search icon click on your name to pull it into the record.

The screenshot shows the 'Procurement Award' tab in the ServiceNow interface. On the left, there are fields for 'Primary POC Proc (CO)', 'Secondary POC Proc (SP)', and 'Secondary POC Proc (CS Buyer)'. The 'Secondary POC Proc (SP)' field has a search icon (magnifying glass) next to it, which is circled in red. To the right, a pop-up window titled 'Users | ServiceNow NSSC IT Service Management Suite - Mozilla Firefox' is open, displaying a list of users. The list includes columns for Name, First name, Last name, User ID, Email, and Business. The first few users listed are LINDA WALKER, MARIA ETHERIDGE, Nicolas Zogaib, and Nikita McInnis. The 'Secondary POC Proc (SP)' field is currently empty, and the 'Secondary POC Proc (CS Buyer)' field is also empty.

Figure 74 **Secondary POC Proc (SP)**

This close-up shows the 'Secondary POC Proc (SP)' field. A red oval highlights the search icon (magnifying glass) and the user selection 'TestUser SAT TEAM - L2'. The 'Primary POC Proc (CO)' field is empty, and the 'Secondary POC Proc (CS Buyer)' field is also empty.

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Figure 75 *Secondary POC Proc (SP) example*

4.3.5.6 Acquisition Strategy

Important Note: Procurement Notice 17-10 requires completion of the electronic document posting checklist when requirements are posted via the internet to public domains (FBO, eBUY, FEDBID, SEWP, etc.) The Electronic Posting checklist is located on the SAT team SharePoint site. The buyer must ensure that the RFQ/Solicitation # is included in the identified description field on the electronic posting checklist before the requirement is submitted for initial review.

4.3.5.6.1 Strategy 1. Oral Solicitations:

An Oral solicitation should be used to the maximum extent practicable. Especially for SAT requirements when the action is expected to exceed \$15,000, but not expected to exceed \$25,000. Oral quotes shall be recorded on the SAT bid abstract. Ensure all vendors solicited are noted on the form even though no quote was received. Follow up the verbal/oral quote with an email. Place email in file for record. Include a memo for record in file.

How to obtain a Solicitation Number – Generating a solicitation number through PPS is not necessary. You may use the PR number as a “reference number” to identify your solicitation

In the event that your oral solicitation needs to be cancelled, the vendors should be individually notified with the following statement and nothing more: “Please be advise that this Request for Quote (RFQ) has been cancelled”. If the vendor responds back to the email, the email should be forwarded to the assigned CO. The buyer should not respond to the vendor or give any additional information.

4.3.5.6.2 Strategy 2. SEWP

(URL: <http://www.sewp.nasa.gov/>): Always check SEWP first for the items that can be procured through SEWP before going to GSA.

What can be procured through SEWP:

- Information technology (computer hardware, storage, security);
- Software & Cloud (software, storage as a service);
- Networking & Communications (routers, modem, telecommunication devices);

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- Supporting Technology (scanners, printers, copiers, shredders, sensors, medical IT);
- AV/Conferencing (A/V equipment, TVs, display monitors, projectors, screens);
- Services (maintenance/warranty, site planning/installation, product based training, product based engineering services.
- Fair opportunity must be provided within at least one Contract Group or Set-Aside.
- Brand Name – posting of justification and approval (J&A) with RFQ is required for orders over \$25,000.
- Sole Source – posting of justification and approval (J&A) with RFQ is required (exceptions and procedures in FAR 16.505).
- SEWP is a Government-Wide Acquisition Contract (GWAC).

Step 1: Click Log-In

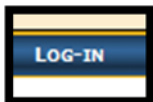


Figure 76 *SEWP Log-In*

Step 2: Enter your User ID and Password. Click on the Log In button.

Figure 77 *SEWP User ID and Password*

Step 3: Click the '**SEWP Tools**' then Click on '**Quote Request Tool (QRT)**' if you are not '**Home**'.

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Figure 78 *SEWP Tools, Quote Request Tool (QRT)*

Step 4: Hover on 'Request'.

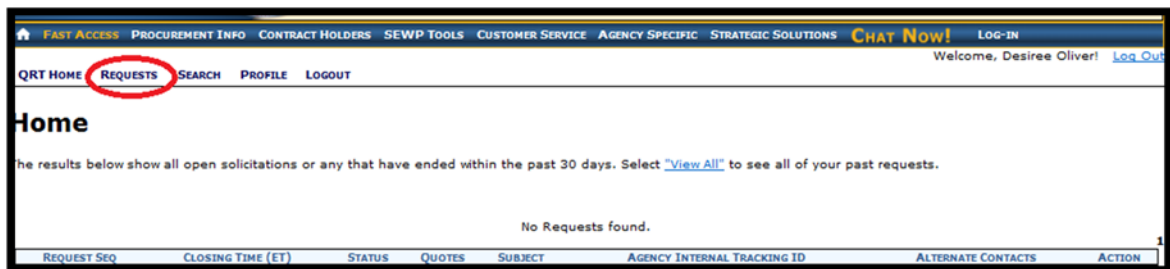


Figure 79 *SEWP Home, Requests*

Step 5: Click on 'Create New Request'.

- Enter '**Subject**', which should coordinate with the brief description on the Request.
- Enter '**Agency Designated Tracking ID**'. This is NSSC plus the Solicitation number generated from PPS.

 A screenshot of a web form titled "General Information". The form contains two text input fields. The first field is labeled "Subject* (e.g. Requirement for 50 laptops)" and has a character count of "(200 chars left)". The second field is labeled "Agency Designated Tracking ID (Optional)" and has a character count of "(40 chars left)". At the bottom right of the form are two buttons: "Save" and "Save and Close".

Figure 80 *SEWP, Create New Request, General Information*

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Step 6: The Request Type is 'Request for Quote (RFQ)'.

Figure 81 *Request Type, Request for Quote*

Step 7: Select Group B and Group C.

Figure 82 *Select Group B and C*

Step 8: Select 'Full and Open' for the Set-aside. Only check small business by checking Groups B and C. If certain Set-asides are wanted, the RFQ can be set-aside to Group B SDVOSB or Group B HUB-Zone.

Figure 83 *SEWP, Select a Set-Aside*

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Step 9: Browse to upload any Statement of Work, Bill of Materials, Terms and Conditions. Use 'Add another file' to upload more than one file.

Step 10: Enter a brief government specification in the Summary. Note that a more detailed specification is uploaded.

Figure 84 *SEWP Specification Example*

Step 11: Press GPAT for requirements that require 508 compliance, which should include all IT related purchases.

Figure 85 *SEWP GPAT 508 Compliance*

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Step 12: Click on the GPAT template that best fits the requirements

Select GPAT

- ☐ [Application/Operating System Software](#)
- ☐ [Call \(Contact/Help Desk\) Center Services](#)
- ☐ [Cloud Computing](#)
- ☐ [Computer Monitors](#)
- ☐ [Computer Printer](#)
- ☐ [Computer-based Training](#)
- ☐ [Data Services or Information Retrieval Systems](#)
- ☐ [Desktop or Portable Computer](#)
- ☐ [Digital Camera \(with Photo Editing Software GPAT also included\)](#)
- ☐ [Driver Software](#)
- ☐ [eBooks](#)
- ☐ [eBooks Reader](#)
- ☐ [eBooks Software](#)
- ☐ [Fax Only](#)
- ☐ [GPS Navigation Device](#)
- ☐ [Information Content Services](#)
- ☐ [Internet or Intranet Services](#)
- ☐ [IP Telephones](#)
- ☐ [Keyboard or Keypad](#)
- ☐ [Management Information System Services](#)
- ☐ [Multifunction Machines](#)
- ☐ [Pointing Devices](#)
- ☐ [Scientific Instruments](#)
- ☐ [Servers](#)
- ☐ [Smartphone](#)
- ☐ [Software Development Services](#)
- ☒ [Software Maintenance Services](#)
- ☐ [Systems Administration](#)
- ☐ [Telephone Service \(not including VoIP\)](#)
- ☐ [Video and Imaging Input Devices](#)
- ☐ [Video Teleconferencing](#)
- ☐ [VOIP Service](#)
- ☐ [Web Application](#)
- ☐ [Web-based Collaboration Tools](#)
- ☐ [Web-based Information, Documentation and Support](#)
- ☐ [Web-based Training](#)

Figure 86 *SEWP GPAT template*

Step 13: Leave defaults for ‘When a quote is submitted for this request how would you like to be contacted?’ and ‘When this request closes how would you like to be contacted?’

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When a quote is submitted for this request how would you like to be contacted?

☐ Email will be sent and it will include All attachments

☐ No email notice will be sent.

☒ Email will be sent but the Attachments will need to be downloaded from SEWP web Site.

When this request closes how would you like to be contacted?

☐ Please include the Quote attachments in the E-mail summary when my Request closes.

☐ Do Not Send me a summary e-mail for Quote Responses. I will return to download them.

☒ Please send me an E-mail summary when my Request closes.

☐ Set this as my default

Figure 87 *Contact preference*

Step 14: Add additional contacts. You should add the Contracting Officer for the Center the requirement is for. Enter 'First Name', 'Last Name', and 'E-mail'. Click 'Add Contact'. You must click '**Add Contact**'.

First Name:*

Last Name:*

E-mail:*

Add Contact

Figure 88 *SEWP Add additional contacts*

Step 15: 'The Reply By Date' allow at least 3 days.

Reply By Date

Provide a closing date and time for this Request. Contract Holders will not be able to respond to this Request after this date and time. All times are Eastern Time. Note: Asterisk (*) indicates a required field.

End Date:*

03/07/2016

End Time:*

11:59 pm ET

Number of Business Days:*

3

Figure 89 *SEWP Reply By Date*

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Step 2: First step of the RFQ process involves finding sources for the product or service needed. Search using the category guide, view schedule listing, or enter into the search box.

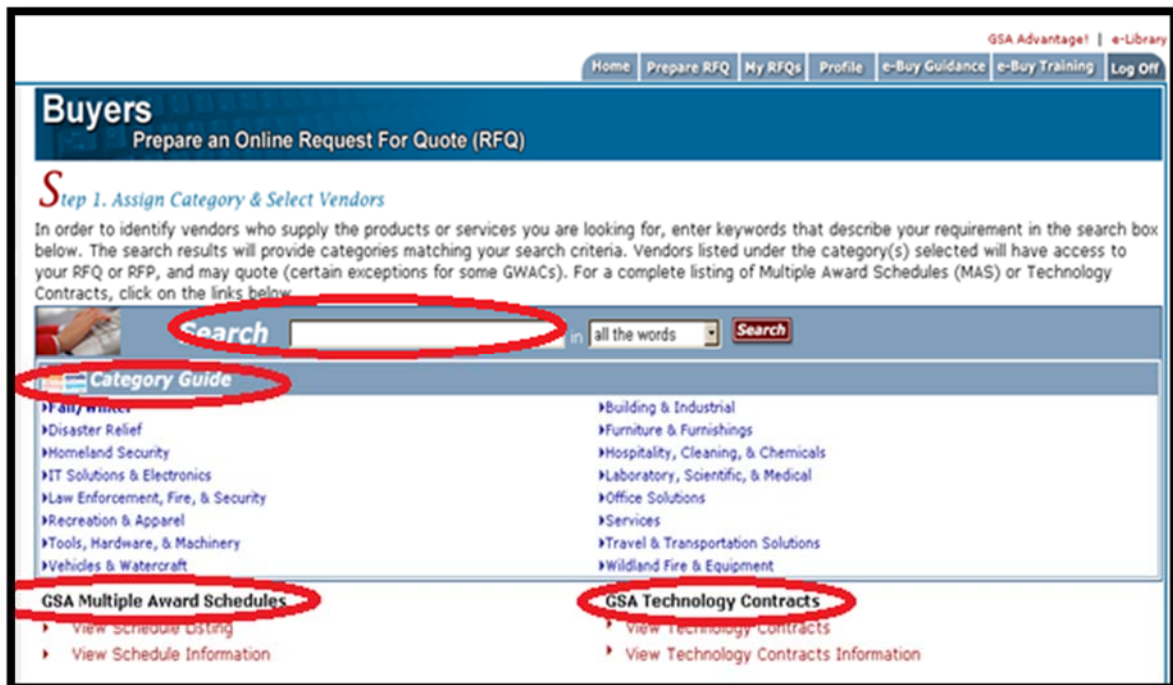


Figure 92 GSA Category Guide

Step 3: Choose a 'Category' that logically fits the request. When choosing a 'Category' chose the schedule that most closely matches the request.

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Step 1. Assign Category & Select Vendors

Instructions: The categories for the Schedule you selected are displayed below. You must now select vendors to receive your RFQ. To begin choosing vendors, click on the 'Category' that meets your criteria. If you are unsure which category to choose, you may select multiple categories.

Search: all the words Find it!

[View Federal Supply Schedule Listing](#)

Law Enforcement, Fire, & Security

84 TOTAL SOLUTIONS FOR LAW ENFORCEMENT, SECURITY, FACILITIES MANAGEMENT, FIRE, RESCUE, CLOTHING, MARINE CRAFT AND EMERGENCY/DISASTER RESPONSE

Category	Description
426 58	Armored Vehicles, Vehicle Armoring Services, Wheeled Vehicles (excluding patrol cars) used strictly for Law Enforcement or Security purposes and other miscellaneous armoring products and services - Includes all types of armored vehicles (excludes Mobile Command Centers). Also includes armoring done on any other type vehicle or structure including, but not limited to boats, temporary jail cells, mobile jail cells (in vehicles) and all services required to provide armored products. Does not include rental or leasing of armored vehicles at this time.
246 40	Intrusion Alarms and Signal Systems - Including audible and visible warning devices (no personal alarms)
246 42 1	Facility Management Systems - (Including Accessories and Repair Parts. Computerized Systems for Surveillance, Monitoring, Controlling, Signaling and Reporting Multiple Functions. Security Functions (i.e., access control, fire detection, intrusion, etc.)
246 42 2	Facility Management Systems - (Including Accessories and Repair Parts. Computerized Systems for Surveillance, Monitoring, Controlling, Signaling and Reporting Multiple Functions. Energy and Facility Management Functions and Services. Building Automation Control systems (including lighting, HVAC controls and sensors). Building Comfort Systems (including heating, ventilation and air conditioning, chillers)
246 42 3	Facility Management Systems - including accessories and repair parts. - Computerized systems for surveillance, monitoring, controlling, signaling and reporting multiple functions. Systems capable of both security functions and energy management functions
246 99	Introduction of New Products/Services relating to Alarm and Signal Systems/Facility
246 43	Perimeter Security/Detection Systems - including but not limited to Fencing, Sensors, etc.
246 50	Ancillary Services relating to Security/Facility Management Systems - Including services necessary to install the system (design through startup), maintain the system (including maintenance agreements, or training). Excludes construction
246 51	Installation of Security/Facility Management Systems Requiring Construction.
246 52	Professional Security/Facility Management Services - including security consulting, training and facility management consulting
246 53	Facility Management and Energy Solutions - Includes, but not limited to projects using appropriated funds as well as alternative financing methods through the use of Energy Savings Performance Contracts (ESPC's) in accordance with the National Energy Conservation Policy Act (NECPA) as amended by the Energy Policy Act of 2005 (EPACT). Projects include energy audits, project management, and energy upgrades of HVAC, Lighting, Controls, etc.
246 54	Protective Service Occupations - Including Security Guards, Alarm Monitors, Baggage Inspectors, Corrections Officers, Court Security Officers, Detection Dog Handlers, Detention Officers, Firefighters, Police Officers, Categories to support Operation On-site of Security Functions, and other support and related categories.
465 10	Emergency Patient Transportation and Immobilization Devices: - Handicapped Evacuation Devices, Stretcher Chairs, Scoop Stretchers, Basket Stretchers, Splints, Fraction Aids, Cervical Spine Immobilization Collars, Keds or Similar Devices and Extrication Devices
465 11	Fire Extinguishing/Suppressing Products, Retardant, Foams and Equipment: - Includes but not to Foam Concentrate, Wetting Agent, Fire Extinguishers (excluding "Halon" fire extinguishing devices), Slip-on Firefighting Units, Pumps, Portable Tanks (folding or collapsible) and Chemical Mixing Equipment (foam proportioners, injectors, educators).

Figure 93 GSA eBuy Category example

Note: Display shows sellers who have contacts under the selected 'Category' with their catalog listed on GSA Advantage.

Step 4: Select Small Business set-aside from the question 'Is this a small business set-aside?' The choices also allow also set-aside for a particular socio-economic code.

Step 5: Click Submit to complete the market research.

Step 6: The requirements for the RFQ are entered on the 'Step 2 - RFQ information' page.

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Step 2. RFQ Information

Instructions: Please enter your RFQ information below. If necessary, you may attach supporting documentation, such as statements of work, proposals, etc., by clicking on "Attach Documents". You should also include any criteria you may use to evaluate quotes.
Reminder: In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors for orders exceeding the micro-purchase threshold (FAR 8.405-1). Include brand name justification/ documentation if applicable (FAR 8.405-6).

Categories Selected:
 04: 246 52 - Professional Security/Facility Management Services
 Vendors selected: 6
 Remove Category: [X]

RFQ ID: RFQ76253
☐ Check if you are seeking sources or information only.
☐ Recovery/Stimulus Acquisition (used to inform Seller, and for your documentation)

Reference #: []
 OPTIONAL - use as needed to assign an internal reference or control number to your RFQ. This number will appear to sellers.

RFQ Title: (ex. Consulting services; Office supplies)
 Security Guard Services

Delivery: (specify delivery expected)
☐ Deliver [] days After Receipt of Order (ARO) (Products)
☒ Date of Award to Date of Completion (Services)
☐ Period of performance: [] through [] (Services)

Line Items (Enter specific line items below)

Mfr. Part/Item #	Manufacturer	Product/Service Name	Qty	Unit	Ship Address	Change Address
					(2)	Change
					(2)	Change
					(2)	Change

[Add Additional Items](#)

Figure 94 GSA RFQ Information Page

Step 7: The selected category already pulls into the PFQ. Add additional categories as needed by click 'Add Category' button.

Step 8: In the Reference # field insert the solicitation number. Enter the RFQ Tile, which should coordinate with the brief description on the Request. Enter Delivery Terms.

Step 9: Enter information about products included in the RFQ in the Line Items Area.

Step 10: Enter a Description.

- Example: Request quote for renewal of Symantec Software as specified in the attached Bill of Materials or equal to. Evaluation and selection will be based on Lowest Price Technically Acceptable (LPTA) Source Selection Criteria.

Note: An RFQ awarded based on Best Value contains this information in the Description.

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Step 11: Attach a Statement of Work (SOW), Bill of Material, or other documentation required for quotes by using the **'Attach Documents'** button.

The screenshot shows the GSA eBuy RFQ form for RFQ ID RFQ76253. The title is 'Security Guard Services'. The 'Delivery' section shows 'Date of Award to Date of Completion (Services)'. The 'Line Items' section is empty. The 'Description' section contains text about the award process. The 'Attached Documents' section has a button labeled 'Attach Documents' which is circled in red. The 'Shipping Address' section shows the GSA field office address in Westphalia, KS. The 'Continue' button is at the bottom right.

Figure 95 GSA eBuy Attach Documents

Browse to file. Name document (optional). Click 'Upload the file'. When finished uploading documents click on **'Go Back to RFQ Basic Info'**.

The screenshot shows the 'Add Attachments to RFQ' page. It includes instructions: 'You may attach a statement of work or additional documents to the RFQ as needed. Each document must be less than 5MB in size.' Below the instructions, there are three steps: 'Step 1 - Select a document for upload' with a 'Browse...' button circled in red; 'Step 2 - Enter a new name for the document' with an optional text field; and 'Step 3 - Click to upload the document' with an 'Upload The File' button circled in red. At the bottom, there is a button labeled 'Go Back to RFQ Basic Info' which is also circled in red. The top navigation bar includes links for Home, Prepare RFQ, My RFQs, Profile, e-Buy Guidance, e-Buy Training, and Log Off.

Figure 96 GSA eBuy Attach Documents to RFQ

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Step 12: Click 'Edit Shipping Address' to change the shipping address, as the shipping address will pull from your GSA Advantage profile.

The screenshot shows a GSA RFQ form. At the top, there is a description box containing text about the RFQ being awarded based on Best Value. Below this is an 'Attached Documents' section with a link to 'Guard Services.doc'. Underneath is an 'Attach Documents' button. The 'Shipping Address' section is highlighted, showing the address for GSA's Field Office in Springfield, MA. The 'Edit Shipping Address' button is circled in red. To the right of the address, there is contact information for the individual receiving the shipment, including the phone number 888-555-5555 and the email GERRY.ADVANTAGE@GSA.GOV.

Figure 97 GSA Edit Shipping Address

Step 13: After all information has been entered and verified, click on the **'Continue'** button.

The screenshot shows a single button labeled 'Continue' with a right-pointing arrow, which is highlighted by a black rectangular box.

Figure 98 GSA Continue button

Note: eBay may suggest additional or alternative categories to post to the RFQ. To use a suggested category, click on the category title. To continue without making any changes, click **'Continue'** button. Choosing a suggested category means repeating step one and choosing a vendor(s). Click the **'Submit'** button. Click **'Continue'** button.

'RFQ Close Date' must remain open a minimum of 2 calendar days, with a 5 calendar day default set. Allow the contractors sufficient time to submit a quote. Review all information. Click the **'Back'** button to make changes. Click the **'Submit RFQ'** to submit.

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Figure 99 GSA Prepare RFQ - Review

Step 14: Place a copy of the RFQ in the folder for the award documentation.

4.3.5.6.4 Strategy 4. FedBizOpps (Open Market)

The FedBizOpps (FBO) web-based portal allows vendors to review Federal Procurement Opportunities over \$25,000. Proposed requirements expected to exceed the amount of \$25,000 must be publicized by synopsisizing in FedBizOpps (FAR 5.101). Exceptions to the posting requirements include:

- Use combined Synopsis/Solicitation to greatest extent possible.
- Select the solicitation response time that will afford potential vendors a reasonable opportunity to respond.
- Use the FBO Buyer Guide to guide you through the posting process (Some of the steps are written below):
https://www.fbo.gov/downloads/FBO_Buyer_Guide.pdf
- Log on to FBO. <https://www.fbo.gov>. You must have a buyers account to post.

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Step 1: Click on **'Notices'**. On the **'Procurement Notices'** tab scroll down. Click on **'Create New Notice/Opportunity Button'**.



Figure 100 *FedBizOpps Homepage, Notices*

Note: Can also use the quicklink **'Create Notice'** on your home page to initiate a new notice.

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Step 2: For the field 'Type' select 'Combined Synopsis/Solicitation'. Enter 'Solicitation Number'. Click the 'Proceed' button.

Welcome, Nancy Buyer Only - test section [Switch Account](#)

Create New Notice

1 Notice Type

Complete all required fields and click proceed to continue to the next step.

Agency/Office:
This field cannot be changed
WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY/test section

Contracting Office Location*:
You are not registered at the office location level. Please select the related office location
5

Type*:
Combined Synopsis/Solicitation

Solicitation Number*:
Agency assigned number for control, tracking, and identification.
Please use ONLY alphanumeric and - _ () characters [no spaces].

[Quit Process And Return](#) [Proceed](#)

Figure 101 *FedBizOpps Create New Notice*

Step 3: Establish the following fields for the Notice. For both Classification Code and NAICS Code fields, the system offers some features to help users more quickly navigate to their target values in the code lists Asterisks indicate required form field

- Title* - description of services, supplies, or project required. NOTE: 256 character limit.
- Classification Code* - Service or supply code number.
- NAICS Code*
- Is this a Recovery and Reinvestment Act Action*
- Response Date* (note – if time is not selected, it will default to 11:59:59 PM ET)
- Primary Point of Contact*
- Secondary Point of Contact
- Description*
- Place of Contact Performance
- Set Aside
- Archiving Policy* (note - notices archive the morning of this date).
- Allow Vendors to Add/Remove From Interested Vendors*

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m. Allow Vendors to View Interested Vendors List*

Step 4: For the Classification Code field, use the arrow key field to open a complete listing. Highlight the target code and hit enter.

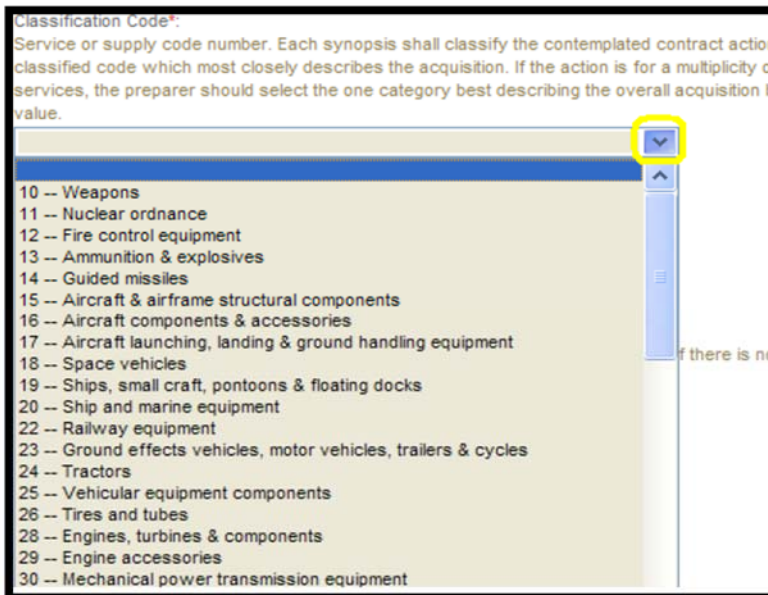


Figure 102 *FedBizOps Classification Code*

Note: Alternatively, you can type the code (e.g., 10 or R) of the target value to navigate to the target selection and hit enter.

Step 5: For the NAICS Code field, place the cursor on the field and start to type the code or the text for the code. Typing part of a word found in a code, e.g., tex, causes the system to display terms with that term in the code. Typing the numeric code causes the system to present codes containing that string of values.

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Type the NAICS code to search for NAICS codes

tex

- 313112 -- Yarn Texturizing, Throwing, and Twisting Mills
- 313312 -- Textile and Fabric Finishing (except Broadwoven F
- 314129 -- Other Household Textile Product Mills
- 314911 -- Textile Bag Mills
- 314999 -- All Other Miscellaneous Textile Product Mills
- 333292 -- Textile Machinery Manufacturing

NAICS Code*:

Type the NAICS code to search for NAICS codes

111

- 111110 -- Soybean Farming
- 111120 -- Oilseed (except Soybean) Farming
- 111130 -- Dry Pea and Bean Farming
- 111140 -- Wheat Farming
- 111150 -- Corn Farming
- 111160 -- Rice Farming
- 111191 -- Oilseed and Grain Combination Farming
- 111199 -- All Other Grain Farming
- 111211 -- Potato Farming
- 111219 -- Other Vegetable (except Potato) and Melon Fa

New Contact

Figure 103 *FedBizOpps NAICS codes*

Step 6: Insert Description.

For the IVL (Interested Vendor List) fields, agency administrators can force configuration of agency solicitations a certain way on the two fields pertaining to IVL. If the IVL fields are not editable, the system is applying agency forced values for this setting. Contact your Agency Administrator for FBO with questions about these settings. Note: Only those with FBO accounts can access the Interested Vendor list.

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Step 7: Click the **'Proceed'** button.

Archiving Policy*:
 Archiving policy. Synopsis and associated documents may be scheduled for archiving fifteen days after the response date, or upon a user-specified date subsequent to the posting date, or left unscheduled and manually archived later. The latest archiving date chosen for a synopsis or any associated document will become the effective archiving date for the entire document set.

☒ Automatic, 15 days after response date
☐ Automatic, on specified date
☐ Manual Archive

Allow Vendors To Add/Remove From Interested Vendors*:
 Choose "yes" if you want vendors to be able to add/remove themselves.

☒ yes ☐ no

Allow Vendors To View Interested Vendors List*:
 Choose "yes" if you want vendors to be able to view the interested vendors list

☒ yes ☐ no

Go Back Save Draft Quit Process And Return **Proceed**

Figure 104 *FedBizOpps Interested Vendor List (IVL) access*

Step 8: Attach documents or packages to the notice. Click the **'Add New Package'** button to upload attachments. Mark whether the package is sensitive or secure and whether the documentation is export controlled or explicit access. Browse and upload. Click add another file as needed. Click the **'Proceed'** button when completed.

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The screenshot shows the 'Create New Notice' page on FedBizOpps.gov. The sidebar on the left lists four steps: 1. Notice Type, 2. Notice Details, 3. Attachments (selected), and 4. Review/Submit. The main content area is titled 'Attachments' and includes a message: 'Click Add New Package below to upload documents to this notice. You may proceed and review without attaching documents.' Below this message is a green box containing the 'Add New Package' button, which is circled in red. At the bottom of the main area are four buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Proceed'. The 'Proceed' button is also circled in red. The top navigation bar has tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. The 'Notices' tab is active. The page also includes a welcome message for 'Nancy Buyer Only - test section' and links for 'Switch Account', 'Accessibility', 'User Guide', and 'Logout'.

Figure 105 *FedBizOpps Notices, Attachments*

Step 9: Review the notice and attachments. Click the 'Post' button to submit.

The screenshot shows the 'Create New Notice' page on FedBizOpps.gov, specifically the 'Review/Submit' step. The sidebar on the left lists four steps: 1. Notice Type, 2. Notice Details, 3. Attachments, and 4. Review/Submit (selected). The main content area is titled 'Notice Details' and displays the following information: Solicitation #: test33, Procurement Type: Combined Synopsis/Solicitation, Date Posted: March 30, 2008, Title: test, Classification Code: 17 - Aircraft launching, landing & ground handling equipment, NAICS Code: 111130 - Dry Pea and Bean Farming, and Response Date: Mar 31, 2008 5:00 pm. At the top of the main area are four buttons: 'Go Back', 'Save Draft', 'Quit Process And Return', and 'Post'. The 'Post' button is circled in red. The top navigation bar has tabs for 'My FBO', 'My Profile', 'Notices', and 'Document Packages'. The 'Notices' tab is active. The page also includes a welcome message for 'Nancy Buyer Only - test section' and links for 'Switch Account', 'Accessibility', 'User Guide', and 'Logout'.

Figure 106 *FedBizOpps, Notices, Review and Submit*

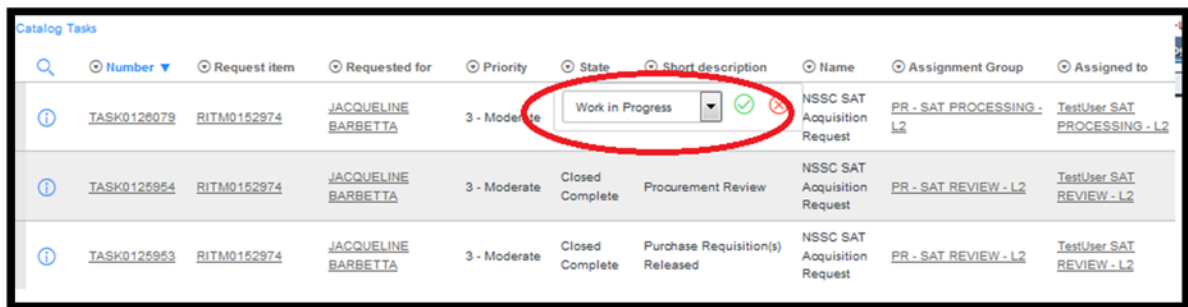
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Sole Source – Pre-solicitation

Post pre-solicitation prior to awarding to a Sole Source in FBO using the same New Notice process as a combined Synopsis/Solicitation. Select 'Pre-Solicitation' as the 'Procurement Type.'

4.3.5.6.5 Update Acquisition Steps

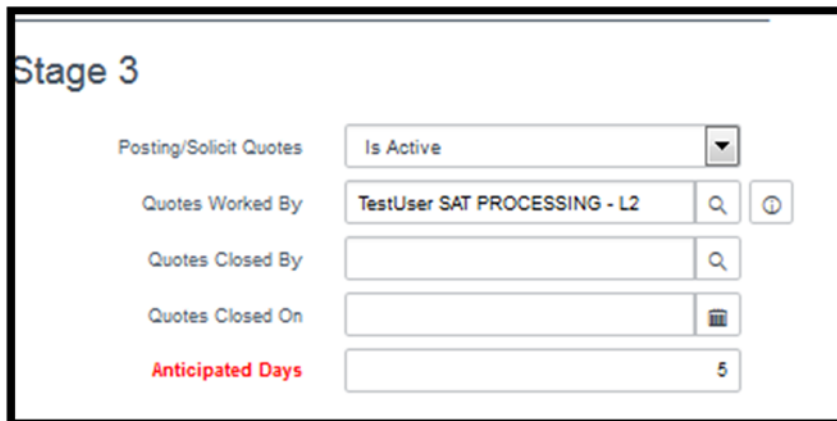
Step 1: Go to the Task Table at the bottom of the SATPC record. Go to the **Task 'Posting/Solicit Quotes'**. For the column 'State' double-click the correct row. Using the drop down change the 'State' from '**Open**' to '**Work in Progress**'. Click the green check to save. Click the '**Save**' Button.



Number	Request item	Requested for	Priority	State	Short description	Name	Assignment Group	Assigned to
TASK0126079	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Work in Progress		NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	TestUser SAT PROCESSING - L2
TASK0125954	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Closed Complete	Procurement Review	NSSC SAT Acquisition Request	PR - SAT REVIEW - L2	TestUser SAT REVIEW - L2
TASK0125953	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Closed Complete	Purchase Requisition(s) Released	NSSC SAT Acquisition Request	PR - SAT REVIEW - L2	TestUser SAT REVIEW - L2

Figure 107 *ServiceNow Posting/Solicit Quotes, State Work in Progress*

Step 2: Go to the SATPC record in ServiceNow. Go to the '**Acquisition Steps**' tab. Go to '**Stage 3**'. After RFQ submission, enter the '**Anticipated Days**' expected for the quotes. Click the 'Save' button.



Stage 3

Posting/Solicit Quotes: Is Active

Quotes Worked By: TestUser SAT PROCESSING - L2

Quotes Closed By:

Quotes Closed On:

Anticipated Days: 5

Figure 108 *ServiceNow Acquisition Steps Stage 3, Anticipated Days*

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Step 3: Go to the 'Processing Notes' tab. Type in the field '**Additional comments – External (Viewable to Customer)**' actions taken. Click the '**Save**' button.

Figure 109 *ServiceNow Processing Notes*

Note: The Technical End-User/Customer can log in, go to their request and see the notes typed.

Figure 110 *ServiceNow Technical End-User notes*

Step 4: 'Quotes Received' marks the final step in Stage 3. Depending on the Acquisition Strategy used, go to the site used for posting and quickly review for adequate responses to the RFQ. It may be necessary to extend the posting length if it is in the best interest of the government and the RFQ did not contain a statement ruling out consideration of late quotes. If no quotes arrive, move up to the next Acquisition Strategy. Make sure to notate it in the 'Additional Comments' under 'Processing Notes' that "No quotes were received, posted to FedBizOpps on ____, set to close on ____". Changing Strategy requires updating the related fields. If changing to FedBizOpps change '**Synopsis Required**' from '**No**' to '**Yes**'. Very important! This field drives our metrics.

Do not move on to 'Stage 4 - Received and Reviewed Quotes' if the situation requires re-soliciting quotes. Also, see if the quotes fall within the PR amount. If the quotes come back significantly higher than the PR amount, the situation may

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require considering full and open re-soliciting. Review findings with the Center's designed CO. Full and open re-soliciting requires an NF 1787. Follow in accordance with the Small Business Coordination NASA Shared Services Center Work Instruction.

If quotes fall within reason with adequate responses received, then close complete Task '**Posting/Solicit Quotes**'. Go to the Task Table at the bottom of the SATPC record. Go to the Task '**Posting/Solicit Quotes**'. For the column 'State' double-click the correct row. Using the drop down change the 'State' from '**Work in Progress**' to '**Closed Complete**.' Click the green check to save. Click the '**Save**' Button.

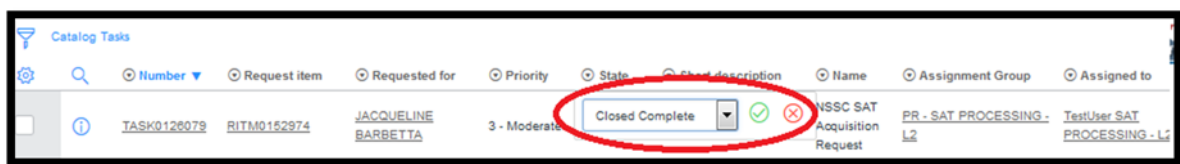


Figure 111 *ServiceNow, State, Closed Complete*

4.3.6 Stage 4: Received and Reviewed Quotes

Step 1: The task, '**Received and Reviewed Quotes**', will automatically be assigned to the person who completed the '**Posting/Solicit Quotes**' Task.

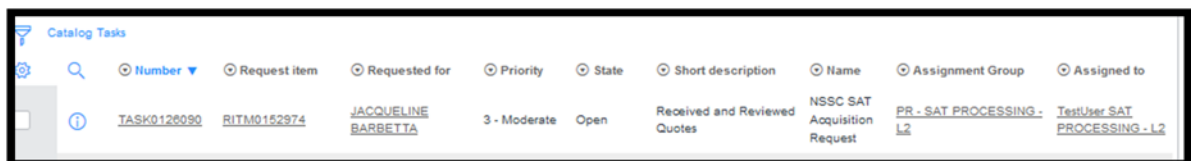


Figure 112 *ServiceNow, Assignment*

Step 2: Go into the SATPC record. Scroll down to the Task Table. Double-click on the field under 'State' column for the task '**Received and Reviewed Quotes**'. Select from the drop down box '**Work in Progress**'. Click on the green check to save the selection. Click the '**Save**' button.

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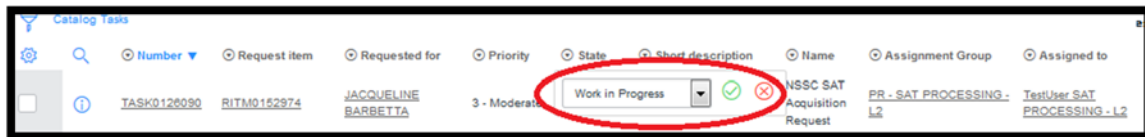


Figure 113 *ServiceNow, State, Work in Progress*

Step 3: Pull the **Bid Abstract** template from the SAT SharePoint. Place received quotes on the bid abstract. Bid Abstract is not needed for sole source or acquisitions with one bid. Review the quotes. Do they appear to meet delivery requirements and request? The technical end- user will verify technical acceptability. Does the lowest quote appear to be unreasonably low? For unreasonably low quotes, the government has the responsibility to ensure the vendor can actually perform the requirements at the quoted price and understood the requirement. Consult the Center CO.

Note: Make sure to include all quotes in the folder for documentation.

Step 4: Acquisition Steps, the final step in Stage 4, documents reviewing quotes and updating the SATPC record. Go to Task Table. Double-click in the field under **'State'** for the task **'Received and Reviewed Quotes'**. Select from the drop down box **"Close Complete"**. Click on the green check to save selection. Click Save.

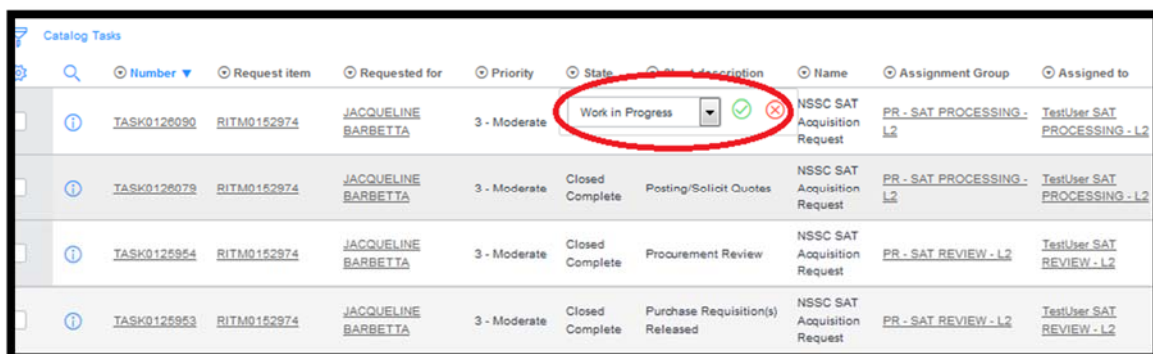
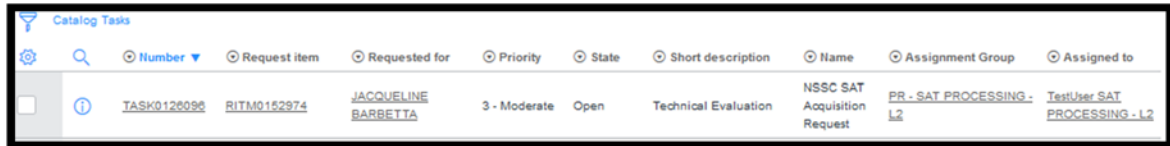


Figure 114 *ServiceNow, change from Work in Progress to Close Complete*

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4.3.7 Stage 5: Technical Evaluation

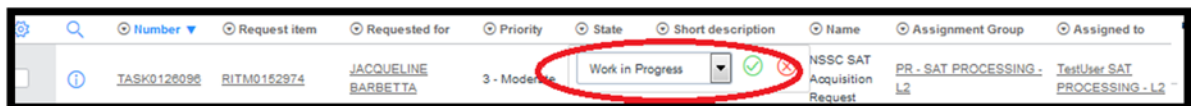
Step 1: The task, '**Technical Evaluation**', will automatically be assigned to the person who completed the '**Received and Reviewed Quotes**' Task.



	Number	Request item	Requested for	Priority	State	Short description	Name	Assignment Group	Assigned to
	TASK0126096	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Open	Technical Evaluation	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	TestUser SAT PROCESSING - L2

Figure 115 *ServiceNow, Technical Evaluation assignment*

Step 2: Go into the SATPC record. Scroll down to the Task Table. Double-click on the field under 'State' column for the task, '**Technical Evaluation**'. Select from the drop down box '**Work in Progress**'. Click on the green check to save the selection. Click the '**Save**' button.



	Number	Request item	Requested for	Priority	State	Short description	Name	Assignment Group	Assigned to
	TASK0126096	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Work in Progress	Technical Evaluation	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	TestUser SAT PROCESSING - L2

Figure 116 *ServiceNow, State Work in Progress*

Note: Based on the selection factors used for obtaining quotes, pull the correct 'Technical Evaluation' template from the SAT SharePoint.

Step 3: Create an email using the Technical Evaluation template and send the email to the Technical End User and CC, the Requestor and Alternate POC. Unless it is a best value Procurement, only the lowest offer should be sent to the customer to evaluate first. If the lowest quote is determine to not be technical acceptable, then the next lowest quote can be sent. Ensure proper justification is included for each offer rejection.

Step 4: After sending the email, update the SATPC record. Go to the 'Processing Notes' tab. Enter in the '**Additional Comments – External**' field enter *Technical Evaluation has been sent to the Technical End User on _____ with a due date of _____*. Click the '**Save**' button.

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Figure 117 *Service Now, Additional Comments, Technical Evaluation sent*

Step 5: Go to the Task Table. Double-click in the field under the ‘**State**’ column for the task ‘**Technical Evaluation**’. Select from the drop down box ‘**Pending**’. Click the Green Check to save selection. Click the ‘**Save**’ button.

Figure 118 *ServiceNow, State Pending*

Step 6: Follow up with the technical end user if no response arrives by due date. After the 2nd attempt, get with the Center Contracting Officer for assistance. Update the additional comments with each attempt. Keep it professional. Example: *Sent reminder email to Technical End User for Technical Evaluation on ____.*

Step 7: After receiving the Technical Evaluation, update the SATPC record. Go to the task table. For the field associated with the column ‘**State**’ for the task ‘**Technical Evaluation**’ double-click in the field. Select from the drop down box ‘**Work in Progress**’. Click the green check to save changes. Click the ‘**Save**’ button.

Figure 119 *ServiceNow, Technical Evaluation, Work in Progress*

Step 8: Review submitted Technical Evaluation to ensure completion. Work with the Technical End-User to complete evaluation, if needed.

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Step 9: If the customer accepted a quote that includes FOB Origin terms, email confirmation is needed from the customer acknowledging they understand the definition of FOB Origin and accept these terms. The following email should be sent for confirmation:

For (Enter REQUIREMENT NAME), the request was sent out with FOB Destination terms however the vendor will not agree to those terms and is requesting FOB Origin. We need input on how you would like to proceed. FOB Origin means that the NASA Center takes on the risk and liability during transit of the product. If the product is damaged or lost in transit it will be on the NASA Center to cover any repair or replacement costs. With FOB Destination, the vendor is responsible for covering any repair or replacement costs. Please provide guidance on how you would like to proceed.

Step 10: Save the email and email response to the efile once it is received.

Step 11: After receiving the Technical Evaluation and reviewing it for completeness, update the SATPC record. Go to the task table. For the field associated with the column '**State**' for the task '**Technical Evaluation**' double-click in the field. Select from the drop down box '**Closed Complete**'. Click the green check to save changes. Click the '**Save**' button.

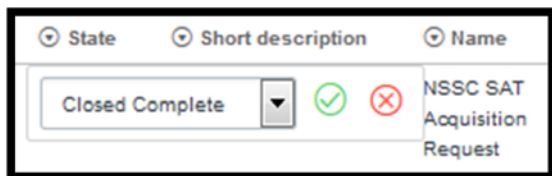


Figure 120 *ServiceNow, State Closed Complete*

4.3.8 Stage 6: Contract Award

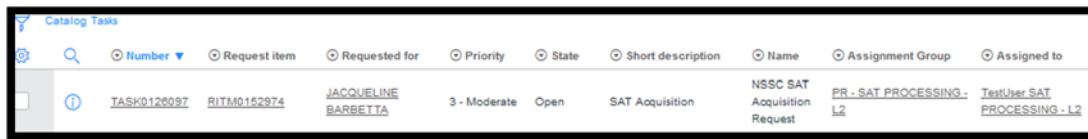
This stage is made up of 3 tasks. The first task '**SAT Acquisition**' is for preparing the award documentation. The second task '**CO Review**' is for the Contracting officer to review the award documentation and make award. The third task '**Distribution**' is the distribution of the award, FPDS-NG finalization, and TechDoc upload.

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- Vendor is selected after quotes are reviewed and technical evaluation is received.

4.3.8.1 Stage 6a - SAT Acquisition

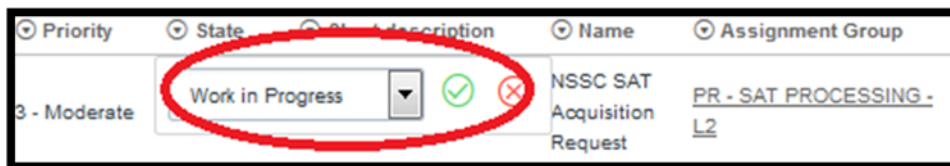
Step 1: The task, '**SAT Acquisition**', will automatically be assigned to the person who completed the '**Technical Evaluation**' Task.



Number	Request item	Requested for	Priority	State	Short description	Name	Assignment Group	Assigned to
TASK0126097	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Open	SAT Acquisition	NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2	TestUser SAT PROCESSING - L2

Figure 121 *ServiceNow, Technical Evaluation Task*

Step 2: Go into the SATPC record. Scroll down to the Task Table. Double-click on the field under '**State**' column for the task, '**SAT Acquisition**'. Select from the drop down box '**Work in Progress**'. Click on the green check to save the selection. Click the '**Save**' button.



Priority	State	Short description	Name	Assignment Group
3 - Moderate	Work in Progress		NSSC SAT Acquisition Request	PR - SAT PROCESSING - L2

Figure 122 *ServiceNow, Work in Progress*

Step 3: Prepare Award Documents

- Verify the select vendor proposed amounts match the released purchase request. Provide Center any updates needed to the PR based on review. For updates, place the task in Pending after sending the email to update purchase requisition. Go into the SATPC record. Scroll down to the Task Table. Double-click on the field under '**State**' column for the task, '**SAT Acquisition**'. Select from the drop down box '**Pending**'. Click on the green check to save the selection. Click the '**Save**' button;
- Upon revised PR release, complete milestone plan for the revised PR. Review PR for any errors or issues. Place the task back in Work in Progress. Go into the SATPC record. Scroll down to the Task Table. Double-click on the field under '**State**' column for the task, '**SAT Acquisition**'. Select from the drop down box '**Work in Progress**'. Click on the green check to save the selection. Click the '**Save**' button;

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- Complete the checklist. Pull Checklist template from SAT SharePoint;
- Check Vendor's certification to ensure legitimacy with no Active Exclusions on the record. See What to Check for in SAM (System for Award Management) below. You will save copies of this information to a PDF file and place in the award file bookmarks.
- **What to Check For in System for Award Management (SAM):**

SAM Step 1: Go to the System for Award Management (SAM) at URL: <https://www.sam.gov> to check Vendor's certification to ensure legitimacy with no Active Exclusions on the record

SAM Step 2: Exclusion Pull (for all awards):

- Click Save PDF
- When PDF pulls up click save

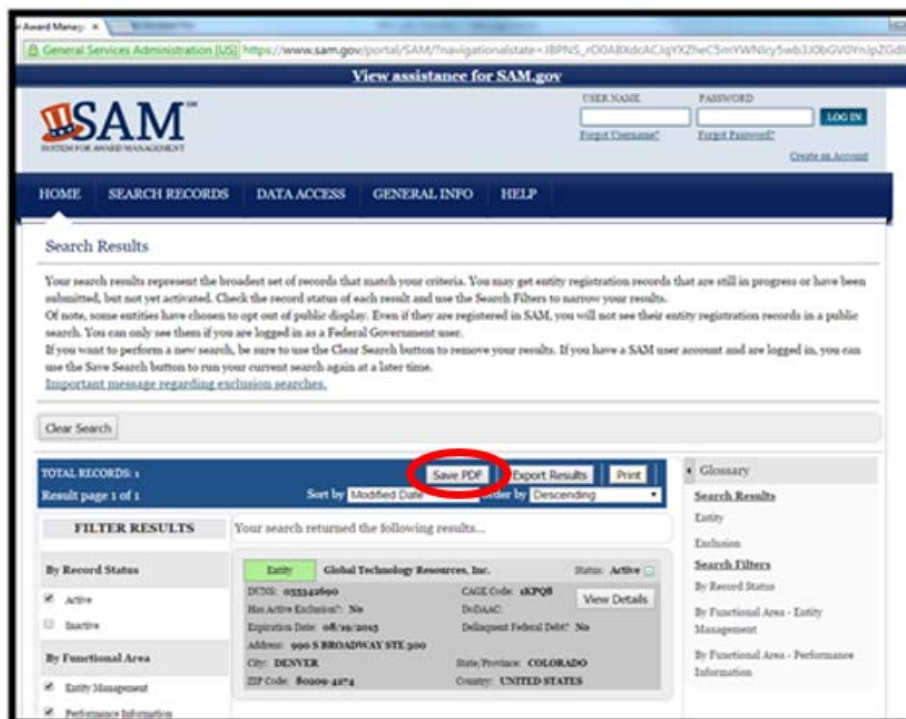


Figure 123 SAM, Save PDF

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SAM Search Results
List of records matching your search for :
Record Status: Active
CAGE Code: 1KPQ8
Functional Area: Entity Management, Performance Information

ENTITY	Global Technology Resources, Inc.	Status: Active
DUNS: 055342690	+4:	CAGE Code: 1KPQ8 DoDAAC:
Expiration Date: Aug 19, 2015	Has Active Exclusion?: No	Delinquent Federal Debt?: No
Address: 990 S BROADWAY STE 300		
City: DENVER	State/Province: COLORADO	
ZIP Code: 80209-4274	Country: UNITED STATES	

Figure 124 SAM, Search Results

SAM Step 3: Pull Core Data (when necessary):

- View Details
- Entity Record

Entity Dashboard

Global Technology Resources, Inc.	990 S BROADWAY STE 300
DUNS: 055342690 CAGE Code: 1KPQ8	DENVER, CO, 80209-4274
Status: Active	UNITED STATES

Review Core Data

Review Core Data

Figure 125 SAM, Review Core Data

SAM Step 4: On the Reps and Certs Section expand *FAR 52.212-3: Offeror Representations and Certifications -Commercial Items (Alternate I & II)* by clicking *FAR 52.212-3*

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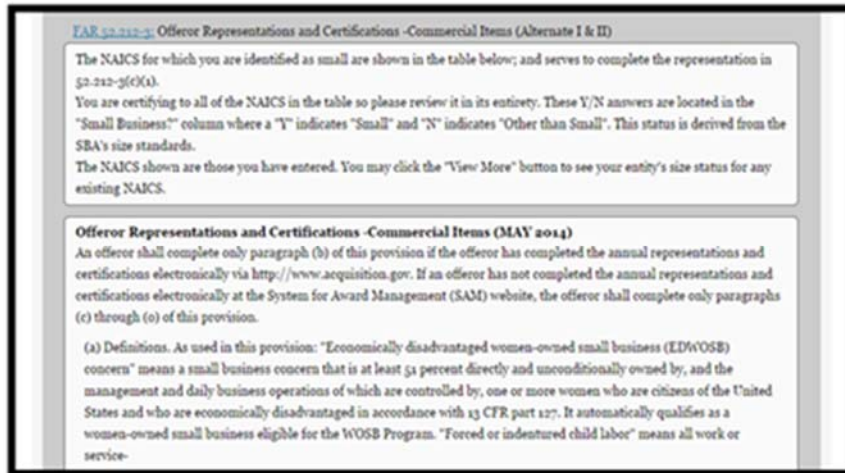


Figure 126 SAM, FAR 52.212-3

SAM Step 5: Choose Print Record

SAM Step 6: Reps & Certs FAR Report (for all awards)

- Click Reps & Certs
- Click Download FAR Report
- Save PDF



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The screenshot shows the SAM Entity Dashboard for Global Technology Resources, Inc. The header includes the company name, DUNS number (055342690), CAGE Code (1KPQ8), and address (990 S BROADWAY STE 300, DENVER, CO, 80209-4274, UNITED STATES). The status is Active. The dashboard has a sidebar with links: Entity Overview, Entity Record, Core Data, Assertions, Reps & Certs, POCs, and Reports. The main content area has a section for 'Review Representations & Certifications' with a 'Current Record' dropdown and a 'VIEW HISTORICAL RECORD' button. Below this are links for 'Download FAR Report' and 'Download FAR & DFARS Report'. At the bottom, there is a certification statement: 'I have read each of the FAR and DFARS provisions presented below. By submitting this certification I, Marie'.

Figure 127 SAM, Download FAR Report

The screenshot shows a PDF document titled 'Global Technology Resources, Inc. -FAR-Report.pdf'. The report is titled 'FAR Report' and contains the following information: 'Certification for: Global Technology Resources, Inc.', 'DUNS: 055342690', 'Certification Validity From: Tue Aug 19 12:09:43 EDT 2014', and 'To: Wed Aug 19 12:09:43 EDT 2015'. Below this, there is a certification statement: 'I have read each of the FAR and DFARS provisions presented below. By submitting this certification, I, Marie Chillemi, am attesting to the accuracy of the representations and certifications contained herein, including the entire NAICS table. I understand that I may be subject to penalties if I misrepresent Global Technology Resources, Inc. in any of the below'.

Figure 128 SAM, FAR Report

Step 4: Prepare Terms and Conditions. Pull the template from the SAT SharePoint. Update Terms and Conditions as needed. Pull any Center unique template from the Center folder from the SAT SharePoint.

Step 5: Prepare Distribution Checklist. Verify the checklist includes all the center unique distribution emails.

Step 6: Prepare statement of Price Analysis. Pull the template from the SAT SharePoint.

Step 7: Prepare an Option justification if applicable. Pull the template from the SAT SharePoint.

Step 8: Update Tabs on the SATPC record

- Check the '**Pre Award**' tab for completeness with no changes needed.

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- Check the **'Procurement Award'** Tab. The "SAT Award Order #" should contain a complete entry. For the field 'Manufacturer' enter manufacturer name if applicable. For the field 'Order Type' choose from drop down box based on type of award. For the field 'Product(s)' enter description of the product(s) if applicable. For the field 'Base Contract Number' enter the SEWP/GSA/IDIQ/BPA contract number if applicable.

Step 9: For the field Vendor click on the search Icon.



Figure 129 *ServiceNow, Vendor Search*

Step 10: First search to see if the Vendor is already in the system. Either type in the vendor name in the search field box or click on the search icon and search using any of the columns.

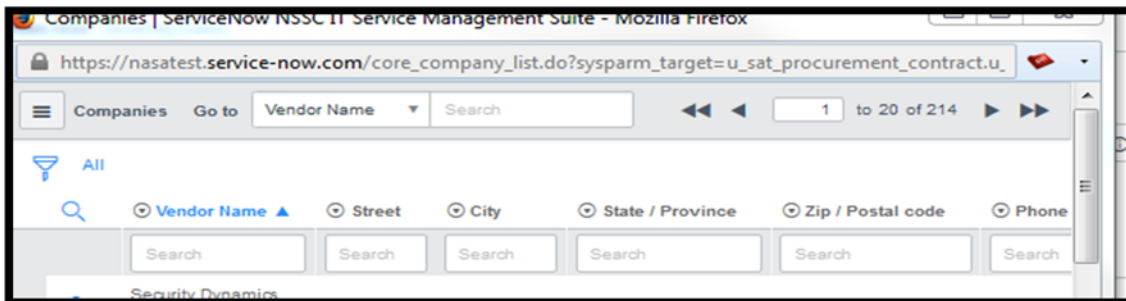


Figure 130 *ServiceNow Vendor Name Search*

Step 11: For vendor not found, close search box. Click on the **'Create Vendor'** box.

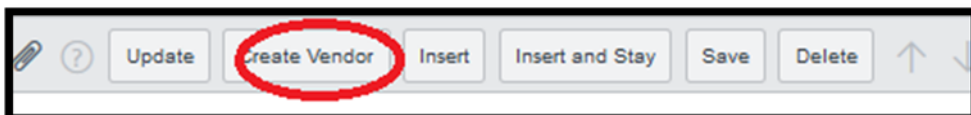


Figure 131 *ServiceNow Create Vendor*

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Step 12: Use the SAM record to enter all the fields on the Vendor table.

Figure 132 *ServiceNow Vendor table*

Step 13: Enter doing Business as Name by coping from the SAM record and pasting into the Vendor record for the associated fields.

Step 14: Click the lock button to unlock the field and enter the Website URL.

Figure 133 *ServiceNow, lock/unlock Website URL entry*

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Step 15 Select from the drop down box the type of business.

- Check all that apply for small business categories by what is enter in their Reps and Certs. Enter the CAGE Code. Click 'Save'.

The screenshot shows a ServiceNow form with the following fields and values:

- Website:
- Type of Business: - Not SB: ☐
- HUBZone: ☐
- 8(a): ☐
- WOSB: ☐
- EDWOSB: ☐
- VOSB: ☐
- SDVOSB: ☐
- SB: ☒
- CAGE Code:

Figure 134 *ServiceNow, Type of Business, CAGE Code*

Step 16: Click 'Save' then click 'Create User'.

The screenshot shows a row of buttons: , , , , and . The 'Create User' button is circled in red.

Figure 135 *ServiceNow, Create User*

Step 17: Enter Point of Contract information for the Vendor POC given on the quote. Select just created vendor using the search icon. Click the 'Save' button.

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The screenshot shows the 'User' form in ServiceNow. The form has a header bar with a back arrow, a hamburger menu, and the text 'User'. Below the header, there are several input fields: 'Name' (a wide field), 'First name', 'Middle name', 'Last name', 'Company' (with a search icon), 'Title' (with a help icon), 'Email' (with an email icon), and 'Business phone'. At the bottom left, there are 'Submit' and 'Save' buttons.

Figure 136 *ServiceNow, Point of Contact Information*

Step 18: After data Save, click the back arrow button

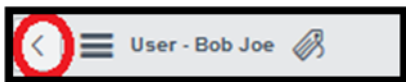


Figure 137 *ServiceNow, Back Arrow*

Step 19: Use the Search icon next to 'Primary Contact' to find the newly created POC.

The screenshot shows the 'Primary Contact' form on the left and the 'Users' list on the right. The 'Primary Contact' form has fields for 'SDVOSB' (checkbox), 'SB' (checkbox), 'CAGE Code' (text field with '1T9K3'), 'Primary Contact' (text field with a search icon), 'Title', and 'Email'. The 'Users' list is titled 'Users' and has a 'Go to' dropdown set to 'Name'. It shows a table with columns 'Name', 'First name', and 'Last name'. The first row is 'Bob Joe', with 'Bob' in the 'First name' column and 'Joe' in the 'Last name' column. A blue dot is next to 'Bob Joe' in the 'Name' column.

Figure 138 *ServiceNow, Primary Contact*

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Step 20: Click on the name. Click Save. Do not click **‘Insert’** or **‘Insert and Stay’** as this will create a second record. Click the back arrow button. Use the search icon next to vendor to search for the newly created vendor or slowly type it in.

Step 21: Go to the **‘Other’** Tab. Enter total value, and total potential value.

Step 22: If the request has options years, enter the total of **‘Number of Option Years’**.

Step 23: On the Option Table, for each option year, enter **‘Option #’**, the **‘Option Start Date’**, and the **‘Date Letter Intent Due’**. The Contract Terms specifies the time period. The standard is 30 days prior to Option Start Date. This may require updating after award for POP based on award date. Click the green check to save entry. When updating using the calendar widget, if the date does not appear, click outside the calendar widget, then click on it again to make the date appear.



Option #	Option Start Date	Date Letter Intent Due	Letter of Intent Sent	Sent By	Sent Date/Time	Option Exercised
1	2017-03-03	2017-02-03	false	(empty)		Option Not Yet Exercised

Figure 139 *ServiceNow, Option Years*

Step 24: Go to the **‘Deliverable & Invoices’** Tab. On the ‘Deliverable’ Table group like items with same due dates on the same row. For multiple delivery dates, insert a new row for the deliverables. Enter a **‘Deliverable Ref’** This Reference can only contain a limited number of characters and will be sent in an email so make sure it is clear and brief. Click the green check to save entry. Enter **‘Deliverable Due’** using the calendar widget (update after award if based on award date). When updating using the calendar widget, if the date does not appear, click

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outside the calendar widget, then click on it again to make the date appear.





Deliverables					
	Number	Deliverable Due	Deliverable Ref	DELQ Reminder 1	DELQ Reminder 2
 	SATDE0002008	2018-06-30	Module and Sun-Sensor		

Figure 140 *ServiceNow, Deliverables and Invoices tab*

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4.3.8.1.1 Create Award Document in PPS:

- The SAT team will create SAT orders based on acquisition strategy used. The following document types will be the ones used for SAT: Purchase Order (ZPO), Legacy Task Order/Delivery Order/BPA Call (ZLTD), Task/Delivery Order (ZTDO), or BPA Call (ZBPC).

Select Purchase Order Type

Select the type of purchase order that you want to create.

Document Type	Document Type Description
ZBPC	BPA Call
ZCOA	Cooperative Agmt
ZFFC	Fully Funded Contrct
ZFO	PPS Funding Order
ZGRN	Grant
ZIAA	Interagency Acq
ZLTD	Legacy TO/DO/Call
ZPO	Purchase Order
ZTDO	Task/Delivery Order

Step 1: Create Order in PPS

- Logon to PPS > Click on the Procurement Tab > Purchasing > Create Document – Purchase Order (FBO posting follow create from solicitation) > select the appropriate Document Type based off the acquisition strategy > Click continue

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TYPE OF AWARD	Document Type
Issuance of New Purchase Orders - 80NSSC17P	ZPO - Purchase Order
Issuance of New Delivery Orders - GSA - 80NSSC17F	ZTDO - Task/Delivery Order
Issuance of New Calls to Existing NNX ELMT BPA's	ZLTD - Legacy TO/DO/Call
Issuance of new Delivery Order from a SEWP Award NNG	ZLTD - Legacy TO/DO/Call
Issuance of New Calls from ELMT BPA's that is 80NSSC17A	ZBPC - BPA Call
Issuance of new Delivery Order from a NSSC Held IDIQ that is 80NSSC17D	ZTDO - Task/Delivery Order

- Note the PIID and Purchase Order Internal Document Number in ServiceNow under SAT Award Order Number

Acquisition Request	Acquisition Steps	Pre Award	Procurement Award	Other	Deliverable & Invoices	Processing
SAT Award Order#			80NSSC18F0111			
Purchase Order Internal Document Number			8500006832			

- You must be in edit mode to make changes to PPS. Be sure to save often.
- Adding a "*" while using a search function will change the search from "looking for exact responses" to "anything that contains"

Items >Item Overview Section

- Bring in your PR first before starting any of the other tabs. Click Add Line > Add Item from PR

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- Search PR by PR number.

- Add the entire PR, make sure it is collapsed before clicking on the button. The PR can be selected by clicking on the grey box on the left of the PR. Click "OK".

- To bring in certain line items expand and hold down shift to select multiple lines in a row or Ctrl when selecting individual lines before clicking the "OK" button. Click "OK" when selection is made.

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Name / Number	Created on	Description	Quantity	Unit	Net / Total Value	Currency	Status text
NS000069 05.06.2017 21:18 4200619353	06/05/2017		0.000		1.00	USD	Approved
Item 1		NNX17CA24C/SBIR 2016-II	0.000		0.00	USD	Approved
Item 2		NNX17CA24C/SBIR 2016-II	1.00	JOB	1.00	USD	Approved

DF007911 15.06.2017 15:23 4200620265	06/15/2017		0.000		3,000.00		Approved
Item 1		TEST-AIRCRAFT SERVICES	0.000		0.00		Approved
Item 3		TEST-AIRCRAFT SERVICES	0.000		0.00		Approved
Item 5		TEST-AIRCRAFT PARTS	5	EA	500.00		Approved
Item 6		TEST-AIRCRAFT PARTS	5	EA	500.00		Approved

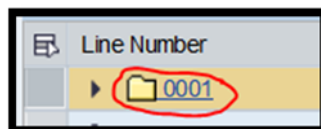
- Click in the Description to edit and add part numbers (adding the part numbers for the winning vendor reduces mods). Expand to check the material group and make additional description updates.

Line Number	Deleted	Internal Item Number	Description	Material Group	Quantity	Unit	Unit Price
0001		1	ETL-76M-190-5A - Pressure Transducers		0.000		0.00
0001.0001		2	ETL-76M-190-5A - Pressure Transducers	A	1.00	JOB	1.00

- You can reduce the unit prices to match the quote at the line item level if needed. As a reminder you cannot increase the line higher the PR amount.

For Delivery Orders/Task Orders on NASA BPA/IDIQ and BPA Calls with the new PIID number

- Click on the line number to get to the “General Data” fields. Edit each line item.



- Enter the contract number for the master contract in the “Contract Number” Field.
- Select search icon> Enter PIID for Master contract under the “PPS Contract No” search criteria> select master contract by select grey box next to the applicable contract.

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Search Contract Number

Search Criteria

PPS Contract No is Contract Name is 80MSFC17C0295 Supplier is Product ID is

Maximum Number of Results: 500

Search Clear Entries Reset to Default

Results List: 1 results found for Contract Number

PPS Contract No	Contract Name	PPS Ctr Lin...	Description	Product ID	Product Cat.	Supplier	Name 1/last nm	Pmt Te.
8800000536	80MSFC17C0295	00001	TRAINING DEVELOPMENT		A	100028	JACOBS TECHNOLOGY	NT30

For TO/DO and Legacy TO/DO/Call (NN)

- Enter the Contract Type at the item level.
- Edit each line item.

Status and Statistics

Item Deleted: No

Closeout Status: ☐

Cancelled: ☐

Line Item Value: 1.00

Line Item Val(Delta): 0.00

* Contract Type: FFP

Line Item Ob(Delta): 0.00

- Enter "Ext Contract Line No" that matches up with the line on the order (This field is not for the GSA Contract #) This information can be found by searching for the base contract's SF1449 through the Prism Legacy System.

Option Type:

Print line on Form: X

Ext Contract Line No: 00013

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Overview Tab

- Enter Vendor – Search by DUNS (Select DUNS from the drop box >enter DUNS >click search>click on vendor). To search by CAGE Code, select “Search Term 1”.

Search Vendor

Search Criteria

DUNS: 959391509
Purch. Organization: NASA SHARED SERVICES CENTER
Purch. Org. ID: O 50000012
Vendor Account Group:

☒ Maximum Number of Results: 500

Search **Clear Entries** **Reset to Default**

Results List: 1 results found for Vendor

Busines...	Name	Name 2	Count...	Re...	Postal C...	City	Street	Building Code	Purch. Organization	DUNS	Creditor	Vendor Account...
117570	UNISTAR-SPARCO COM...			US	TN	38053-6...	MILLINGTON	7089 RYBURN DR	NASA SHARED SERVICE...	95939...	117570	KRED

- Search for created milestone plan by entering the “Transaction ID” received when the MP was created. The Transaction ID should be listed in your internal work notes. If you did not take write down your transaction ID from earlier, you may need to use the “created by” search criteria. Enter your “NS” number into the corresponding field, select “search”, and select your MP by clicking the grey box next to the MP.

Search Criteria

User: OLIVER
Last name: OLIVER
First name: DESREE
Department:

☒ Maximum Number of Results: 500

Search **Clear Entries** **Reset to Default**

Results List: 1 results found for Created By

User	Last name	First name	Department	Building co...	Room N...	Extension	Cost co...	Internal mail	Company	Name
NS000274	OLIVER	DESREE	Procurement	1111		36299			NASA	NASA

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Search: Milestone Plan

Search Criteria

Transaction ID is []

MP Template type is []

Created By is [NS000274]

Purch. Group ID is []

Maximum Number of Results: 500

Search Clear Entries Reset to Default

Results List: 1 results found for Milestone Plan

Transaction ID	Name
8900000107	4200619353 - MP

- Milestone Plan must be released before pulling in, so check for warnings. Click the display next to the Milestone Plan to pull up the milestone. Only one milestone plan may be linked per order, no matter how many PRs or PR revisions.

Milestone Plan: 8900000108

- Enter Award/Change Form Description: Enter valuable information regarding the procurement. What it is, quote number, period of performance. Must include shipping term in following format INCO Terms 1: ____ INCO TERMS 2: _____

Example BPA Call – services

This is BPA Call #15 for Pointwise software perpetual license annual maintenance renewal. See attached quote #Q-16-097 dated 3/17/2016.

Period of Performance: 7/1/2016-6/30/2017. No invoicing prior to period of performance.
INCO TERMS 1: FOB INCO TERMS 2: Destination

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Example of language to use for a delivery of items rather than ARO:

Delivery of items quoted is required within 30 days after the date signed shown in block 31c. of the SF 1449. INCO Terms 1: ____ INCO TERMS 2: _____

Example PO with ARO:

This Order is for 7MM Cryoterm with MT7250A Data Module; Pressurizing System (Helium); and Ambient Termination based on Quote Number 23407 (Attached), dated MM/DD/YYYY.

Delivery of items quoted is required within ____ after the date signed shown in block 31c of the SF 1449. Delivery location on terms. INCO TERMS 1: FOB INCO TERMS 2: Destination

Example PO with POP:

This is a Purchase Order for Land Shark Shredding Services. See attached quote #04122016, dated MM/DD/YYYY.

Period of Performance 05/13/2016 to 05/17/2017. INCO TERMS 1: FOB INCO TERMS 2: Destination

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The screenshot shows the 'General Header Data' tab of the NSSC Process Work Instruction form. The form contains the following fields and values:

- PID: 80NSSC17R2140
- Internal Document Number: 8500001236
- Vendor: 117570 (UNSTAR-SPARCO COMPUTERS, INC.)
- Requisitioner: 1000037368 (Barbara Hamel)
- Plant: 1000000011 (NASA Shared Services Center (NSSC))
- Ship-To Address: 1000000013 (NASA Shared Services Center (NSSC))
- Purchasing Organization: NASA Shared Services Center
- Purchasing Group: XBS - Oliver, Desiree
- Obligated Amount: 1.00

A 'Change Note to Supplier' dialog box is open, displaying the following note:

Note to Supplier: This Order is for Pressure Transducers based on Quote Number 23407 (Attached), dated 06/16/2017. Delivery of items quoted is required within 3 weeks after the date signed shown in block 31c of the SF 1449. Delivery location on terms.

Header Tab > General Data

- Enter the following fields (Fields may differ depending on Document Type). Some fields may require you to search and select instead of just entering it.
- Internal Reference: Enter "SAT" for standard SAT requirements. If you are working an ELMT Call/Order, enter "SAT – ELMT" in the field. (this is very important for reporting capabilities)

The screenshot shows the 'Organization' section of the form with the following fields and values:

- Purchasing Organization: NASA Shared Services Center
- Purchasing Group: XBS - Oliver, Desiree
- Internal Reference: SAT

A 'Show Members' link is visible next to the Purchasing Group field.

- DOCB Template Name > This can be left blank
- Prd of Perform StrDt (Period of Performance Start Date)
- Prd of Perform EndDt (Period of Performance End Date)

The screenshot shows the 'DOCB Template Name' and 'Period of Performance' fields with the following values:

- DOCB Template Name: AWARD_GSA
- Prd of Perform StrDt: 06/14/2017
- Prd of Perform EndDt: 03/13/2017

- Product or Service Code (This should match closely with the material group)

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- Inherently GovFunCde: OT
- NAICS Code

* Product or Serv Code: 6640 


Description: LABORATORY EQUIPMENT AND SUPPLIES

Inherently GovFunCde: OT 


* NAICS Code: 332911 

NAICS Desc/Size: INDUSTRIAL VALVE MANUFACTURING 750


- Print on Form: Current

* Print on Form: Current 


- Strategic Source Ini: None

* Strategic Source Ini: NONE 

- Business Size: 01 – Small Business or 02 – Other than Small Business depending on selected vendor

* Business Size: 01 

- Invoice Matching: 3

* Invoice Matching: 3-Way 

- Invoice Approver: (Following Center Guidance): CO or COTR
- COR/TPOC: if the invoice approver is the COTR

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Legacy TO/DO/Call Enter the following fields

- Contract Type: FFP
- Legacy Contract Number: Enter Master Contract Number (NN_; SEWP or ELMT)

The screenshot shows a web form with the following fields:

- Basic Identification:**
 - PID: 80NSSC17F2070
 - Internal Document Number: 8500001249
 - Document Type: Legacy TO/DO/Call
- Organization:**
 - Purchasing Organization: NASA Shared Services Center
 - Purchasing Group: XBS - Oliver, Desiree (with a "Show Members" link)
 - Internal Reference: (empty field)
 - * Contract Type: FFP (selected)
 - Legacy Contract Number: NNX15MC76B

Task Order/Delivery Order (GSA orders)

- Contract Type: FFP
- ParentCtr is External: If ordering from a NASA master contract created in PPS, select "No". If ordering from an external contract (GSA, Library of Congress, etc), select "Yes"

The screenshot shows a search window titled "Search: ParentCtr is External" with the following content:

- Search: ParentCtr is External
- Results List: 2 results found for ParentCtr is External
- Personal Value List
- Table with 2 columns: ParentCtr is External, Short Description
- Row 1: (empty), No
- Row 2: X, Yes

- ExternalContract No: Enter GSA or other external agency master contract number. Do not include hyphens in the GSA contract number or you may have trouble connecting FPDS record to master contract.

The screenshot shows the following fields:

- ParentCtr is External: X
- External Contract No: GS07F0080T

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Partner Section under General Data Tab

- Enter the following Partners: (will not be able to just type in a number, these selections must be selected from the search button)
 - Goods Recipient (End User). This defaults to the PR creator – since this is a new field – we will have to obtain clarification on who should go here.
 - Ship To Address: Select the NASA Center that the product or service is for by looking at the address and the “c/o” column (1449 issues – will have to do a work around by editing the PDF version until PPS can be fix to edit the ship to address in PPS)

Results List: 26 results found for Number												
Name of Org	Address 1	Address 2	Address 3	City	House N.	Building Code	Floor	Room No.	City	Address No.	Co.	Pin.
NASA	KSC Logistics Facility	Bldg. 6B-1547		Kennedy Space Center					Kennedy Logistics Facility	308017	US	32099
NASA	NASA Transportation Office/Receiving		Bldg. 6B-0744	Kennedy Space Center					Kennedy Space Center	308018	US	32099
NASA	4 South Marvin Street	Bldg. 1206		Hampton					Langley Research Center	308019	US	23061
NASA				National Space Flight Center					Marshall Space Flight Center	308040	US	35812
NASA	JPL Propulsion Laboratory	4800 Jet Drive Drive	MS 168-462	Pasadena					Marshall Space Flight Center	308041	US	91109
NASA	Jet Propulsion Station	4800 Jet Drive Drive		Pasadena					Germans Research Center	308042	US	44870
NASA	NASA Transportation Office	400 Prop. Bldg. Richard A.	Bldg. 101 South Dock	New Orleans					Storms Space Center	308043	US	70129
NASA	White Sands Test Facility	12001 NASA RD		Las Cruces					Johnson Space Center	308044	US	88512
NASA	Wallopsville ME, Bldg. 4576.			Edwards					Armstrong Flight Research	308049	US	93524

- Invoice Recipient: Accounts Payable

Search: Number

Search Criteria

Search term 1

Address 1

Address 2

Address 3

☒ Maximum Number of Results:

Results List: 1 results found for Number

Name of Org.	Address 1	Address 2	Address 3	Postal Co.	House N.	Building Code	Floor	Room No.	City
NASA		Account Payable		39529-0001				Shared Services Center (R...	309066 US Stennis Space Center

- Contracting Officer: Select the assigned CO (might be best to search last name). NSSC P Group usually start with "X".

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Business Partner IS

Name 1/last name IS BINDER

Name 2/First name IS

Search term 1 IS

☒ Maximum Number of Results: 500

Results List: 1 results found for Number

Last Name	First Name	Org. Unit Name	BusinessPar...	E-Mail Address
Binder	Brad	XAQ	1000035595	

- Issuing Office: Select the Shared Services Center (NSSC)

Search Criteria

Search term 1 is

Address 1 is

Address 2 is

Address 3 is

☒ Maximum Number of Results: 500

Results List: 12 results found for Number

Name of Org.	Address 1	Address 2	Address 3	City	House N...	Building Code	Floor	Room No...	City	Address nu...	Postal Co...
NASA	Procurement Operations D...			Greenbelt						309000	20771
NASA	Headquarters Procurement...			Greenbelt						309001	20771
NASA	Attn: CO name and Mail Code	2101 NASA Parkway		Houston						309002	77058-3090
NASA	Office of Procurement	MAL CODE OP		Kennedy Space Center						309003	32099
NASA	5 Langley Blvd., Bldg. 2101	MIS 12		Hampton						309004	23061-2199
NASA	Office of Procurement			Marshall Space Flight Center						309005	35812
NASA	Jet Propulsion Laboratory	4800 Oak Grove Drive	MIS 180-802	Pasadena						309006	91109
NASA	Building 1111, Jerry Hiss			Stennis Space Center						309007	39029-0001
NASA	Office of Procurement	Building 1100 Room 251H		Stennis Space Center						309008	39029-0000

- Admin Office: Select the Shared Services Center (NSSC)

Search Criteria

Search term 1 is

Address 1 is

Address 2 is

Address 3 is

☒ Maximum Number of Results: 500

Results List: 19 results found for Number

Name of Org.	Address 1	Address 2	Address 3	Postal Co...	House N...	Building Code	Floor	Room No...	City	Address nu...	Co...	City
NASA	5 Langley Blvd., Bldg. 2101	MIS 12		23061-2199						309090	US	Hampton
NASA	Jet Propulsion Laboratory	4800 Oak Grove Drive	MIS 180-802	91109						309091	US	Pasadena
NASA	Plum Brook Station	6100 Columbus Avenue		44070						309093	US	Sandusky
NASA	Office of Procurement	Building 1100 Room 251H		39029-4000						309094	US	Stennis Space Center
NASA	Wallops Flight Facility			23337-5099						309096	US	Wallops Island
NASA				35812						309107	US	Marshall Space Flight...
NASA	Independent Verif. & Valid...	100 University Dr.		26554						309475	US	Farmont
NASA	Building 1111, Jerry Hiss			39029-0001						309476	US	Stennis Space Center
NASA	Wallops Flight Facility	Attn: CO Name/Mail Code	12600 NASA Road	88012						309477	US	Las Cruces

- Originating Office: Select the Shared Services Center (NSSC)

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Header Tab > Notes and Attachment

- Edit the FPDS-NG Description. Click on “FPDS-NG Description”.

Category	Description
Header Rejection Notes	-Empty-
Award/Change Form Description	-Empty-
Internal Note	-Empty-
Supplier Remarks	-Empty-
FPDS-NG Description	Add Description of purchase

- Add a brief description of purchase > Click OK

Change Purchase Order

Internal Document Number: 8500001236 Document Type: Purchase Order Status: Saved Document Date: 06/09/2017 Obligated Amount: 0.00 USC PID: 80NSSC17P2140 Vendor: UNSTA

Overview Header Items Notes and Attachments Approval Tracking

General Data Notes and Attachment Output Extended PO History Payment User-Specified Status

Notes

Category: FPDS-NG Description

Description: Add Description of purchase

Attachments

Add Attachment Edit Description Versioning Delete

Category: Description: File Name

The table does not contain any data

OK Cancel

Header Tab > Payment

- Select Payment Terms based off quote. Normal Payment terms is Net 30, but vendor may have proposed a discount. For search boxes that allow you to edit personal value list, you may want to add commonly used values such as “Net 30 days”. Click either all values or Edit Personal value list to add new values.

Search: Terms of Payment Key

Personal Value List: There are 1 entries for Terms of Payment Key

All Values Edit Personal Value List

Own explanation	Terms of Payment	Logical System
Net 30 days	NT30	SAPCN1600

- Enter Ship to terms

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- FOB – Edit Personal Value List to add FOB

Edit Personal Value List: Incoterms 1 / 2

Results List [Show Search Criteria](#)

Incote...	Incoterm Name	Location
CPT	Carriage Paid To	X
DAF	Delivered at Frontier	X
DDP	Delivered Duty Paid	X
DDU	Delivered Duty Unpaid	X
DEQ	Delivered Ex Quay (Duty Paid)	X
DES	Delivered Ex Ship	X
EXW	Ex Works	X
FAS	Free Alongside Ship	X
FCA	Free Carrier	X
FOB	Free On Board	X

Incote...	Incoterm Name	Location
FOB	Free On Board	X

OK Cancel

- Enter Destination or Origin as applicable in second fill in

Overview **Header** Items Notes and Attachments Approval

General Data Notes and Attachment Output Extended PO History **Payment**

Payment Terms: NT30 Net 30 days

Incoterms 1 / 2: FOB Destination

Related Links > Document Builder

- Cannot be in edit mode in PPS.
- Document Builder > Header Data > this tab is informational. Nothing in this tab can be changed in Document Builder.

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- Document Builder > Dialog > When using a template of the Terms and Conditions from the sharepoint, this section may be skipped.
- Document Builder > Document Summary
 - Click on 1449, except Non Commercial use OF 347
 - Click on Full Text and Fill-ins

Position	Section	Element	Effective Date	Version	Regulation Set	Property	Description	Editable	Inclusion	Fill-in Status	Content Modifier	All Element	Element Changed
1	1	OF347	11/01/2005		FAR	Full Text	ORDER FOR SUPPLIES OR SERVICES						
2	1	SF1449	11/01/2005		FAR	Full Text	SOLICITATION/CONTRACT ORDER FOR COMMERCIAL ITEMS						
3	1	SF30	11/01/2005		FAR	Full Text	AMENDMENT OF SOLICITATION/CONTRACT ORDER						
4	2	Z_SMRACQ_021	01/01/2016	1	ASA	Full Text	DELIVERY AND PERFORMANCE REQUIREMENTS						
5	2	Z_SMRACQ_022	01/01/2016	1	ASA	Full Text	LIST OF ATTACHMENTS						
6	2	Z_SMRACQ_023	01/01/2016	1	ASA	Full Text	STATEMENT OF WORK						
7	2	Z_SMRACQ_024	01/01/2016	1	ASA	Full Text	APPLICABLE COMMERCIAL CLAUSES						
8	2	FS2204-09	01/01/2011	1	FAR	IER	52.204-9 PERSONAL IDENTITY VERIFICATION OF CONTRACTOR PERSONNEL (JAN 2011)						
9	2	FS2204-13	10/01/2016	1	FAR	IER	52.204-13 SYSTEM FOR AWARD MANAGEMENT MAINTENANCE (OCT 2016)						
10	2	FS2204-18	07/01/2018	2	FAR	IER	52.204-18 COMMERCIAL AND GOVERNMENT ENTITY CODE MAINTENANCE (JUL 2018)						

- Block 3 Date to be used: Signed on Date
- Contact Name of Solicitation or Contract: NSSC SAT Team
- Contact Person Telephone Number: 877-677-2123

Contact Name of Solicitation or Contract:	<input type="text" value="NSSC SAT Team"/>
Contact Person's Telephone Number:	<input type="text" value="877-677-2123"/>

- Acquisition/RFQ is “a set-aside” for competitive to Small Business or “not a set-aside” for sole source or full and open competition. Percent of Set Aside enter 100% if set-aside is used and select Small Business

This Acquisition/RFQ is:	
<input checked="" type="radio"/> Is a set-aside <input type="radio"/> Is not a set-aside (Unrestricted)	
Percent of Set Aside (SF1449 Blk10): <input type="text" value="100"/>	
Small Business: <input checked="" type="checkbox"/>	

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- Select FOB Type

Select Free on Board (FOB) type

- ☐ Not applicable
- ☒ Destination
- ☐ Origin
- ☐ Both (Destination and Origin)
- ☐ Other

- Contractor Telephone Number: Enter if known

Supplier Address Country Key:

Contractor Telephone number:

Contract Cage Number:

- Check the check box if Contract/Purchase Order incorporates by reference FAR 52.212-4. 52.212-5 is attached "Are" attached and click "Are" if you selected "Purchase Order". For delivery orders and BPA calls, the box should not be checked and N/A should be selected.

Contract/Purchase Order incorporates by reference FAR 52.212-4. 52.212-5 is attached: ☒

Contract/PO's Addenda


- ☐ N/A
- ☒ Are
- ☐ Are Not Attached

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- If signature by contractor is required check “Is this document required to sign by contractor?” and enter 1 for “Number of Copies of signed document to return to the issuing office”. Contractor signature is required for all service contracts (excluding subscriptions and renewals). There may be higher valued complex commodity orders with longer lead times or special terms and conditions that we will want Contractor signature on as well. Those instances will be determined on a case by case basis. Unless the contracting officer has requested vendor signature on requirements for high valued complex commodity orders, this box should be left unchecked. If the contracting officer has reviewed the requirement and determined vendor signature is needed before award, then you may go into PPS, check this box, and obtain vendor signature.

Is this document required to sign by Contractor?: <input checked="" type="checkbox"/>
Number of copies of signed document to return to the issuing office: <input type="text" value="1"/>






- Check “Is this document Award of Contract?” Enter Quote Number in “Referenced Award Number”, and select quote date from calendar icon.


Is this document Award of contract?: <input checked="" type="checkbox"/>
Referenced Award number: <input type="text" value="23407"/>
Referenced Award Date: <input type="text" value="06/16/2017"/> 

- > Accept
- Document Builder > Preview
 - Highlight the SF1449
 - Select the “Save” icon to save the SF1449 to your file.

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Available Output Types	
Available Sections	
Report Type	Report Name
100	T&Cs.docx
105	SF1449.pdf
108	SF30.pdf
131	OF347.pdf
2	Reviewers Check List.docx

SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS OFFEROR TO COMPLETE BLOCKS 12,17,23,24, & 30		
2. CONTRACT NO.	3. AWARD/EFF. DATE	4. ORDER NUMBER 80NSSC18P0219
7. FOR SOLICITATION INFORMATION CALL: 	a. NAME	

- Select “Save” at the top of Document Builder to Save Progress
- Exit Document Builder

4.3.8.1.2 How to Process the FPDS-NG Record in PPS

Once you have completed the required fields in PPS that will be used to auto-populate certain fields in FPDS, complete your portion of the FPDS record before forwarding to the CO for review and award. Click on the FPDS button at the top of the PPS Record.

Check	Close	View FPDS-NG Record	Related Links
007634 Document Type Purchase Order Status Save			
Items	Notes and Attachments	Approval	Tracking

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Figure 141 *FPDS button*

There are only 4 function buttons available at the top of the FPDS screen as follows:

Save Draft Saves the information in your document. Use this when you report data in the system, whether complete or in part. If you have made changes to the action, please hit the Save Draft button before validating or closing the action. This process will ensure that your data will not be lost.

Validate Determines if there are any errors. Use this when the record is complete. If there are errors, the screen will display error messages at the top of the document. All fields in error status are shown in Red and must be corrected in order to Validate and Approve the action.

Print Allows you to print the document that is currently on the screen. A copy of the FPDS record will be added once awarded and should be placed in the electronic award file PDF bookmarked FPDS.

Help Provides the user on-line help that includes a glossary. You can also access the help by clicking the Help button at the top right corner of the main FPDS screen.

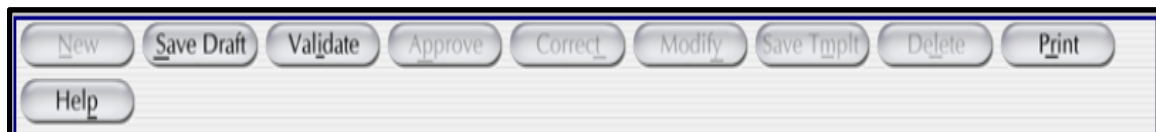


Figure 142 *FPDS Function Buttons*

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The first 3 sections of the FPDS record which are the Transaction Information, Document Information, and Amounts will automatically be populated from PPS information. The Dates section will also be partially populated from PPS. Check to ensure that the information is accurate. If any information is missing from the Dates section, ensure the fields are properly completed. You will see the fields that may require change/revision or to be completed in **orange** and marked with an asterisk*.

Purchaser Information Section:

Step 1: Use this section to navigate to the Contracting Office ID, Funding Agency ID and Funding Office ID screens one at a time.

Transaction Information			
Award Type:	Purchase Order	Prepared Date:	12/05/2017 08:47:50
Award Status:	Draft	Last Modified Date:	12/05/2017 09:44:17
Closed Status:	No	Closed Status Date:	
		Prepared User:	DEVAN.R.HERRIN@NASA.GOV
		Last Modified User:	NICOLAS.A.ZOGAIB@NASA.GOV
		Closed By:	
Document Information			
Award ID:*	Agency: 8000	Procurement Identifier: 80NSSC18P0359	Modification No: 0
Referenced IDV ID:			Trans No: 0
Reason For Modification:			
Solicitation ID:			
Treasury Account Symbol:	Agency Main Identifier: 8000	Sub Account: 80NSSC	Initiative: Select One
Dates		Amounts	
Date Signed (mm/dd/yyyy):*	12/05/2017	Action Obligation:*	\$5,740.00
Effective Date (mm/dd/yyyy):*	12/05/2017	Base And Exercised Options Value:*	\$5,740.00
Completion Date (mm/dd/yyyy):*	12/31/2017	Base and All Options Value (Total Contract Value):*	\$5,740.00
Est. Ultimate Completion Date (mm/dd/yyyy):*	12/31/2017	Fee Paid for Use of IDV:	\$0.00
Purchaser Information			
Contracting Office Agency ID:*	8000	Contracting Office Agency Name:	NATIONAL AERONAUTICS AND SPACE A
Contracting Office ID:*	80NSSC	Contracting Office Name:	NASA SHARED SERVICES CENTER
Funding Agency ID:*	8000	Funding Agency Name:	NATIONAL AERONAUTICS AND SPACE A
Funding Office ID:*	80NSSC	Funding Office Name:	NASA SHARED SERVICES CENTER
Foreign Funding:*	Not Applicable		

Figure 143 FPDS, Purchaser Information Section

Step 2: Contracting Office ID: (Contracting Office Selection) - Click on the  icon to the right of the field and click on the radio button for NSSC0 NASA Shared Services Center and choose Select.

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Contracting Office Selection

Select	Office ID	Office Name	Agency ID	Agency Name
<input checked="" type="radio"/>	80NSSC	NASA SHARED SERVICES CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION


1 out of 1 items found.

Find items that match the following criteria:

Office ID:	<input type="text" value="80NSSC"/>	Office Name:	<input type="text"/>
Agency ID:	<input type="text" value="8000"/>	Agency Name:	<input type="text"/>
City:	<input type="text"/>	State:	<input type="text"/>
Region Code:	<input type="text"/>	Zip Code:	<input type="text"/>
Active Offices Only:	<input checked="" type="checkbox"/>		

Select
Cancel
Search
Clear
Help

Figure 144 *FPDS, Contracting Office Selection*

Step 3: Funding Agency ID:* (Agency Selection) - Click on the  icon to the right of the field, scroll down and click on the radio button for 8000 for NATIONAL AERONAUTICS AND SPACE ADMINISTRATION and choose Select.

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Agency Selection

<input type="radio"/>	8026	GODDARD SPACE FLIGHT CENTER	8000
<input type="radio"/>	8001	HEADQUARTERS, NASA	8000
<input type="radio"/>	8032	JOHNSON SPACE CENTER	8000
<input type="radio"/>	8035	KENNEDY SPACE CENTER	8000
<input type="radio"/>	8038	LANGLEY RESEARCH CENTER	8000
<input type="radio"/>	8044	MARSHALL SPACE FLIGHT CENTER	8000
<input type="radio"/>	8048	NASA MANAGEMENT OFFICE -- APPLIED PHYSICS LABORATORY	8000
<input type="radio"/>	8029	NASA RESIDENT OFFICE, JET PROPULSION LABORATORY	8000
<input type="radio"/>	8025	NASA SHARED SERVICES CENTER	8000
<input type="radio"/>	8049	NASA SHARED SERVICES CENTER	8000
<input checked="" type="radio"/>	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION	8000
<input type="radio"/>	8047	STENNIS SPACE CENTER	8000

15 out of 15 items found.


Find items that match the following criteria:

Department ID: 8000 Parent Agency ID:

Agency ID: Agency Name:

Buttons: Select, Cancel, Search, Clear, Help

Figure 145 *FPDS, Agency Selection*

Step 4: Funding Office ID* (Government Office Selection): Click on the  icon to the right of the field and click on the radio button for NSSC0 NASA Shared Services Center. You will use the NSSC0 even though the PR funding is another NASA Center and choose Select.

HOME Advanced Search GO Log Off

Government Office Selection

<input type="radio"/>	80APLO	NASA MANAGEMENT OFFICE -- APL	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80ARCO	NASA AMES RESEARCH CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80GRCO	NASA GLENN RESEARCH CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80GSFC	NASA GODDARD SPACE FLIGHT CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80HQTR	NASA HEADQUARTERS	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80JSCO	NASA JOHNSON SPACE CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80KSCO	NASA KENNEDY SPACE CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80LARC	NASA LANGLEY RESEARCH CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80MSFC	NASA MARSHALL SPACE FLIGHT CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80NM00	NASA MANAGEMENT OFFICE -- JPL	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input checked="" type="radio"/>	80NSSC	NASA SHARED SERVICES CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
<input type="radio"/>	80SSCO	NASA STENNIS SPACE CENTER	8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION

14 out of 14 items found.

Find items that match the following criteria:

Office ID: Office Name:

Agency ID: 8000 Agency Name:

City: State:

Region Code: Zip Code:

Active Offices Only: ☒

Buttons: Select, Cancel, Search, Clear, Help

Figure 146 *FPDS, Government Office Selection*

Step 5: Foreign Funding: normally not applicable.

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Step 6: The Contractor Information section should be automatically populated from PPS. Check to ensure that the DUNS Number matches the selected Vendor's SAM Entity Record.

Step 7: The Business Category section will be automatically populated from the selected Vendor's SAM Entity record.

Step 8: You will need to complete the Contract Data Section by using the dropdown menu choices for the applicable fields.

Contract Data

Type of Contract:* Firm Fixed Price

Inherently Governmental Functions: Other Functions

Multiyear Contract: Select One

Major Program:

National Interest Action:* None

Cost Or Pricing Data: Select One

Purchase Card Used As Payment Method:* No

Undefinitized Action:* No

Performance Based Service Acquisition:* No - Service where PBA is not used.

* FY 2004 and prior; 80% or more specified as performance requirement
 * FY 2005 and later; 50% or more specified as performance requirement

Contingency Humanitarian Peacekeeping Operation:* Not Applicable

Contract Financing: Select One

Cost Accounting Standards Clause: Select One

Consolidated Contract:* Not Consolidated

Number Of Actions: 1

Figure 147 *FPDS, Contract Data dropdown menus*

Step 9: Type of Contract:* 'Select One' of 15 choices from the drop-down. The normal selection for most SAT Acquisitions will be 'Firm Fixed Price' Awards. For Modifications, the field will automatically be populated with the original base award choice.

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The screenshot shows the 'Contract Data' section of a form. The 'Type of Contract*' dropdown menu is open, displaying a list of contract types. The 'Firm Fixed Price' option is currently selected and highlighted in blue. The list includes various contract types such as 'Select One', 'Combination', 'Cost No Fee', 'Cost Plus Award Fee', 'Cost Plus Fixed Fee', 'Cost Plus Incentive Fee', 'Cost Sharing', 'Fixed Price Award Fee', 'Fixed Price Incentive', 'Fixed Price Level of Effort', 'Fixed Price Redetermination', 'Fixed Price with Economic Price Adjustment', 'Labor Hours', 'Other', and 'Time and Materials'. The background of the form shows other fields like 'Multiyear Contract:', 'Major Program:', 'National Interest Action*:', 'Cost Or Pricing Data:', 'Purchase Card Used As Payment Method*:', 'Undefinitized Action*:', 'Performance Based Service Acquisition*:', 'Contingency Humanitarian Peacekeeping Op', 'Contract Financing:', 'Cost Accounting Standards Clause:', 'Consolidated Contract*:', and 'Number Of Actions:'.

Figure 148 *FPDS, Type of Contract dropdown menu*

Step 10: Inherently Governmental Functions: This field should automatically generate from PPS. Review the selection and ensure it is correct.

Step 11: The next three fields in the Contract Data section are normally not applicable:

- National Interest Action*:
- Cost Or Pricing Data:
- Purchase Card Used As Payment Method:
- Undefinitized Action*:

Step 12: Performance Based Service Acquisition*: (PBA) The selection for this field will be contingent on the type of requirement being procured in this order. If this requirement is for a service (shown with a service code in the "Product or Service Information section) then "No – Service where PBA is not used" will normally be selected. If the requirement is for a product (shown with a product code in the "Product or Service Information section), then the selection will be "Not Applicable".

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The screenshot shows the 'Contract Data' section of the FPDS form. On the left, there are several fields with asterisks indicating required information: Type of Contract, Multiyear Contract, Major Program, National Interest Action, Cost Or Pricing Data, Purchase Card Used As Payment Method, Undefined Action, Performance Based Service Acquisition (with sub-requirements for FY 2004 and FY 2005), Contingency Humanitarian Peacekeeping Operation, Contract Financing, Cost Accounting Standards Clause, Consolidated Contract, and Number Of Actions. On the right, there are dropdown menus for 'Firm Fixed Price' (set to 'Select One'), 'None', 'Select One', 'No', 'No', and 'No - Service where PBA is not used.'. A dropdown menu for 'Performance Based Service Acquisition' is open, showing options: 'No - Service where PBA is not used.', 'Select One', 'No - Service where PBA is not used.', 'Not Applicable', and 'Yes - Service where PBA is used.'. The 'Number Of Actions' field is set to '1'.

Figure 149 *FPDS, Contract Data, Performance Based Service Acquisition*

Step 13: The next two fields in the Contract Data section are normally not applicable:

- Contingency Humanitarian Peacekeeping Operation:* 'Not Applicable'
- Consolidated Contract:* 'Not Consolidated'

Legislative Mandates Section:

The screenshot shows the 'Legislative Mandates' section of the FPDS form. On the left, there are several fields with asterisks indicating required information: Clinger-Cohen Act, Labor Standards, Materials, Supplies, Articles, and Equip, Construction Wage Rate Requirements, Additional Reporting, Interagency Contracting Authority, and Other Interagency Contracting Statutory Authority (1000 characters). On the right, there are dropdown menus for 'Clinger-Cohen Act' (set to 'No'), 'Labor Standards' (set to 'No'), 'Materials, Supplies, Articles, and Equip' (set to 'No'), 'Construction Wage Rate Requirements' (set to 'No'), 'Additional Reporting' (set to 'Select One or More Options'), 'Interagency Contracting Authority' (set to 'Not Applicable'), and 'Other Interagency Contracting Statutory Authority'. A dropdown menu for 'Clinger-Cohen Act' is open, showing options: 'No', 'Yes', 'Service Contract Inventory', and 'None of the Above'. The 'Principal Place of Performance' section on the right includes fields for 'Principal Place Of Performance Code', 'Principal Place Of Performance County Name', 'Principal Place Of Performance City Name', 'Congressional District Place Of Performance', and 'Place Of Performance Zip Code(+4)' (set to '14120 -7043').

Figure 150 *FPDS, Legislative Mandates*

Step 14: Clinger-Cohen Act:* Select No unless the acquisition has to do with Information Technology Management Reform Act. You will need to check 'Yes' if the acquisition is applicable.

- What is the Clinger-Cohen Act? The Clinger-Cohen Act of 1996, originally named the Information Technology Management Reform Act, updates and defines how the federal government may acquire and dispose of information

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technology. This act passed in the National Defense Authorization Act FY 1996. The legislation passed at a time when electronic records and computers were becoming more prevalent in government work and established a control and compliance structure that involves a dedicated Chief Information Officer for each government agency.

Step 15: Labor Standards: refers to the Service Contract Act:* Select 'No' or 'Not Applicable' unless the acquisition has to do with a contractor performing a service and wage determination is based on the various classes.

- What is the Service Contract Act? The McNamara-O'Hara Service Contract Act requires contractors and subcontractors performing services on prime contracts in excess of \$2,500 to pay service employees in various classes no less than the wage rates and fringe benefits found prevailing in the locality, or the rates (including prospective increases) contained in a predecessor contractor's collective bargaining agreement. The Department of Labor issues wage determinations on a contract-by-contract basis in response to specific requests from contracting agencies. These determinations are incorporated into the contract.
- For prime contracts in excess of \$100,000, contractors and subcontractors must also, under the provisions of the Contract Work Hours and Safety Standards Act, as amended, pay laborers and mechanics, including guards and watchmen, at least one and one-half times their regular rate of pay for all hours worked over 40 in a workweek. The overtime provisions of the Fair Labor Standards Act may also apply to SCA-covered contracts.

Step 16: Material, Supplies, Articles, and Equip: refers to the Walsh-Healey Act:* Select 'No' or 'Not Applicable' for acquisition of commercial items. It could be 'Yes' for certain types of service type acquisitions.

- The Walsh-Healey Act or Walsh–Healey Public Contracts Act, passed in 1936 as part of the New Deal, is a United States federal law that applies to U.S. government contracts exceeding \$15,000 for the manufacture or furnishing of goods. Walsh-Healey establishes overtime pay for hours worked by contractor employees in excess of 40 hours per week, and sets the minimum wage equal to the prevailing wage as determined by the Secretary of Labor. The law prohibits the employment of youths less than 16 years of age and convicts (only those currently in prison), except under certain conditions. [1] The Act sets standards for the use of convict labor, and job health and safety standards. The Walsh-Healey Act does not apply to commercial items.


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Step 17: Construction Wage Rate Requirement: refers to the Davis-Bacon Act:* Select 'No' or 'Not Applicable' for acquisition of commercial items and/or services since it is mainly related to wages for construction contracts.

- The Davis-Bacon and Related Acts, apply to contractors and subcontractors performing on federally funded or assisted contracts in excess of \$2,000 for the construction, alteration, or repair (including painting and decorating) of public buildings or public works. Davis-Bacon Act and Related Act contractors and subcontractors must pay their laborers and mechanics employed under the contract no less than the locally prevailing wages and fringe benefits for corresponding work on similar projects in the area. The Davis-Bacon Act directs the Department of Labor to determine such locally prevailing wage rates. The Davis-Bacon Act applies to contractors and subcontractors performing work on federal or District of Columbia contracts. The Davis-Bacon Act prevailing wage provisions apply to the "Related Acts," under which federal agencies assist construction projects through grants, loans, loan guarantees, and insurance.

Step 18: Additional Reporting: Normally selected as "None of the Above"

Step 19: Interagency Contracting Authority:* Select 'Not Applicable'.

Step 20: Principal Place of Performance Code:* Select USA unless in the case of a service performed in a foreign country or commercial item purchased from a foreign vendor. Click on the  icon to the right of the field, scroll down and click on the radio button for 'USA – United States'.

Step 21: Place of Performance Zip Code (+4):* Refer to the *Physical Address* of the selected vendor's SAM Entity Record and type in the first field the Zip Code and second field the +4.

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Product or Service Information Section:

The screenshot shows the 'Product Or Service Information' section of the FPDS system. The form is populated with the following data:


- Product/Service Code:** AB91 (Description: R&D- COMMUNITY SERVICE/DEVELOPMENT: OT)
- Principal NAICS Code:** 541715 (Description: RESEARCH AND DEVELOPMENT IN THE PHYSICAL, ENGINEERING, AND MANAGEMENT SCIENCES)
- Bundled Contract:** Not Bundled
- DOD Acquisition Program:** (Empty)
- Country of Product or Service Origin:** USA
- Place of Manufacture:** Not a manufactured end product
- Domestic or Foreign Entity:** U.S. Owned Business
- Recovered Materials/Sustainability:** No Clauses Included and No Sustainability Included
- InfoTech Commercial Item Category:** Select One
- Claimant Program Code:** (Empty)
- Sea Transportation:** Select One
- GFP Provided Under This Action:** Transaction does not use GFP
- Use Of EPA Designated Products:** Not Required
- Description Of Requirement:** OT Metal Fabrication Study

Figure 151 *FPDS, Product or Service Information Section*

Step 22: Product/Service Code: Normally will be populated from PPS. Check to ensure that the correct code was used for the acquisition which should automatically populate the Description field.

Step 23: Principal NAICS Code: Normally will be populated from PPS. Check to ensure that the correct code was used based on the selected Vendor's NAICS Code. The Description field should automatically populate based on the NAICS Code.

Step 24: Bundled Contract:* Select 'Not bundled'. Only in special circumstances it may be a 'Mission Critical' requirement.

Step 25: Country of Product or Service Origin:* Select USA unless in the case of a service that may be performed in a foreign country or commercial item purchased from a foreign vendor. Click on the  icon to the right of the field, scroll down and click on the radio button for 'USA – United States'.

Step 26: Place of Manufacture:* 'Select One' of 12 choices from the drop-down. Be sure you choose the correct answer that best fits the acquisition.

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1. Mfg in U.S. – The action is predominantly for acquisition of manufactured end products that are manufactured in the United States.
2. Mfg outside U.S. – Commercial information technology - The foreign manufactured end products are predominantly commercial information technology items (Far 25.103(e)).
3. Mfg outside U.S. – Domestic non-availability – The foreign manufactured end products were predominantly not domestically available as shown by one of the following: (i) The item is listed as FAR 25.104 (FAR 25.103(b) (1)). (ii) The agency did an individual determination (FAR 25.103(b) (2)). (iii) No offer of a domestic end product was received, even though the acquisition was synopsisized and conducted through full and open completion (FAR 25.103(b) (3)).
4. Mfg outside U.S. – Public Interest determination – The head of the agency has made a determination that domestic preferences would be inconsistent with the public interest (FAR 25.103(a)).
5. Mfg outside U.S. – Qualifying country (DoD only) – For DoD only, the foreign manufactured end products are predominantly qualifying country end products (DFARS 225.003 and 225.872-1)
6. Mfg outside U.S. – Resale – The foreign manufactured end products acquired are predominantly for resale (FAR 25.103(d)).
7. Mfg outside U.S. – Trade Agreements – The foreign manufactured end products are predominantly eligible products acquired under Trade Agreements (FAR 25.402(a)(1)).
8. Mfg outside U.S. – Unreasonable cost – The cost of the offered domestic end products was unreasonable (FAR 25.103(c), 25.105, and Subpart 25.5).
9. Mfg outside U.S. – Use outside the United States – The foreign manufactured end products acquired are predominantly for use outside the United States (FAR 25.100).
10. Not a manufactured end product – Not a manufactured end product action.
11. Performed or Manufactured in US, but services performed by a foreign concern or more than 50% foreign content – The action is for (i) A foreign end product that is manufactured in the United States, but still determined to be a foreign because 50 percent or more of the cost of its components is not mined, produced, or manufactured inside the United States or inside qualifying countries; or (ii) Services performed in the United States by a foreign concern.
12. Performed or Manufactured outside US – The action is for (i) Any other foreign end product; or (ii) Services performed outside the United States by a foreign concern.

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Place of Manufacture:*	Not a manufactured end product
Domestic or Foreign Entity:*	Select One
Recovered	Mfg in U.S.
Materials/Sustainability:*	Mfg outside U.S. - Commercial information technology
InfoTech Commercial Item	Mfg outside U.S. - Domestic nonavailability
Category:	Mfg outside U.S. - Public interest determination
Claimant Program Code:	Mfg outside U.S. - Qualifying country (DoD only)
Sea Transportation:	Mfg outside U.S. - Resale
GFE/GFP Provided Under This	Mfg outside U.S. - Trade Agreements
Action:*	Mfg outside U.S. - Unreasonable cost
Use Of EPA Designated	Mfg outside U.S. - Use outside the United States
Products:*	Not a manufactured end product
	Performed or Manufactured in US, but services performed by a foreign concern or more than 50% foreign content
	Performed or Manufactured outside US

Figure 152 *FPDS, Place of Manufacture*

Step 27: Domestic or Foreign Entity:* ‘Select One’ of 5 choices from the drop-down. Choose the correct answer that best fits the entity. Normally, the acquisition will be from a ‘U.S. Owned Business,’ but always check SAM first if you are uncertain. For a Foreign Owned entity, validate the vendor as responsible, since many do not have SAM registrations (see instructions on acquisitions with foreign vendors).

Domestic or Foreign Entity:*	U.S. Owned Business
Recovered	Select One
Materials/Sustainability:*	U.S. Owned Business
InfoTech Commercial Item	Other U.S. Entity (e.g. Government)
Category:	Foreign-Owned Business Incorporated in the U.S.
Claimant Program Code:	Foreign-Owned Business Not Incorporated in the U.S.
	Other Foreign Entity (e.g. Foreign Government)

Figure 153 *FPDS, Domestic or Foreign Entity*

Step 28: Recovered Materials/Sustainability:* ‘Select One’ of 12 choices from the drop-down. Be sure you choose the correct answer that best fits the acquisition concerning purchasing ‘Green’ products or services. For more information, click on the [OMB Policy on Sustainable Acquisition](#) to the right of the field from the Office of Management and Budget’s Office of Federal Procurement Policy Sustainable Acquisition.

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Recovered	No Clauses Included and No Sustainability Included	OMB Policy on Sustainable Acquisition
Materials/Sustainability:	Select One	
InfoTech Commercial Item	Bio-based	
Category:	Energy efficient	
Claimant Program Code:	Environmentally preferable	
Sea Transportation:	FAR 52.223-4 & bio-based	
GFE/GFP Provided Under This	FAR 52.223-4 & bio-based & energy efficient	
Action:	FAR 52.223-4 & bio-based & energy efficient & environmentally preferable	
Use Of EPA Designated	FAR 52.223-4 & bio-based & environmentally preferable	
Products:	FAR 52.223-4 & energy efficient	
Description Of Requirement:	FAR 52.223-4 & environmentally preferable	
(4000 characters)	FAR 52.223-4 Included	
	FAR 52.223-4 and FAR 52.223-9 Included	
	No Clauses Included and No Sustainability Included	

Figure 154 *FPDS, Recovered Materials or Foreign Entity*

Note: Check the product(s) specification for clues on which selection to use. Normally spec sheet, technical evaluation or the NF 1707 will list the information or the 'Body' of the award documents will list what portion of FAR 52 to reference. For requirements obtained through a SEWP contract, the selection should always be "Energy efficient".

Step 29: GFP Provided Under this Action: Select as applicable. Normally SAT requirements do not include government furnished property (GFP). If the requirement does not include GFP, select "Transaction does not use GFP"

Step 30: Use of EPA Designated Products:* 'Select One' of 5 choices from the drop-down. Be sure you choose the correct answer that best fits the acquisition for use of 'Recycled' products. Normally, the acquisition will be 'Not Required'.

Use Of EPA Designated	Not Required
Products:	Select One
Description Of Requirement:	Justification - Performance
(4000 characters)	Justification - Price
	Justification - Time
	Meets Requirements
Competition Information	Not Required

Figure 155 *FPDS, EPA Designated products*

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Competition Information Section:

Competition Information	
Extent Competed For Referenced IDV:	
Extent Completed:*	Competed under SAP
Solicitation Procedures:*	Simplified Acquisition
IDV Type Of Set Aside:	
Type Of Set Aside:*	Small Business Set Aside - Total
Type Of Set Aside Source:	This Action
Evaluated Preference:*	No Preference used
SBIR/STTR:	Select One
Fair Opportunity/Limited Sources:	Select One
Other Than Full And Open Competition:	Select One
Local Area Set Aside:*	No
FedBizOpps:*	No
A76 Action:*	No
Commercial Item Acquisition Procedures:*	Commercial Item
IDV Number of Offers:	
Number Of Offers Received:*	2
Number of Offers Source:	This Action
Small Business Competitiveness Demonstration Program:	<input type="checkbox"/>
Simplified Procedures for Certain Commercial Items:*	No

Figure 156 *FPDS Competition Information Section*

Step 31: Extent Completed:* ‘Select One’ of 7 choices from the drop-down. ‘Not Completed under SAP’ would be used for sole source open market.

Extent Completed:*	Competed under SAP
Solicitation Procedures:*	Select One
Type Of Set Aside:*	Competed under SAP
Evaluated Preference:*	Follow On to Competed Action
SBIR/STTR:	Full and Open Competition
Fair Opportunity/Limited Sources:	Full and Open Competition after exclusion of sources
	Not Available for Competition
	Not Completed
	Not Completed under SAP

Figure 157 *FPDS, Extent Competed*

Step 32: Solicitation Procedures:* Select ‘Simplified Acquisition’.

Step 33: Type of Set-Aside:* ‘Select One’ of 25 choices from the drop-down. Do not select “Reserved for Small Business”. Remember to check SAM Entity record to ensure correct selection. Check the SBA website for vendor certification as needed. Selecting the correct small business set aside provides a crucial link to NASA’s Small Business Programs. No Set aside would be used for sole source. If you did a small business set aside in your solicitation, you would normally select “Small Business Set Aside – Total”.

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Type Of Set Aside:*	Small Business Set Aside - Total
Evaluated Preference:*	Select One
SBIR/STTR:	8(a) Sole Source
Fair Opportunity/Limited Sources:	8(a) with HUB Zone Preference
Other Than Full And Open Competition:	8a Competed
Local Area Set Aside:*	Buy Indian
FedBizOpps:*	Economically Disadvantaged Women Owned Small Business
A76 Action:*	Economically Disadvantaged Women Owned Small Business Sole Source
Commercial Item Acquisition Procedures:*	Emerging Small Business Set Aside
Number Of Offers Received:*	HBCU or MI Set-Aside -- Partial
Small Business Competitiveness Demonstration Program:	HBCU or MI Set-Aside -- Total
Commercial Item Test Program:*	HUBZone Set-Aside
Preference Programs / Other Data	HUBZone Sole Source
Contracting Officer's Business Size Selection:*	Indian Economic Enterprise
Subcontract Plan:*	Indian Small Business Economic Enterprise
Price Evaluation Percent Difference:	No set aside used
	Reserved for Small Business
	SDVOSB Sole Source
	Service Disabled Veteran Owned Small Business Set-Aside
	Small Business Set Aside - Partial
	Small Business Set Aside - Total
	Very Small Business
	Veteran Set Aside
	Veteran Sole Source
	Women Owned Small Business
	Women Owned Small Business Sole Source

Figure 158 *FPDS Type of Set-Aside*

Step 34: Evaluated Preference:* 'Select One' of 5 choices from the drop-down.

Evaluated Preference:*	No Preference used
SBIR/STTR:	Select One
Fair Opportunity/Limited Sources:	Combined HUB/SDB Preference
Other Than Full And Open Competition:	HUBZone Price Evaluation
Local Area Set Aside:*	No Preference used
	SDB Price Evaluation
	SDB preferential consideration partial SB set aside

Figure 159 *FPDS Evaluated Preference*

Step 35: Local Area Set-Aside:* Select 'No'.

Step 36: FedBizOpps:* Select 'Yes' for FedBizOpps for solicited/advertised acquisitions. Choose 'No' if not.

Step 37: A76 Action: Select "No"

Step 38: Commercial Item Acquisition Procedures:* 'Select One' of 4 choices from the drop-down that best fits the acquisition. Common selections are "Commercial Item" for commercial requirements and "Commercial Item Procedures not used" for non-commercial requirements.

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Commercial Item Acquisition Procedures:*	Supplies or services pursuant to FAR 12.102(f) ▼
Number Of Offers Received:*	Select One
Small Business Competitiveness Demonstration Program:	Commercial Item
	Commercial Item Procedures not used
	Services pursuant to FAR 12.102(g)
Commercial Item Test Program:*	Supplies or services pursuant to FAR 12.102(f)

Figure 160 *FPDS Commercial Item Acquisition Procedures*

Step 39: Number of Offers Received:* Place the actual numbers of quotes/offers received for the acquisition. Normally, for full and open competition, the SAT guidelines require at least '3' (three); for non-compete or sole source, '1' (one).

Step 40: Simplified Procedures for Certain Commercial Items:* Select 'No'.

Preference Programs / Other Data Section:

Preference Programs / Other Data	
Contracting Officer's Business Size Selection:*	Small Business ▼
Subcontract Plan:*	Plan Not Required ▼
Price Evaluation Percent Difference:	0 %

Figure 161 *FPDS, Preference Programs/Other Data*

Step 41: Contracting Officer's Business Size Selection:* Select 'Small Business' if the award is going to a small business. For certain circumstances with no small business available to provide the product or service and the award is going to an "other than small business", choose 'Other than Small Business'.

Step 42: Subcontract Plan:* Select 'Plan Not Required'.

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NASA Specific Data Elements Section:

NASA Specific Data Elements		
Offeror's Proposal Number:		
PR Number:*	4200671692	Close Out PR:*
Accession Number:		Advisory/Assistance Services Contract:
Installation Unique:		Support Services Type Contract:
Administrative CO:*	XCG	New Technology or Patent Clause:
Contracting Officer Code:*	XCG	Property Financial Reporting:
Buyer Code:*	XCG	Value Engineering Clause:
COR Organization Code:*	AFRC	Security Code:*
COR Name:*	ROBERT GARCIA	Is Physically Complete:
Alternate COR Name:		Physical Completion Date (mm/dd/yyyy):
Funded Through Date (mm/dd/yyyy):		Final Invoice Paid Date (mm/dd/yyyy):
Contract Fund Code:*	Fully funded	Solicitation Issue Date (mm/dd/yyyy):
Management Reporting Requirements:	Select One	Cancellation Date (mm/dd/yyyy):
Accounting Installation:*	Armstrong Flight Research Center	Destroy Date (mm/dd/yyyy):
Field Of Science or Engineering:	Select One	Non-Federal Funding Amount:
Contract Administrations Delegated:	Select One or More Options	
	Blanket Delegation	
	Closeout	
	Consent to Subcontract	
	Cost Accounting Standards	
	Engineering or Product Surveillance	
	None	
	Other	
	Post Award Audit	
	Property Administration	
	Quality Assurance	
	Security	
	Transportation	

Figure 162 *FPDS, NASA Specific Data Elements*

Step 43: PR Number:* Field is not autopopulated from PPS. Enter the PR number used for this requirement as applicable.

Step 44: Administrative CO:* Use the PGroup Number for the Administrative Contracting Officer (ACO). If your requirement does not have an ACO, use the code for the assigned contracting officer. Normally SAT requirements do not have an ACO assigned.

Step 45: Contracting Officer Code:* and Buyer Code:* Select the awarding Contracting Officer's code

Step 46: COR Organization Code:* Place the originating center code in the field (ie. AFRC, ARC, GRC, GSFC, HQ, JSC, KSC, LaRC, MSFC, NMO/JPL, NSSC or SSC).

Step 47: COR Name:* Type in first and last name of the Technical End User for this requirement.

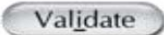
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Step 48: Contract Fund Code:* Use 'Fully Funded' for SAT acquisitions.

Step 49: Accounting Installation:* Enter the funding center based on the PR from the drop down.

Step 50: Close Out PR:* Do Not Check the box.

Step 51: Security Code:* Do Not Check the box.

Step 52: When complete, go back to the top of the FPDS record and choose . Note any messages in **red** indicating missing or incorrectly completed fields or dates. Correct as applicable. Validate again and then choose

· 

Step 53: You are now ready to let the CO know that all is completed and ready for review and award. The Distribution team will ensure the FPDS record is finalized a final copy in the official PDF is uploaded.

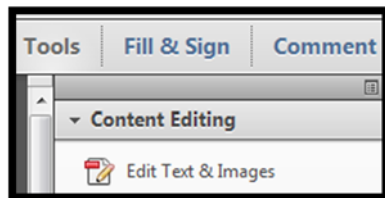
4.3.8.2 SAT Acquisition Task Close Complete

Step 1: When all documentations are completed create a combined electronic file. This electronic file should have main bookmarks based on what is check off on the check sheet. All additional documents under a tab should be moved to a sub-bookmark. When add the main bookmarks, add bookmark by clicking the 'Add Bookmark' icon. Enter Bookmark name to Tab number – Description based on check sheet. Scroll to the first page of the bookmark section. Right click bookmark. Click on 'Set' Destination'. Drag bookmarks of documents related to that tab under the main tab. To collapse all bookmarks click the bookmark options icon. Click on **'Collapse Top-Level Bookmarks'**. Include a file review sheet as part of the file. In the ServiceNow ticket include in **the 'Work Notes – Internal'** the file name and file location.

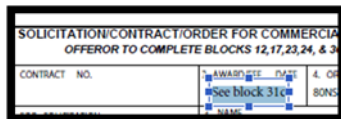
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Step 2: Edit the SF1449

- Open the SF 1449. Click the Tools > Edit Text



- Add text to block 3. Click under tools “Add Text”. Add a text box in block 3. Add the Text “See block 31c”. Change the size to 10.



- Edit the Deliver to address (block 15) to include additional POC information on the technical end user. Follow Center Specific WI.
- From:

BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE		Net 30 days	
15. DELIVER TO		CODE	16. AD
NASA Langley Research Center 4 South Marvin Street Bldg 1206 Hampton VA 23681-2199			NA Sh Bu Ste
17a. CONTRACTOR/	CODE 1DFA6	FACILITY	18a. P

- To:

<input type="checkbox"/> SEE SCHEDULE			
15. DELIVER TO		CODE	
NASA/ Langley Research Center 4 South Marvin Street Bldg 1206 Attn: Shaun Reno / 1251A:124 / 757-864-1122 Mark for 80NSSC17P2140 Hampton VA 23681-2199			

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- Add the Accounts Payable email address (NSSC-AccountsPayable@nasa.gov) to block 18a

18a. PAYMENT WILL BE MADE BY	CODE
NASA Shared Services Center (NSSC) Financial Management Division (FMD) Accounts Payable NSSC-AccountsPayable@nasa.gov Building 1111, Jerry Hlass Road Stennis Space Center MS 39529-0001	

- >Save PDF.

Step 3: Return to PPS and upload Attachments

- Return to PPS
- Return to the “Notes and Attachment” Tab. Click Add Attachment > Browse

- Upload any documentation that has to be distributed out to the vendor and customer as a separate document including GRC supplemental, Q Docs, and Statement of Work. Name file PIID Number – Brief description (Example 80NSSC17P2140 – GRC Supplemental). Uncheck Internal only. Document will not be sent to folder management if checked. Click Ok
- Attachments in PPS should at a minimum include:
 - SF1449
 - Terms and Conditions

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- Quote
- Efile
- Any other attachments listed in the Terms and Conditions that need to be sent to the contractor in the award distribution.

▼ Attachments			
Add Attachment Edit Description Versioning Delete			
Assigned To	Category	Description	File Name
Document Header	Standard Attachment	80NSSC17F2094 - SF1449.pdf	80NSSC17F2094 - SF1449.pdf
Document Header	Standard Attachment	80NSSC17F2094 - T&Cs.docx	80NSSC17F2094 - T&Cs.docx
Document Header	Standard Attachment	80NSSC17F2094 - eFile	80NSSC17F2094 - eFile.pdf
Document Header	Standard Attachment	80NSSC17F2094 - Quote	80NSSC17F2094 -Quote.docx

- In Folders Management all the attachments will show up under the folder PPS PO Attachments (Including Terms and Conditions)

65					
Attributes Record					
Browser					
Purchase Order 80NSSC17F2094 Version 1					
<div> <div>Short Description</div> <div>Purchase Order 80NSSC17F2094</div> </div> <div> <div>FOIA Indicator</div> <div></div> </div> <div> <div>Language</div> <div>EN</div> <div>English</div> </div> <div> <div>Logical System</div> <div>SAPSRC400</div> <div>SRC Client 400</div> </div> <div> <div>Object ID</div> <div>8500001371</div> </div> <div> <div>Creation time</div> <div>06/14/2017 10:56:52</div> </div> <div> <div>Created by</div> <div>NS000274</div> <div>Desiree Oliver</div> </div>					
Hierarchy	Element Type	Visibility	Last Processed	Nod...	
▼ Purchase Order 80NSSC17F2094			EAICPIC / 06/14/2017 / ...		
• PPS PO	Purchase Order	All Roles		3	
• Purchase Order 80NSSC17F2094	Purchase Order	All Roles	EAICPIC / 06/14/2017 / ...	3	
• PPS Novation	Purchase Order	All Roles		33	
• Related ECC PR Records	Related ECC PR Records	All Roles	NS000274 / 06/14/201...	90	
• Related PPS Purchase Requisition	NASA Related PPS Purc...	All Roles	NS000274 / 06/14/201...	5	
▼ PPS PO Attachments (Including T...		All Roles		85	
• PPS Attachments	NASA Attachment	All Roles		87	
• NASA Attachment 80NSSC17F...	NASA Attachment	All Roles	EAICPIC / 06/14/2017 / ...	87	
• NASA Attachment 80NSSC17F...	NASA Attachment	All Roles	EAICPIC / 06/14/2017 / ...	87	
• NASA Attachment 80NSSC17F...	NASA Attachment	All Roles	EAICPIC / 06/14/2017 / ...	87	
• NASA Attachment 80NSSC17F...	NASA Attachment	All Roles	EAICPIC / 06/14/2017 / ...	87	
▶ PPS PO Related GR/IR		All Roles		86	
▶ IAAs		All Roles		344	
▶ Large Purchase		All Roles		239	
▶ Under SAT		All Roles		269	
▶ Grants and Cooperative Agreemen		All Roles		360	

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Step 4: Some SAT awards will require the firm signature before the CO Signature.

- Send an email to the CO to review the file before it goes to the firm.
- Once an email has been sent to the Contracting Officer requesting file review, place your task in “Pending” and document this action in your work notes.
- Once the contracting officer approves the file, send an email to the firm to sign the SF 1449.

Email Language should be as follows:

In an effort to finalize the Purchase Order between NASA and your firm, attached are the following tentative contract documents for your review:

- SF 1449
- Terms
- Quote Number _____

After your review of the above documents and concurrence, please sign and return the SF 1449 by _____. Electronically return this form to _____.

After receipt of the signed SF 1449, a Contracting Officer will review your file. Your firm is not authorized to commence work until after receiving the fully executed purchase order that is signed by the Contracting Officer.

Thank you in advance for your time.

- Do not give more than 2 days for firms review and signature. Follow up before the due date to ensure they received email.

Step 5: Update the pdf file with firm signed SF 1449 and re pulled exclusions.

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Step 6: When the file is ready to go to the CO for review update the SATPC record. Go to Task Table. Double click in the field under **'State'** for the task **'SAT Acquisition'**. Select from the drop down box **"Closed Complete"**. Click on the green check to save selection. Include in your work notes that the requirement was submitted for CO review. Click Save. Be very careful not to select any of the other closed options.

	Number	Request item	Requested for	Priority	State	Short description	Name
	TASK0126097	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Closed Complete		NSSC SAT Acquisition Request
	TASK0126096	RITM0152974	JACQUELINE BARBETTA	3 - Moderate	Closed Complete	Technical Evaluation	NSSC SAT Acquisition Request

Figure 163 *ServiceNow, Update SATPC Record*

4.3.8.3 Stage 6b - Assignments

Step 1: Only the CS does assignments for this Task. To make an assignment, go to **'Open - Unassigned Task'** under SAT Tasks. Click the Search Icon. In the search field for the **'Short description'** type **'CO Review'**. Click on the SATPC number to open up the record.

Number	State	Number	Number	Number	Number	SAT Award Order #	Short description	Name	Assignment Group
TASK0125636	Open	RITM0152769	SATPC0001073	(empty)	(empty)	4200087684	CO Review	NSSC SAT Acquisition Request	PR - SAT TEAM - L3
TASK0125610	Open	RITM0152872	SATPC0001061	(empty)	(empty)		CO Review	NSSC SAT Acquisition Request	PR - SAT TEAM - L3
TASK0125605	Open	RITM0152698	SATPC0001058	(empty)	(empty)	NNK16MD13D	CO Review	NSSC SAT Acquisition Request	PR - SAT TEAM - L3
TASK0125200	Open	RITM0152525	SATPC0001045	(empty)	(empty)	NNK16MA07D	CO Review	NSSC SAT Acquisition Request	PR - SAT TEAM - L3
TASK0125596	Open	RITM0152697	SATPC0001067	(empty)	(empty)	NNK16MC03D	CO Review	NSSC SAT Acquisition Request	PR - SAT TEAM - L3
TASK0126099	Open	RITM0152974	SATPC0001122	(empty)	(empty)	NNK16WA10P	CO Review	NSSC SAT Acquisition Request	PR - SAT TEAM - L3
TASK0125484	Open	RITM0152503	SATPC0001042	(empty)	(empty)	NNK16AA20P	CO Review	NSSC SAT Acquisition Request	PR - SAT TEAM - L3

Figure 164 *ServiceNow, Search*

Dragging the search breadcrumbs over to the Left hand side saves the search as a future reference for someone making assignments for this task.

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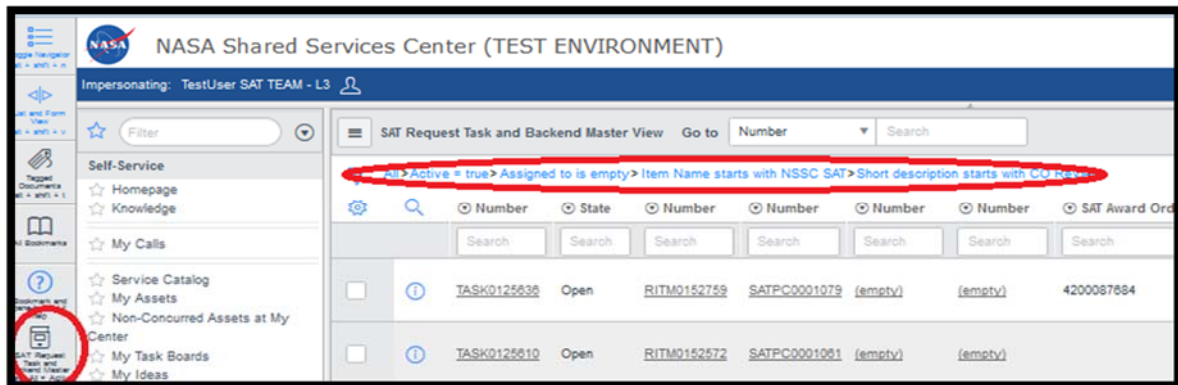


Figure 165 *ServiceNow, Breadcrumbs*

Step 2: Go to the task table. For the Task '**CO Review**' double-click in the field for the column '**Assigned To**'. Use the search icon to search. Click on the name to make a selection. Click the green check box to save. Click the '**Save**' button.

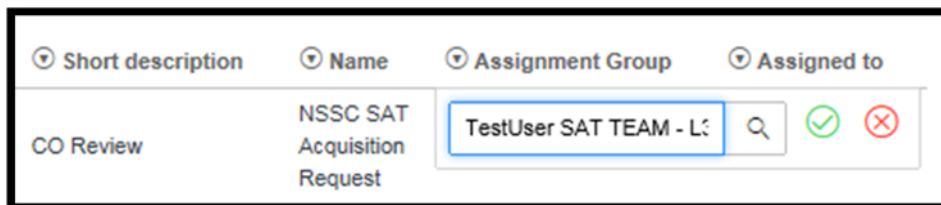


Figure 166 *ServiceNow, CO Review*

Step 3: Go to 'Task Assigned to me'. Open a ticket by clicking on the SATPC number. Review Ticket. Review all tabs. Use the assigned SAT Award Order # located on the 'Procurement Award' tab to browse to the N Drive Folder and to find the correct PPS file.

- Review file for completeness and accuracy. For files that need corrections due to errors, send an email to Team Lead, Back-up Lead, or other designated processor team member. The email should include SATPC ticket number. Note error in the SATPC ticket. Go to '**Processing Notes**'. Enter error in '**Work Note –Internal**'. Do not place error note in 'Additional Comments – External (Viewable to Customer)'.
- The Contracting Officer posts updates to reflect the same date as award. The Processor will place a new exclusion on the day of submission for CO Review.

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At the time of award, the Contracting Officer may pull a new exclusion from SAMs and place in the related folder on the N Drive if needed.

- The Contracting Officer shall review the FPDS record prior to award.
- The Contracting Officer should award the contract in PPS once the Award documentation and Award documents are correct and ready. All required electronically signed documentation should reside in a related folder on the N Drive.

4.3.8.3.1 Acquisition Steps and Award Date

Step 1: After the Contracting Officer has approved and awarded in PPS, the SATPC record needs updating. Go to the '**Procurement Award**' Tab. Enter the '**Award Date**' by using the calendar widget. This date drives the NSSC Metrics. Do not fill in until completion of the official approval and award.



Figure 167 *Award Date*

Step 2: Go to Task Table. Double-click in the field under '**State**' for the task '**CO Review**'. Select from the drop down box "**Close Complete**". Click on the green check to save selection. Click the '**Save**' button.

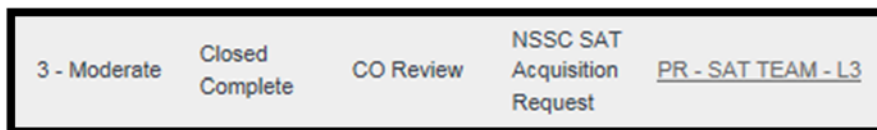


Figure 168 *CO Review, Closed Complete*

4.3.8.4 Stage 6c – Distribution Assignments

Step 1: To make an assignment go to '**Open - Unassigned Task**' under SAT Tasks. Click the Search Icon.

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	Number	Status	Number	Number	Number	Number	SAT Award Order #	Title
<input type="checkbox"/>	TASK0177764	Open	RITM0177776	(empty)	(empty)		SATMR0001001	Purchase Requisition(s) Released
<input type="checkbox"/>	TASK0177765	Open	RITM0177776	(empty)	(empty)		SATMR0001001	Modification Request Review
<input type="checkbox"/>	TASK0177784	Open	RITM0177790	(empty)		SATAR0001003	(empty)	Assess Assistance Request

Figure 169 *ServiceNow, Open Unassigned Task*

Step 2: In the search field for the ‘**Short description**’ type ‘**Distribution**’. Click on the SATPC number to open up the record.

Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
SATPC0001006	(empty)	(empty)		Distribution	NSSC SAT Acquisition Request	PR - SAT DISTRIBUTION-L2	

Figure 170 *ServiceNow, Short Description search*

Step 3: Go to the task table. For the Task ‘**Distribution**’ double-click in the field for the column ‘**Assigned To**’. Use the search icon to search. Click on the name to make a selection. Click the green check box to save. Click the ‘**Save**’ button.

Title	Name	Assignment Group	Assigned to
Distribution	NSSC SAT Acquisition Request		<input type="text" value="Johnny Hisaw"/> <input type="button" value="Search"/> <input checked="" type="checkbox"/> <input type="button" value="X"/>

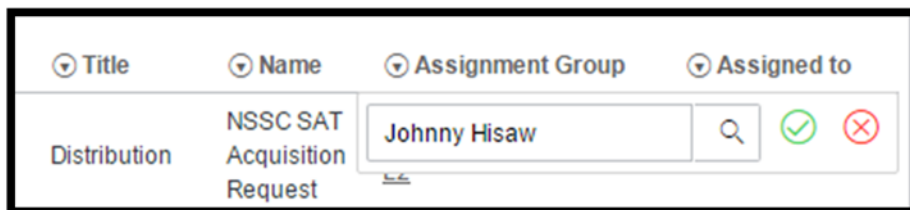
Figure 171 *ServiceNow, Assigned To*

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4.3.8.5 Stage 6c – Distribution

Step 1: Copy the SAT Award Order number that you are working on from the distribution spreadsheet and paste into the search field for the '**SAT Award Order #**'. Hit enter. Click on the SATPC number to open up the record.

Step 2: Go to the tasks for SAT Procurement at the bottom of the page. Double-click in the field for the column '**Assigned To**' next to the distribution task. Use the search icon to search. Click on the name, type in your name or the person assigning to (First, Last) and click on the name to add to field. Click the green check box to save. Click the '**Save**' button.



The screenshot shows a table with four columns: Title, Name, Assignment Group, and Assigned to. The 'Title' column contains 'Distribution'. The 'Name' column contains 'NSSC SAT Acquisition Request'. The 'Assignment Group' column is empty. The 'Assigned to' column contains a search box with 'Johnny Hisaw' entered, a search icon, a green checkmark, and a red X icon.

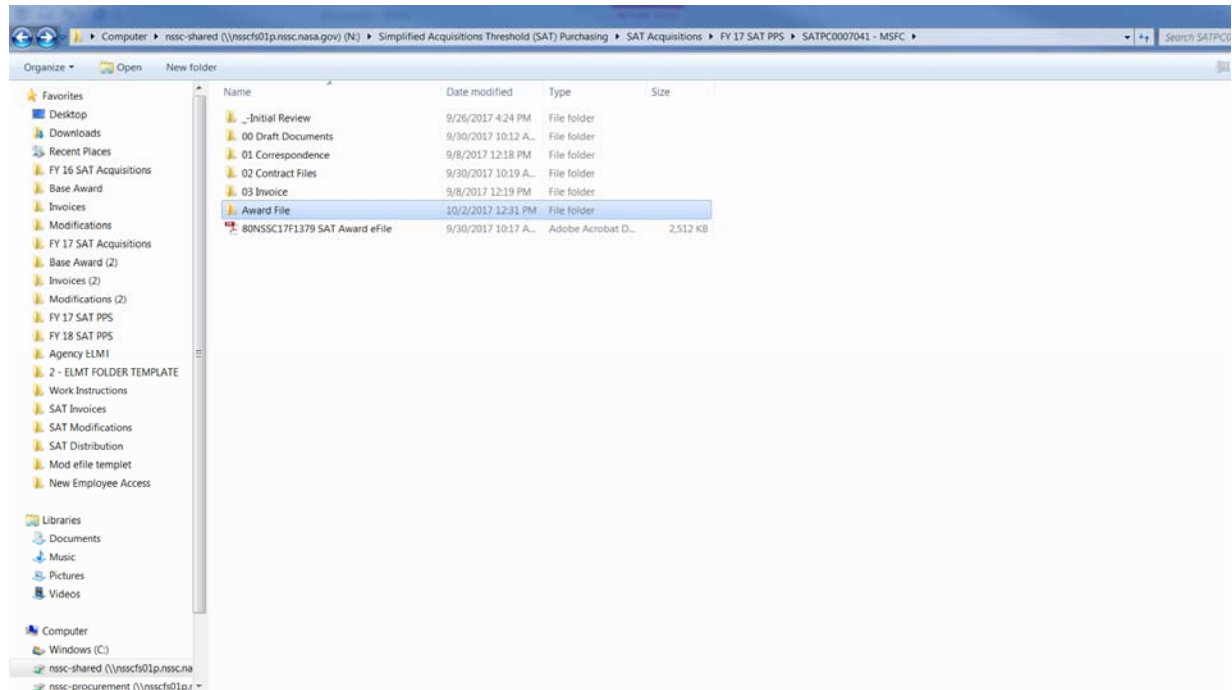
Title	Name	Assignment Group	Assigned to
Distribution	NSSC SAT Acquisition Request		Johnny Hisaw

Figure 172 **ServiceNow, Assigned To**

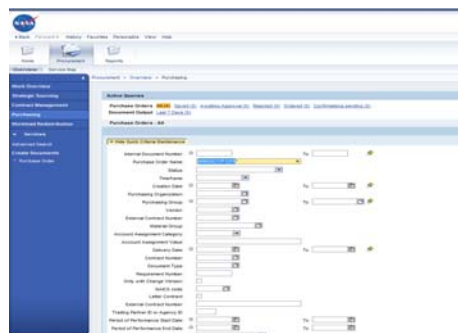
Step 3: Create new email and retrieve the email template for distribution. Paste the award order number, SATPC number, RITM number, and PR number (all from the Service Now ticket) into the email. Keep the email open for later.

Step 4: Obtain the 'SAT Award Order #' located on the 'Procurement Award' tab. Go to the N Drive and pull up the folder associated with your order number. Create an Award file folder.

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Step 5: Log into PPS. Click on Procurement. Click on Purchasing. Paste your award order number next to Purchase Order Name. Place a * behind the number in case there is a pending modification. Click the yellow apply button.



Step 6: Click on the blue Internal Document Number. Double check that the Status states “Ordered” and not Saved. If the status is “saved” and stage 6b is closed out in Service Now, send an email to the CO asking them to approve the order in PPS.

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The screenshot shows a web-based form for document management. It includes fields for document type, status, and various dates. A table at the bottom lists documents with columns for document number, description, and status. A blue arrow points to the 'Notes and Attachments' tab in the top navigation bar.

Step 7: Click on the Notes and Attachments tab. Save the signed SF 1449, T&C, Quote, and any additional attachments that should go with the award documents (GRC supplemental, Q Docs, Statement of Work) to the Award File folder that you created on the N drive. This should be all files except for the master efile. Never send the eFile (PIID Number – eFile).

- 1) SF 1449
- 2) Body – Terms and Conditions
- 3) Attachments – Quote, Drawings, Statement of Work, Specifications, etc.

The screenshot shows the 'Display Purchase Order' page. The 'Notes and Attachments' tab is selected, showing a list of documents and attachments. A blue arrow points to the 'Notes and Attachments' tab in the top navigation bar. The table below lists documents with columns for document number, description, file name, version, processor, and status.

Document Number	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
80N5SC17F1379	Terms and Conditions	80N5SC17F1379 Tab 20 QSA Terms and Conditions.docx	1				docx	32	NS000596	09/30/2017
80N5SC17F1379	Quote	80N5SC17F1379 Tab 20 Quote.pdf	1				pdf	27	NS000596	09/30/2017
80N5SC17F1379	SAT Award eFile	80N5SC17F1379 SAT Award eFile.pdf	1				pdf	2512	NS000596	09/30/2017

Step 8: Click the yellow Approve FPDS-NG button at the top of the page. A pop-up will appear stating that it is approved or FPDS-NG record cannot be approved. If approved, click on the yellow View FPDS-NG Record and save to the Award file folder on the N Drive. If it cannot be approved. Click on the yellow View FPDS-NG

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Record. When the FPDS-NG comes up, click on validate. Look for any simple corrections that you can fix, if not, send an email to the processor to fix the FPDS-NG. Always click Save Draft after validating. Sometimes, the system just needs that update to approve. If there are no validation errors, click Save Draft, then exit. Click on the Approve FPDS-NG button again to approve the FPDS. Then Click on the View FPDS-NG Record and save to the Award file folder on the N Drive. Save the FPDS as the PIID number FPDS Final (Ex: 80NSSC17F1379 FPDS Final).

Step 9: Go to the Award file folder on the N drive where you saved all of the documents to. Pull up the SF1449 and any other documents that you saved from PPS. Double check the items on the documents to reconfirm that the documents match:

SF1449- Vendor name, price, Quote number, Quote date, Delivery Date, price of each item, page numbers, etc.

Terms and Conditions- Award number at top of page, page numbers, payment terms, delivery date, delivery location, Firm fixed price, any attachments listed, etc.

Quote- Quote date, quote price, price of each item, payment terms, etc.

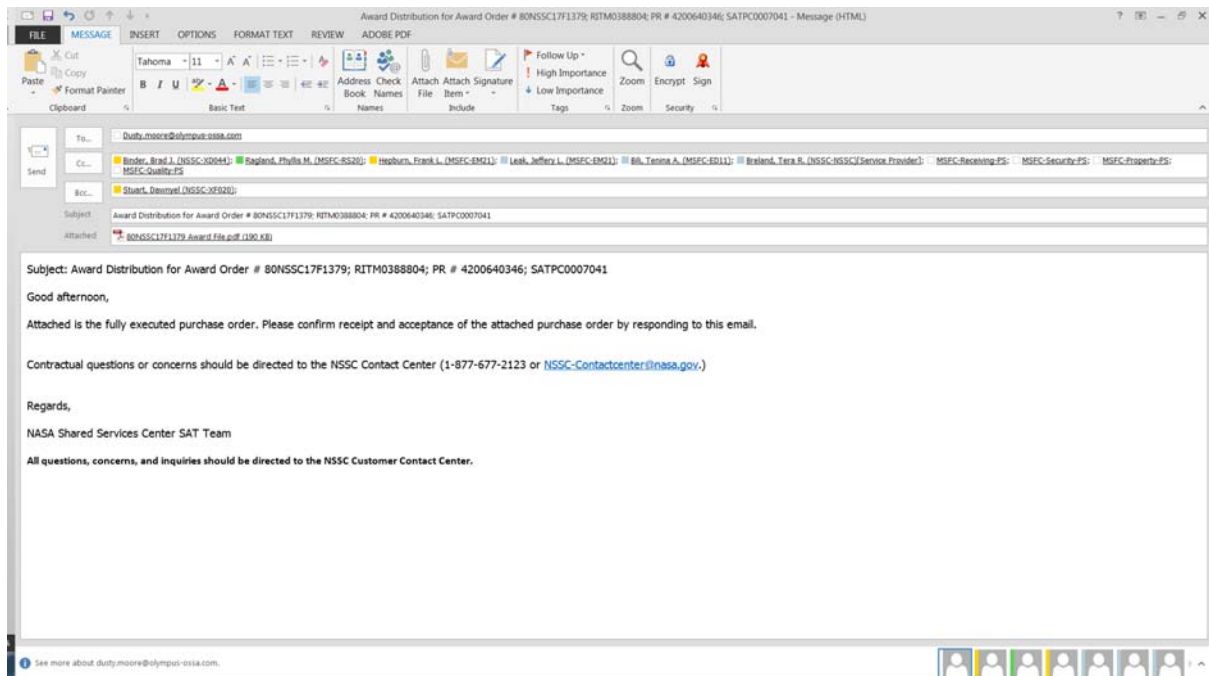
*Always check the number of pages on the SF1449. Sometimes only the first page is uploaded to PPS. Retrieve the other pages from the file on the N drive.

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Step 10: Prepare award document for distribution. Combine signed SF1449 with Terms and Conditions (if applicable), Quote and other required attachments (if applicable). Rename to reflect the correct award file name as shown in the examples below:

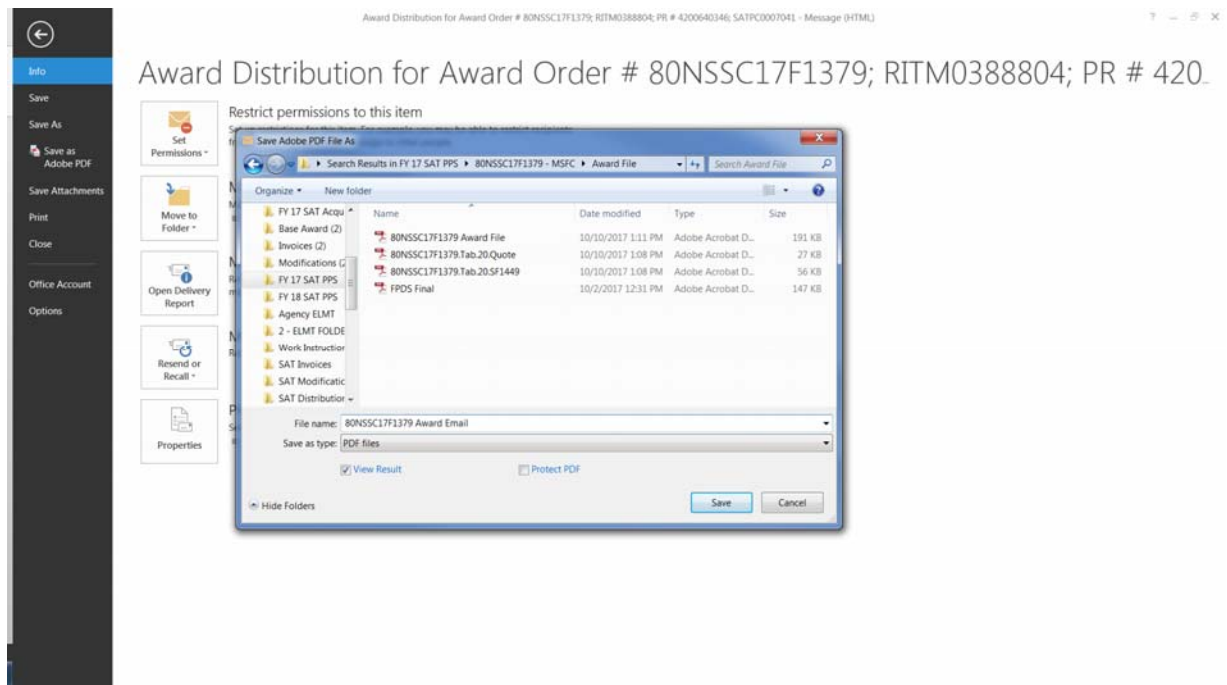
ELMT BPA Calls: NNX14MC03Z Call 1 80NSSC17F1339 Award File
ELMT IDIQ Orders: NNX15MC76B Order 1 80NSSC17F1339 Award File
SEWP Contracts: NNG15SD34B 80NSSC17F1339 Award File
Purchase Orders: 80NSSC17P1339 Award File

Step 11: Send Award File document to email addresses listed on the distribution sheet. Make sure that you check to see if there are any special or additional POCs to Distribute the Award document to.



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Step 12: Save a copy of the distribution email to pdf and place in the Award File on the N Drive. Make sure to update the bottom portion of the distribution sheet and add to the master PDF.



☒ Distribution Emails Sent 3/4/2016 - DLO

☒ FPDS-NG Finalized 3/4/2016 - DLO

☒ TechDoc Upload 3/4/2016 - DLO

Email Distribution Sheet

4.3.8.5.1 Folders Management – Official Documentation Files

Step 1: On the N Drive, combine the FPDS, Award File, Distribution Sheet, and Award Email and name the PIID number (space)–(space)Distribution File (80NSSC17F1379 – Distribution File). Upload the file to PPS by clicking on the yellow Related Links button, then Folders Management.

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Display Purchase Order

Internal Document Number: 800000004 Document Type: Task/Delivery Order Status: Order **Documents** Folder Management Document Builder

Obligated Amount: 13,854.12 USD PWD: 80NSSC17F1379 Vendor: OLYMPIUS AMERICA INC.

General Header Data

PO: 80NSSC17F1379

Internal Document Number: 800000004

* Vendor: 12825 OLYMPIUS AMERICA INC.

* Requisitioner: 1000003281 Study M. Reinsel

* Plant: 1000000009 Marshall Space Flight Center

Ship-To Address: Multiple null

* Purchasing Organization: NASA Shared Services Center

* Purchasing Group: JSC - Brand, Term Show Members

Obligated Amount: 13,854.12

Milestone Plan: Display

Step 2: Click on the eye glasses/pencil icon. Click on the arrow next to Under SAT. Click on the arrow next to 40. Closeout documentation. Double click on Documents.

Records Browser - Record "Purchase Order 80NSSC17F1379" Edit

Short Description: Purchase Order 80NSSC17F1379

FOIA Indicator: EN

Language: SAPSR400

Logical System: English

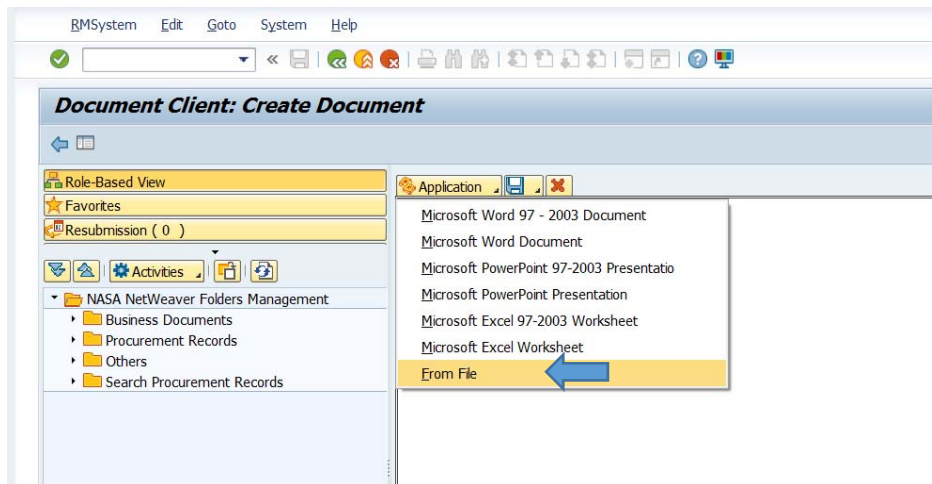
Object ID: 8500006004

SRP Client: 400

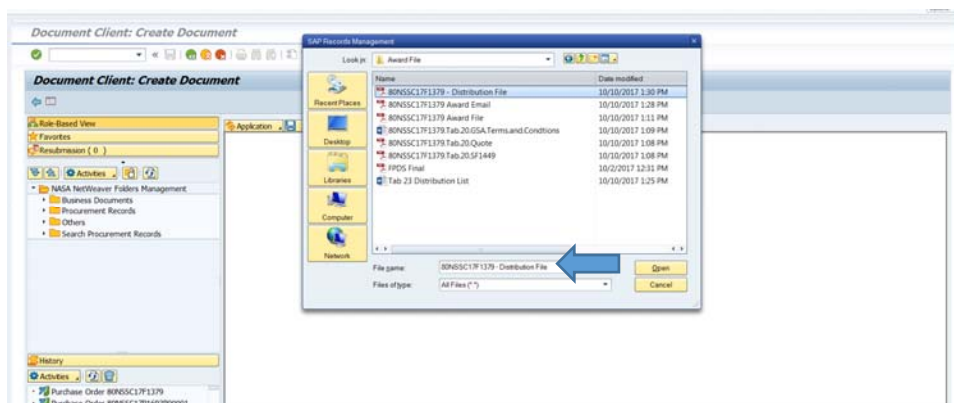
Hierarchy	Element Type	Visibility	Last Processed	Node ...
PPS Novation	Purchase Order	All Roles		33
Related ECC PR Records	Related ECC PR Records	All Roles	NS000566 / 09/30/2017 / 09...	90
Related PPS Purchase Requestion Records	NASA Related PPS Purchase ...	All Roles	NS000566 / 09/30/2017 / 09...	5
PPS PO Attachments (Including Terms and		All Roles		85
PPS PO Related GR/IR		All Roles		86
IAs		All Roles		344
Large Purchase		All Roles		239
Under SAT		All Roles		269
36. Modification supporting documentat		All Roles		270
37. Public Vouchers/Progress Payments/I		All Roles		271
38. Contractor Performance Evaluations		All Roles		272
39. BPA Call Annual Reviews		All Roles		273
40. Closeout documentation		All Roles		274
Documents	NASA Documents(Word,PDF...	All Roles		342
Subfolder	Case	All Roles		343
Grants and Cooperative Agreements		All Roles		360

Step 3: Click on Application, then From File.

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Step 4: Go to the folder on the N drive. Click on the file name. (Copy the file name after you click on it) Click Open.



Step 5: Paste the file name into Short Description. Click on the green checkmark. Click on the Blue X above the open document. Then click the Save button. Click Save.

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Document Client: Create Document

Short Description: 80NSC17F1379 - Distribution File
Unique ID: NS001245-2017010194627
Language: EN
Creation time: 10/10/2017 14:46:27
Created by: NS001245
Last changed by: Tracy Bennett
Version: 1
Expiry Date:
Keyword (1):
Keyword (2):
As Copy of:
Model that Was Used to Create Document:
Check-Out Path on Desktop (1):
ID of Original Document:
Version of Original Document:
Document Template:
Author (in MS Document):
Attribute Values Last Changed:
Attribute Values Last Changed by:
User Who Checked Out the Document:
Do Not Archive Document:
File Plan Position (1):
File Plan Position (2):
SRM_DOC_PDF_FORM
Storage Identification:
Storage Location (1):
Storage Location (2):

Document Client: Create Document

FPDS-NO ABBY R.LOGIUDICE@NASA.GOV [Award Print] Page 1 of 3

Transaction Information
Award Type: DeliveryTask Order
Prepared Date: 09/06/2017 10:55:33
Prepared User: TERA R. DRELAND@NASA.GOV
Award Status: Final
Last Modified Date: 09/06/2017 11:38:07
Last Modified User: BRAD J. BINDER@NASA.GOV
Closed Status: No
Closed Status Date:
Closed By:

Document Information
Agency: 8000
Procurement Identifier: 80NSC17F1379
Modification No: 0
Trans No: 0
Referenced IDV ID: 4730
Reason For Modification: GS07F59338
PO007INNOVATE
Solicitation ID:
Agency Main Sub Identifier Account Account
Treasury Account Symbol:
Dates
Date Signed: 09/30/2017
Amounts
Action Obligation: \$13,654.12

4.3.8.5.2 Update the SATPC Record In ServiceNow

Step 1: Go to the 'Procurement Award' tab. Update the 'Product Delivery Date' for commercial items. Update the 'Order Start Date' and 'Order End Date' for services.

Product Delivery Date 2016-06-30

Figure 173 *ServiceNow Product Delivery Date*

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Award Date	2016-03-04	Date	
Order Start Date	2016-03-04	Order End Date	2017-03-03

Figure 174 *ServiceNow Award Date and Order Start Date*

Step 2: Go to the ‘Other’ tab. Check the dates for options.

Acquisition Request	Acquisition Steps	Pre Award	Procurement Award	Other	Deliverable & Invoices	Processing Notes
Total Value	35,000.00	Unusual & Compelling Urgency		<input type="checkbox"/>		
Total Potential Value	70,000.00	Internal Request		No		
Current End Date	2017-03-02					
Number of Option Years	1					
Option Years						
	Option #	Option Start Date	Date Letter Intent Due	Letter of Intent Sent	Sent By	Sent Date/Time
	1	2016-03-04	2017-02-03	false		(empty)
Insert a new row...						

Figure 175 *ServiceNow Other Tab*

Step 3: Go to the ‘Deliverables’ tab. Check the ‘Deliverable Due’ dates.

Deliverables		
	Number	Deliverable Due
	SATDE0001071	2016-06-30
	software package support	

Figure 176 *ServiceNow Deliverables Tab*

4.3.8.5.3 Stage 6c – Distribution Task Close Complete

Step 1: Go to Task Table. Double-click in the field under ‘State’ for the task ‘Distribution’. Select from the drop down box “Close Complete”. Click on the green

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check to save selection. Click the **'Save'** button.

The screenshot shows a ServiceNow record interface. At the top, there are tabs for 'Requested for', 'Priority', 'Status', 'Title', 'Name', and 'Assignment Group'. Below these tabs, the record details are displayed: 'Paul Laurenzi' for Requested for, '3 - Moderate' for Priority, 'Closed Complete' for Status (with a dropdown arrow), a green checkmark icon, a red 'X' icon, 'NSSC SAT Acquisition Request' for Name, and 'PR - SAT DISTRIBUTION - L2' for Assignment Group.

Figure 177 *ServiceNow Close Complete*

4.3.9 Stage 7: Product or Service Received

Step 1: Proactively seek confirmation of receipt from Technical End-User on the business day following the delivery date. ServiceNow should send an automatic email to the Technical End-User to confirm acceptable delivery.

Step 2: Run **'SAT Acquisition – Late Deliverables'** report weekly for review. If ServiceNow sent the email automatically, follow up again with the Technical End User 5 business day after the first email.

Step 3: Delivery confirmation should follow this naming scheme:

Type	Naming Scheme	Example
Delivery Confirmation	PO # Delivery Confirmation Date Received ~FYLL~SAT Award Order #	NNX16WA00P Delivery Confirmation 03 04 2016~16WA~NNX16WA00T

Figure 178 *Delivery Confirmation Naming Scheme*

Step 4: Place Documentation in the relevant N Drive folder in the subfolder **'02 – Invoice'**. Upload the Documentation into TechDoc in the relevant Invoice folder.

Step 5: In a second windows browser. Go to: <N:\Document Imaging\PR - SAT\SAT Acquisitions> Go to the folder for the Current Fiscal Year. Go to the folder for Invoices. Copy and paste delivery confirmation in the invoice folder. The delivery confirmation will verify receipt of the invoice.

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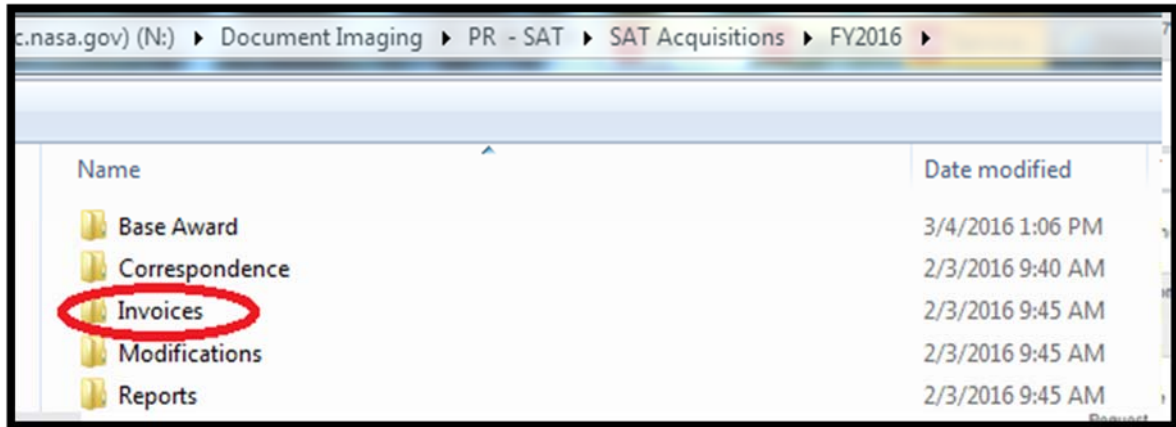


Figure 179 *N-Drive Invoices Folder for FY2016*

Step 6: Update the SATPC record. Go to the '**Deliverable & Invoices**' Tab. On the Deliverables table. Click on the 'SATDE' number to open up the Deliverable record. Click '**Tech Approval recd**'. Click the 'Save' button.



Figure 180 *SATPC Record, Tech Approval recd*

Step 7: Click the 'OK' button on the pop-up warning that you are about to send an email that Technical approval has been received.

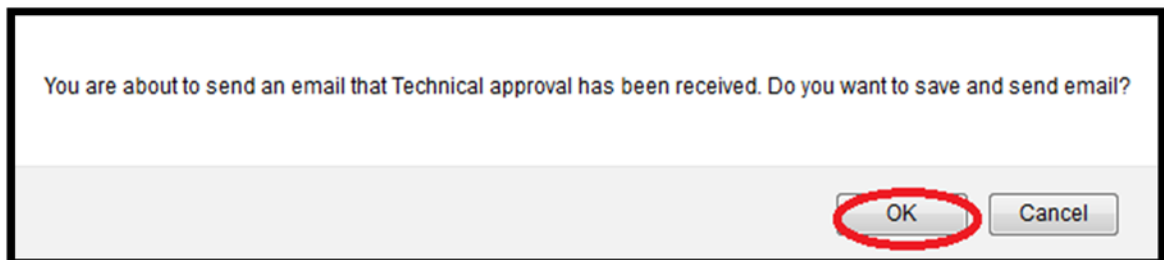


Figure 181 *Technical Approval Received Warning*

Step 8: Click the back button.

Step 9: If all deliverables have been received go to the task table. For the task 'Product or Service Received' double-click in the field for the column '**Assigned to**'

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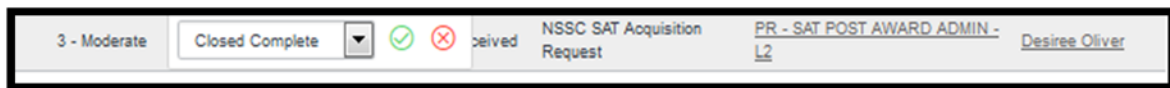
search for your name. Click the green check to save the selection.



The screenshot shows a row in a task table. The first column is 'Product or Service Received'. The second column is 'NSSC SAT Acquisition Request'. The third column is 'PR - L2'. The fourth column is a search bar containing 'Desiree Oliver'. To the right of the search bar are two buttons: a green checkmark and a red X.

Figure 182 *Task Table, Assigned To*

Step 10: Go to Task Table. Double-click in the field under ‘**State**’ for the task ‘**Product or Service Received**’. Select from the drop down box “**Close Complete**”. Click on the green check to save selection. Click the ‘**Save**’ button.



The screenshot shows a row in a task table. The first column is '3 - Moderate'. The second column is 'Closed Complete' with a dropdown arrow. The third column is 'NSSC SAT Acquisition Request'. The fourth column is 'PR - SAT POST AWARD ADMIN - L2'. The fifth column is 'Desiree Oliver'. To the right of the dropdown menu are two buttons: a green checkmark and a red X.

Figure 183 *Task Table, Closed Complete*

4.3.10 Stage 8: Invoice

Step 1: Update the SATPC ticket after receiving and forwarding an invoice for review. Supplies received at the dock and has been marked inspected and approved in SAP, the Invoices will be approved for payment in finance. If SAP shows that payment has been disperse for the total amount ‘Close Complete’ this task.

For Services: When an IRIS Approval Pending email has been received. Click the link in the sentence “To respond to this request, please go to ...”. This link will open up IRIS. Use the information in IRIS to update ServiceNow. Click ‘**View Invoice**’. Click ‘**Open**’ for Tech Doc. Verify the invoice using the SAT Order. For SAT services, and new licenses/product verify with the end user that service/licenses/product has been received and is acceptable. For software maintenance no verification is needed from end user. If verification has already been received during Stage 7, there is no need to send another email.

Send the following email to end user and other POCs listed on the request:

SAT SERVICE - Email to Tech End User:

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Subject: Service Confirmation Needed on SAT Order # _____ Invoice # _____

Attachment: Invoice

Greetings from the NASA Shared Services Center,

Please confirm service was performed by the vendor in a satisfactory manner for services procured in order number _____. The NSSC is requesting that you respond within three business days (MM/DD/YYYY) with your confirmation and/or non-confirmation. Your prompt response is appreciated in order for the invoice to be approved for payment in a timely manner so as not to incur interest.

Reference:

Order Number: _____ Invoice #: _____

Vendor Name _____ Total Award Value _____

Thanks in advance for your time and response.

ELMT NEW LICENSE/PRODUCT - Email to Tech End User:

Subject: Delivery Confirmation Needed on Order Number _____ Invoice # _____

Attachment: Invoice

Greetings from the NASA Shared Services Center,

Please confirm receipt of services or products procured in order number _____. The NSSC is requesting that you respond within three business days (MM/DD/YYYY) with your confirmation and/or non-confirmation. Your prompt

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response is appreciated in order for the invoice to be approved for payment in a timely manner so as not to incur interest.

Reference:

Order Number: _____ Invoice #: _____

Base Contract Number: _____ Call/Order #: _____

Vendor Name _____ Total Award Value _____

Thanks in advance for your time and response.

MAINTENANCE – No EMAIL

After invoice has been reviewed and SAT services or new licenses/product has been verified send one of the following emails to the CO listed as the approval.

SAT SERVICE - Email from SP to CS:

Pricing on invoice number ##### is in line with the awarded order amount. Verified with the end user that the service was performed by the vendor in a satisfactory manner. Invoice is ready for approval.

OR

Pricing on invoice number ##### does not match the awarded order amount. Invoice should be rejected and vendor will have to resubmit with correct pricing.

OR

Pricing on invoice number ##### is in line with the awarded order amount but the service has not been provided in full yet by the vendor. Invoice should be rejected

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and vendor will have to resubmit once the service has been fully performed by the vendor in a satisfactory manner.

MAINTENANCE – Email from SP to CS

Pricing on invoice number ##### is in line with the awarded order amount. Invoice is ready for approval.

OR

Pricing on invoice number ##### does not match the awarded order amount. Invoice should be rejected and vendor will have to resubmit with correct pricing.

NEW LICENSE/PRODUCT – Email from SP to CS

Pricing on invoice number ##### is in line with the awarded order amount. Verified with the end user that the license/product was received from the vendor. Invoice is ready for approval.

OR

Pricing on invoice number ##### does not match the awarded order amount. Invoice should be rejected and vendor will have to resubmit with correct pricing.

OR

Pricing on invoice number ##### is in line with the awarded order amount but the end user has not received the license/product yet from the vendor. Invoice should be rejected and vendor will have to resubmit once the license/product is delivered to the end user.

Step 2: Go to the task table. For the task **'Invoice'** update the **'Assigned to'** block and place the task in Work in Progress. For the column **'Assigned to'** double-click in the field. Select your name using the search icon. Click the green check. For the column **'Status'** use the drop down box to select **'Work in**

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Progress’.

Priority	Status	Title	Name	Assignment Group	Assigned to
3 - Moderate	Work in Progress		NSSC SAT Acquisition Request	PR - SAT POST AWARD ADMIN - L2	Desiree Oliver

Figure 184 *SATPC, Work in Progress*

Step 3: Go to the ‘**Deliverable & Invoices**’ tab. Go to the ‘**Invoices**’ table. Enter the ‘**DRN #**’, ‘**Invoice #**’, and ‘**Invoice Received Date**’. After entry click the green check to save entry. Calendar dates may require clicking on something else before the date appears.

Invoices					
	Number	DRN #	Invoice #	Invoice Received Date	Invoice Approved Date
	SATIN0001129	5602388450	XYZ001	2018-02-22	

Figure 185 *Invoice Received Date*

Step 4: Review invoice. Check to see if confirmation of product or services has been received. If not, contact the technical end user for confirmation. Notify the CO that confirmation has been received.

Step 5: For an invoice approved for payment, go to the ‘**Deliverable & Invoices**’ tab. Go to the ‘**Invoices**’ table. Enter the ‘**Invoice Approved Date**’ using the calendar widget. Calendar dates may require clicking on something else before the date appears.

Invoices					
	Number	DRN #	Invoice #	Invoice Received Date	Invoice Approved Date
	SATIN0001129	5602388450	XYZ001	2018-02-22	2018-03-04

Figure 186 *Invoice Approved Date*

Step 6: Place any invoice related documentation on the related invoice folder. Upload any related invoice documentation to TechDoc.

Type	Naming Scheme	Example
------	---------------	---------

NSSC Process Work Instruction	NSPWI-5113-0001	Basic
	Number	
	Effective Date:	01/12/2018
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Invoice Documentation	PO # Invoice Doc Date Received ~FYLL~SAT Award Order #	NNX16WA00P Invoice Doc 03 04 2016~16WA~NNX16WA00T
Invoice	PO # Invoice Date Received ~FYLL~SAT Award Order #	NNX16WA00P Invoice 03 04 2016~16WA~NNX16WA00T

Figure 187 Invoice Naming Scheme

Step 7: In a second windows browser. Go to: <N:\Document Imaging\PR - SAT\SAT Acquisitions> Go to the folder for the Current Fiscal Year. Go to the folder for Invoices. Copy and paste delivery confirmation in the invoice folder. The delivery confirmation will verify receipt of the invoice.

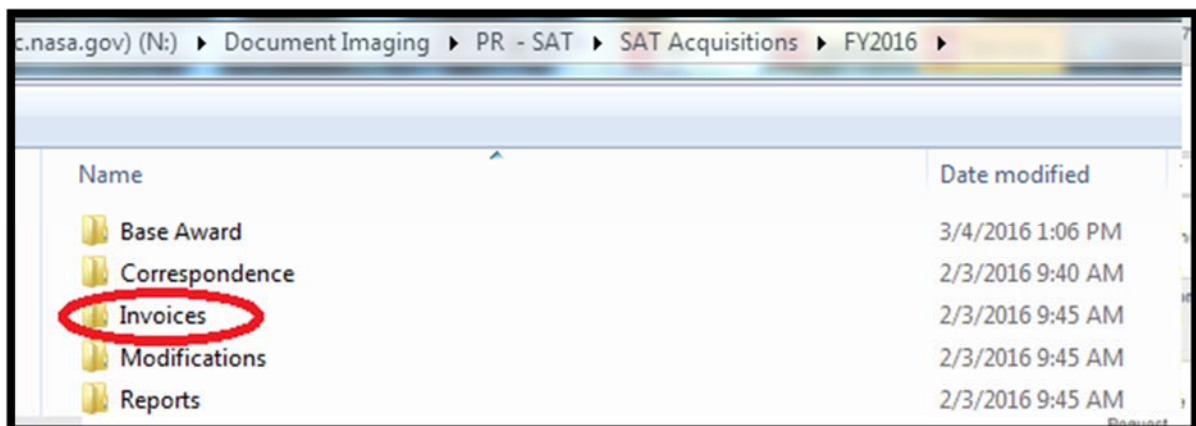


Figure 188 *Invoices Folder*

Step 8: Go to Task Table. Double-click in the field under 'State' for the task 'Invoice'. Select from the drop down box 'Closed Complete'. Click on the green check to save selection. Click the 'Save' button.

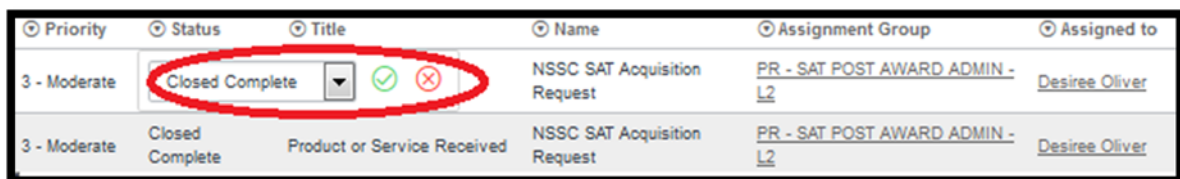


Figure 189 *Closed Complete*

4.3.11 Stage 9: Sent to Closeout

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Step 1: File ready for closeout.

Step 2: Trigger is After Period of Performance End Date or Delivery of Goods Received and Invoiced.

Step 3: Go to the task table. For the task '**Sent to Closeout**' update the '**Assigned to**' block and place the task in Work in Progress. For the column Assigned to double-click in the field. Select your name using the search icon. Click the green check to save entry.

Title	Name	Assignment Group	Assigned to
Sent to Closeout	NSSC SAT Acquisition Request	PR - L2	Gary Walker

Figure 190 *Sent to Closeout, Assigned To*

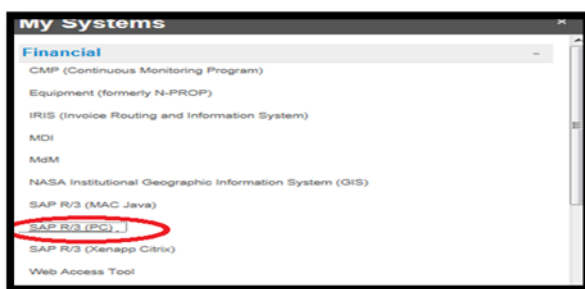
Step 4: For the column 'State' select from the drop down box '**Work in Progress**'. Click on the green check to save selection. Click the '**Save**' button.

Status	Title	Name	Assignment Group	Assigned to
Work in Progress	NSSC SAT Acquisition Request	PR - SAT POST AWARD ADMIN - L2	Gary Walker	

Figure 191 *Work in Progress*

Step 5: In SAP, pull up subject SAT Award. Verify that 'Goods Receipt' is \$0.00. If verified as \$0.00, take screen shot and place in Contract file on P: If there is a balance in the subject field, alert the CO for action and next steps.

Step 6: Log-in to SAP from the bReady. Click on My Systems. Click on Financial. Click SAP R/3 (PC). If a pop-up appears, click on open.



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Figure 192 *bReady, My Systems, SAP R/3 (PC)*

Step 7: Go to SAP Menu>Logistics>Materials Management>Purchasing>Purchase Order>Double-click on Display. (right click to add to favorites).

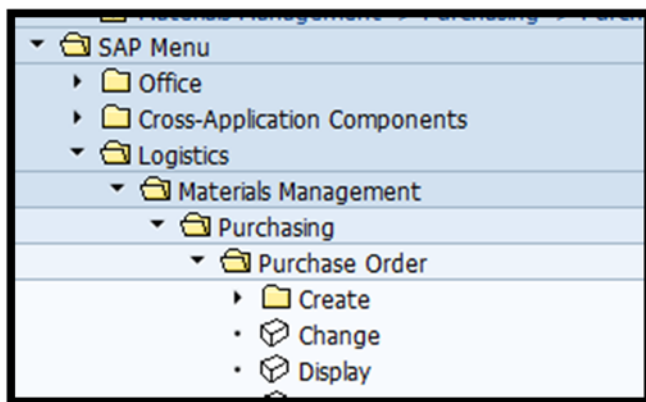


Figure 193 *SAP Menu folders*

Step 8: Click on the 'Other Purchase Order' icon

Step 9: Enter SAT Award Order # in the field '**Pur. Order**'. Click '**Enter**' on keyboard or '**Other Document**'.

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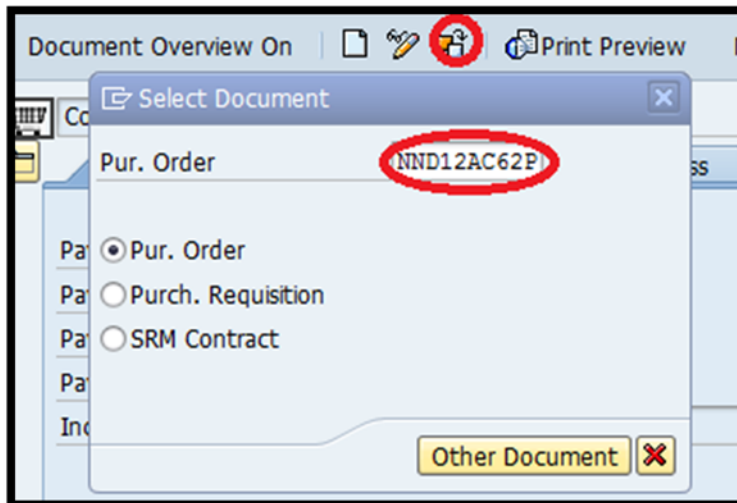


Figure 194 *Select Document, Purchase Order*

Step 10: Go to the tab 'Purchase Order History' under Item. Scroll until you find 'Good receipt'.

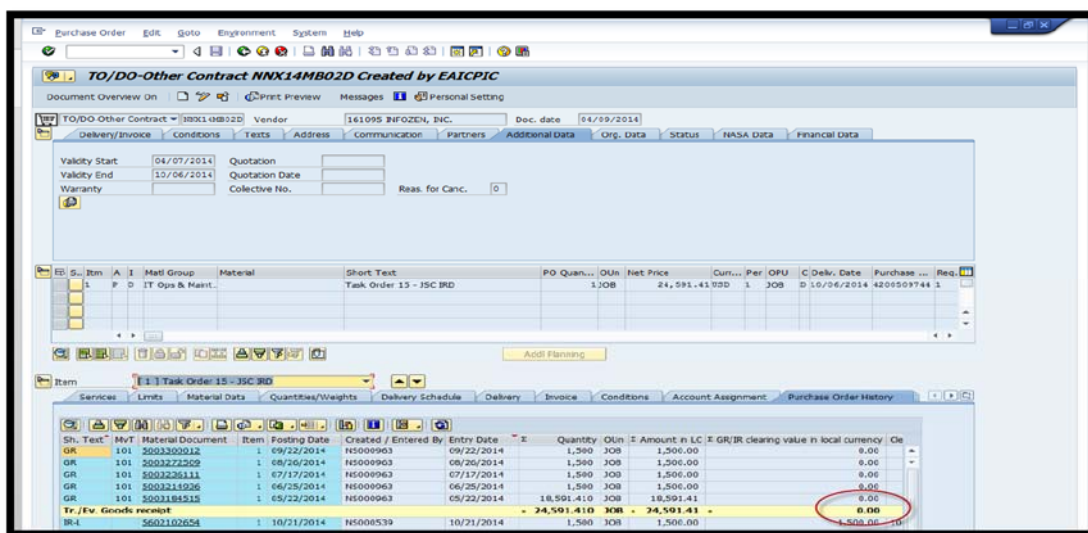


Figure 195 *Purchase Order History*

Step 11: Verify all necessary files are present for closeout.

Step 12: In TechDoc located/browse to the folder for the file that needs to go to closeout. Click 'Modify'. In the Folder Description Enter the SAT Order Number –

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Sent to Closeout. Enter '**Sending to Closeout**' for the field '**Reason**'. Click the '**OK**' button.

Modify Folder 'NNX16WA00P'

Name:	NNX16WA00P
Description:	NNX16WA00P - Sent to Closeout
Organization:	PR - Procurement
RMA File Plan:	Financial transaction records related to procuring goods and services, paying bills, collecting debts, accounting (GRS 1.1 Item 010)
Reason:	Sending to Closeout

OK Cancel

Figure 196 *TechDoc Edit Folder Name*

Step 13: Verify the associations for the folder and documents in the folders. Click '**Associations**' under '**Show**'. Make sure the group '**PR_Closeout_SAT**' has R, M, CF, and CD access. Closeout should be notified by email of files ready for closeout. Send email to NSSC-Closeout@mail.nasa.gov. If multiple files are ready to go to closeout at the same time, than one email listing all the SAT Order Numbers can be sent.

Step 14: Go to Task Table. Double-click in the field under '**State**' for the task '**Sent to Closeout**'. Select from the drop down box '**Closed Complete**'. Click on the green check to save selection. Click the '**Save**' button.

Status	Title	Name	Assignment Group	Assigned to
Closed Complete		NSSC SAT Acquisition Request	PR - SAT POST AWARD ADMIN - L2	Gary Walker

Figure 197 *Closed Complete*

4.4 How to process a SAT Assistance Request

The NSSC SAT team will receive SAT Assistance Requests in ServiceNow from the Initiator, Business Analysts, or Technical End-User. Through the Simplified Acquisition Customer Portal (SACP) the customer can submit an Assistance Request for the following:

- Plan a Forecast Meeting Request
- Assistance Completing a Procurement Related Document Request
- Non-Conforming Product/Service Assistance Request

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- Other Assistance Request
- Request a Report to Be Built (located under SAT Report Request of the SACP)

Each of these Assistance Requests or Report to Be Built Requests, when submitted, will create an SAT Assistance Ticket (SATAR). All open SAT Assistance Tickets can be viewed when logged into ServiceNow console by going to the **‘Open Assistance Request’** under the section header **‘SAT Requests’**.

The Assistance Request ticket workflow encompasses 3 Stages as follows:

1. **Stage 1 - Assess Request** – a member of the L2 group reviews and assesses the submitted request to determine the course of action required for the requested assistance.
2. **Stage 2 - Provide Assistance L2** –assistance is provided to the requestor by a member of the L2 group. Majority of the requests will require L2 assistance. If after the Stage 1, the request is assessed and it is determined that only L3 can provide assistance, this stage can be **‘Closed Skipped’**.
3. **Stage 3 – Did this request require L3 Assistance?** –assistance is provided to the requestor by a member of the L3 group. After Stage 2 has been completed and it is determined that the assistance requested has been stratified at the L2 Stage and does not require L3 then the stage can be **‘Closed Skipped’** by selecting **‘No’** from the question **‘Did this request require L3 Assistance’**.

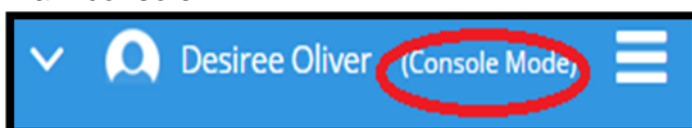
The Assistance Request Ticket will be unassigned when created with the assignment group **‘PR – SAT ASSISTANCE – L2’**.

The SAT team may also receive an Assistance Request through the Customer Contact Center or through the Center Assigned Contracting Officer. To ensure documenting, working and tracking the request, the SAT team may have to submit an Assistance Request on behalf of the customer.

4.4.1 Stage 1 – Simplified Acquisitions, Assigning Open Acquisition Requests, Assess Request

Step 1: ServiceNow Console

To access the **Open Acquisition Request Unassigned Tasks**, log into ServiceNow (<https://esd.nasa.gov/>). On the main console, click **‘Console Mode’** in the upper right hand corner next to your name, if not automatically brought into the main console.



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Figure 198 *ServiceNow Console Mode*

Step 2: SAT Assistance Request, Open Unassigned Tasks

Scroll down to the **Simplified Acquisitions** section column to the left which reflects **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click **Open – Unassigned Tasks** and click the search icon to view the search field boxes for each column. For the column **Title** enter **Assess Assistance Request** and hit **Enter** on keyboard to view a list of open requests that require the ticket(s) assignment and work.

▼ Title	▼ Name	▼ Assignment Group	▼ Assigned to
Assess	NSSC S	Search	Search
Assess Assistance Request	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L2	

Figure 199 *Assess Assistance Request*

Step 3: SAT Assistance Request, SATAR Ticket

Look for the SAT Assistance Request without a team member's name in the **'Assigned to'** column. Click on the SATAR number to open the SAT Assistance

▼ Number	▼ Number	▼ SAT Award Order #	▼ Title
Search	Search	Search	Assess
SATAR0001009	(empty)		Assess Assistance Request

Figure 200 *SATAR Ticket*

Step 4: SAT Assistance Request, Assess Assistance Request Task

Go to the Task table at the bottom of the ticket. Double-click in the field for the column **'Assigned to'** for the task **'Assess Assistance Request'**. Select from the

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search icon to choose the person to assess and work the assistance request. Pull the selected person into the field by clicking their name. Click on the green checkmark to save the name. Then click the **'Save'** button to the upper right of the SATAR record and choose the back arrow button to return to the console.

Name	First name	Last name	User ID	Email	Business phone number
Cody Stuart	Cody	Stuart	crstuart	cody.r.stuart@nasa.gov	228.813.6429
Dawan Thomas	Dawan	Thomas	dlthoma5	dawan.l.thomas@nasa.gov	
Desiree Oliver	Desiree	Oliver	dgant	desiree.l.oliver@nasa.gov	228.813.6299
Elisa Clark	Elisa	Clark	ejclark2	elisa.j.clark@nasa.gov	228.813.6098
Gary Walker	Gary	Walker	gwwalker1	gary.w.walker@nasa.gov	228.813.6790
Johnny Hisaw	Johnny	Hisaw	jhisaw	johnny.m.hisaw@nasa.gov	228.813.6484
LINDA WALKER	LINDA	WALKER	lbwalker	linda.b.walker@nasa.gov	228.813.6300
MARIA ETHERIDGE	MARIA	ETHERIDGE	meetheri	maria.e.etheridge@nasa.gov	228.813.6251

Figure 201 Assess Assistance Request Task

4.4.2 SAT Assistance Request, Tasks Assigned to Me

Step 1: ServiceNow Console

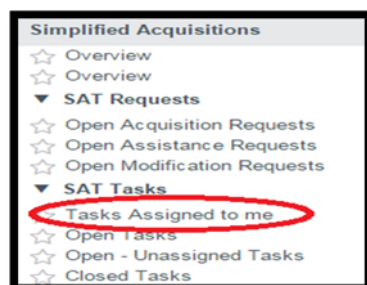
To open **Tasks Assigned to Me**, log into ServiceNow (<https://esd.nasa.gov/>). On the main console, click **'Console Mode'** in the upper right hand corner next to your name, if not automatically brought into the main console.



Figure 202 ServiceNow, Console Mode

Step 2: SAT Assistance Request, Tasks Assigned to me

Scroll down to the **'Simplified Acquisitions'** section. Go to the header **'SAT Tasks'** and click on **'Tasks Assigned to me'**.



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Figure 203 *Simplified Acquisitions, Tasks Assigned to me*

Step 3: SAT Assistance Request, Search for Task(s)

To find a task for a particular type of SAT request use the search icon to view the different columns to search on. In the 'Name' column add 'Assistance Request' to the text already entered, which should then read 'NSSC SAT Assistance Request'. Hit 'Enter' on keyboard.

Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
Search	Search	Search	Search	NSSC S	Search	Search
SATAR0001012	(empty)		Assess	NSSC SAT	PR - SAT ASSISTANCE -	Desiree Oliver
			Assistance	Assistance	L2	
			Request	Request		

Figure 204 *SAT Assistance Request, Search for Tasks*

Step 4: SAT Assistance Request, SATAR Record

Click on the SATAR number to go into the record.

Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
Search	Search	Search	Search	NSSC S	Search	Search
SATAR0001012	(empty)		Assess	NSSC SAT	PR - SAT ASSISTANCE -	Desiree Oliver
			Assistance	Assistance	L2	
			Request	Request		

Figure 205 *SAT Assistance Request, SATAR Record*

Step 5: SAT Assistance Request, Assess Assistant Request Task

Go to task table to place the 'Assess Assistant Request' task in Work in Progress. Under the column 'Status' double-click in the field. From the drop down select 'Work in Progress'. Click the green check to save selection. Click the 'Save' button.

Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group	Assigned to
ANITA CROSS	ES53	Desiree Oliver	NSSC	4 - Low	Work in Progress			PR - SAT ASSISTANCE -	Desiree Oliver
						Request	Request	L2	

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Figure 206 *SAT Assistance Request, Assess Assistant*

Step 6: SAT Assistance Request, Initiator and/or Requestor and Type of Assistance Requested

Review the Assistance Request to determine the level of assistance and if the request requires assistance from the Contracting Officer. Go to the **'Assistance Request Tab'**. The **'Requestor Name'** is the customer needing assistance. The **'Initiator Name'** is the person who enter the request from the SAPC. Additional information provided on the assistance request is based on the **'Type of Assistance Requested'**. There are 7 different SAT Assistance Request selections in the ESD NSSC SAT Customer Portal for the customer to choose from, but only 4 of the SAT Assistance Request require the request to be worked by the NSSC SAT Team as follows:

- A) Plan a Forecast Meeting
- B) Assistance Completing a Procurement Related Document Request
- C) Non-Conforming Assistance Request
- D) Other Assistance Request
- E) Request a New SAT Report be Built (located under SAT Report Request of the SACP)

A) SAT Assistance Request, Plan a Forecast Meeting

The requestor should have provided the timeframe of the expected purchase located in the **'Request Justification or Information'** field. The **'Description of Request'** field contains additional information regarding the request. Contact the Requestor or Initiator for additional information to complete the task as needed.

SAT Assistance Request		Assistance Steps	POC	Processing Notes
Requestor Name	ANITA CROSS	Initiator Name	Desiree Oliver	
Email	anita.y.cross@nasa.gov	Email	desiree.i.oliver@nasa.gov	
Title	ENGINEERING TECHNICIAN(AERO)	Title	Procurement Support Specialist	
Business phone	256.544.7154	Business phone	228.813.6299	
Center Abbrv	MSFC	Center Abbrv	NSSC	
NASA Org Code	ES53	NASA Org Code	NSSC	
Type of Assistance Requested	Plan a Forecast meeting			
Request Justification or information	The April Time Frame			
Description of Request	Purchases to stand up a new lab for SLS			

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Figure 207 SAT Assistance Request, Plan a Forecast meeting

B) SAT Assistance Request, Complete a Procurement Document

The requestor should have provided the name of the document in which they need assistance with in the **‘Request Justification or Information’** field. The **‘Description of Request’** field contains any additional information regarding assistance with completing a form. This type of assistance request should have the document in question attached or other documentation to support the request. Contact the Requestor or Initiator for additional information as needed.

The screenshot shows the 'SAT Assistance Request' form for SARAR0001014. The form is titled 'Manage Attachments (1) Recommendation and Determination for Soliciting Only One Source.docx [rename] [view]'. The 'Request Item' is 'RTM0177891'. The 'Requestor Name' is 'Alicia Carroll', 'Email' is 'alicia.s.carroll@nasa.gov', 'Title' is 'AST, TECHNICAL RESOURCES MA', 'Business phone' is '256.544.4341', 'Center Abbrev' is 'MSFC', and 'NASA Org Code' is 'ED12'. The 'Initiator Name' is 'Desiree Oliver', 'Email' is 'desiree.l.oliver@nasa.gov', 'Title' is 'Procurement Support Specialist', 'Business phone' is '228.613.6299', 'Center Abbrev' is 'NSSC', and 'NASA Org Code' is 'NSSC'. The 'Type of Assistance Requested' is 'Complete a Procurement Document'. The 'Request Justification or Information' is 'RDSS'. The 'Description of Request' is 'New Procurement for cameras for EV. Need someone to look at the attached RDSS to see if it refined.'

Figure 208 SAT Assistance Request, Complete a Procurement Document

C) SAT Assistance Request, Non-Conforming Assistance

The requestor should have provided the name of the SAT Award Order Number in which they need help with a Non-Conforming product/service with in the **‘Request Justification**

Or Information’ field. The **‘Description of Request’** field will contain any additional information. Contact the Requestor or Initiator for additional information as needed.

The screenshot shows the 'SAT Assistance Request' form for SARAR0001015. The form is titled 'Manage Attachments (1) Recommendation and Determination for Soliciting Only One Source.docx [rename] [view]'. The 'Request Item' is 'RTM0177892'. The 'Requestor Name' is 'RALPH HEUSINGER', 'Email' is 'ralph.heusinger@nasa.gov', 'Title' is 'AST, AEROSPACE FLIGHT SYSTE', 'Business phone' is '256.544.3568', 'Center Abbrev' is 'MSFC', and 'NASA Org Code' is 'ES12'. The 'Initiator Name' is 'Desiree Oliver', 'Email' is 'desiree.l.oliver@nasa.gov', 'Title' is 'Procurement Support Specialist', 'Business phone' is '228.613.6299', 'Center Abbrev' is 'NSSC', and 'NASA Org Code' is 'NSSC'. The 'Type of Assistance Requested' is 'Non-Conforming Assistance Request'. The 'Request Justification or Information' is 'NNX16WAD1P'. The 'Description of Request' is 'Cable delivered was not to specs. The connector should have been a male connector and not a female connector. We need the correct part next week.'

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Figure 209 *SAT Assistance Request, Non-Conforming Assistance*

D) **SAT Assistance Request, Other Assistance Request**

The requestor should have provided a categorization of assistance request. The ‘**Description of Request**’ field will contain any additional information. Contact the Requestor or Initiator for additional information as needed.

The screenshot shows the 'Assistance Request - SATAR0001016' form. Key fields include:

- Number:** SATAR0001016
- Request Item:** RITM0177863
- SAT Acquisition Request:** (empty)
- Requestor Information:** Name (Chantel Jacob), Email (chantel.e.jacob@nasa.gov), Title (BUDGET ANALYST), Business phone (256.544.3540), Center Abbrev (MSFC), NASA Org Code (ED11).
- Initiator Information:** Name (Desiree Oliver), Email (desiree.l.oliver@nasa.gov), Title (Procurement Support Specialist), Business phone (228.613.6299), Center Abbrev (NSSC), NASA Org Code (NSSC).
- Type of Assistance Requested:** Other
- Other Categorize:** copy of award document
- Description of Request:** I need a copy of the award for NNX16WA02P.

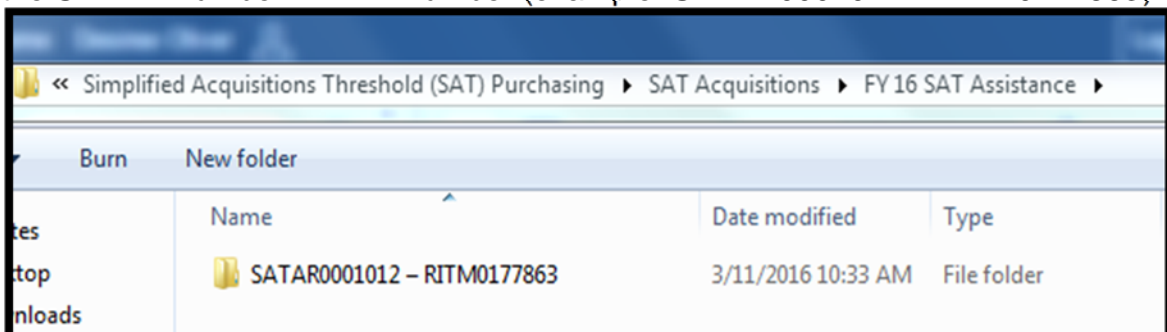
Figure 210 *SAT Assistance Request, Other Assistance*

E) **NSSC SAT Reporting Request, Request a New SAT Report be Built**

This type of request falls under SAT Report Request of the SACP. Each report request creates a SAT Assistance Request (SATAR).

Step 7: SAT Assistance Request, Documenting the Request

Create a folder for the Assistance Request on the N Drive at the following location: [\\nsscfs01p.nssc.nasa.gov\nssc-shared\Simplified Acquisitions Threshold \(SAT\) Purchasing\SAT Acquisitions](\\nsscfs01p.nssc.nasa.gov\nssc-shared\Simplified Acquisitions Threshold (SAT) Purchasing\SAT Acquisitions). Open the folder for the current Fiscal Year for Assistance tickets (example: FY 16 SAT Assistance). The folder name should use the SATAR Number - RITM Number (example: SATAR0001012 – RITM0177863)

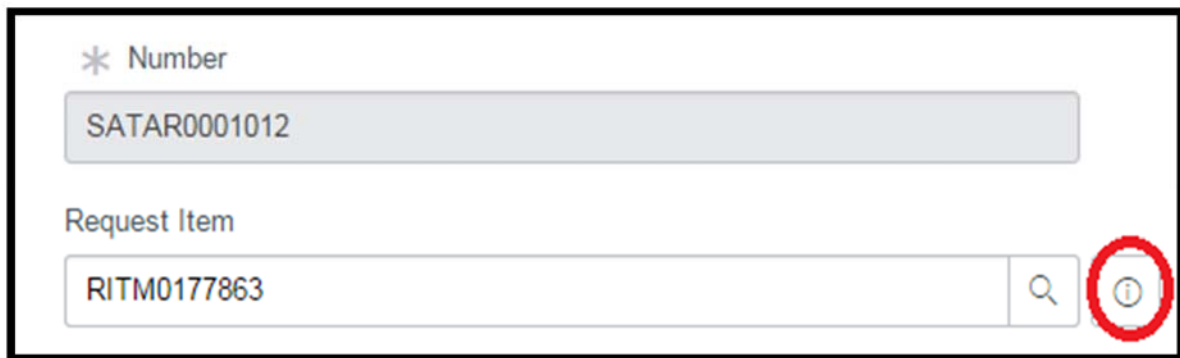


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Figure 211 *SAT Assistance Request, SATAR Folder*

Step 8: SAT Assistance Request, Create a File Copy PDF

Create a pdf copy of the RITM. Click on the information icon next to the Request Item number to open the request. Click the toggle/gear icon next to the logout button to edit user preference and print.




The screenshot shows a web interface for SAT Assistance Request. It features two input fields: 'Number' with the value 'SATAR0001012' and 'Request Item' with the value 'RITM0177863'. To the right of the 'Request Item' field is a search icon (magnifying glass) and an information icon (i) which is circled in red. The interface is clean with a light gray background and blue text for labels.

Figure 212 *SAT Assistance Request, Create a File Copy PDF*

Step 9: SAT Assistance Request, Create a File Copy PDF (con't)

Click on 'Printer friendly version'.



The screenshot shows the 'Settings' page of the application. It includes sections for 'Home', 'Preferences', 'Date/Time', 'Split Layout', 'Related List Loading', and 'Theme'. At the bottom of the page, there are two links: 'Printer friendly version' and 'JavaScript Log and Field Watcher'. The 'Printer friendly version' link is circled in red.

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Figure 213 *Create a File Copy PDF, continued*

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Step 10: SAT Assistance Request, Create a File Copy PDF (con't)

From the printer friendly version click the 'Click to Print' button.



Figure 214 *Click to Print*

Step 11: SAT Assistance Request, Create a File Copy PDF (con't)

Change the Printer name to 'Adobe PDF'. Click 'OK'.

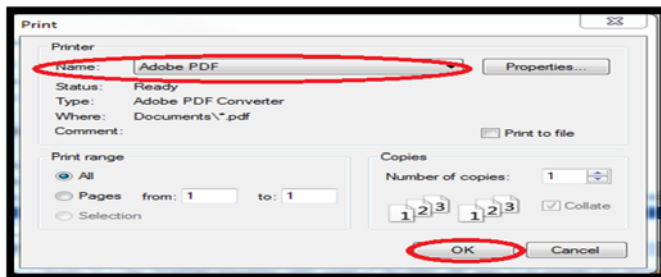


Figure 215 *Create a File Copy PDF, continued*

Step 12: SAT Assistance Request, Create a File Copy PDF (con't)

Browse and Save file to the newly created folder. Close printer friendly version when done.

Step 13: SAT Assistance Request, Manage Attachments

Click the back arrow button at the top of the ServiceNow navigation to return to the Assistant Ticket. Download and place in the folder any documents attached at the top of the ticket.

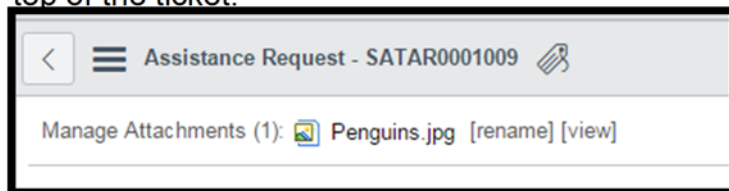


Figure 216 *SAT Assistance Request, Manage Attachments*

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Step 14: SAT Assistance Request, Work Notes – Internal and Additional Comments – External

Make sure to note in the Processing Notes, any important information captured during assessment. Type notes to the team in **‘Work Notes – Internal’** then click Save.

Figure 217 *Work Notes - Internal*

Type notes for the customer in **‘Additional Comments – External’** then Click Save.

Figure 218 *Additional Comments - External*

Step 15: SAT Assistance Request, Assess Assistant Request Task, Closed Complete

Close the **Assess Assistant Request** task upon completion of the steps for SAT Assistance Request. Go to the task table and double-click the **‘Status’** column for the **‘Assess Assistant Request’** task and select **‘Closed Complete’**. Click the green check to save selection. Click the **‘Save’** button on the upper right portion of the ticket. Both Stage 2 – **‘Provide Assistance Request L2’** and Stage 3 – **‘Provide Assistance Request L3’** will be active after the **‘Assess Assistant Request’** status is **Closed Complete**.

Number	Request item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group
TASK0177968	RITM0177863	ANITA CROSS	ES63	Desiree Oliver	NSSC	4 - Low	Closed Complete			PR - SAT ASSISTANCE - L2

Figure 219 *SAT Assistance Request, Assess Assistant Request Task, Closed Complete*

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Step 16: SAT Assistance Request, Stage 1 – Assess Request Status, Is Completed

Once the **Assess Assistant Request** task is 'Closed Complete', on the **Stage 1 – Assess Request** drop-down, choose **'Is Completed'**. Click the **'Save'** button on the upper right portion of the ticket.

Figure 220 SAT Assistance Request, Stage 1 – Assess Request Status, Is Completed

4.4.3 Stage 2 – Simplified Acquisitions, Assigning Open Acquisition Requests, Provide Assistance L2:

Step 1: Assigning Open Acquisition Requests, Provide Assistance L2

Go to task table for the task **'Provide Assistance Request L2'** double-click in the column **'Assigned to'** and type in your name. Click the green check to save selection. Click the **'Save'** button.

Number	Request Item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group	Assigned to
#0178038	RITM0177863	ANITA CROSS	ES53	Desiree Oliver	NSSC	4 - Low	Open	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L3	
#0178037	RITM0177863	ANITA CROSS	ES53	Desiree Oliver	NSSC	4 - Low	Open	Provide Assistance Request Service L2	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L2	Desiree Oliver
#0177868	RITM0177863	ANITA CROSS	ES53	Desiree Oliver	NSSC	4 - Low	Closed Complete	Assess Assistance Request	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L2	Desiree Oliver

Figure 221 Assigning Open Acquisition Requests, Provide Assistance L2

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	Effective Date:	01/12/2018
	Expiration Date:	01/11/2019
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SUBJECT: Simplified Acquisition Threshold		

Step 2: Assigning Open Acquisition Requests, Provide Assistance L2, Status

Go to task table to put the **'Provide Assistance Request L2'** task in Work in Progress. Under the column **'Status'** double-click in the cell. From the drop down select **'Work in Progress'**. Click the green check to save selection. Click the **'Save'** button.



Figure 222 Assigning Open Acquisition Requests, Provide Assistance L2, Status

Step 3: Assigning Open Acquisition Requests, Provide Assistance L2, Secondary POC

Go to the **'POC'** tab. For the field **'Secondary POC Proc (SP)'** use the search icon to find your name. Click on your name in the search box. Alternately, start by typing your name and select when it pops up.

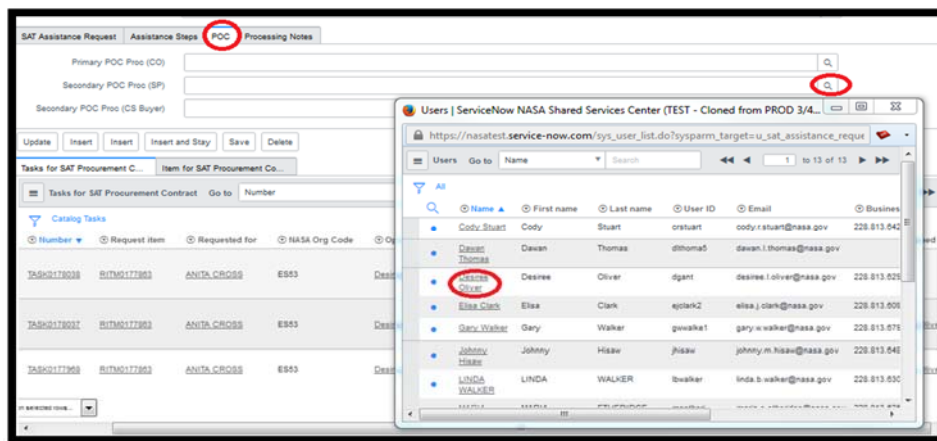


Figure 223 Assigning Open Acquisition Requests, Provide Assistance L2, Secondary POC

Step 4: Assigning Open Acquisition Requests, Provide Assistance L2, Type of Assistance Workflow

Provide type of assistance as requested:

A) Plan a Forecast Meeting

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- B) Assistance Completing a Procurement Related Document Request
- C) Non-Conforming Assistance Request
- D) Other Assistance Request
- E) Request a Report to Be Built

A) SAT Assistance Request, Plan a Forecast Meeting, Provide Assistance L2

1) Coordinate with the Center's designated Contracting Officer Point of Contact. Send an email with the SATAR number informing the CO and designated backup of the forecast request. You may wish to include the link to the request. To obtain a link to the SATAR, click the additional action icon. Click copy URL. (Note: this function may not work in IE browsers) Copy URL from pop-up and paste in email. Place task in Pending after sending.

2) Go to task table for the task '**Provide Assistance Request L2**'. Under the column '**Status**' double-click in the cell. From the drop down select '**Pending**'. Click the green check to save selection. Click the '**Save**' button.

3) The Contracting Officer will coordinate regarding the forecast meeting or whether the forecast meeting has taken place. If participating, place the task back in Work in Progress. When the meeting has taken place put the task in '**Closed Complete**'. Place any related emails in the folder on the N Drive.

⊙ Status	⊙ Title	⊙ Name	⊙ Assignment Group	⊙ Assigned to
Closed Complete	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L3	Charles Bridges
Closed Complete	Provide Assistance Request Service L2	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L2	Desiree Oliver
Closed Complete	Assess Assistance Request	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L2	Desiree Oliver

Figure 224 *SAT Assistance Request, Plan a Forecast Meeting, Provide Assistance L2*

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B) SAT Assistance Request, Complete a Procurement Document, Provide Assistance L2

1) Review the provide procurement document and determine areas needing improvement. The Recommendation and Determination for Soliciting only one Source (RDSS) makes up the majority of the Procurement Document Assistance requests. A valid justification must establish a reasonable basis to conclude the only one source can satisfy the agency's minimum needs. Use the work instructions on the RDSS and examples as a guide in making suggestions. For Word documents, add in the header text with small font size the RITM number. Other procurement documents include Statement of Work, or NF 1707.

2) When needed, coordinate with the Center's designated Contracting Officer Point of Contact or designated backup via email. Place task in Pending after sending the email. Go to task table for the task '**Provide Assistance Request L2**'. Under the column '**Status**' double-click in the cell. From the dropdown select '**Pending**'. Click the green check to save selection. Click the '**Save**' button. Place any unresolved task back in '**Work in Progress**'.

3) Place a copy of the refined document in the ServiceNow ticket. Click the paperclip icon at the top of the ticket. Click browse to view file and choose Open File. Click Attached. Click the X to get out of the pop-up.

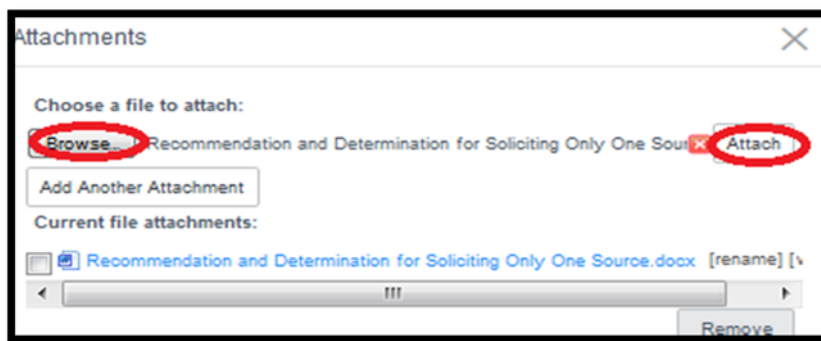


Figure 225 *Attachments*

4) Upon completion of assistance, place the task status in '**Closed Complete**' and place Stage 2 in '**Is Completed**'.

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5) If this request does not require L3 assistance, go to the 'Assistance Steps' tab. Under 'Stage 3' click on the dropdown box for the question **'Did this request require L3'** and change the selection to **'No'**. Click on pop up **'Yes'** for the question **'You are about to Close Skip this Task. Do you want to Continue?'**.

Stage 3

Did this request require L3 Assistance?

Provide Assistance L3

Provide Assistance L3 Worked By

Provide Assistance L3 Closed By ⓘ

Provide Assistance L3 Closed On

Figure 226 *Stage 3, L3 Assistance Steps*

⊙ Status	⊙ Title	⊙ Name	⊙ Assignment Group
Closed Skipped	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L3
Closed Complete	Provide Assistance Request Service L2	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2
Closed Complete	Assess Assistance Request	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2

Figure 227 *SAT Assistance Status*

C) SAT Assistance Request, Non-Conforming Assistance Request, Provide Assistance_L2

- 1) Review the detail provided in the request. Obtain any additional information with regard to the non-conforming product or service.
- 2) When needed, coordinate with the Center's designated Contracting Officer Point of Contact or designated backup via email. Place task in Pending after sending the

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email. Go to task table for the task '**Provide Assistance Request L2**'. Under the column '**Status**' double-click in the cell. From the dropdown select '**Pending**'. Click the green check to save selection. Click the '**Save**' button. Place any unresolved task back in '**Work in Progress**'.

3) Attach any important documentation in the ServiceNow record. Click the paperclip at the top of the ticket to 'Browse' the file. Open File. Click Attached. Click the X to get out of the pop-up.

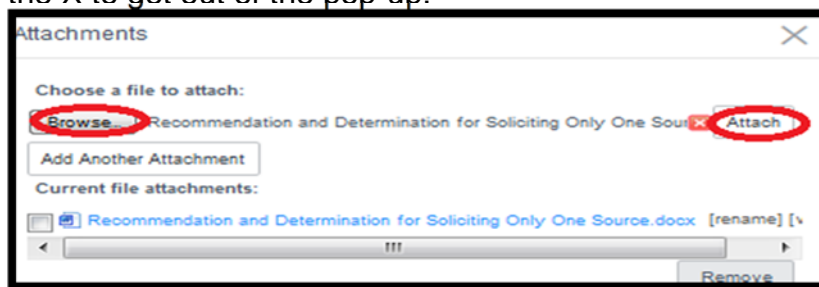


Figure 228 *Attachments*

4) Place the completed task in '**Closed Complete**' and place Stage 2 in '**Is Completed**'.

5) For requests not requiring L3 assistance, go to the 'Assistance Steps' tab. Under 'Stage 3' click on the drop down box for the question '**Did this request require L3**' and change the selection to '**No**'. Click on pop up '**Yes**' for the question '**You are about to Close Skip this Task. Do you want to Continue?**'. Click the '**Save**' button.

Figure 229 *Stage 3 L3 Requests*

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Status	Title	Name	Assignment Group
Closed Skipped	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L3
Closed Complete	Provide Assistance Request Service L2	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2
Closed Complete	Assess Assistance Request	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2

Figure 230 *Assistance Requests, Closed*

D) SAT Assistance Request, Other Assistance Request, Provide Assistance L2

- 1) Review the details provided in the request. Obtain any additional information as needed. Provide assistance.
- 2) When needed, coordinate with the Center's designated Contracting Officer Point of Contact or designated backup via email. Place task in Pending after sending the email. Go to task table for the task '**Provide Assistance Request L2**'. Under the column '**Status**' double-click in the cell. From the dropdown select '**Pending**'. Click the green check to save selection. Click the '**Save**' button. Place any unresolved task back in '**Work in Progress**'.
- 3) Attach any important documentation in the ServiceNow record. Click the paperclip at the top of the ticket to browse the file. Open File. Click Attached. Click the X to get out of the pop-up.

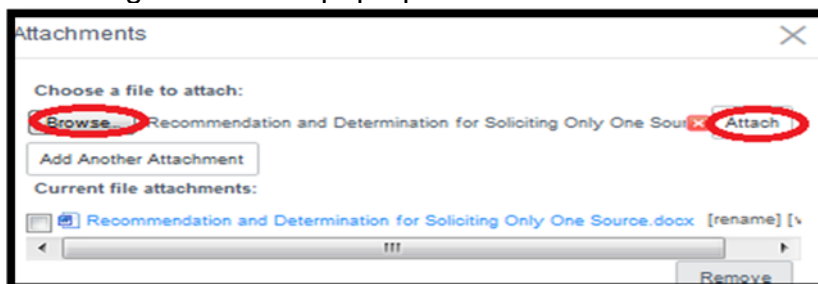


Figure 231 *Attachments*

- 4) Upon completion, place the task in '**Closed Complete**' and Stage 2 '**Is Completed**'.

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5) If this request does not require L3 assistance, go to the 'Assistance Steps' tab. Under 'Stage 3' click on the drop down box for the question '**Did this request require L3**' and change the selection to '**No**'. Click on pop up '**Yes**' for the question '**You are about to Close Skip this Task. Do you want to Continue?**'. Click the '**Save**' button.

Figure 232 *Stage 3, L3 Requests*

⊙ Status	⊙ Title	⊙ Name	⊙ Assignment Group
Closed Skipped	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L3
Closed Complete	Provide Assistance Request Service L2	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2
Closed Complete	Assess Assistance Request	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2

Figure 233 *Stage 3, Request Status*

E) SAT Assistance Request, Request a Report to Be Built, Provide Assistance L2

- 1) Review the details provided in the request. Obtain any additional information as needed to build the report such as required fields or data output.
- 2) Go to Reports in ServiceNow. See if any reports closely match the request. If you don't have to start from new, make sure to save a copy. Pull in any needed fields or filters. Run report. Save as excel version of the report. Email report to 'Requestor'.
- 3) When assistance is completed put the task in '**Closed Complete**' and Stage 2 '**Is Completed**'.

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4) If the request does not require L3, go to the 'Assistance Steps' tab. Under 'Stage 3' click on the drop down box for the question '**Did this request require L3**' and change the selection to '**No**'. Click on pop up '**Yes**' for the question '**You are about to Close Skip this Task. Do you want to Continue?**'. Click the '**Save**' button.

Figure 234 Stage 3, L3 Requests

Status	Title	Name	Assignment Group
Closed Skipped	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L3
Closed Complete	Provide Assistance Request Service L2	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2
Closed Complete	Assess Assistance Request	NSSC SAT Assistance Request	PR - SAT ASSISTANCE L2

Figure 235 Stage 3, Request Status

4.4.4 Stage 3 – Simplified Acquisitions, Assigning Open Acquisition Requests, Did this request require L3 Assistance:

Step 1: ServiceNow Console

To assign tasks, you must be logged into ServiceNow (<https://esd.nasa.gov/>). Go to the main console. Click '**Console Mode**' in the upper right hand corner next to your name.

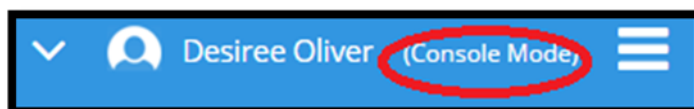


Figure 236 ServiceNow Console Mode

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Step 2: Simplified Acquisitions, Open – Unassigned Tasks, Provide Assistance Request Service L3

Scroll down to the **Simplified Acquisitions** section in the left column which lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click **‘Open – Unassigned Tasks’**. Click the search icon. This will show the search field box for each column. For the column **‘Title’** enter **‘Provide Assistance Request Service L3’**. Hit **‘Enter’**.

The screenshot shows a search results table with the following columns: Number, SAT Award Order #, Title, Name, Assignment Group, and Assigned to. The 'Title' column is circled in red. The search results show a single entry with the title 'Provide Assistance Request Service L3' and the assignment group 'PR - SAT ASSISTANCE - L3'.

Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
RITM0177863 (empty)	SATAR0001012 (empty)	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L3	

Figure 237 *Provide Assistance Request Service L3*

Step 3: SAT Assistance Request, Assigned to, SATAR Number

Look for the SAT Assistance Request without a team member's name in the **‘Assigned to’** column. Click on the SATAR number to open the SAT Assistance Ticket.

The screenshot shows the same search results table as Figure 237. The 'Assigned to' column is circled in red, showing the name of the team member assigned to the request.

Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
RITM0177863 (empty)	SATAR0001012 (empty)	Provide Assistance Request Service L3	NSSC SAT Assistance Request	PR - SAT ASSISTANCE - L3	

Figure 238 *Assistance Request, Assigned to*

Step 4: SAT Assistance Request, Assigned to, Provide Assistance Request Service L3

Because this task opens up at the same time as the **‘Provide Assistance Request Service L2’**, review **‘Processing Notes’** tab and request to see if this request assignment to L3. If it does, go to the Task table. Double-click in the field for the column **‘Assigned to’** for the task **‘Provide Assistance Request Service L3’**. Select the search icon, and search for the person that should assess and work the assistance request. Pull the selected person into the field by clicking their name. Click on the green check to save entry. Click the **‘Save’** button. Click the back arrow button to get out of the record. Alternately, Contracting Officers can assign

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the task to themselves during any coordination request by searching for the SATAR number, and pulling up the ticket. L2 cannot assign a task directly to L3.

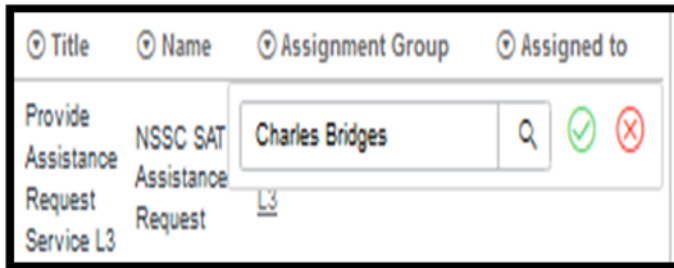


Figure 239 *Provide Assistance Request Service L3*

Step 5: SAT Assistance Request, Provide Assistance Request Service L3, Primary POC Proc (CO)

Go to tab 'POC'. For the field 'Primary POC Proc (CO)' use the search icon to pull up your name. Alternately, start by typing your name and select when it pops up.

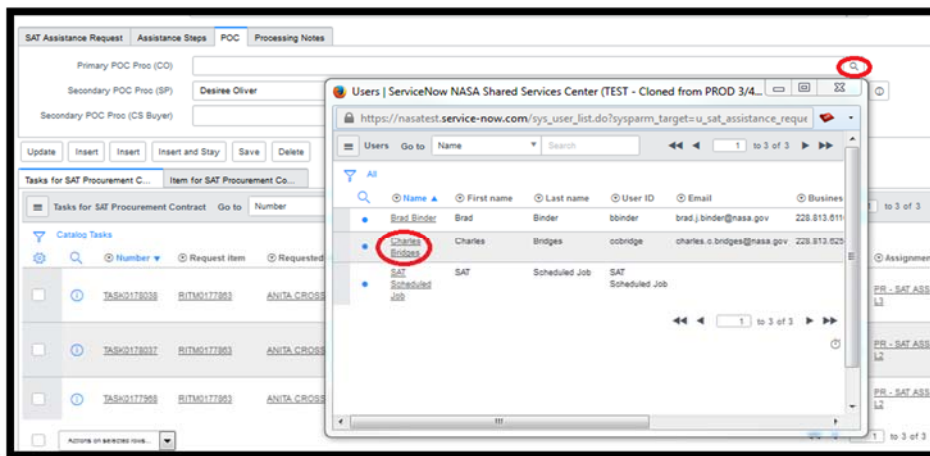


Figure 240 *Primary POC Proc (CO)*

Step 6: SAT Assistance Request, Provide Assistance Request Service L3, Secondary POC Proc (CO)

If needed, add and coordinate with the listed 'Secondary POC Proc' to assist with the request.

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Step 7: SAT Assistance Request, Provide Assistance Request Service L3, Status

Go to the task table. For the Task **'Provide Assistance Request Service L3'** double-click for the column **'Status'**. Select from the drop down **'Closed Complete'**. Click the green check to save selection. Choose **'Is Completed'** in Stage 3 Provide Assistance.

The screenshot shows a table with columns: Opened by, NASA Org Code, Priority, Status, Title, Name, Assignment Group, and Assigned to. The 'Status' column is expanded, showing a dropdown menu with 'Closed Complete' selected. Below the dropdown are two buttons: a green checkmark and a red X. The row data shows 'Desiree Oliver' as the opener, 'NSSC' as the org code, '4 - Low' as the priority, and 'PR - SAT ASSISTANCE - L3' as the title. The assigned to is 'Charles Bridges'.

Figure 241 *Provide Assistance Request Service L3, Status*

The screenshot shows the 'Stage 3' assistance form. It contains the following fields: 'Did this request require L3 Assistance?' with a dropdown set to 'Yes'; 'Provide Assistance L3' with a dropdown set to 'Is Completed'; 'Provide Assistance L3 Worked By' with an empty text box; 'Provide Assistance L3 Closed By' with an empty text box; and 'Provide Assistance L3 Closed On' with an empty text box.

Figure 242 *Stage 3 Assistance L3*

4.5 How to process a SAT Modification Request

The CO may modify and change the contract in accordance with FAR Part 43, Contract Modifications. The government's right to modify written contracts is expressed through issuance of modifications, either unilaterally (signed only by the CO), or bilaterally (mutual consent). The initiator for changes in a contract requirement may be the CO, the Technical End User, the requiring activity, or the vendor. However, only the CO may execute modifications to the contract.

Bilateral Modification

Supplemental agreement – A supplemental agreement may be issued

- To change the terms of a contract that may not be unilaterally changed by the CO.

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- In place of a unilateral modification when both parties negotiate and agree to the equitable adjustment prior to effecting the change.
- To incorporate an agreement on an equitable adjustment (in price and other contract terms after issuance of a unilateral change.

Unilateral Modification

- Administrative Change – A unilateral change, in writing, that does not affect the substance or price of the contract (substantive rights). An example of an administrative change is a change in the appropriation data or paying office.

A modification request should be initiated through the Simplified Acquisition Customer Portal through a Simplified Acquisition Modification Request if the change is from the Technical End User or requirement organization. If it a request from the CO or if a purchase requisition is released for a modification without a RITM, then initiated the Simplified Acquisition Modification Request on behalf of. Refer to the Simplified Acquisition Customer Guide Section 4.3.2 to create Modification Request.

4.5.1 Modification Request Ticket

In the modification request ticket do not do any of the following:

- Click on Insert, or Insert and Stay
- Mark a task Closed Incomplete, Closed Cancelled, or Closed Rejected
- Only marked a task Closed Skipped if that task is not relevant to the current modification.

4.5.2 Stage 1 and 2 – Assignment:

Step 1: To assign tasks, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column and lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on **Open – Unassigned Tasks**. Click on the search icon to make the search fields appear for each column. In the column label ‘Title’ enter ‘**Modification Request Review**’. Look for tickets in the Assigned Group ‘**PR – SAT MODIFICATION – L2**’ with a blank Assigned Processor. To open the ticket, click on the underlined SATMR Number.

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All > Active = true > Assigned to is empty > Item Name starts with NSSC SAT > Title starts with Modification Request Review											
	Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
	Search	Search	Search	Search	Search	Search	Search	Modifica	NSSC SAT	Search	Search
<input type="checkbox"/>	① TASK0177765	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Request Review	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	
<input type="checkbox"/>	① TASK0178102	Open	RITM0177936	(empty)	(empty)	SATMR0001003		Modification Request Review	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	
<input type="checkbox"/>	① TASK0177997	Open	RITM0177873	(empty)	(empty)	SATMR0001002		Modification Request Review	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	

Figure 243 *ServiceNow Task Table*

Step 2: Go to the **Modification Steps** tab. Scroll down to **Tasks for SAT Procurement Mod** located under the Stages. For Task **Purchase Requisition(s) Released** and **Modification Request Review** doubleclick in the field under the column 'Assigned To' to select a name. Click the search icon. Click on the name to assign the task. Click the Green check to save the selection. Click **Save** at the top of the form. Exit the ticket to go to the next ticket.

Catalog Tasks											
ber ▼	Request item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group	Assigned to
7785	RITM0177776	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Open	Modification Request Review	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	
7784	RITM0177776	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Open	Purchase Requisition(s) Released	NSSC SAT Change/Modification Request	Tera Breland	<input type="text"/> <input type="button" value="Search"/> <input checked="" type="button" value="OK"/> <input type="button" value="Cancel"/>

Figure 244 *Tasks for SAT Procurement Mod Task Table*

4.5.3 Stage 1 and 2 – Task Assigned to You:

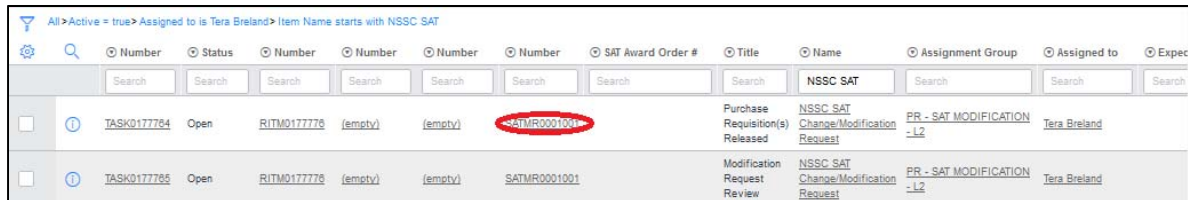
Step 1: To open a task assigned to you, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column that lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on **Tasks Assigned to me** under section ‘SAT Tasks’.

Simplified Acquisitions	
☆ Overview	
☆ Overview	
▼ SAT Requests	
★ Open Acquisition Requests	
▼ SAT Tasks	
★ Tasks Assigned to me	
★ Open tasks	
★ Open - Unassigned Tasks	
★ Closed Tasks	
★ All Tasks	

Figure 245 *ServiceNow Tasks Assigned to me*

NSSC Process Work Instruction	NSPWI-5113-0001	Basic
	Number	
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SUBJECT: Simplified Acquisition Threshold		

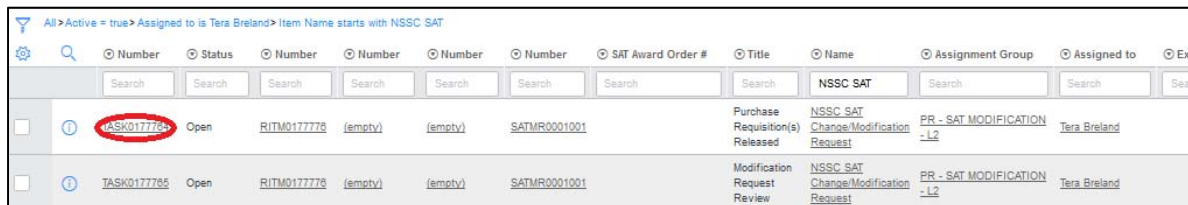
Step 2: Click on **SATMR** Number in the second column to open up the SAT Procurement Ticket.



All > Active = true > Assigned to is Tera Ireland > Item Name starts with NSSC SAT											
	Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
	Search	Search	Search	Search	Search	Search	Search	Search	NSSC SAT	Search	Search
<input type="checkbox"/>	TASK0177764	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Purchase Requisition(s) Released	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	Tera Ireland
<input type="checkbox"/>	TASK0177765	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Request Review	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	Tera Ireland

Figure 246 *ServiceNow SATMR Number*

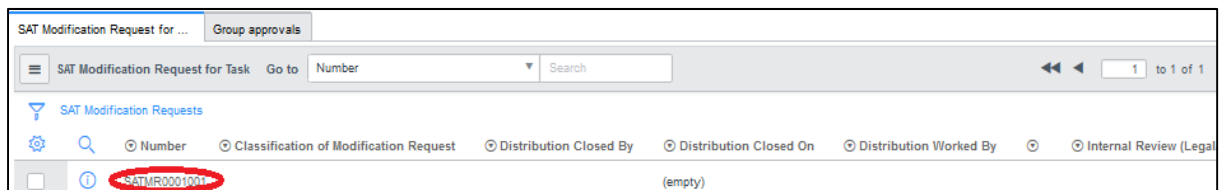
OR Click on the **Task Number** to open the task.



All > Active = true > Assigned to is Tera Ireland > Item Name starts with NSSC SAT											
	Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
	Search	Search	Search	Search	Search	Search	Search	Search	NSSC SAT	Search	Search
<input type="checkbox"/>	TASK0177764	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Purchase Requisition(s) Released	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	Tera Ireland
<input type="checkbox"/>	TASK0177765	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Request Review	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	Tera Ireland

Figure 247 *ServiceNow Task number*

To go to the SATMR ticket click on the '**SAT Modification Request for T...**' tab at the bottom of the Task. Click on the SATMR in the SAT Modification Request for Task Table.



SAT Modification Request for ... Group approvals											
SAT Modification Request for Task Go to Number Search 1 to 1 of 1											
SAT Modification Requests											
	Number	Classification of Modification Request	Distribution Closed By	Distribution Closed On	Distribution Worked By	Internal Review (Legal					
<input type="checkbox"/>	SATMR0001001	(empty)									

Figure 248 *ServiceNow SATMR in the SAT Modification Request Table*

Step 3: Start with the **Modification Request** tab and do a quick review of the information. Check the Modification Description for a Purchase Requisition number. Check the **Purchase Requisition (PR)** associated with the request (if applicable). Check to see if the PR has been released to the NSSC or if already in-house using the PR number provided. If no PR is provided, then check other key information to see if there is one in-house that matches the modification request. Based on the modification type there may not be any need for a Purchase Requisition.

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- If a PR is released, update the Purchase Requisition (PR) table under the tab 'Modification Information' tab with Purchase Requisition, PR amount, and PR released date. Double-click in the fields to enter information and to update table. Click Save.

Number	PR Amount	PR Release Date	Purchase Requisition	u_sat_modification_request	SAT Procurement Contract	SAT Procurement Contract
SATPR0001178	8,000	2018-03-24	4200566668			

Figure 249 *Purchase Requisition (PR) Table*

- The Purchase Requisitions received and released in SAP are placed on the N drive in the following location: SAT Acquisitions > Current FY Folder > 1 – PR Staging.
- Refer to '**How to Print a Copy of the PR from PPS**' in section 4.3.2.3. Refer to '**Purchase Request (PR) Review**' in section 4.3.2.5.
- To save a PR for a Legacy award, from SAP, typ in ZMM_pr in the search field then select enter



- Then enter your PR number in the white box next to Purchase Requisition. Type mail next to printer. Click on the green checkmark. The PR will be emailed to you. When you receive the email, save to your folder on the N drive.

- Review PR for correctness. Log-in to SAP and pull up the PR for a thorough review. Once the PR has been received and reviewed, then the task '**Purchases Requisition(s) Released**' should be placed in '**Closed Complete**'. Go to Task Table. Double-click in the field under 'State' for the task 'Purchase Requisition(s) Released'. Select from the drop down box '**Closed Complete**'. Click on the green check to save selection. Click Save.

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- If a PR is not correct, then the then the task '**Purchases Requisition(s) Released**' should be placed in '**Pending**'. Go to Task Table. Double-click in the field under 'State' for the task 'Purchase Requisition(s) Released'. Select from the drop down box '**Pending**'. Click on the green check to save selection. Click Save.
- If the PR is for a PIID award order number, then the send to PPS button under the NASA Data tab, should be checked. If this selection is not made, email the SAT lead and request for the PR to be released to PPS.
- If the PR is for a legacy award order number (NNX), then the send to PPS button under the NASA Data tab, should not be checked. If this button is checked, you cannot use the PR. A new PR will need to be requested.
- If a PR is not needed for this modification request, then the task '**Purchases Requisition(s) Released**' should be placed in '**Closed Skipped**'. Go to Task Table. Double-click in the field under 'State' for the task 'Purchase Requisition(s) Released'. Select from the drop down box '**Closed Skipped**'. Click on the green check to save selection. Click Save.

Step 4: Go to Task Table. Double-click in the field under 'State' for the task 'Modification Request Review'. Select from the drop down box '**Work in Progress**'. Click on the green check to save selection. Click Save.

Tasks for SAT Procurement Mod Go to Number Search									
Catalog Tasks									
Number	Request item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name
TASK0177765	RITM0177776	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Work in Progress		Modification Request
TASK0177764	RITM0177776	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Closed Complete	Purchase Requisition(s) Released	NSSC SAT Change/Modification Request

Figure 250 *Modification Request Review Task – Work in Progress*

Step 5: Review the modification. If additional information is needed, place the task in Pending. Enter the 'Modification Number' (example: 000001) located on the Modification Information Tab. Selected Modification Type by using the provided drop down box.

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The screenshot shows the 'Modification Information' tab selected. It contains the following fields:

- * Number: SATMR0001001
- Request Item: RITM0177776
- SAT Acquisition Request: SATPC0001001
- SAT Award Order #: (empty)
- Modification Request: (empty)
- Modification Steps: (empty)
- Modification Information: (active tab)
- Processing Notes: (empty)
- Modification Number: 000001
- Modification Type: Funding Mod - Bilateral

Figure 251 **Modification Information Tab**

Step 6: Create a modification folder named '04 – Modifications' on the n drive in the folder for the SAT Award Order #. Add sub folder under modifications. Name subfolder the Mod number (example: Mod 000001 for an NNX number or Mod P00001 for a PIID number). Save all files to the N drive as Award Order Number Mod Number File Name. (80NSSC17P1470 Mod P00001 RITM0340000, 80NSSC17P1470 Mod P00001 PR4200643577).

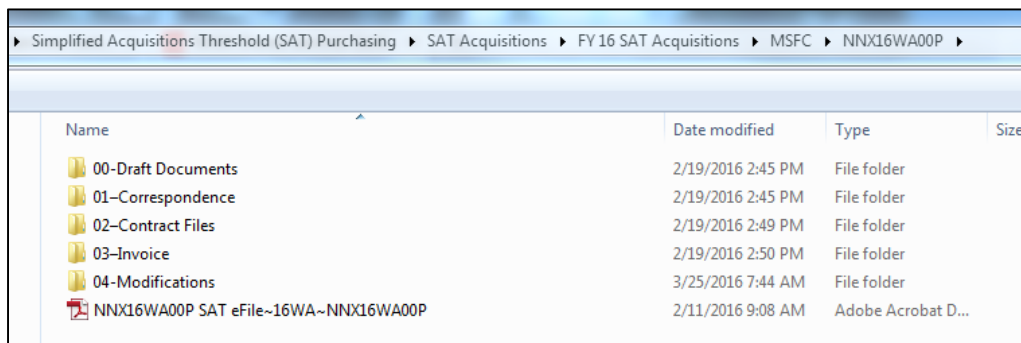
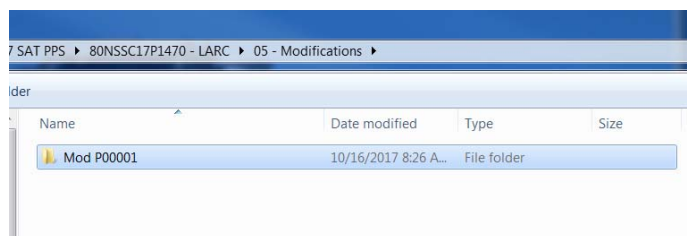


Figure 252 **N Drive Modifications Folder**



Step 7: Open up the Request Item by clicking on the information icon. Click the gear/toggle icon. Go to printer friendly version. Click the 'Click to Print' button. Save a PDF copy of the RITM into the Modification folder on the N Drive. Close

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printer friendly version. Return to the SATMR ticket by clicking the back arrow button.

The screenshot shows the RITM system interface. The main content area displays the details for Request Item RITM0177776, including fields for Number, Item, Request, Requested for, Due date, Configuration item, Watch list, Title, Additional comments, Work notes, Aging Category, Asset, and TechRefreshFlag. The right sidebar contains settings for Home, Preferences, Date/Time, Split Layout, Related List Loading, and Theme. The 'Printer friendly version' link is highlighted in the right sidebar.

Figure 253 RITM – Printer Friendly Version

Step 8: Download any attachments to the Modification folder on the N Drive. Find a copy of the distribution list in the folder on the N drive and copy and paste into the Modification subfolder.

Step 9: When modification request has been reviewed and all required documents have been received go to Task Table. Double-click in the field under 'State' for the task 'Modification Request Review'. Select from the drop down box '**Closed Complete**'. Click on the green check to save selection. Click Save.

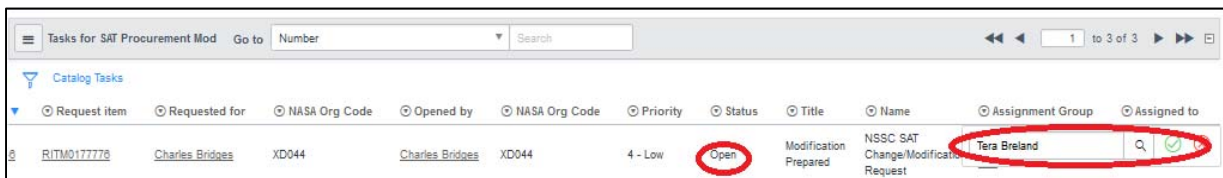
The screenshot shows the 'Catalog Tasks' table. The table has columns for Number, Request item, Requested for, NASA Org Code, Opened by, NASA Org Code, Priority, Status, Title, and Name. The 'Status' column for the task 'TASK0177765' is highlighted, and the 'Closed Complete' status is selected from the dropdown menu.

Figure 254 Modification Request Review Task – Closed Complete

NSSC Process Work Instruction	NSPWI-5113-0001	Basic
	Number	
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4.5.4 Stage 3 – Modification Prepared

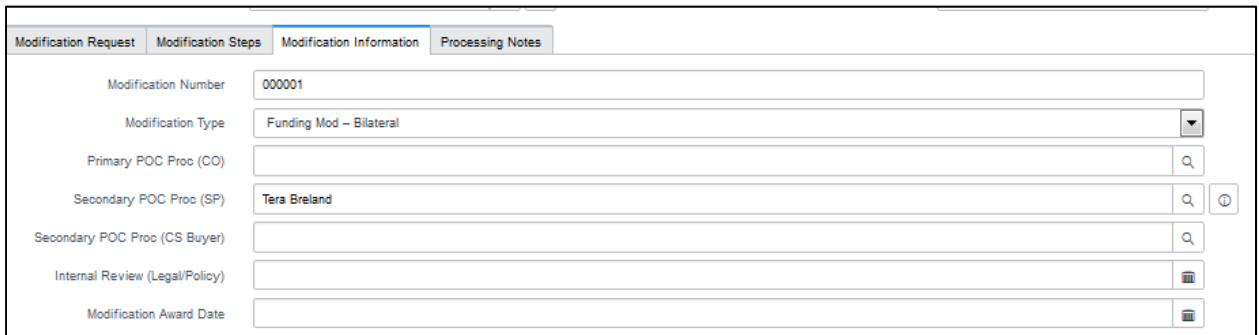
Step 1: Go to the Task Table. Double-click in the field under ‘Assigned to’ for the task ‘**Modification Prepared**’ and type in your name. Click on the green check to save selection. Double-click in the field under ‘State’ for the same task. Select from the drop down box ‘**Work in Progress**’. Click on the green check to save selection. Click Save.



Request Item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group	Assigned to
RITM0177776	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Open	Modification Prepared	NSSC SAT Change/Modification Request	Tera Breland	

Figure 255 *Modification Prepared Task – Assignment and Work in Progress*

Step 2: Go to the ‘Modification Information’ tab and select your name for Secondary POC Proc. Click Save.



Modification Request	Modification Steps	Modification Information	Processing Notes
Modification Number	000001		
Modification Type	Funding Mod – Bilateral		
Primary POC Proc (CO)			
Secondary POC Proc (SP)	Tera Breland		
Secondary POC Proc (CS Buyer)			
Internal Review (Legal/Policy)			
Modification Award Date			

Figure 256 *Secondary POC Proc*

Step 3: Go to the ‘Processing Notes’ tab and enter any important information in regards to status in the ‘Additional Comments – External’ Field.

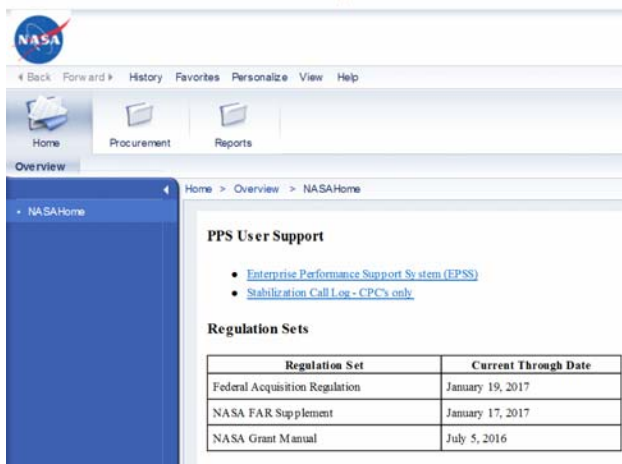
Step 4: Review Support documents. Use the Mod Matrix in Appendix F to help determine what documents and other validations are needed. Extension require consideration unless waived.

Step 5: Complete modification documentations and build modification terms.

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4.5.4.1 Stage 3 – Modification Prepared through PPS:

Step 1: Log into PPS at: <https://epportal.ndc.nasa.gov/irj/portal>



Step 2: Select the “Procurement” tab and then under the “Purchasing” ribbon, select “Advanced Search”. Under the “Search For” drop down, select “Purchase Order”. Enter the award number of the PO/DO requiring a modification.

Step 3: Once those fields have been entered, select “Search” at the bottom of the page.

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Search

Search Results: 1 Purchase Orders

Internal Document Number	PIID	Purchasing Group	Total	Status	Physically Complete Date
8500000070	80NSSC17K0008	XJX - Linn, Steven	458,090.00	Ordered	

Step 4: Select the internal document number. Once the order page has loaded, select the yellow edit button.

Display Purchase Order

Internal Document Number: 8500000070 Document Type: Grant Status: Ordered Document Date: 06/20/2017 Obligated Amount: 458,090.00 USD PIID: 80NSSC17K0008 Vendor:

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

PIID: 80NSSC17K0008

Internal Document Number: 8500000070

* Vendor: 123801 REGENTS OF THE UNIVERSITY OF COLORADO

* Requisitioner: 1000001929 Adamina Licavage

* Plant: 1000000004 Goddard Space Flight Center

Ship-To Address:

* Purchasing Organization: NASA Shared Services Center

* Purchasing Group: XJX - Linn, Steven Show Members

Obligated Amount: 458,090.00

Milestone Plan: On play

Award/Change Form Description:

Recipient's Budget: \$709,963.00
Direct Labor Costs: \$709,963.00
Direct Costs Equipment: \$14,000.00

Internal Note: Formerly N0037AM01G

Item Overview

Details Add Line Add Subline Cut Copy Paste Delete Undelete Exercise Option

Line Number	Deleted	Internal Item Number	Description	Material Group	Quantity	Unit	Unit Price	Q
1			Featherstone, Nicholas		0.000		0.00	

Step 5: Select the header tab. Click on the box next to Generate Modification Number. The Modification number will be added to the SAT award order number.
Ex: 80NSSC17P1505P00001

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Change Purchase Order

Order Save Print Preview Check Close Cancel Park View FRDS-NG Record Related Links

Internal Document Number 8500000070 (Change Version) Document Type Grant Status In Progress

Overview Header Items Notes and Attachments Approval Tracking

General Data Notes and Attachment Output Extended PO History Payment Synopsis Us

Basic

Identification

PID: 80NSSC17K0008

☐ Generate Modification Number

Internal Document Number: 8500000070

Document Type: Grant

Organization

Purchasing Organization: NASA Shared Services Center

Purchasing Group: XJX - Linn, Steven

Internal Reference:

Contract Type: FFP

DOCB Template Name:

Period of Performance Start Date: 06/23/2017

Period of Performance End Date: 06/22/2020

Effective Date: 06/23/2017

Signed-On Date: 07/19/2017

Delivery Date: 06/22/2020

Completion Date:

Product or Service Code:

PSC Description:

Inherently Gov FunCde:

CFDA Code: 43.001

CFDA Description: SCIENCE

Step 6: If you are completing a funding modification. Select the Overview tab

Overview Header Items Notes and Attachments Approval Tracking

- Under "Item Overview" select "Add Subline". Proceed to add items from your PR.

Item Overview				
Details Add Line Add Subline Cut Copy Paste Delete Undo Exercise Option				
Line Number	Deleted	Internal Item Number	Description	Material Group
0001		1	Marks, Steven	
0001.S001		2	NSPACE- Office of Edu. Initial Award	
		0		

- Enter your Purchase Requisition Number, press search. Highlight your PR and click OK.

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The screenshot shows the 'Document Builder' window with the 'General Data' tab selected. The 'Administrative Data' tab is also visible on the right. The 'General Data' section includes fields for DocBuilder Number, Version No., RID, Template, Document Selection, and Document Date. The 'Administrative Data' section includes fields for Content, Created by, External Document, and Status.

Internal Version	Created by	Creation Date	Creation Time	Note	External Change
1	NS000782	08/15/2017	10:29:36		X

Step 9: Select “Finish with Defaults”.

The first screenshot shows the 'Document Builder' window with the 'Groups' tab selected. The 'Finish with Defaults' button is highlighted in the 'Groups' section. The second screenshot shows the 'Document Builder' window with the 'General' tab selected. The 'Finish with Defaults' button is highlighted in the 'General' section.

Step 10: Select the “Document Summary” tab. Select the SF30.

The screenshot shows the 'Document Builder' window with the 'Document Summary' tab selected. The 'SF30' element is highlighted in the 'Document Summary' section. The 'SF30' element is a 'Full Text and Fill-In' type.

Position	Section	Element	Effective Date	Version	Regulation Set	Property	Description	Editable	Inclusion	Fill-In Status	Content Builder	All Elements	Element Changed
1	A	SF100	11/01/2005	1	Full	Full Text	Table of Contents						
2	A	SF101	11/01/2005	1	Full	Full Text	Table of Contents						
3	A	SF102	11/01/2005	1	Full	Full Text	Table of Contents						
4	A	SF103	11/01/2005	1	Full	Full Text	Table of Contents						
5	A	SF104	11/01/2005	1	Full	Full Text	Table of Contents						
6	A	SF105	11/01/2005	1	Full	Full Text	Table of Contents						
7	A	SF106	11/01/2005	1	Full	Full Text	Table of Contents						
8	A	SF30	11/01/2005	1	Full	Full Text	SF30 - AMENDMENT OF SOLICITATION/ORDER OF CONTRACT						
9	A	SF31	11/01/2005	1	Full	Full Text	SF31 - AMENDMENT OF SOLICITATION/ORDER OF CONTRACT						
10	A	T00	11/01/2005	1	Full	Full Text	Table of Contents						

Step 11: Select the “Full Text and Fill-Ins” tab to edit the fields within the SF30. Under “Enter Modification type”, select “C. This Supplemental agreement is pursuant to authority of:” and complete the “Supplemental Agreement Authority in MOD blk 13 C:” with “FAR 52.212 – 4 (c)”.

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Step 12: For the “Is contractor required to sign this document?” field, if this is a unilateral modification, select “No”. If this is a bi-lateral modification, select “Yes”. Then enter “1” into the “Number of returning signed copies to issuing office” field.

Step 13: Select the Preview tab. Highlight the SF30. Select “Generate”. A preview of the SF30 will come up. Select “Return to PPS”.

Step 14: Select “Log off”, then “Yes”

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Step 15: Select the edit button to enter “Edit Mode”. Locate your SF30. Highlight your SF30 document. Select “Versioning”, and then “Check-out”. Save the document to your modification folder on the N drive.

Step 16: Select “Save” in PPS to return your order to “Save Mode”.

Step 17: Filling out the SF30. While the document is open, click on Tools, edit text & images. Remove the date located in block 3 and replace with “see block 16c.” Remove the date located in block 10B. Remove the contracting officer’s name located in block 16a.

Based on the type of modification that you are working on, copy and paste the below language to block 14 and fill in information where necessary:

Examples of funding modification language:

- Cancellation**

The purpose of this bi-lateral funding modification is to cancel the award _____ in its entirety due to _____ (reason for cancellation). Therefore, the cancellation of this award results in the de-obligation of funding in the amount of \$_____.

This Purchase Order will be re-issued under _____.

Previous Value: \$

This Modification: -\$

Revised Value: \$

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- **Funding Decrease**

The purpose of this bi-lateral funding modification is decrease funding on Purchase Order # _____ from _____ to _____ due to _____ (reason for decrease). Therefore, this reduction in funding results in the de-obligation in the amount of ____ (de-obligated amount).

Previous Value: \$

This Modification: \$ -

Revised Value: \$

All other terms and conditions remain unchanged.

- **Funding Increase**

The purpose of this bi-lateral funding modification is to increase funding on Purchase Order # _____ from _____ to _____ due to _____ (reason for increase). Therefore, this increase in funding results in the obligation of additional funds in the amount of ____ (obligated amount).

Previous Value: \$

This Modification: \$

Total Award Value: \$

All other terms and conditions remain unchanged.

Examples of administrative modification language:

- **Delivery Date**

The purpose of this bi-lateral administrative modification is to change the delivery date listed in the terms and conditions and on the cover page for Purchase Order # _____.

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The delivery date for this order is changed from _____ to _____.

All other terms and conditions remain unchanged.

- **Period of Performance**

The purpose of this bi-lateral administrative modification is to change the Period of Performance listed in the terms and conditions and on the cover page of Purchase Order # _____.

The Period of Performance is changed from _____ to _____.

All other terms and conditions remain unchanged.

- **Delivery To Address**

The purpose of this bi-lateral administrative modification is to change the 'Deliver To' address listed in the terms and conditions and on the cover page for Purchase Order # _____.

The Deliver To address is changed to read:

All other terms and conditions remain unchanged.

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• Quote Change

The purpose of this bi-lateral administrative modification is to revise the quote listed on the cover page and attached on Purchase Order # _____. The quote associated with this order change from quote # _____, dated _____ to quote # _____, dated _____ (See attached revised quote).

All other terms and conditions remain unchanged.

Step 18: After you fill out all information, press the arrow button, then save.

4.5.4.2 Stage 3 – Modification Prepared for Legacy System:

Step 1. Pull a SF30 directly from the share point and edit the following:

- Include the correct number of pages,
- modification number – block 2,
- effective date – block 3 - put “See Block 16C”
- Include the PR number under block 4 if the modification uses a single purchase requisition number. If the modification incorporates multiple purchase requisition numbers, list “See Schedule”,
- Add vendor name and address along vendor’s cage code in block 8
- Add the award order number in block 10a.

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Step 2: Under section 13, place an X next to C. then type FAR 52.212 – 4 (c) on the line under the C. explanation.

Step 3: In section **E. Important:** If this is a unilateral modification, click on the box between Contractor and is not required to sign this document. If bi-lateral modification, click on the box next to is required to sign this document and return (type 1) copies to the issuing office.

Step 4: Based on the type of modification that you are working on, copy and paste the below language to block 14 and fill in information where necessary.

- See 4.5.4.1 “**Stage 3 – Modification Prepared through PPS**” for examples of funding modification language:

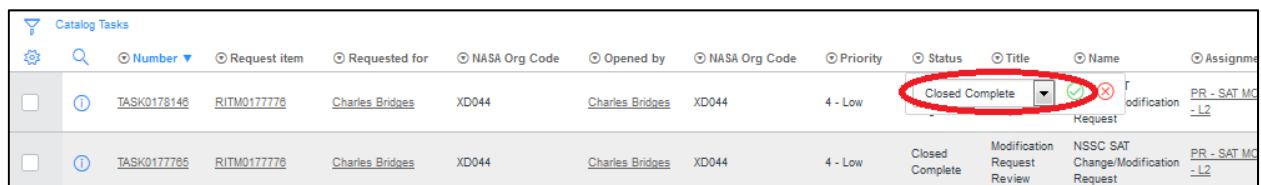
Step 5: Save the OF347 document. Name file award order number mod number SF30 (NNX17HA55D Mod 000002 SF30).

NSSC Process Work Instruction	NSPWI-5113-0001	Basic
	Number	
	Effective Date:	01/12/2018
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Step 6: Complete the OF336 with additional information if needed, and save the document. Name file award order number mod number OF336 (NNX17HA55D Mod 000002 OF336).

4.5.4.3 Stage 3 – Modification Prepared – Closing Task:

Step 1: Once your modification documentation is completed, go to task table. Double-click in the field under ‘State’ for the task ‘Modification Prepared’. Select from the drop down box ‘**Closed Complete**’. Click on the green check to save



Number	Request item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignme
TASK0178148	RITM0177778	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Closed Complete	Request	Modification	PR - SAT MC - L2
TASK0177785	RITM0177778	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Closed Complete	Modification Request Review	NSSC SAT Change/Modification Request	PR - SAT MC - L2

Figure 257 *Modification Prepared Task – Closed Complete*

4.5.5 Stage 4 – Modification Technical Concurrence

Step 1: Determine if modification requires Technical Concurrence. If modification does not require Technical Concurrence go to the Task Table. Double-click in the field under ‘State’ for the same task. Select from the drop down box ‘**Closed Skipped**’. Click on the green check to save selection. Click Save.

If the modification does require Technical Concurrence go to the Task Table. Double-click in the field under ‘Assigned to’ for the task ‘**Technical Concurrence**’ and type in your name. Click on the green check to save selection. Double-click in the field under ‘State’ for the same task. Select from the drop down box ‘**Work in Progress**’. Click on the green check to save selection. Click Save.

Step 2: Send out the modification for review. Place the task in Pending. Make notations under processing notes when modification was sent for review to the Technical End User. Follow up with Technical End User if no response is received after response date. After two follow up attempts engage Contracting Officer for assistance. When Technical Concurrence is received close complete task.

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Catalog Tasks										
	Request item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group
47	RITM0177778	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Closed Complete			PR - SAT MODIFICATION - L2

Figure 258 *Modification Technical Concurrence Task – Closed Complete*

4.5.6 Stage 5 – Modification Vendor Signature

Step 1: Determine if modification requires Vendor Signature. If the modification is unilateral then, 'closed skipped' task 'Modification Vendor Signature'. Double-click in the field under 'State' for the task. Select from the drop down box '**Closed Skipped**'. Click on the green check to save selection. Click Save.

If the modification does require Vendor Signature go to the Task Table. Double-click in the field under 'Assigned to' for the task '**Vendor Signature**' and type in your name. Click on the green check to save selection. Double-click in the field under 'State' for the same task. Select from the drop down box '**Work in Progress**'. Click on the green check to save selection. Click Save.

Step 2: Send out the modification for signature. Place the task in Pending. Make notations under processing notes when modification was sent to vendor for signature. Follow up with vendor if no response is received after response date. After two follow up attempts engage Contracting Officer for assistance. When Vendor signature is received close complete task.

Catalog Tasks										
	Number	Request item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Assignment
	TASK0178149	RITM0177778	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Closed Complete		PR - SAT MODIFICATION - L2

Figure 259 *Modification Vendor Signature Task – Closed Complete*

4.5.7 Stage 6 – Modification Prepare for Award

Step 1: Go to the task table. Double-click in the field under 'Assigned to' for the task '**Modification Prepare for Award**' and type in your name. Click on the green check to save selection. Double-click in the field under 'State' for the same task. Select from the drop down box '**Work in Progress**'. Click on the green check to save selection. Click Save.

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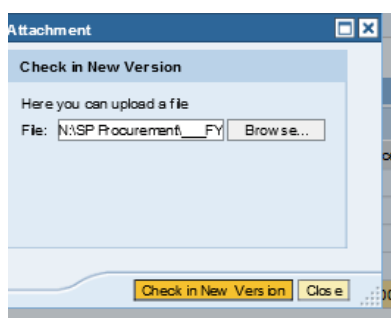
Step 2: Finish award file. Check for completeness. Make sure all required mod documents are present. Start FPDS-NG record, SF30, Terms, Distribution Sheet, SAM exclusion, and other required modification documents. Make sure the award documents are available in PPS and the rest of the documents are available on the N Drive.

Step 3: Start FPDS-NG record in PPS.

Step 4: Upload all necessary attachments to PPS. To upload the document back to PPS:

- Click on the edit button.
- Select “Versioning” and then “Check-in”.
- Upload SF30 from the N drive. (if unilateral no signature is required, if bi-lateral must have vendor signature).
- Select “Check in”.

Attachments			
Add Attachment Edit Description Versioning Delete			
Assigned To	Category	Description	File Name
Document Header	Standard	NSSC17K0049 - Terms & Conditions	80NSSC17K0080...THE CHILDREN'S HOSPITAL OF PH
Document Header	Standard	NSSC17K0049 - Terms & Conditions	80NSSC17K0049.body.docx
Document Header	Standard	AWARD FILE - F00001	80NSSC17K0049 F0001.pdf
Document Header	Standard Attachment	BODY F00001	BODY F00001.pdf
Document Header	Legal Document	80NSSC17K0049F00001 - NF1687.pdf	80NSSC17K0049F00001 - NF1687.pdf



- Select “Add Attachment”.
- Select “Browse” and find your modification efile. Select “OK”.

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Attachments			
Add Attachment Edit Description Versioning Delete			
Assigned To	Category	Description	File Name
Document Header	Standard Attachment	80NSSC17K0049 - NF1687.pdf	80NSSC17K0049...NF1687.pdf
Document Header	Standard Attachment	80NSSC17K0049 - Terms & Conditions	80NSSC17K0060...THE CHILDREN'S HOSPITAL OF PHILADELPHIA
Document Header	Standard Attachment	80NSSC17K0049 - Terms & Conditions	80NSSC17K0049.body.docx

Add Attachment

Here you can upload an attachment. You have to assign it to either the document general data or to an item

File: [Browse...](#)

Description:

Assign To: General Data

Visible Internally only: ☒ Keep this attachment internal

[OK](#) [Cancel](#)

Step 5: Once all necessary requirements are uploaded to PPS, select the “SAVE” button towards the top of the page to enter “Save Mode”

Note: For Legacy Orders, you will not need to upload your attachments to PPS. The processor will only need to ensure that the electronic file is completed and other necessary documents are completed on the N-Drive file before closing this task.

Step 6: Go to Task table. Double-click in the field under ‘State’ for the ‘Modification Prepare for Award’ task. Select from the drop down box ‘**Closed Complete**’. Click on the green check to save selection. Click Save.

Request Item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group	Assigned to
RITM0177778	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Closed Complete	Modification Vendor Signature	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	Tara Breland
RITM0177778	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Closed Complete	Modification Vendor Signature	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	Tara Breland

Figure 260 *Modification Prepare for Award Task – Closed Complete*

4.5.8 Stage 7 Assignment

Step 1: To assign tasks, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column and lists **SAT Requests**, **SAT**

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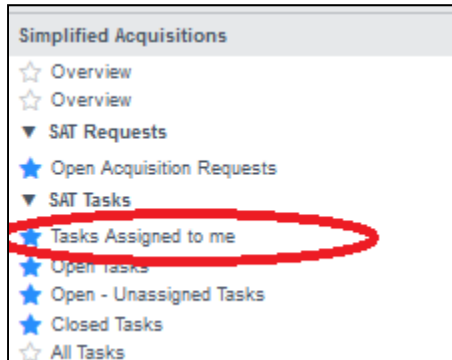


Figure 263 *ServiceNow Tasks Assigned to me*

Step 2: Click on **SATMR** Number in the second column to open up the SAT Procurement Ticket.

All > Active = true > Assigned to is Charles Bridges > Item Name starts with NSSC SAT											
Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to	
Search	Search	Search	Search	Search	Search	Search	Search	NSSC SAT	Search	Search	
TASK0178151	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Award	NSSC SAT Change/Modification Request	PR - SAT TEAM - L3	Charles Bridges	

Figure 264 *ServiceNow SATMR Number*

OR Click on the **Task Number** to open the task.

All > Active = true > Assigned to is Charles Bridges > Item Name starts with NSSC SAT											
Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to	
Search	Search	Search	Search	Search	Search	Search	Search	NSSC SAT	Search	Search	
TASK0178151	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Award	NSSC SAT Change/Modification Request	PR - SAT TEAM - L3	Charles Bridges	

Figure 265 *ServiceNow Task number*

To go to the SATMR ticket click on the '**SAT Modification Request for T...**' tab at the bottom of the Task. Click on the SATMR in the SAT Modification Request for Task Table.

SAT Modification Request for ...

Group approvals

SAT Modification Request for Task

Go to

Number

Search

1

to 1 of 1

SAT Modification Requests

Number

Classification of Modification Request

Distribution Closed By

Distribution Closed On

Distribution Worked By

Internal Review (Legal)

SATMR0001001

(empty)

Figure 266 *ServiceNow SATMR in the SAT Modification Request Table*

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Step 3: The SAT Award Order # is located at the top of the modification request. Go into PPS and the N Drive based on this SAT Award Order #. Review file for completeness and accuracy. Files that need corrections due to errors, send an email to Team Lead, Back-up Lead, or other designated processor/modification team member. The email should include SATMR ticket number. Note error in the SATMR ticket. Go to 'Processing Notes'. Enter error in 'Work Note –Internal'. Do not place error note in 'Additional Comments – External (Viewable to Customer)'. Include Review sheet in email.

Step 4: If file is ready for award. Make award in PPS. Go to the medication ticket on the 'Modification Information' tab enter your name in the Primary POC Proc field and enter the Modification Award Date.

The screenshot displays the 'SAT Modification Request - SATMR0001001' form. At the top, there are buttons for 'Update', 'Insert', 'Insert and Stay', and 'Save'. Below these are input fields for 'Number' (SATMR0001001), 'Request Item' (RITM017776), 'SAT Acquisition Request' (SATPC0001001), and 'SAT Award Order #' (NNX16WA01P). The form has four tabs: 'Modification Request', 'Modification Steps', 'Modification Information' (which is active), and 'Processing Notes'. Under the 'Modification Information' tab, there are several fields: 'Modification Number' (000001), 'Modification Type' (Funding Mod – Bilateral), 'Primary POC Proc (CO)' (Charles Bridges, circled in red), 'Secondary POC Proc (SP)' (Tera Breland), 'Secondary POC Proc (CS Buyer)', 'Internal Review (Legal/Policy)', and 'Modification Award Date' (2018-03-25, circled in red).

Figure 267 *Modification information Tab - Award Date*

Step 5: Go to Task table. Double-click in the field under 'State' for the 'Modification Award' task. Select from the drop down box '**Closed Complete**'. Click on the green check to save selection. Click Save.

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Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group	Assigned to
Charles Bridges	XD044	4 - Low	Closed Complete	Modification Request		PR - SAT TEAM - L3	Charles Bridges
Charles Bridges	XD044	4 - Low	Closed Complete	Modification Prepare for Award	NSSC SAT Change/Modification Request	PR - SAT MODIFICATION - L2	Tera Breland

Figure 268 *Modification Award Task – Closed Complete*

4.5.10 Stage 8 Assignment

Step 1: To assign tasks, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column and lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on **Open – Unassigned Tasks**. Click on the search icon to make the search fields appear for each column. In the column label ‘Title’ enter ‘**Modification Distribution**’. Look for tickets in the Assigned Group ‘**PR – DISTRIBUTION – L3**’ with a blank Assigned Processor. To open the ticket, click on the underlined SATMR Number.

All Active = true Assigned to is empty Item Name starts with NSSC SAT Title starts with Modification Distribution									
Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group
Search	Search	Search	Search	Search	Search	Search	Modifica	NSSC SAT	Search
TASK0178152	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Distribution	NSSC SAT Change/Modification Request	PR - SAT DISTRIBUTION - L2

Figure 269 *ServiceNow Task Table*

Step 2: Go to the **Modification Steps** tab. Scroll down to **Tasks for SAT Procurement Mod** located under the Stages. For Task **Modification Award** double-click in the field under the column ‘Assigned To’ to select a name. Click the search icon. Click on the name to assign the task. Click the Green check to save the selection. Click **Save** at the top of the form. Exit the ticket to go to the next ticket.

Catalog Tasks									
Request item	Requested for	NASA Org Code	Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment Group
RITM0177776	Charles Bridges	XD044	Charles Bridges	XD044	4 - Low	Open	Modification Distribution	NSSC SAT Change/Modification Request	Dawan Thomas

Figure 270 *Make Assignment*

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4.5.11 Stage 8 – Modification Distribution Task Assigned to Me

Step 1: To open a task assigned to you, log into ServiceNow. Go to the main console. Click “console” in the upper right hand corner next to your name. Scroll down to the **Simplified Acquisitions** section in the left column that lists **SAT Requests**, **SAT Tasks**, and **SAT Reports**. Click on **Tasks Assigned to me** under section ‘SAT Tasks’.

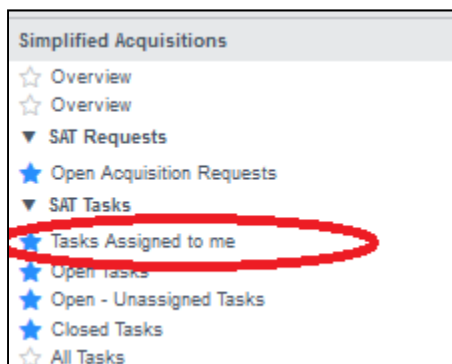


Figure 271 *ServiceNow Tasks Assigned to me*

Step 2: Click on **SATMR** Number in the second column to open up the SAT Procurement Ticket.

All > Active = true > Assigned to is Dawan Thomas > Item Name starts with NSSC SAT											
	Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
<input type="checkbox"/>	TASK0178152	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Distribution	NSSC SAT Change/Modification Request	PR - SAT DISTRIBUTION - L2	Dawan Thomas

Figure 272 *ServiceNow SATMR Number*

OR Click on the **Task Number** to open the task.

All > Active = true > Assigned to is Dawan Thomas > Item Name starts with NSSC SAT											
	Number	Status	Number	Number	Number	Number	SAT Award Order #	Title	Name	Assignment Group	Assigned to
<input type="checkbox"/>	TASK0178152	Open	RITM0177776	(empty)	(empty)	SATMR0001001		Modification Distribution	NSSC SAT Change/Modification Request	PR - SAT DISTRIBUTION - L2	Dawan Thomas

Figure 273 *ServiceNow Task number*

To go to the SATMR ticket click on the ‘**SAT Modification Request for T...**’ tab at the bottom of the Task. Click on the SATMR in the SAT Modification Request for Task Table.

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Figure 274 *ServiceNow SATMR in the SAT Modification Request Table*

Step 3: Double-click in the field under ‘State’ for the Modification Distribution Task. Select from the drop down box ‘**Work in Progress**’. Click on the green check to save selection. Click Save.

4.5.12 Stage 8 – Modification Distribution - PPS

Step 1: Pull the modification document, SF 30, and any modification attachments that may be included from PPS and save to the modification subfolder on the N drive. (Bi-lateral: both vendor and CO signatures. Uni-lateral: only CO signature).

Combine documents and name the file accordingly:

ELMT BPA Calls: NNX14MC03Z Call 1 80NSSC17P1339 P00001 Mod Award File

ELMT IDIQ Orders: NNX15MC76B Order 1 80NSSC17P1339 P00001 Mod Award File

SEWP Contracts: NNG15SD34B 80NSSC17P1339 P00001 Mod Award File

Purchase Orders: 80NSSC17P1339 P00001 Mod Award File

Step 2: Prepare award document for distribution. Combine executed cover sheet with terms and conditions, and any required documentation that goes to the Vendor. Retrieve the email template for modification distribution from the share-point. Prepare your distribution email in accordance with the email template.

Step 3: Send Modification Award document to email addresses listed on the original distribution sheet. Make sure that you check to see if there are any special or additional POCs to Distribute the Award document to. Uni-lateral modifications do not get distributed to the vendor. Only the tech end user, requestor, processor and CO.

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Step 4: Print a copy of the distribution email to pdf and place in the related folder on the N Drive. Make sure to update the distribution sheet.

☒ Distribution Emails Sent 3/4/2016 - DLO
☒ FPDS-NG Finalized 3/4/2016 - DLO
☒ TechDoc Upload 3/4/2016 - DLO

Figure 275 *Distribution Check Off*

Step 5: Select the yellow “Approve FPDS-NG” option in the modification page on PPS to finalize the FPDS-NG record. Save finalized FPDS-NG record to the N-Drive file.

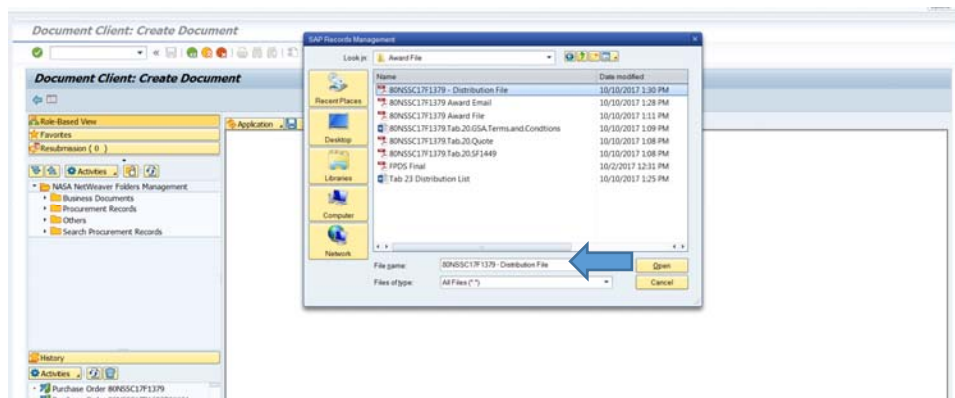
Note: If the file cannot be approved, look into the FPDS-NG record and select validate to view any required corrections. Correct any simple errors. If there is a complex error that cannot be resolved by the modification processor, it may be necessary to contact the original buyer. Always select “Save Draft” after validating.

Step 6: Combine the finalized modification FPDS, modification award documents, modification award email, and distribution sheet into the electronic file. Save as: PIID number Mod#(space)–(space)Distribution File (80NSSC17F1379 P00001–Distribution File).

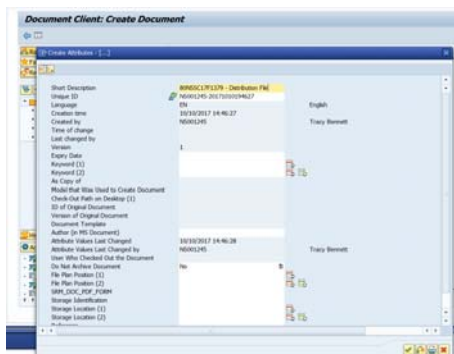
Step 7: Upload the file to PPS by clicking on the yellow Related Links button, then Folders Management.

Step 8: Select the eye glasses/pencil icon. Select the arrow next to “Under SAT” to expand this folder. Select the arrow next to “36. Modification supporting documentation” to expand this folder. Double click “Documents”.

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Step 11: Paste the file name into the “Short Description” field. Select the green checkmark to complete the action.



Step 12: Proceed to **4.5.14 Stage 8 – Modification Distribution – Closing Task** for instructions on how to close the task.

4.5.13 Stage 8 – Modification Distribution – Legacy System

Step 1: Locate the signed SF 30 form. (Bi-lateral: both vendor and CO signatures. Uni-lateral: only CO signature). Locate any attachments that should be included with the SF30 for distribution such as quote, warranty, etc.

Combine documents and name the file accordingly:

ELMT BPA Calls: NNX14MC03Z Call 1 NNX17MS00D SF 30 Mod. #000001
Award File

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ELMT IDIQ Orders: NNX15MC76B Order 1 NNX17MT00D Mod. #000001 Award File

SEWP Contracts: NNG15SD34B NNX17MS00D Mod. #000001 Award File

Purchase Orders: NNX17WB00P Mod. #000001 Award File

Step 2: Prepare award document for distribution. Combine executed cover sheet with terms and conditions, and any required documentation that goes to the Vendor. Retrieve the email template for modification distribution from the share-point. Prepare your distribution email in accordance with the email template.

Step 3: Send Modification Award document to email addresses listed on the original distribution sheet. Make sure that you check to see if there are any special or additional POCs to Distribute the Award document to. Uni-lateral modifications do not get distributed to the vendor. Only the tech end user, requestor, processor and CO.

Step 4: Print a copy of the distribution email to pdf and place in the related folder on the N Drive. Make sure to update the distribution sheet.

<input checked="" type="checkbox"/> Distribution Emails Sent <u>3/4/2016</u> - <u>DLO</u> <input checked="" type="checkbox"/> FPDS-NG Finalized <u>3/4/2016</u> - <u>DLO</u> <input checked="" type="checkbox"/> <u>TechDoc</u> Upload <u>3/4/2016</u> - <u>DLO</u>

Figure 276 *Distribution Check Off*

Step 5: Log into the FPDS website. Search for your award number with the “Advanced Search” option. Locate your FPDS record and finalize it. Once your FPDS-NG records is finalized, Save a PDG file of that page to your modification file folder on the N-Drive.

Step 6: Clean up folder, but leave the eFile document in the main modification folder for the SAT award.

00 – Draft Documents: Move all draft documents into ‘00 ☐ Draft Documents’ Folder (example: unsigned versions of documents)

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01 – Correspondence: Move all msg format emails into ‘**01 – Correspondence**’ Folder

02 – Contract Files: Move all contract files (files used to make the electronic file for TechDoc) into ‘**02 – Contract File**’ Folder

Threshold (SAT) Purchasing ► SAT Acquisitions ► FY 16 SAT Acquisitions ► MSFC ► NNX16WA00P ► 04-Modifications ►				
Name	Date modified	Type	Size	
00-Draft Documents	2/19/2016 2:45 PM	File folder		
01-Correspondence	2/19/2016 2:45 PM	File folder		
02-Contract Files	2/19/2016 2:49 PM	File folder		
NNX16WA00P SAT MOD 000001 eFile~16...	2/11/2016 9:08 AM	Adobe Acrobat D...	27 KB	

Figure 277 *N Drive Modification Folder*

Step 7: In a second window. Go To [N:\Document Imaging\PR - SAT\SAT Acquisitions](#). Go to the folder for the current Fiscal Year. Go to the folder ‘**Modifications**’.

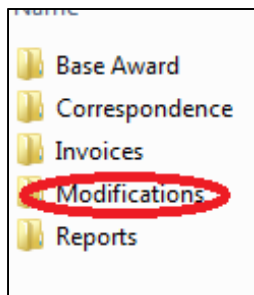


Figure 278 *Auto TechDoc Folders*

Step 11: Copy and paste file eFile in the Modification Award folder. This will upload it to TechDoc.

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nssc-shared ► Document Imaging ► PR - SAT ► SAT Acquisitions ► FY2016 ► Modifications				
Print Burn New folder				
Name	Date modified	Type	Size	
AutoTD	2/3/2016 9:45 AM	Text Document	1 KB	
NNX16WA00P SAT MOD 000001 eFile~16...	2/11/2016 9:08 AM	Adobe Acrobat D...	27 KB	

Figure 279 *Auto TechDoc File*

4.5.14 Stage 8 – Modification Distribution – Closing Task

Step 12: Go to the Task Table. Double-click in the field under ‘State’ for the Modification Distribution Task. Select from the drop down box ‘**Closed Complete**’. Click on the green check to save selection. Click Save. Exit out of ticket.

Opened by	NASA Org Code	Priority	Status	Title	Name	Assignment
Charles Bridges	XD044	4 - Low	Closed Complete		Request	PR - SAT DISTF - L2

Figure 280 *Modification Distribution Task – Closed Complete*

5.0 Roles and Responsibilities

The following defines some of the roles associated with the acquisition of SAT Awards:

NASA Center

- Technical End-User
The Technical End-User with the actual need for the supply or service identifies the requirement to start the acquisition process and may also likely serve as the Contracting Officer’s Representative (COR) for the requirement.
- Resource Analyst (RA) and/or Budget Analyst
The Resource Analyst (RA) or designee has the primary responsibility of tracking funds for the assigned program, project, or organization.

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- Initiator/Requisitioner

The initiator or designee is primarily responsible for identifying and initiating a particular purchase:

- Develops a written description of the item or service to be purchased;
- Prepares the Purchase Request (PR) and supporting documents;
- Processes the PR through appropriate channels at the Center;
- Supports the solicitation preparation and the evaluation/award process;
- Enters the PR in Systems, Application & Products (SAP) in Data Processing.

NSSC SAT Team

- Procurement Specialist/Buyer

The Procurement Specialist/Buyer is responsible for performing assigned work and actions in accordance with applicable regulations, policies, procedures, and instructions. Key duties include acquisition planning and coordination, preparation of procurement packages, and monitoring/providing status of procurements to management.

- Contracting Officer (CO)

The Contracting Officer (CO) executes contracts within the limits of delegated authority and in accordance with applicable regulations, policies, procedures, and instructions. The Certificate of Appointment (Warrant) establishes the specific authority of each CO, while the Federal Acquisition Regulation (FAR) and the NASA FAR Supplement (NFS) set forth signature authority for each level of CO. CO's provide guidance to the Procurement Specialist/Buyer working the acquisition package. Only COs have the official authority to contractually bind the government and overall responsibility for the entire process subsequent to the initial requirement determination.

6.0 Records

All SAT award documents and supporting file documentation will be 100% electronic and stored in the NSSC's TechDoc repository. The NSSC uses TechDoc as the software solution for the NSSC Electronic Library (NEL) and serves as the repository for the NSSC's official electronic records. As the NSSC's NEL repository, TechDoc incorporates records management features and capabilities such as retention, disposition, security/privacy protection, and reporting.

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All SAT records will be maintained in accordance with FAR Subpart 4.8; NFS Subpart 1804.8; NRRS 1441.1A, NASA Records Retention Schedules; NPR 1441.1E, *NASA Records Management Program Requirements*; and NID 1600.55, *Sensitive But Unclassified Controlled Information*.

7.0 Cancellation/Supersession of Previous Documents

This document is the initial version. There are no previous versions.

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APPENDIX A - ACRONYM LIST

Acronym	Definition
8(a)	SBA Certified – Small-Disadvantaged, Minority-Owned Business
A&E, AE	Architectural & Engineering
ACES	Agency End-User Services
AFRC	Armstrong Flight Research Center
ALT	Alternate
AP	Accounts Payable
AR	Accounts Receivable
ARC	Ames Research Center
AXA	Ames Research Center PGroup
BA	Budget or Business Analyst
BOBJ	Business Objects
BPAD	Best Procurement Approach Determination
BPA	Blanket Purchase Agreement
CAAC	Civil Agency Acquisition Council
CAGE Code	Commercial and Government Entity Code
CCC	Customer Contact Center
CF	Core Financial
CFR	Code of Federal Regulations
CMM	Contract Management Module
CO	Contracting Officer
CoC	Certificate of Competency
COR	Contracting Officer's Representative
COTR	Contracting Officer's Technical Representative
COTS	Commercially Off-the-Shelf Product
CPARS	Contractor Performance Assessment Reporting System
CS	Civil Service/Civil Servant
CS	Contracting Specialist
CXA	Glenn Research Center PGroup

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Acronym	Definition
D&F	Determinations and Findings
DCAA	Defense Contract Audit Agency
DCMA	Defense Contract Management Agency
DFAR	Defense Federal Acquisition Regulations
DI	Document Imaging
DLA	Defense Logistics Agency
DO	Delivery Order
DoD	Department of Defense
DUNS	Data Universal Numbering System
DXA	Armstrong Flight Research Center PGroup
EAR	Export Administration Regulations
EAST	Enterprise Applications Service Technologies
EIN	Employer Identification Number
EDWOSB	Economically Disadvantaged Woman-Owned Small Business
EFT	Electronic Funds Transfer
EO	Executive Orders
ESD	Enterprise Service Desk
FA	Formal Agreement
FAC	Federal Acquisition Circular
FAC-C	Federal Acquisition Certification for Contracting
FAPIIS	Federal Awardee Performance and Integrity Information System
FAQ(s)	Frequently Asked Question(s)
FAR	Federal Acquisition Regulation
FedBizOpps	Federal Business Opportunities
FFP	Fixed-Price Contracts
FM	Financial Management
FOB	Free-on-Board
FPDS-NG	Federal Procurement Data System – Next Generation
FSC	Federal Supply Code
FSG	Federal Supply Group

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Acronym	Definition
FSRS	Federal Funding Accountability & Transparency Act Sub-award Reporting System
FSS	Federal Supply Schedule
GAO	Government Accountability Office
GFE	Government-Furnished Equipment
GFI	Government-Furnished Information
GFP	Government-Furnished Property
GPO	Government Printing or Publishing Office
GRC	Glenn Research Center
GRS	General Records Schedule
GSA	General Services Administration
GSFC	Goddard Space Flight Center
GWAC	Government-wide Acquisition Contracts
GXA	NASA Headquarters and Goddard Space Flight Center PGroup
HAZMAT	Hazardous Materials
HQ	NASA Headquarters
HR	Human Resources
HUBZone	Historically Underutilized Business Zone
IA, IAA	Interagency Agreement
IDC	Indefinite Delivery Contract
IDIQ	Indefinite Delivery Indefinite Quantity
IEMP	Integrated Enterprise Management Program
IFB	Information for Bid
IGCE	Independent Government Cost Estimate
IPO	Industrial Property Officer
IPT	Integrated Product Team
IRIS	Invoice Routing and Information System
IRS	Internal Revenue Service
ISO	International Organization for Standardization
IT	Information Technology
ITAR	International Traffic in Arms Regulations

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Acronym	Definition
ITAR	NSSC IT Access Request
JPL	Jet Propulsion Laboratory
JSC	Johnson Space Center
JXA	Johnson Space Center PGroup
KSC	Kennedy Space Center
KXA	Kennedy Space Center PGroup
LaRC	Langley Research Center
LOC	Library of Congress
LSA	Labor Surplus Area
LSJ	Limited Source Justification
LSR	Limited Source Requirement
LXA	Langley Research Center PGroup
MOA	Memorandum of Agreement
MOD	Modification
MOU	Memorandum of Understanding
MFR	Memorandum for Record
MSFC	Marshall Space Flight Center
MXA	Marshall Space Flight Center PGroup
NAICS	North American Industry Classification Code
NAMS	NASA Access Management System
NAMIS	NASA Aircraft Management Information System
NASA	National Aeronautics and Space Administration
NCE	NASA Cost Estimate
NEL	NSSC Electronic Library
NF	NASA Form
NFS	NASA FAR Supplement
NICS	NASA Integrated Communications Services
NID	NASA Interim Directive
NMO	NASA Management Office
Non-COTS	Not Commercially Off-the-Shelf Produce

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Acronym	Definition
NPR	NASA Procedural Requirements
NRRS	NASA Record Retention Schedules
NS	Non-Sensitive Information
NSSC	NASA Shared Services Center
NXA	NASA Management Office and Jet Propulsion Laboratory PGroup
OCIO	Office of the Chief Information Officer
OFPP	Office of Federal Procurement Policy
OMB	Office of Management and Budget
OP	Office of Procurement
OSBP	Office of Small Business Programs
OSHA	Occupational Safety and Health Administration
P-Card	Purchase Card
PCR	Procurement Center Representative
PDF	Portable Document Format
PGroup	Purchasing Group
PIC	Procurement Information Circular
PII	Personally Identifiable Information
PM	Project Manager
PMO	Program Management Office
PN	Procurement Notice
PO	Purchase Order
POC	Point of Contact
PPS	Procurement for Public Sector
PR	Procurement
PR	Purchase Request/Requisition
PriPro	Privileged/Proprietary
PSC	Product Service Code
PSG	Product Service Group
QA	Quality Assurance
QC	Quality Control

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Acronym	Definition
QM	Quality Manual
RA	Resource Analyst
RDSS	Recommendation and Determination for Soliciting only one Source
RFO	Request for Offer
RFP	Request for Proposal
RFQ	Request for Quote
SAM	System for Award Management
SAP	Systems Applications and Products
SAT	Simplified Acquisition Threshold
SATERN	System for Administration, Training, and Educational Resources for NASA
SB	Small Business
SBA	Small Business Administration
SBIR	Small Business Innovation Research
SBU	Sensitive But Unclassified
SC	Service Contract
SDB	Small Disadvantaged Business
SDG	Service Deliver Guide
SDVOB	Service-Disabled Veteran-Owned Business
SEWP	Solutions for Enterprise-Wide Procurement
SEWP BOWL	Solutions for Enterprise-Wide Procurement Business and Operations Workstation Laboratory
SF	Standard Form
SME	Subject Matter Expert
SOW	Statement of Work
SN	ServiceNow
SP	Service Provider
SSC	Stennis Space Center
STTR	Small Business Technology Transfer
SUNS	Standards Update Notification System
SXA	Stennis Space Center PGroup

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Acronym	Definition
TAA	Trade Act Agreement
TAS	Treasury Account Symbol
TE	Technical Evaluation
TIN	Tax Identification Number
T.O.	Technical Officer/User
TQ&E	Technical Quality and Excellence
UNICOR	Federal Prison Industries
USC	United States Code
VA	Veterans Administration
VBE	Veteran Business Enterprise
VETS	Veterans
VPAT	Voluntary Product Accessibility Template (SEWP)
WEST	Web Enterprise Services Technologies
WFF	Wallops Flight Facility
WOSB	Woman-Owned Small Business
WOSDB	Woman-Owned Small Disadvantaged Business

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APPENDIX B – NSSC SAT REQUEST CHECKLIST

Please note that in addition to the required documentation listed below, any documentation deemed mandatory as a part of your Center's PR release strategy for a Simplified Acquisition is still required when sending requests to the NSSC. Internal routing procedures will still occur as if the Procurement was being made at your Center. Once local approvals occur, the PR package will be delivered to NSSC Procurement for processing instead of your Center's Procurement Office.

The NSSC will commence work on requested SAT acquisitions once the requisition package is determined to be complete. A complete requisition package for sent to the NSSC for processing and award MUST include the following:

- **Purchase Request (PR):** Funds are certified if the PR version shows "released" in SAP. If you need assistance on how to code a PR in SAP so that it routes to the NSSC, please see Simplified Acquisition Threshold Customer Guide Appendix C.
- **NF1707:** A completed electronic copy of the NF1707 should be included in the PR package in SAP.
- **Statement of Work (SOW), Item Description and/or Specifications:** A SOW, Item Description, and/or specifications are required and should accurately describe the essential salient characteristics and functions required to meet the Government's minimum needs. If applicable, include part numbers, items numbers, manufacturer details, etc. so buyers can ascertain precise requirements. For services, a SOW should be performance based describing desired outcomes in terms of work accomplished and/or services delivered rather than how the work is to be accomplished \delivered.
- **Completion of a New Acquisition Request in the Simplified Acquisition Customer Portal (SACP) or Completion of the Simplified Acquisition Request Template (SART):** Only one is required. The Simplified Acquisition Threshold Customer Guide includes instructions on how to create a new acquisition request in the SACP or how to complete the SART to be attached in SAP.
- **Market Research:** Provide any research that has been conducted in regard to the requirement such as budgetary quotes, historical purchases, catalog/published pricing, and suggested sources of supply. Market research for SAT purchases is discretionary, but highly encouraged. Completed market research will assist buyers to understand the exact needs of the customer.
- **Recommendation and Determination to Solicit from One Source (RDSS) or Brand Name Justification (If Applicable):** A RDSS or Brand Name Justification is required for any new work that will be procured using other than full and open competition. A RDSS and Brand Name Justification template can be found at <https://www.nssc.nasa.gov/simplifiedacquisition>.
- **Evaluation Criteria (If Applicable):** Most SAT purchases, especially for commercial items, are awarded on the basis of "low price, technically acceptable." However, if an

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award decision should be made on a best value-tradeoff between technical approach, management approach, past performance, etc., then draft evaluation criteria should be included in the PR package.

- **List of Government Furnished Property (If Applicable):** List of any Government property or services that will be provided to the contractor.

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APPENDIX C – ACCESS REQUIREMENTS

Application/System	Purpose	Access Approval and Level
NSSC ServiceNow	<p>ServiceNow is the work tracking tool utilized by the NSSC and will be the primary system used by the SAT team. ServiceNow will be used to track the attributes of each SAT request and to assign work back and forth within the team.</p> <p>ServiceNow will also be used by requestors at the centers to initiate a SAT request. The will do this through NASA Enterprise Service Desk>Order Services>NSSC Simplified Acquisition Customer Portal (SACP). No special access is required to use the NASA Enterprise Service Desk Customer Portal other than must be listed in the id.nasa.gov. directory.</p>	Submit a NAMS request at https://nams.nasa.gov/ for NSSC ServiceNow Access Request to SAT Groups
Share Drive N:\Simplified Acquisitions Threshold (SAT) Purchasing\SAT Acquisitions	Access to the N: drive is needed as the Simplified Acquisition Team folder is located on this drive. This folder acts as the primary repository of general information and documentation for the SAT team that is not shared on the SAT Sharepoint site.	Submit a NAMS ITAR request at https://nams.nasa.gov/ for read and modify
bReady Portal	Access to NASA My Systems such as Financial, Procurement, Procurement Training, Support, and Information Delivery.	Submit a NAMS request at https://nams.nasa.gov/
CMM (Contract Management Module) through the bReady Portal>PRISM	Required to produce the SAT award documents	Submit a NAMS request at https://nams.nasa.gov/

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SAP (Systems, Application & Products in Data Processing)	NASA System that is used to create Purchase Requisitions and apply funds to awards; also used to write certain types of procurements.	Submit a NAMS request at https://nams.nasa.gov/ and also include in PPS NAMS request
FPDS-NG (Federal Procurement Data System – Next Generation)	System that interfaces with USA Spending to provide funds to awards and also includes types of federal procurements by industry size standards, socio-economics, small business awards, etc.	NAMS request submitted within the PPS NAMS request
NASA SEWP	For fixed price awards for approved list of IT products and product based services; with over 3,000,000 contract line items (CLINS) from over 3000 providers are available through the SEWP Contract Holders; also list 120 NASA SEWP Contract holders listed by business type and NAICS Code(s)	Register at http://www.sewp.nasa.gov/

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APPENDIX D – USEFUL INFORMATION

URL Links:

1. NASA ESD Customer Portal - <https://esd.nasa.gov/esd/>
2. NSSC Simplified Acquisition Threshold - <https://www.nssc.nasa.gov/simplifiedacquisition>
3. Federal Acquisition Regulations (FAR) - <https://www.acquisition.gov/?q=browsefar>
4. NASA FAR Supplement - <http://www.hq.nasa.gov/office/procurement/regs/nfstocA.htm>
5. NASA Procurement Notices - <http://www.hq.nasa.gov/office/procurement/regs/pn.htm>
6. NASA Procurement Class Deviations - <http://www.hq.nasa.gov/office/procurement/regs/pcd.htm>
7. NASA SEWP ((Solutions for Enterprise-Wide Procurement) - <http://www.sewp.nasa.gov/>

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APPENDIX E – ORDERING AIRCRAFT PARTS AND USING NAMIS

What is NAMIS?

Researchers at NASA's Johnson Space Center have developed a modular software suite that provides comprehensive, precise, real-time aircraft operations, maintenance, and logistics support. The NASA Aircraft Management Information System (NAMIS) tracks grounding discrepancies, inspections, aircraft configurations, and crew flight status; provides continuous and active control of all assets, including materials, parts, and equipment; and provides data and metrics to support business decisions and financial reporting. Originally developed for the aviation community, it can serve any large organization in need of information management.

Benefits

- Cost savings: The system provides an extraordinary return on investment in terms of cost savings and more efficient operations and business processes.
- Increased efficiency: NAMIS provides Web-based, authoritative, real-time data on aircraft, personnel, and assets.
- Reduced waste: The system's tools manage materials, parts, equipment, and labor hours, thereby reducing waste and further lowering costs.
- Increased productivity: The automated systems eliminate paper-based records, improve productivity and accuracy, and reduce duplication of efforts.
- Scalability: The system is made up of seven distinct software modules, and each one can be implemented separately for a variety of uses.
- Versatility: The NAMIS modules can benefit any large organization or corporation in need of information management software.

How to Order Aircraft Parts from NAMIS

Step 1: Log into NASA Aircraft Management Information System (NAMIS). Each center has its own view of NAMIS airplane parts and information. When a center enters a request into NAMIS, it assigns a Doc #. In NAMIS, enter the Doc #, enter date assigned, assigned buyer, and in the comments section, enter request received and buyer assigned.

Step 2: Request quality documents (q-docs) from Center if the request package contains none.

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Step 3: Perform market research to identify vendor sources:

- a. Partsbase.com (requires subscriptions at URL: <http://www.partsbase.com/landing/default.asp>) or;
- b. IISmart.com (requires subscriptions at URL: <http://www.iismart.com>).

Step 4: Review quotes to ensure they state that they can meet required quality requirements set in the provided quality documents. If the quotes state that they cannot comply with the provided quality documents the reviewer can disqualify them as they not technically acceptable. The vendors should understand the information provided in the quality documents.

Note: Most aircraft parts will require an 8130 – Airworthiness Approval Tag. For documents over 5 years old, reach out to the quality department.

Step 5: Check Government-Industry Data Exchange Program (GIDEP) found at URL: <http://www.gidep.org>. GIDEP acts as a cooperative activity between government and industry participants seeking to reduce or eliminate expenditures of resources by sharing technical information essential during research, design, development, production and operational phases of the life cycle of systems, facilities and equipment.

Step 6: Check the “Qualified Supplier List” located in SAT SharePoint site for the Center if the request is for:

- a. AFRC Specific;
- b. When the vendor row is “green” the vendor is approved; however, it is only approved for parts sited in the scope. We cannot award to a vendor that is approved but the specific part type is not listed in the scope. Contact AFRC quality team to see if their scope of approval can be adjusted, if there is not a second vendor with the required part;
- c. When the vendor row is “blue” the vendor is inactive. Meaning that there have been no purchases to the vendor for 6 months. Vendor will need to be reactivated before a purchase can be made to them. They can only be reactivated by the AFRC quality team;
- d. When the vendor row is “red” the vendor is not approved. If the vendor is not approved then go to the next vendor. If the not approved vendor is the only vendor that has the required parts, then complete a non-approved supplier waiver and submit it to the AFRC quality team for review.

Note: Update the comment section in NAMIS throughout the process.

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Step 7: Update NAMIS after award:

- a. Due In – Date of order;
- b. New purchase request;
- c. Vendor ID is created by the quality department. Cannot create a purchase request in NAMIS if a vendor is deactivate;
- d. Enter Vendor price/unit price. Do not include shipping or extra fees;
- e. Include due date.

Aircraft Parts – Definitions

1) **Aircraft Part** - An aircraft part is an article or component approved for installation on an aircraft. It includes any part ordered for replacing, upgrading, or modifying on an aircraft. Any consumables used to create or repair the above mentioned parts, including, but not limited to, adhesives, fasteners, special tools, raw stock (metal or composite based), wiring, electrical, electronic, electromechanical components, are also considered aircraft parts. All aircraft parts must be ordered through NAMIS in order to allow proper tracking. This includes both standard and non-standard parts.

A standard part is a part or material that conforms to an established industry or U.S. Government-*published* specification. A part is no longer considered “standard” if it is used in a critical application that imposes qualification or quality control requirements beyond the standard specification. Nonstandard parts have specifications known only to the manufacturer and are not published. Approval of nonstandard parts is done by issued Technical Standard Orders (TSO).

2) **Aircraft on Ground (AOG)** – An Aircraft on Ground (AOG) refers to an aircraft that cannot fly due to lack of a flight item, usually an aircraft part, and the aircraft’s status will cause significant schedule delays. AOG status is assigned to a flight item if (i) the aircraft’s flight status jeopardizes a mission critical flight or (ii) all maintenance on that aircraft is at a standstill until said part is received. AOG status (Urgent Box in NAMIS Requisition tab) is the highest priority that can be assigned to a flight item being purchased. Because of the schedule disruptions and higher costs associated with an AOG order, the use of the AOG status should be used with care.

3) **Flight Item –**

- a) Any hardware or software installed on an air vehicle. This includes aircraft parts and items fabricated for installation on an aircraft (e.g., pods, booms, optics).
- b) Any ground-based equipment (hardware or software) whose faulty operation or failure could result in damage to an aircraft. This may include ground support equipment (GSE), mobile operating facility (MOF), ground control station (GCS), and simulations.

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4) **Flight Safety Critical Aircraft Part** – According to 41 CFR 102-36.40, a Flight Safety Critical Aircraft Part is any aircraft part, assembly, or installation containing a critical characteristic whose failure, malfunction, or absence could cause a catastrophic failure resulting in engine shut-down or loss or serious damage to the aircraft resulting in an unsafe condition. These include navigation systems, communication systems, traffic collision avoidance systems, etc.

NAMIS CUSTOMER SUPPORT

The Help Desk provides support on all issues, from configuration changes to data loading to questions related to the NAMIS modules. They work with users on an interactive basis for the most immediate response according to the urgency of the reported problem.

Contact the NAMIS Help Desk 24/7 at 281-244-8888 or via e-mail at jsc-namis@mail.nasa.gov.

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APPENDIX F – MODIFICATION MATRIX

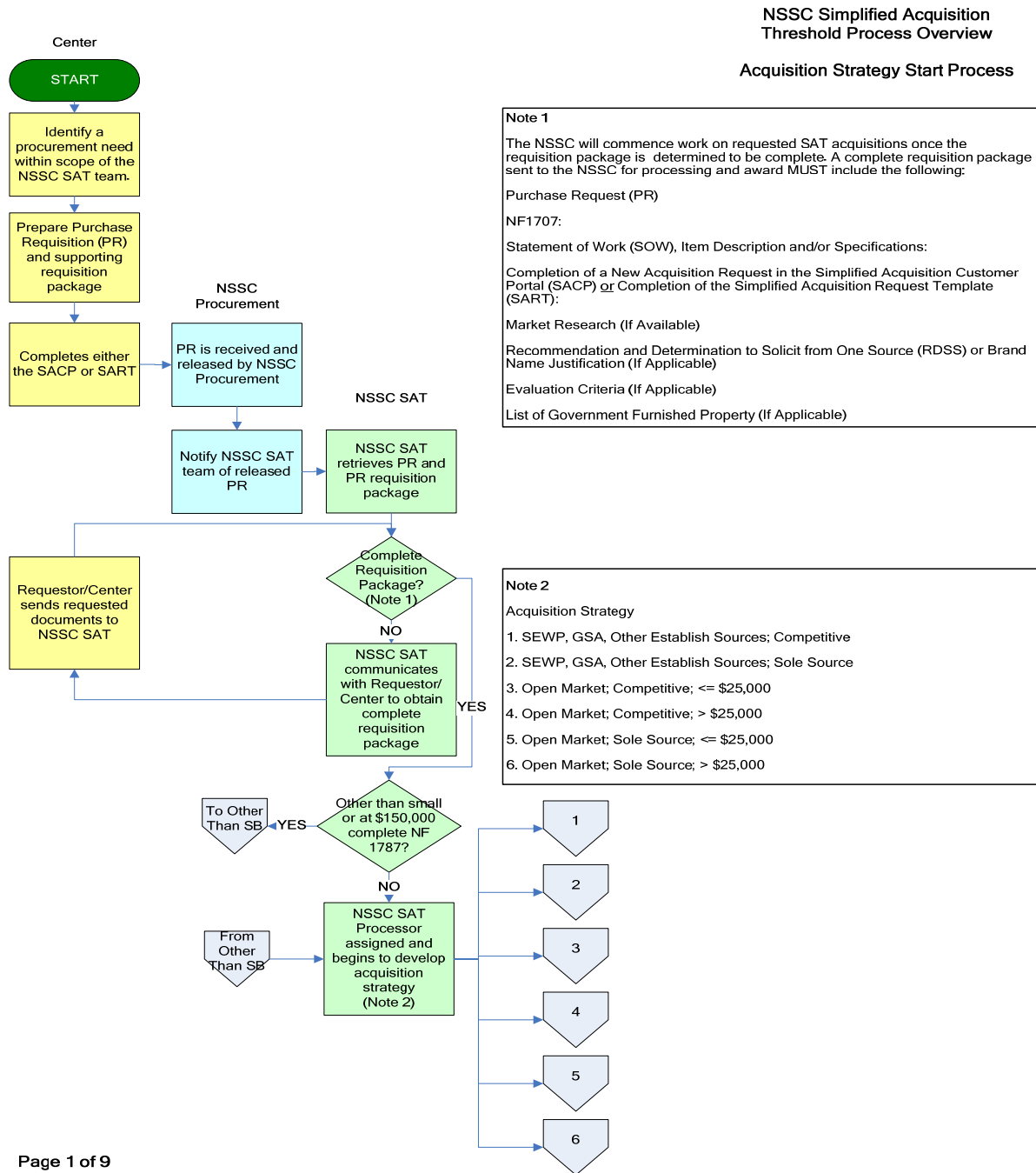
Modification	Bilateral or Unilateral	Technical End User Concurrence Needed?	Required Extra Mod Attachments	Required File Supporting Documentation	Authority (SF30 Block 13)
No-Cost Extension (POP or Deliverable)	Bilateral	Yes	n/a	Vendor consideration for extension	C. Mutual Agreement of Both Parties
Payment and Delivery Schedule Change	Bilateral	Yes	n/a		C. Mutual Agreement of Both Parties
Statement of Work Change	Bilateral	Yes	n/a	New SOW, email confirmation of price impact	C. Mutual Agreement of Both Parties
Adding/Removing Clauses	Bilateral	No	n/a		C. Mutual Agreement of Both Parties
Exercise an Option	Bilateral	Yes	n/a		D. FAR 52.217-9, Option To Extend The Term Of The Contract
De-Obligation/ Re-Obligation	Bilateral	Yes	n/a	Deob Form	D. FAR 52.212-4(c) – Changes (commercial) D. FAR 52.243-1 (noncommercial)
In-Place Delivery	Bilateral	Yes	Distro List (if new delegation)	NF1430, NF1430C, NF1431	C. 52.245-1 Government Property (APR 2012)
Property Transfer	Bilateral	Yes	Distro List (if new delegation)	NF1430, NF1430C, NF1431, Shipping Doc(s)	C. 52.245-1 Government Property (APR 2012)
Adding Gov't Furnished Property	Bilateral	Yes	Distro List (if new delegation)	NF1430, NF1430C, NF1431, Shipping Doc(s)	C. 52.245-1 Government Property (APR 2012)

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Stop-Work Order	Unilateral	No	n/a	Signed Notice to Vendor	C. 52.242-15 Stop-Work Order (AUG 1989)
Cancellation/Termination	Unilateral	No	n/a	Any documentation regarding termination (show cause, notices, correspondence)	D. 52.212-4 (commercial Items) D. 52.213-4 (Noncommercial)
PPS Correction / Internal Mod	Unilateral	No	n/a		B. "X"

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APPENDIX G – PROCESS FLOWS



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NSSC Simplified Acquisition Threshold Process Overview

NF 1787 – Other Than Small or at \$150,000

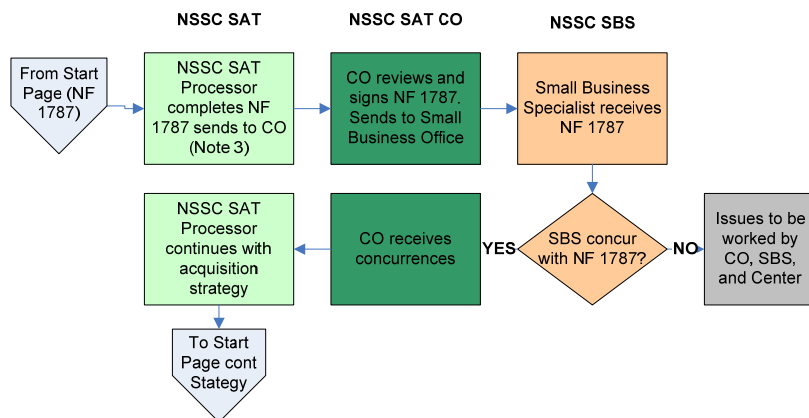
Note 3

NF 1787 is required for awards at \$150,000 or awards not set aside for Small Business. NF 1787 located at <http://nef.nasa.gov>

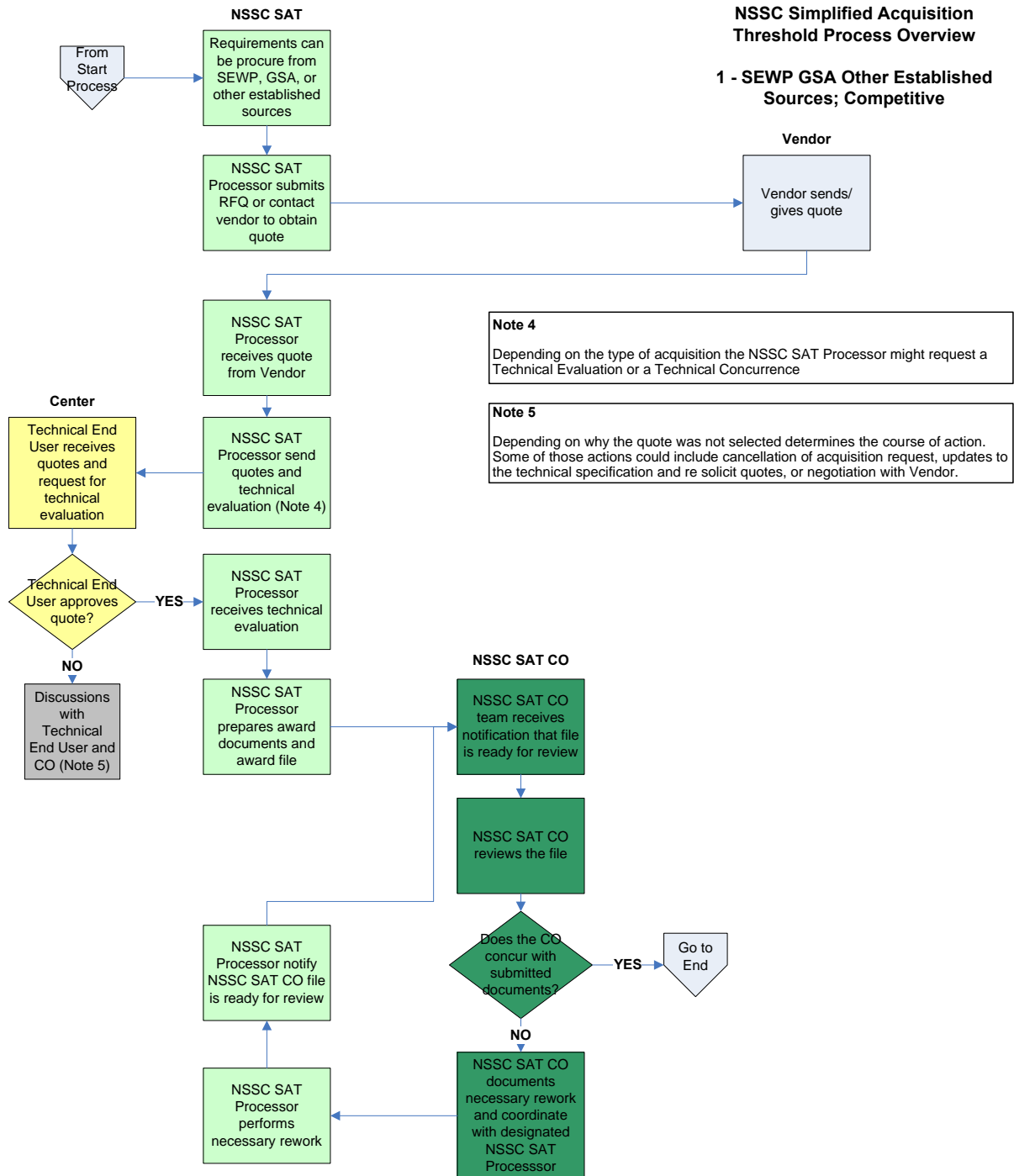
Processor should complete the NF 1787 as required and send to the Center's assigned Contracting Officer POC or other designated CO.

Consult the Small Business Coordination NASA Shared Services Center Work Instruction for additional guidance.

SAT will be set aside for Small Business unless the Contracting Officer determines there is not a reasonable expectation of obtaining offers from two or more responsible small business concerns that are competitive in terms of market prices, quality, and delivery.



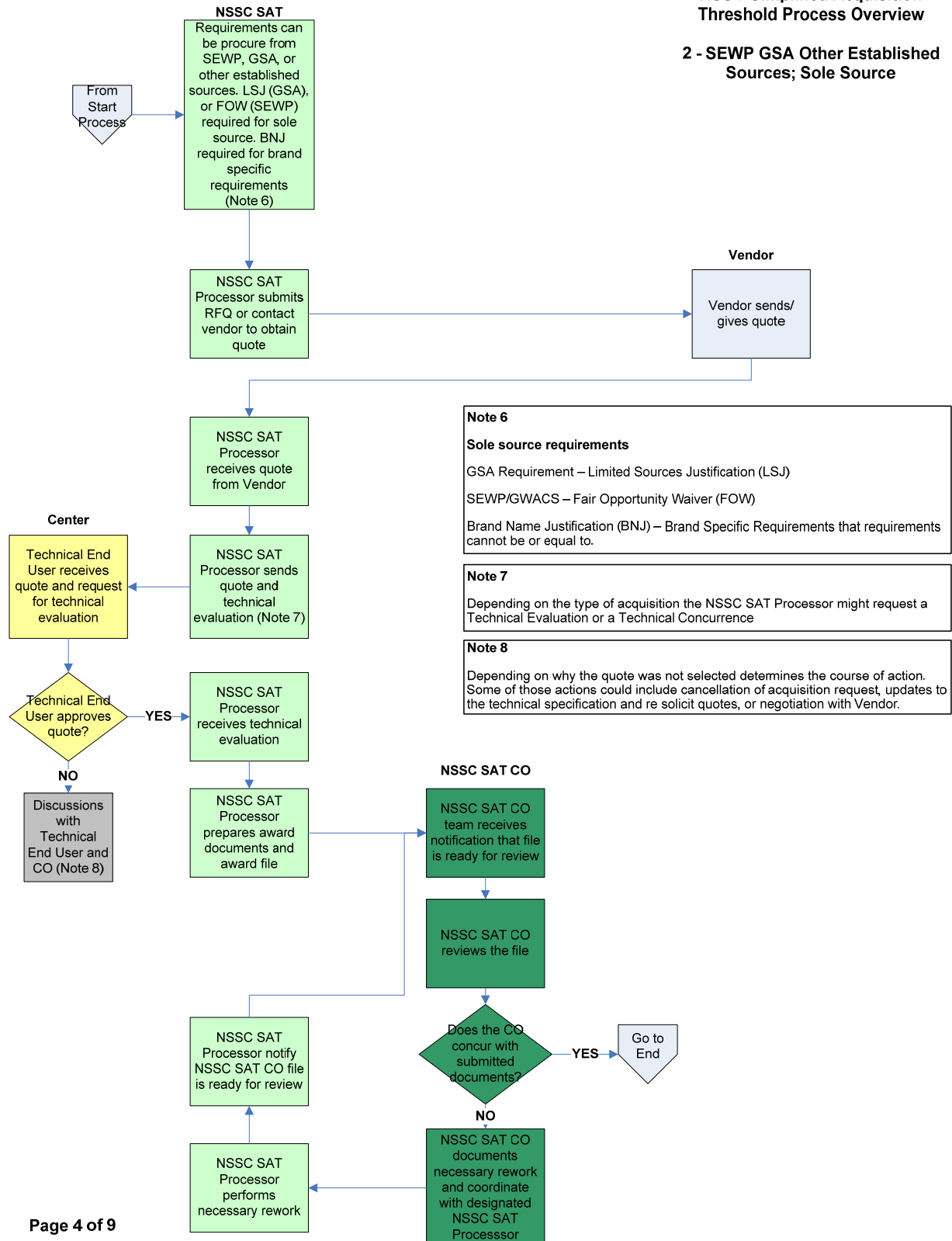
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**NSSC Simplified Acquisition
Threshold Process Overview**

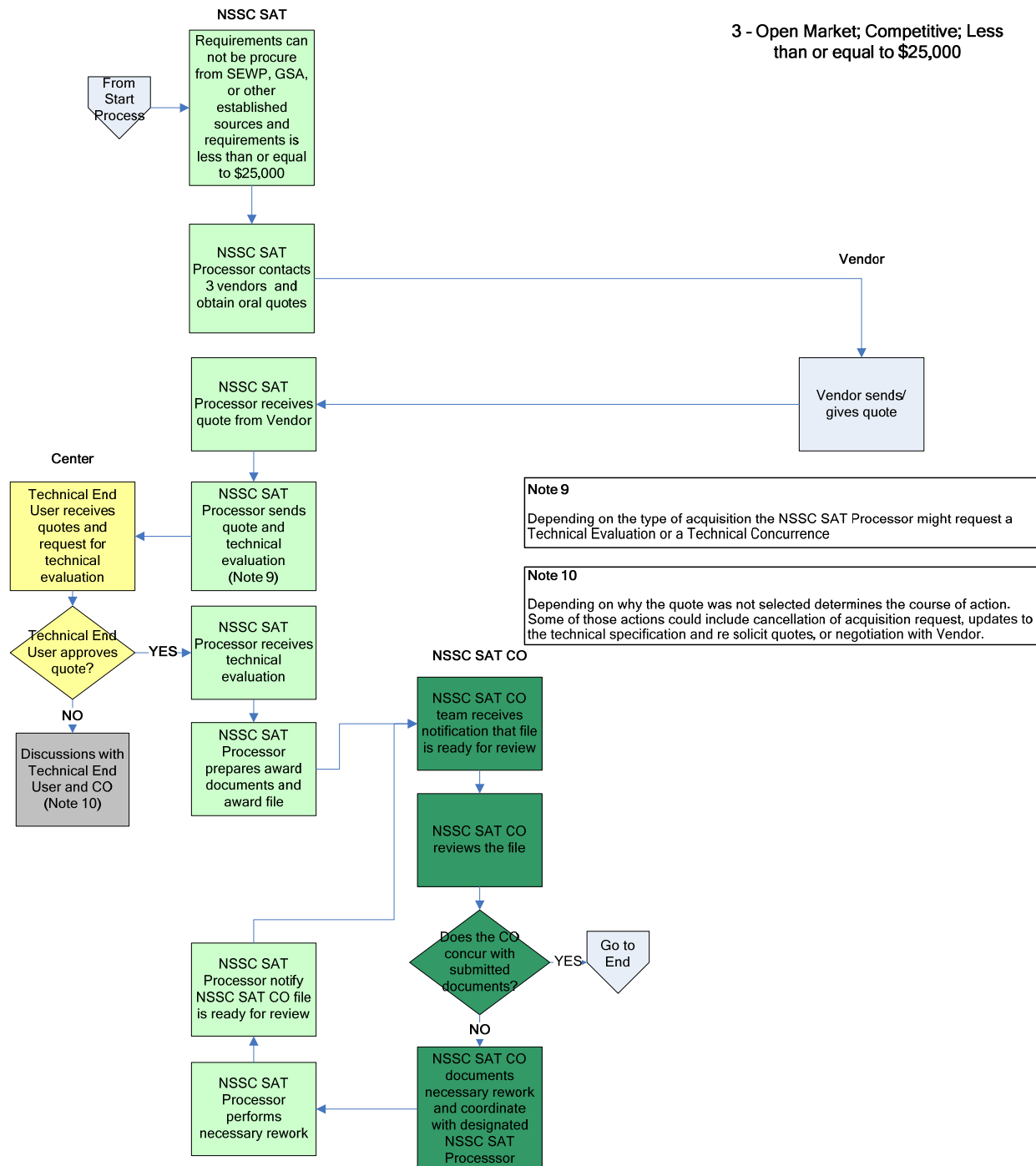
**2 - SEWP GSA Other Established
Sources; Sole Source**



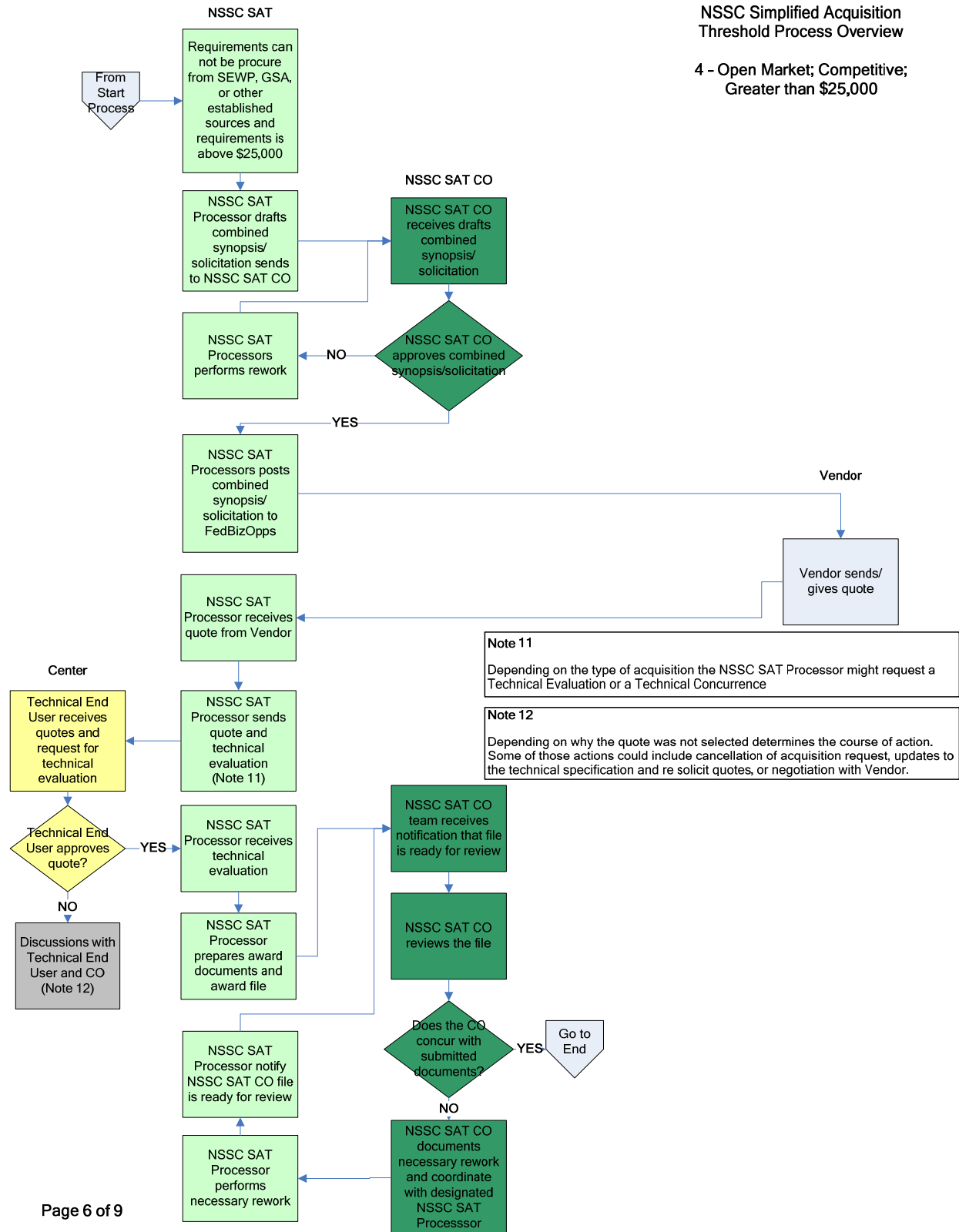
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NSSC Simplified Acquisition Threshold Process Overview

3 - Open Market; Competitive; Less than or equal to \$25,000



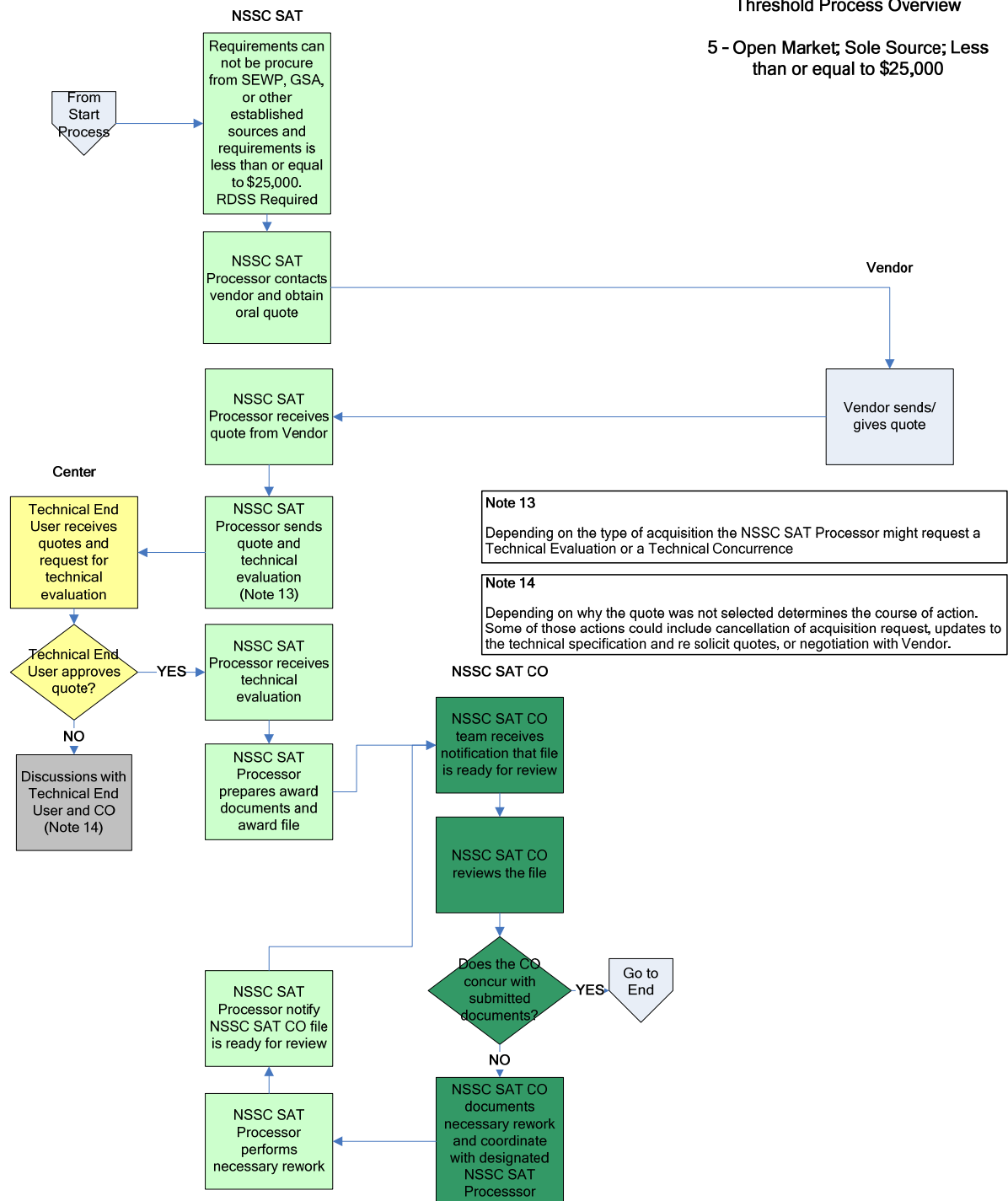
NSSC Process Work Instruction	NSPWI-5113-0001	Basic
	Number	
	Effective Date:	01/12/2018
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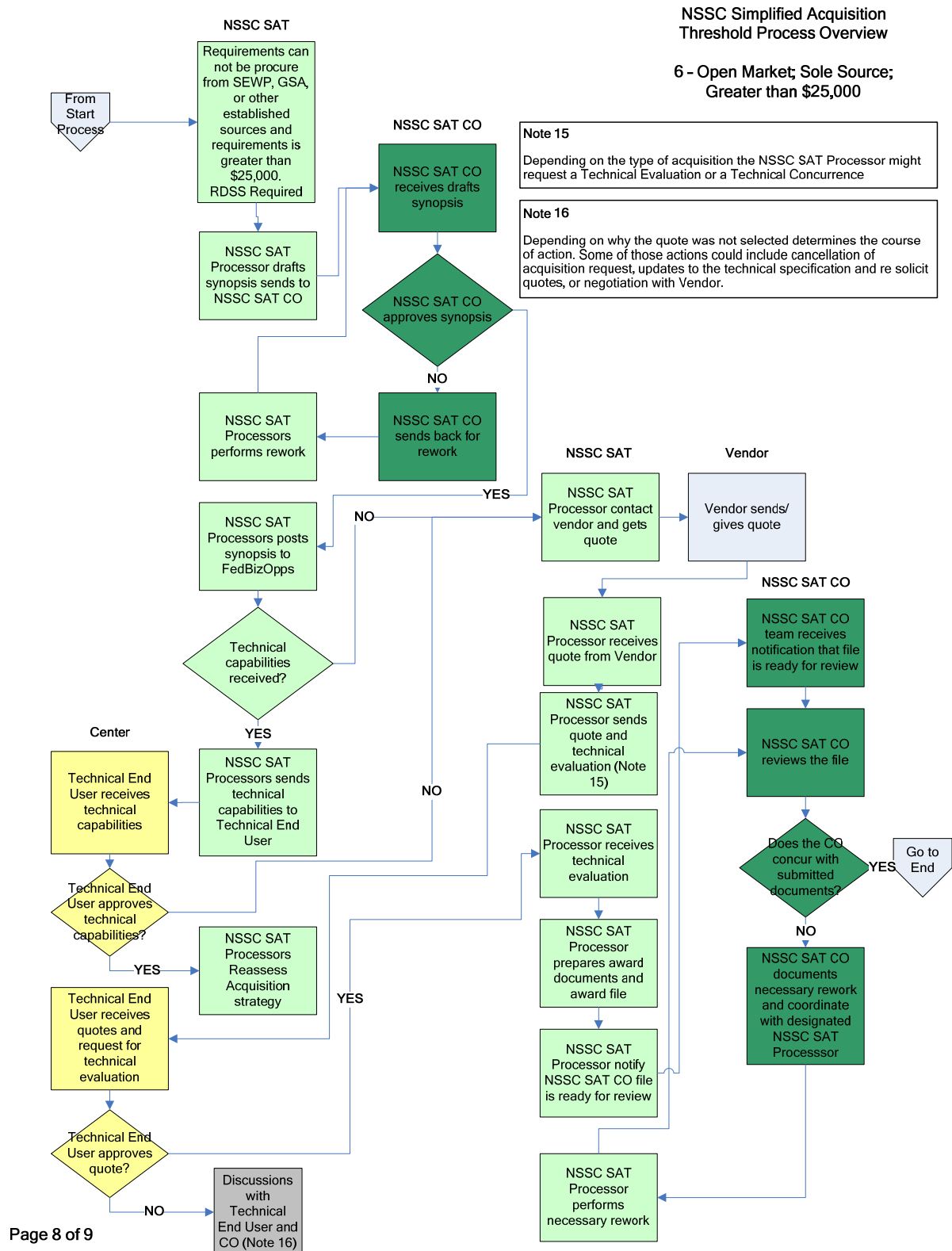
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NSSC Simplified Acquisition Threshold Process Overview

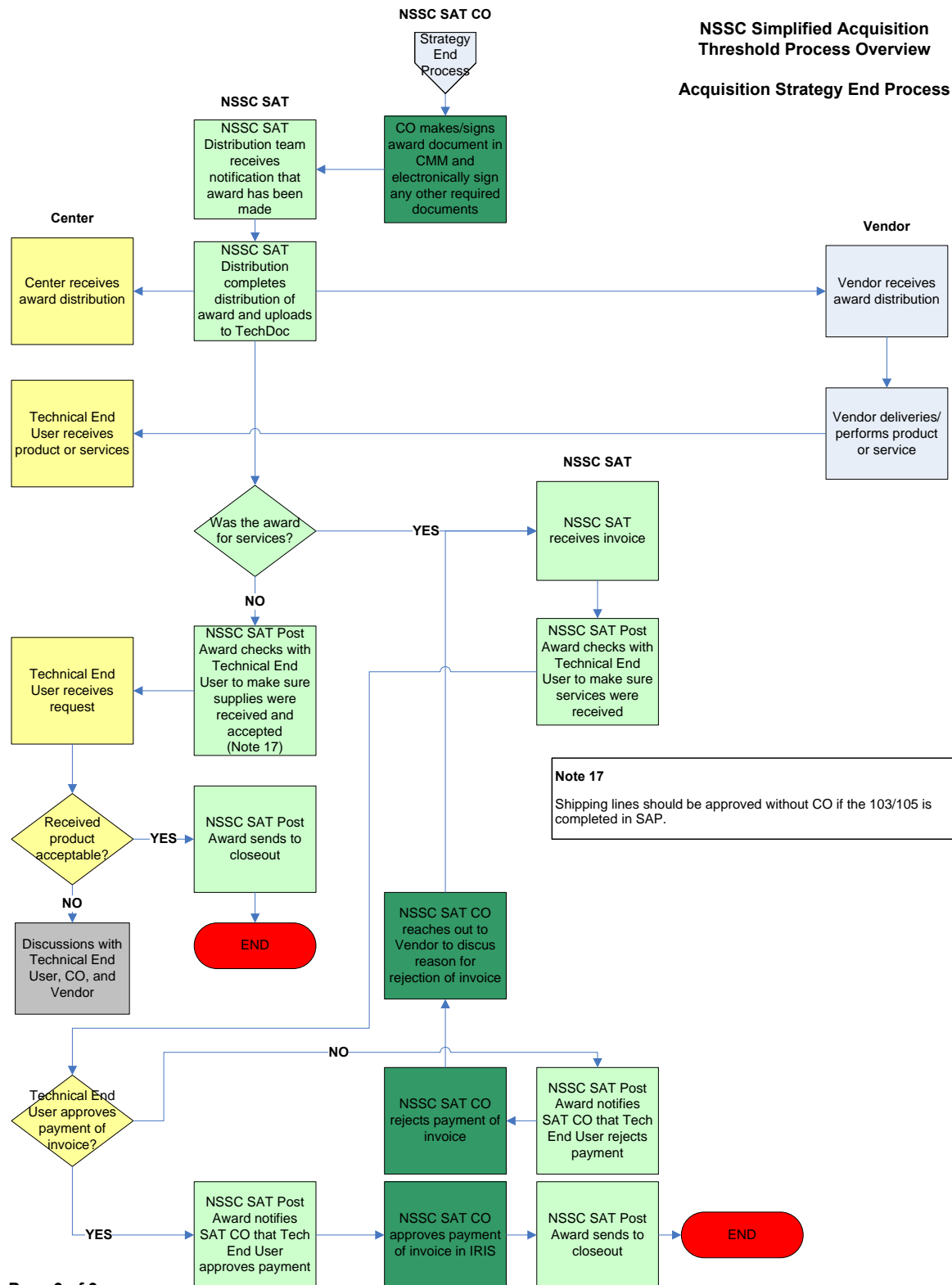
5 - Open Market; Sole Source; Less than or equal to \$25,000



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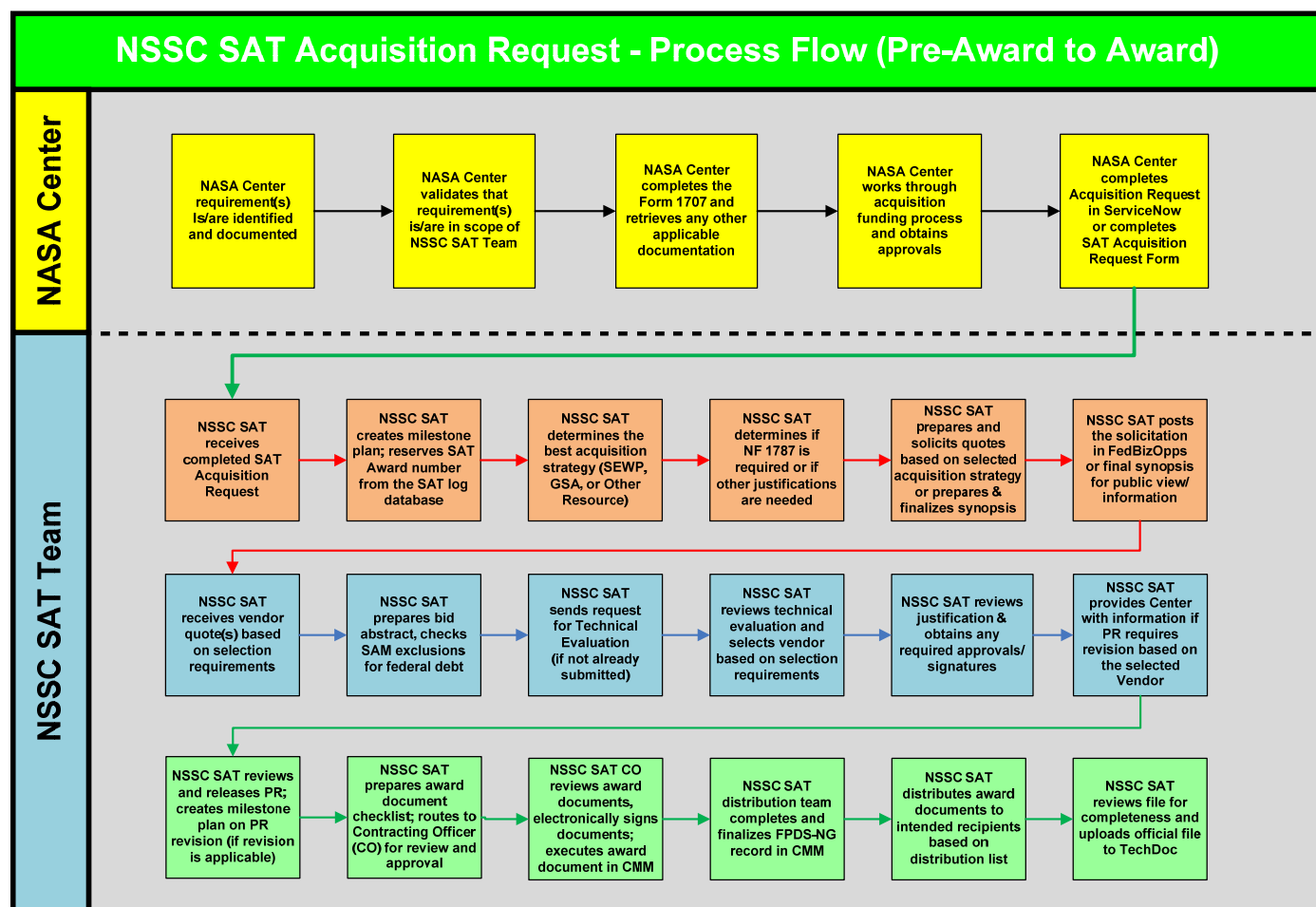


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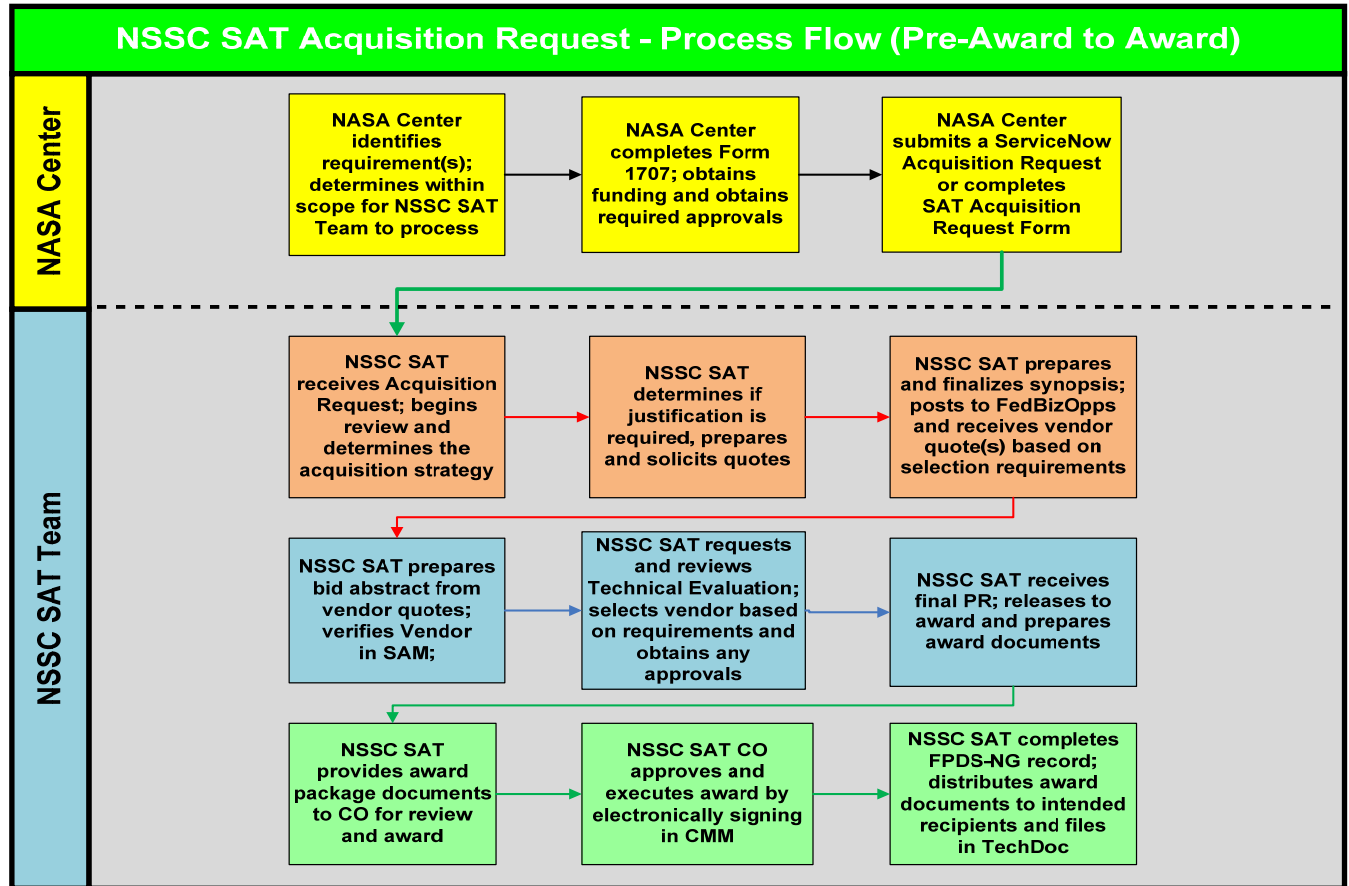


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APPENDIX H – SATPC TICKET PROCESS FLOWS

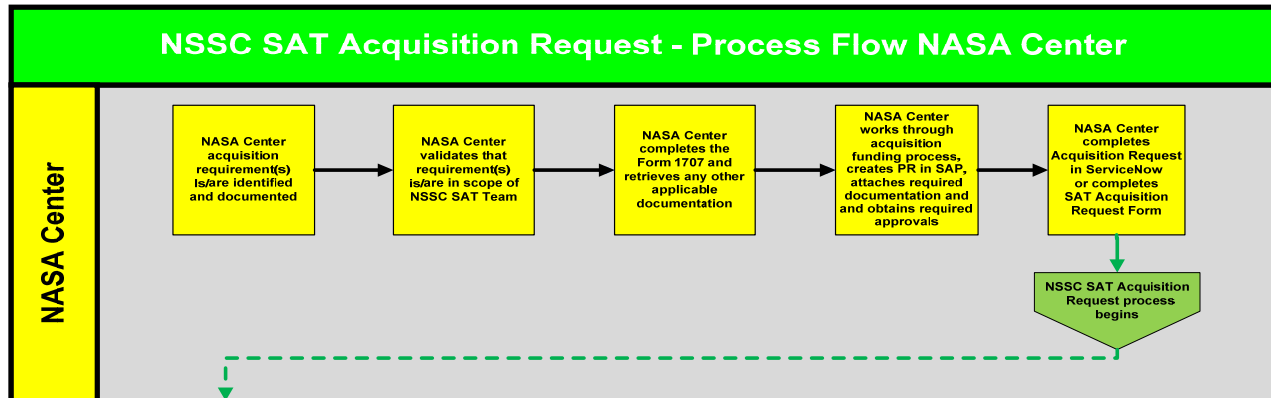


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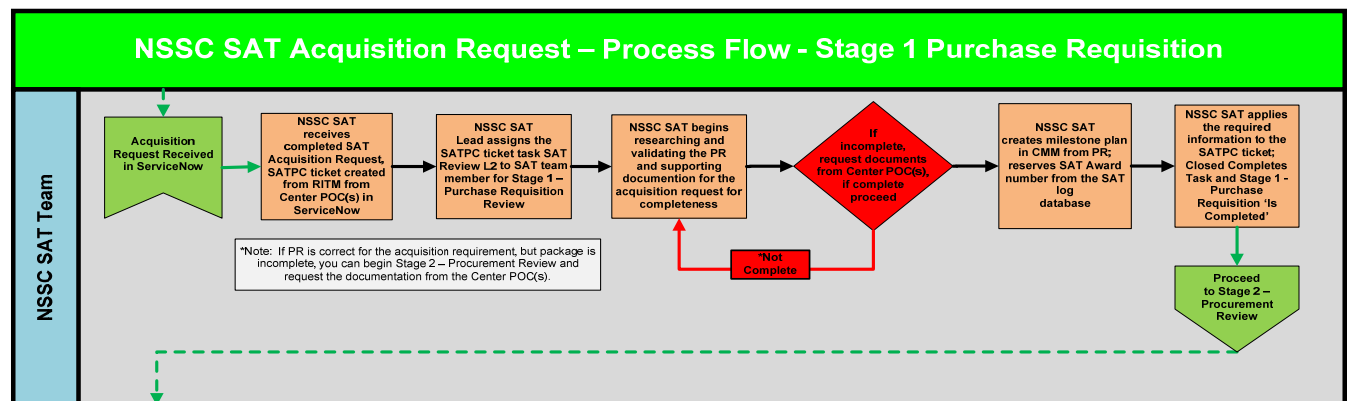
NASA Center – SAT Acquisition Request Process Flow



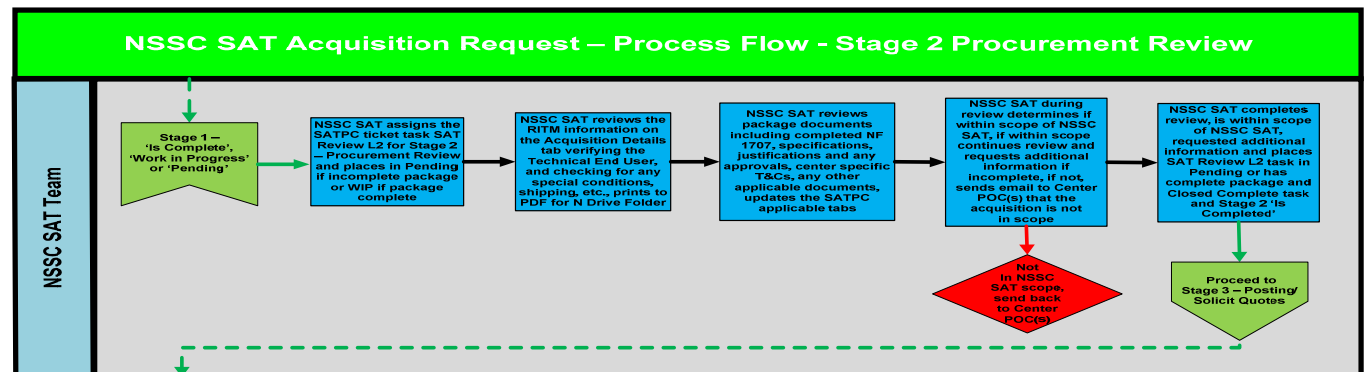
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NSSC SAT Team Internal Process Flow from Pre-Award to Award

Stage 1 – Purchase Requisition

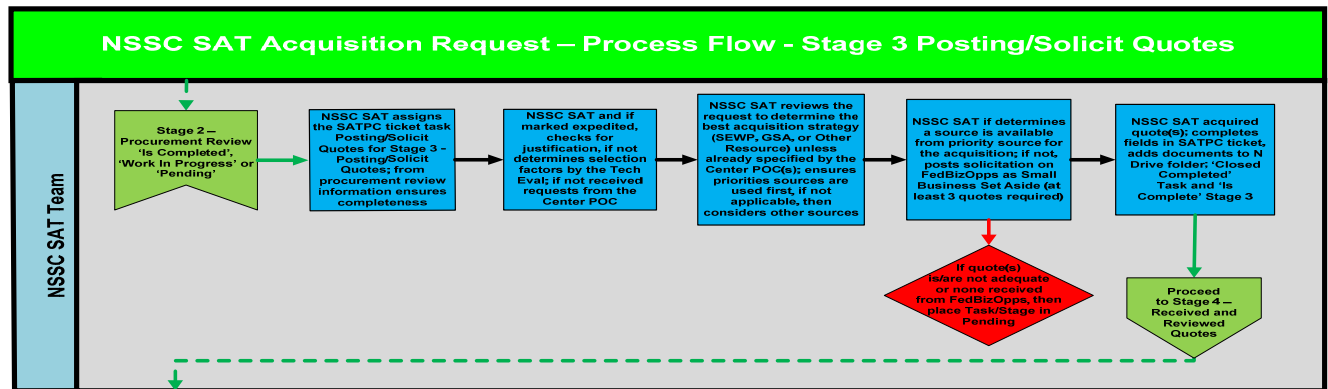


Stage 2 – Procurement Review

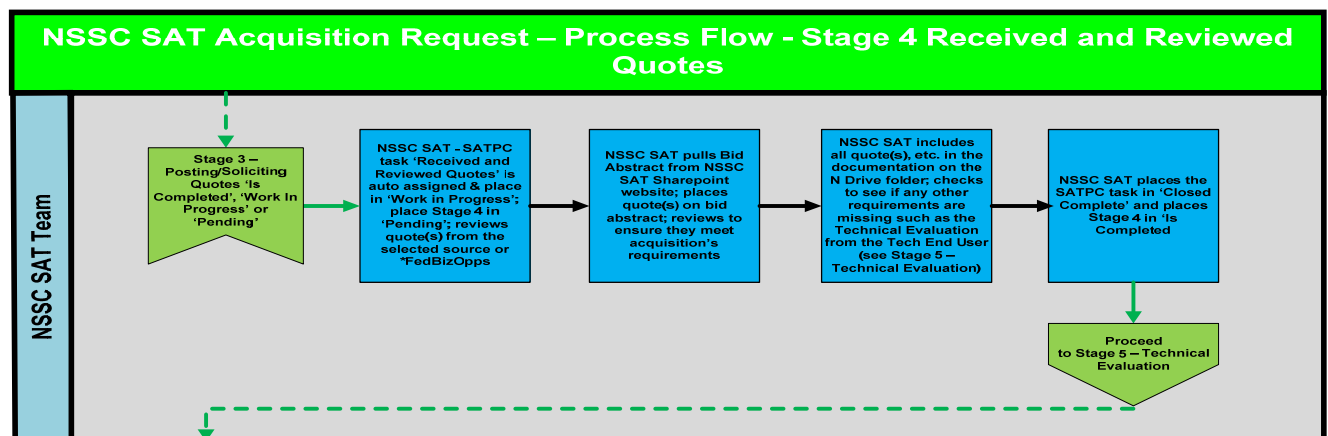


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Stage 3 – Posting/Solicit Quotes

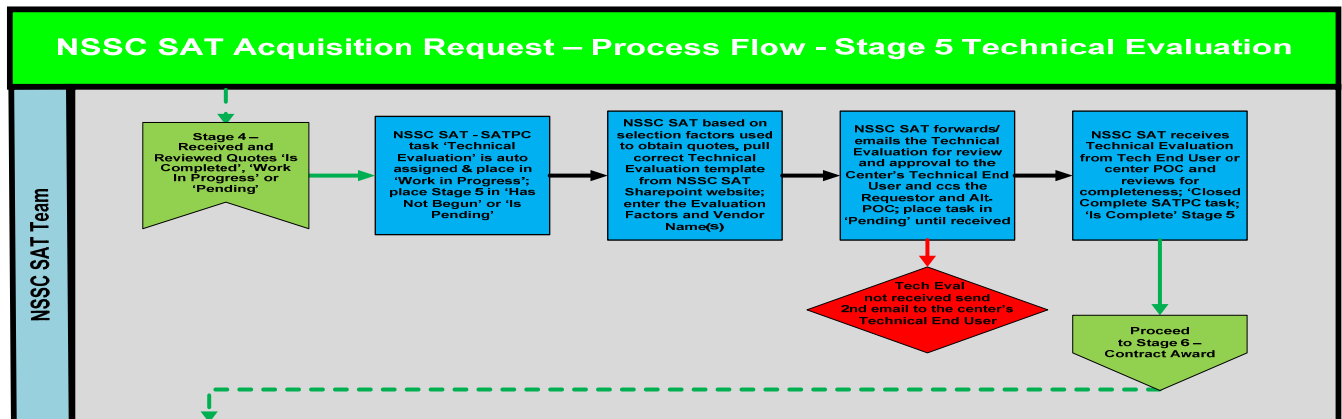


Stage 4 – Received and Reviewed Quotes

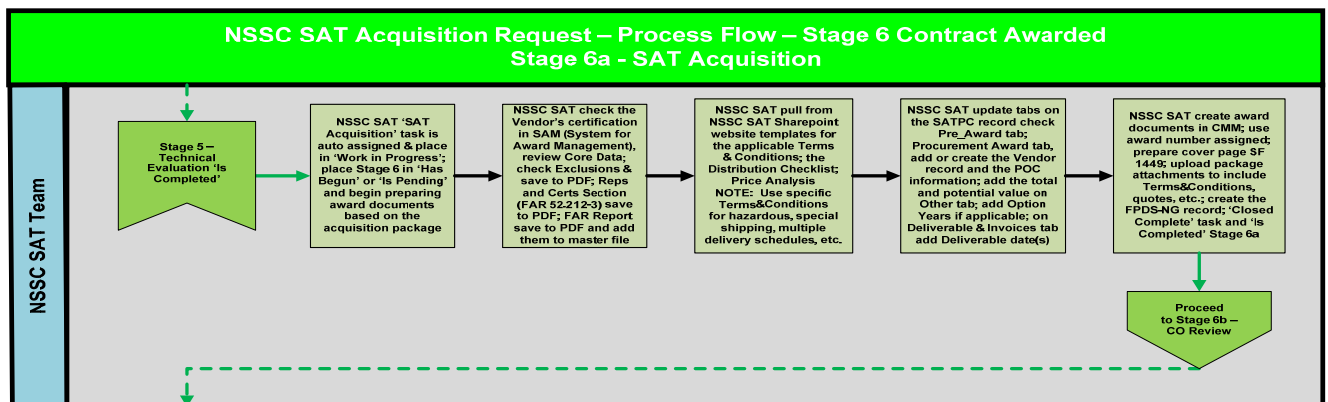


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Stage 5 – Technical Evaluation

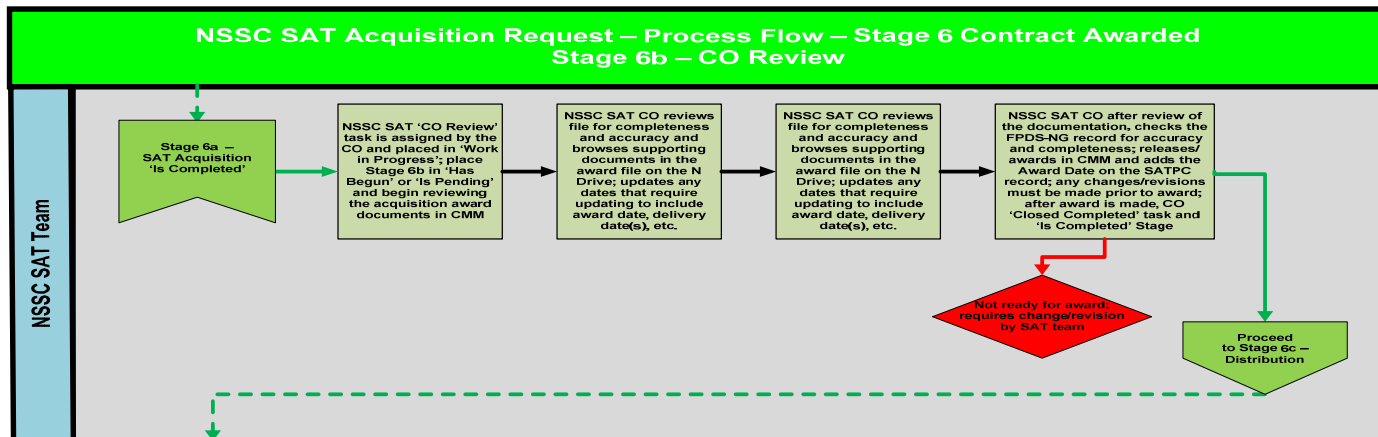


Stage 6 – Contract Award: 6a – SAT Acquisition

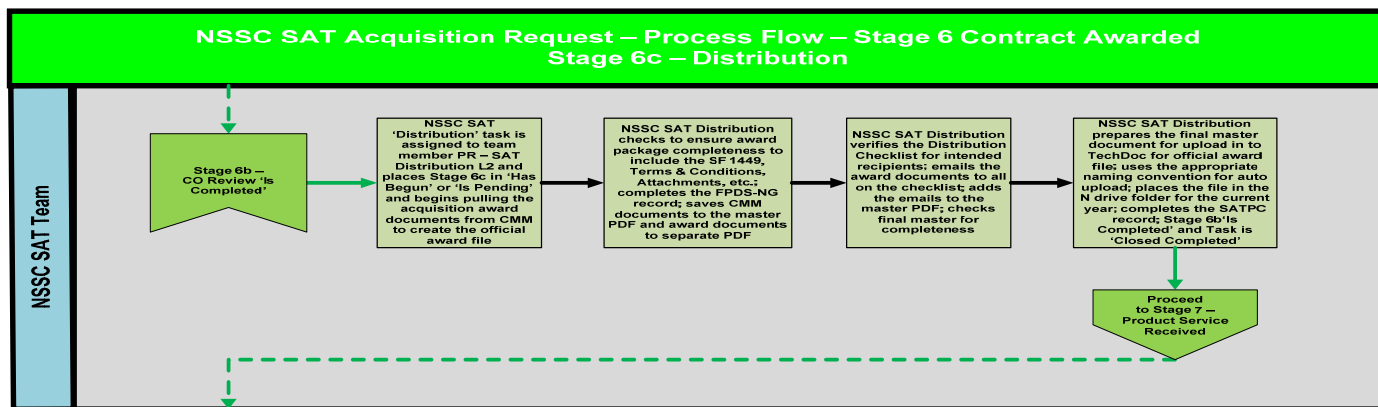


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Stage 6 – Contract Award: 6b – CO Review

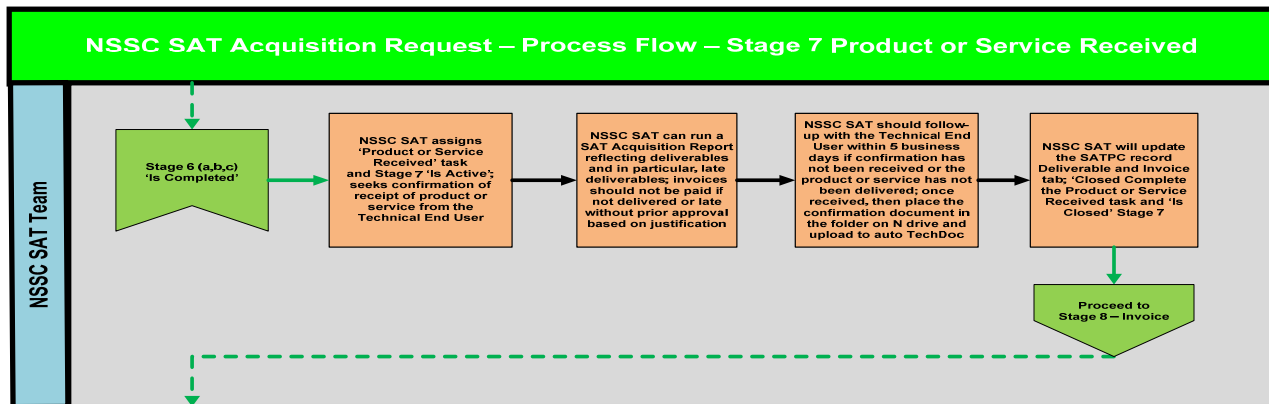


Stage 6 – Contract Award: 6c – Distribution

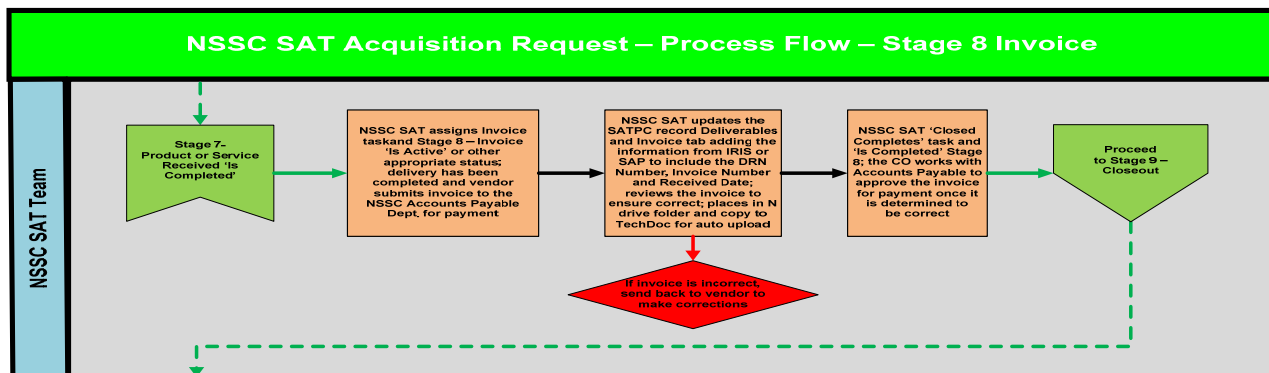


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Stage 7 – Product or Service Received



Stage 8 – Invoice



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Stage 9 – Closeout

