

ROSS TIPS

ROSS TIP: #26
Date: July 21, 2003
Subject: Entering Blanket Purchase Agreements (BPA's), Emergency Equipment Rental Agreements (EERA's), and Contracts into ROSS

The purpose of this document is to provide an example of three types of procurement documents, how their information is entered in to ROSS, and how the screens will look in ROSS after the information has been input.

NOTE:

- ◆ The sample procurement documents included will provide an idea of how to enter the information in to ROSS.
- ◆ The Organization used for these examples is "Sample Organization"
- ◆ The person entering the procurement document information must have a Data Administrator role in ROSS.
- ◆ Refer to ROSS Tip #12 to determine if a vendor's resources need to be entered in ROSS. This document assumes you have determined that the resources should be entered in ROSS (for the EERA and Contract examples).

Following is a table that may be of assistance when trying to determine which office could enter what type(s) of Contracts.

Contract Type	NICC	GACC	Local Dispatch Office
Exclusive Use	Normally	X	Occasionally
Call When Needed	X	X	X
Purchase Agreement			Normally ¹

¹ Enters Organization (Vendor) and Resource Item(s) when the contracting office is in their area. Only enters Resources they dispatch when the Contract has been entered at the National or GACC level. The Contract cannot be entered by more than one office.

BPA's:

Following is a sample Blanket Purchase Agreement (BPA) (first sections only) for a Service item (meals) followed by a step-by-step description of how to input the information in to ROSS. In this example, the "Sample Organization" entered the information in to ROSS. ROSS Tip #12 is a great reference.

BPA for meals

BUREAU OF LAND MANAGEMENT
BLANKET PURCHASE AGREEMENT
MEALS

Vendor Name: Super C Restaurant
Address: 111 W. Front Street
City/State/Zip: Anytown, CO 80400

AGREEMENT NUMBER: 56-03R2-2-1234
(Show on all invoices)

Contact: Jane Smith

Phone Number: 303-123-4567

Tax Identification Number: 01-2345678

(Must be included)

DESCRIPTION OF AGREEMENT

This Blanket Purchase Agreement (BPA) is established to provide for food and lodging services in accordance with the procedures described herein.

All personnel using this agreement for meals will have meal slips issued by the Rocky Mountain Regional Fire Cache, (see Restaurant Authorization form attached). These slips will have an authorized signature of a person listed in paragraph 5. The meals/lodging provider will have to include these original slips with payment request. See paragraph 6.

SIGNATURES

Manager (type or print):
Jennifer Lopez

Contracting Officer (type or print):
Susan Brown

Signatures:
/s/ Jennifer Lopez
Phone Number: 303-123-4567

Signatures:
/s/ Susan Brown
Phone Number: 303-987-6543

VENDOR SELF CERTIFICATION (MUST CHECK ONE):

()Small business ()Small Disadvantaged Business (X)Woman-Owned ()Large Business

2. EXTENT OF OBLIGATION

The government shall be obligated only to the extent of authorized purchases actually made under this BPA.

3. PRICING

Prices to the Government shall be as low or lower than those charged the vendor's most favored customers for comparable quantities under similar terms and conditions, in addition to any discounts for prompt payment. Under Part (1) Section 39-26-114, CRS 1973 as amended, all sales to the United States Government are exempt from taxation. Costs of each meal shall not exceed the following prices. These prices are to include nonalcoholic beverages.

Breakfast	\$ 8.00
Lunch	\$ 8.00
Dinner	\$18.00

4. PURCHASE LIMITATIONS

No single order against this BPA shall exceed \$2,500 without prior approval of the Contracting Officer.

5. INDIVIDUALS AUTHORIZED TO ORDER UNDER THIS AGREEMENT

6. INVOICES

All request for payments provided under this BPA shall be by invoice and contain the following information:

- (1) Name of Supplier/Vendor
- (2) BPA number
- (3) Date of Purchase
- (4) Itemized list of supplies or services furnished.
- (5) Quantity, unit price, and extension of each item, less applicable discounts.
- (6) Legible signature of Government employee receiving supplies or services.

Invoices shall be submitted to the following address for payment:

Bureau of Land Management
Attention: Susan Brown
1345 Youngfield
Lakewood, CO 80401
Phone number: 303-987-6543

7. BPA EFFECTIVE PERIOD:

This BPA is in effect from 8/1/02 through 7/31/04.

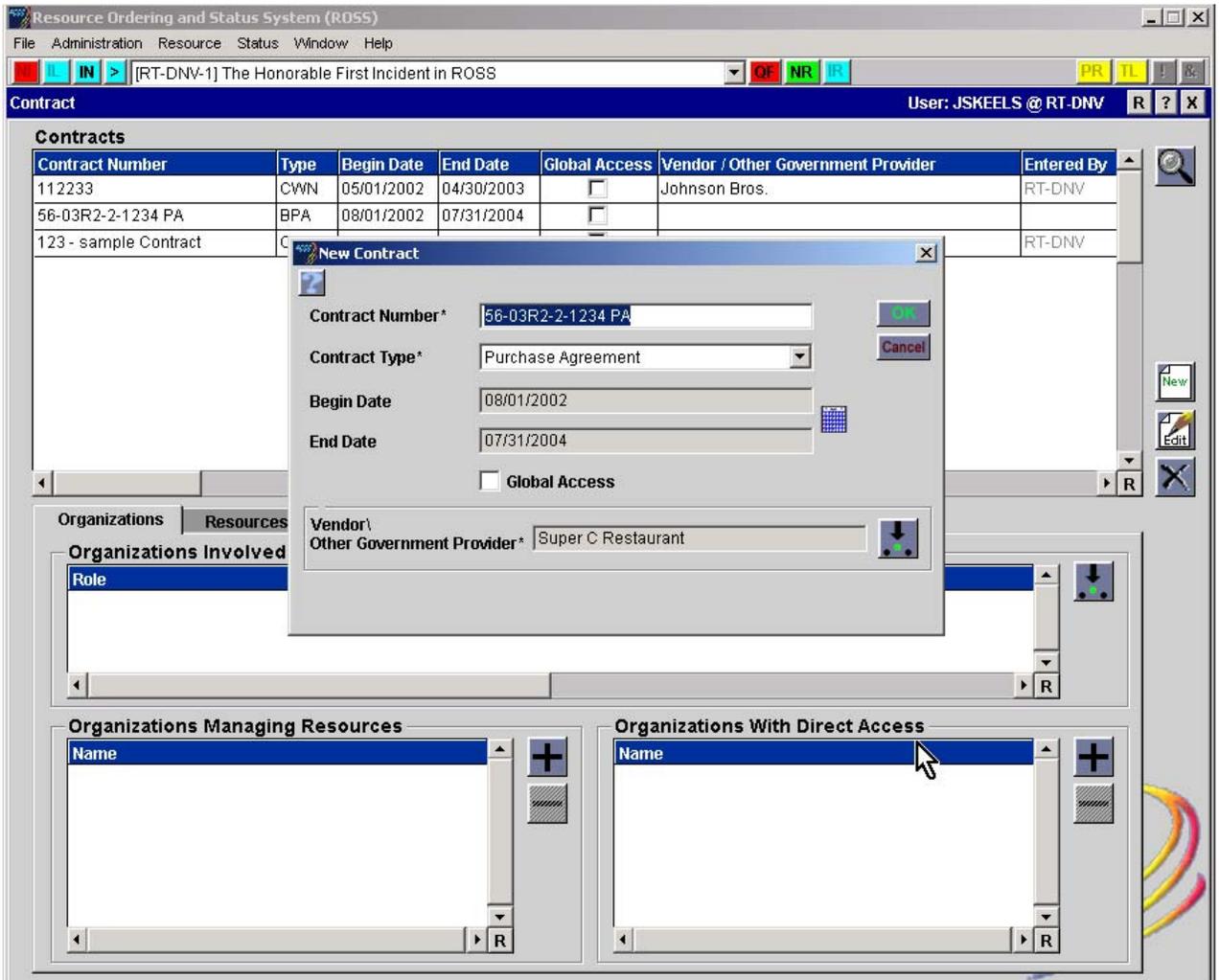
Steps to enter this information in to ROSS:

NOTE: If you are sure the Organization (Vendor) has been entered in ROSS, proceed to step 2.

1. If you are not sure if the Organization (vendor) is in ROSS, open the Organization screen in ROSS. Click on the appropriate type (Vendor). Conduct a search to find the Organization. It is a good idea to use wildcards (*) since you can't be sure exactly how the vendor name was entered. If you are positive that the Organization is not there, click the "?," or "Help," refer to the User's Guide, and/or read ROSS Tips #3-9 if you need assistance entering the Organization.

After checking all of those resources and you still have questions, call the ROSS Helpdesk (866-224-7677).

2. Open the Contract screen in ROSS.
3. In the Contract screen, click on **New** (Contract).
4. Enter the Contract Number.
5. Enter the Contract Type (Purchase Agreement—PA—for this resource). See ROSS Tip #12 for more information on Contract Type.
6. Enter the **Begin Date** and **End Date** for the Effective Dates of the PA.
7. Pick **Vendor/Provider** for the contract by searching for Super C Restaurant.
8. Click **OK**. This is how the dialog box (New Contract) should look:



9. Click **OK**.
10. Ensure the **Contracting Office** and **Managing Dispatch** office are correct. Remember, the Contracting Office is the Government (Non-Dispatch) office where the responsible contracting officer is located. If necessary, click on the

appropriate line, click the *Pick* icon, *Search* for the right organization, click on it to select it and click *OK*.

11. Add Organizations under the Organization panel to show dispatch offices that can have direct access to the contracted resources or who can add, delete, or modify resources under this contract as shown below.

The screenshot displays the ROSS interface with the following components:

- Contracts Table:**

Contract Number	Type	Begin Date	End Date	Global Access	Vendor / Government (Non-Dispatch) Provider	Entered By
112233	CWN	05/01/2002	04/30/2003	<input type="checkbox"/>	Johnson Bros.	RT-DNV
123 - sample Contract	CWN	07/01/2002	07/31/2003	<input type="checkbox"/>	ABC Engines	RT-DNV
56-03R2-2-1234 PA	BPA	08/01/2002	07/31/2004	<input type="checkbox"/>	Super C Restaurant	RT-DNV
- Organizations Involved Table:**

Role	Organization
Contracting Office	Bureau of Land Management Colorado State Office
Managing Dispatch	Rocky Mountain Area Coordination Center
- Organizations Managing Items:** An empty list box with a "+" button for adding organizations.
- Organizations With Direct Access:**
 - Rocky Mountain Area Coordination Center
 - Sample Organization

Annotations in the image provide the following information:

- A callout box points to the "Organizations Involved" table: "Contracting Office and Managing Dispatch Offices are identified here."
- A callout box points to the "Organizations Managing Items" list: "Resources can be added, deleted, and/or modified by the dispatch offices displayed here. Click on the '+' if organizations should be added."
- A callout box points to the "Organizations With Direct Access" list: "Organizations displayed here are dispatch offices with direct access to the contracted resources. They may request and assign resources from the contract. Click on the '+' if organizations should be added."

This completes the data entry for the PA. As you will have noted: no Resources were added to this Contract/PA. In this example, the "Sample Organization" entered the information in to ROSS. Refer to ROSS Tip #12 for additional information.

EERA's

Following is a sample EERA for a Non-Service item followed by a step-by-step description of how to input the information in to ROSS.

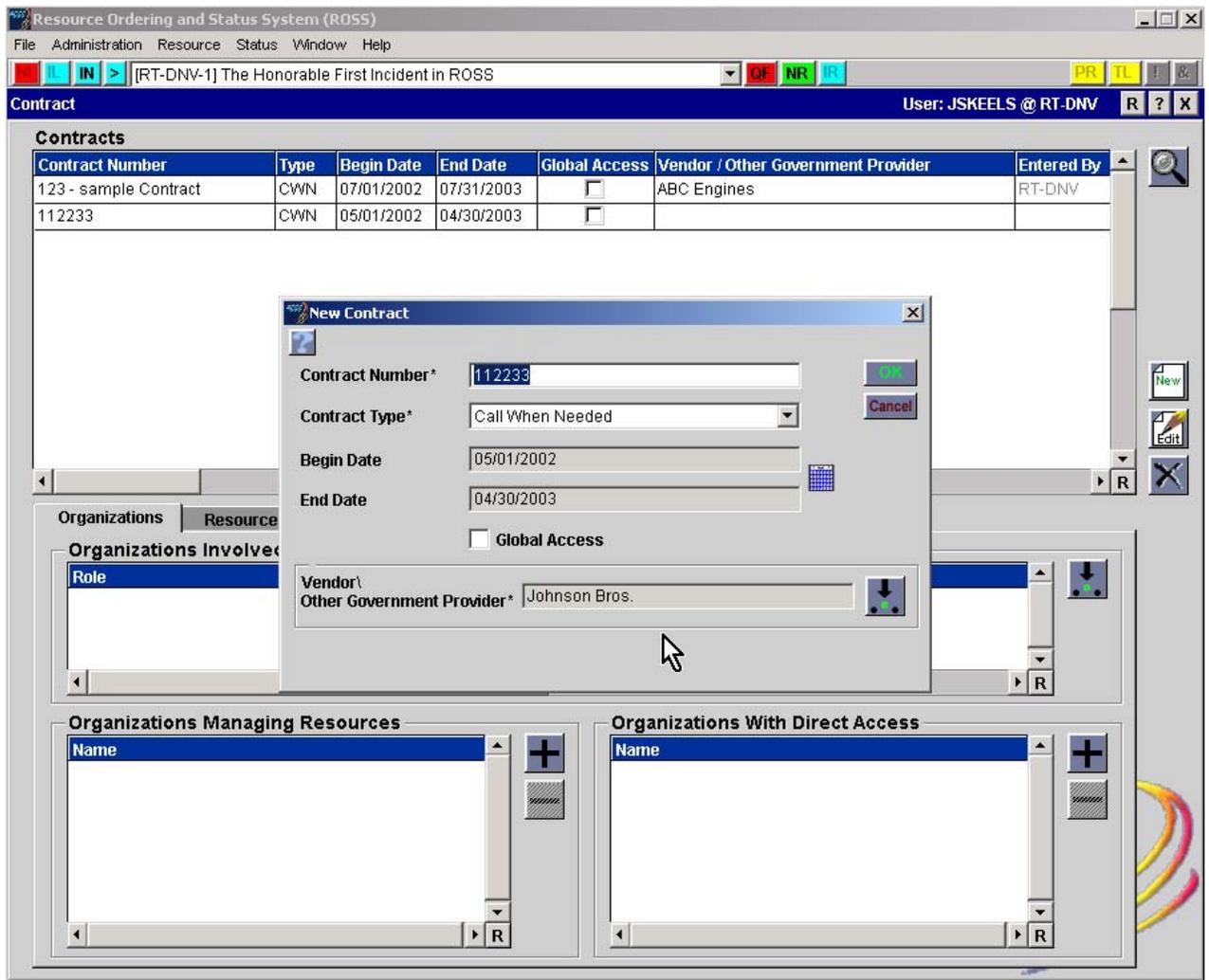
EMERGENCY EQUIPMENT RENTAL AGREEMENT

1. ORDERING OFFICE (name and address) USDA Forest Service Boise National Forest 1249 South Vinnell Way., Suite 200 Boise, ID 83709		AGREEMENT NUMBER MUST APPEAR ON ALL PAPERS RELATING TO THIS AGREEMENT									
		2. AGREEMENT NUMBER 112233		3. EFFECTIVE DATES a. Beginning 05/01/02 b. Ending 04/30/03							
4. CONTRACTOR a. Name and Address Johnson Bros. P.O. Box 4 Horseshoe Bend, ID 83629		5. POINT OF HIRE (location when hired) Location at time of hire		6. THE WORK RATE IS BASED ON ALL OPERATING SUPPLIES BEING FURNISHED BY <input checked="" type="checkbox"/> CONTRACTOR <input type="checkbox"/> GOVERNMENT							
b. EIN/SSN: 82-3421		c. Telephone Number (day) 208-555-5555		d. Telephone Number (night) 208-555-5555		7. OPERATOR FURNISHED BY <input checked="" type="checkbox"/> CONTRACTOR <input type="checkbox"/> GOVERNMENT					
8. TYPE OF CONTRACTOR ("X" appropriate boxes)											
<input checked="" type="checkbox"/>	SMALL BUSINESS	<input type="checkbox"/>	LARGE BUSINESS	<input type="checkbox"/>	SMALL DISADVANTAGED OWNED	<input type="checkbox"/>	WOMEN OWNED	<input type="checkbox"/>	LABOR SURPLUS AREA	<input type="checkbox"/>	GOVERNMENT EMPLOYEE
9. ITEM DESCRIPTION <i>(include make, model, year, serial number and accessories)</i>				10. NUMBER OF OPERATORS		11. WORK OR DAILY a. rate b. unit		12. SPECIAL a. rate b. unit		13. GUARANTEE <i>(8 or more hours)</i>	
a. Dozer (90 HP) Caterpillar D-4D 78H Hydraulic Angle Blade Ser #622. Type 1				1		\$72.00 Hour				\$555.00	
14. SPECIAL PROVISIONS											
15. CONTRACTOR'S OR AUTHORIZED AGENT'S SIGNATURE /s/ Al Johnson						16. DATE		17. CONTRACTING OFFICER'S SIGNATURE /s/ Smokey Bear			18. DATE May 1, 200
19. PRINT NAME AND TITLE Al Johnson, Owner						20. PRINT NAME AND TITLE Smokey Bear, Contracting Officer					

Steps to enter this EERA information in to ROSS:

NOTE: If you are sure the Organization (Vendor) and Resource Item(s) has been entered in ROSS, proceed to step 3.

1. If you are not sure if the Organization (Vendor) is in ROSS, open the Organization screen in ROSS. Click on the appropriate type (Vendor, etc.). Conduct a **Search** to find the Organization. It is a good idea to use wildcards (*) since you can't be sure exactly how the vendor name was entered. If you are positive that the Organization is not there, click the "?," or "Help," refer to the User's Guide, and/or read ROSS Tips #3-9 if you need assistance entering the Organization. After checking all of those resources and you still have questions, call the ROSS Helpdesk (866-224-7677).
2. If you are not sure if the Resource Item(s) is in ROSS, open on the Resource Item screen in ROSS. Click on the appropriate type (Equipment, etc.). Conduct a **Search** to find the Resource Item. If the Resource Item is in ROSS, look under the Organizations tab and verify that the Vendor is correctly identified as the "Owner" of the Resource Item. If necessary, use the "Pick" button to select the Vendor. If the Resource Item is not in ROSS, click the "?," or "Help" on the Resource Item screen or refer to the User's Guide if you need assistance with this task. After checking all of those resources and you still have questions, call the ROSS Helpdesk (866-224-7677).
3. Open the Contract screen in ROSS.
4. In the Contract screen, click on **New** (Contract).
5. Enter the Contract Number.
6. Enter the Contract Type (Call when Needed for this resource). See ROSS Tip #12 for more information on Contract Type.
7. Enter the **Begin Date** and **End Date** for the Effective Dates of the EERA.
8. Pick **Vendor/Provider** for the contract by searching for Johnson Bros.
9. Only check the Global Access check box if all dispatch centers are allowed to order off this contract! This is very rare. An example where the box would be checked is the OAS contract.
10. Click **OK**. This is how the dialog box (New Contract) should look:



11. Click **OK**.
12. Ensure the **Contracting Office** and **Managing Dispatch** office are correct. Remember, the Contracting Office is the Government (Non-Dispatch) office where the responsible contracting officer is located. If necessary, click on the appropriate line, click the **Pick** icon, search for the right organization, click on it to select it and click **OK**.
13. Add Organizations under the Organization panel to show dispatch offices that can have direct access to the contracted resources or who can add, delete, or modify resources under this contract as shown below.

Resource Ordering and Status System (ROSS)

File Administration Resource Status Window Help

Contract User: JSKEELS @ RT-DNV

Contracts

Contract Number	Type	Begin Date	End Date	Global Access	Vendor / Government (Non-Dispatch) Provider	Entered By
112233	CWN	05/01/2002	04/30/2003	<input type="checkbox"/>	Johnson Bros.	RT-DNV
123 - sample Contract	CWN	07/01/2002	07/31/2003	<input type="checkbox"/>	ABC Engines	RT-DNV
56-03R2-2-1234 PA	BPA	08/01/2002	07/31/2004	<input type="checkbox"/>	Super C Restaurant	RT-DNV

Contracting Office and Managing Dispatch Offices are identified here.

Organizations Involved

Role	Organization
Contracting Office	Boise National Forest
Managing Dispatch	Boise Interagency Logistics Center

Organizations Managing Resources

Name

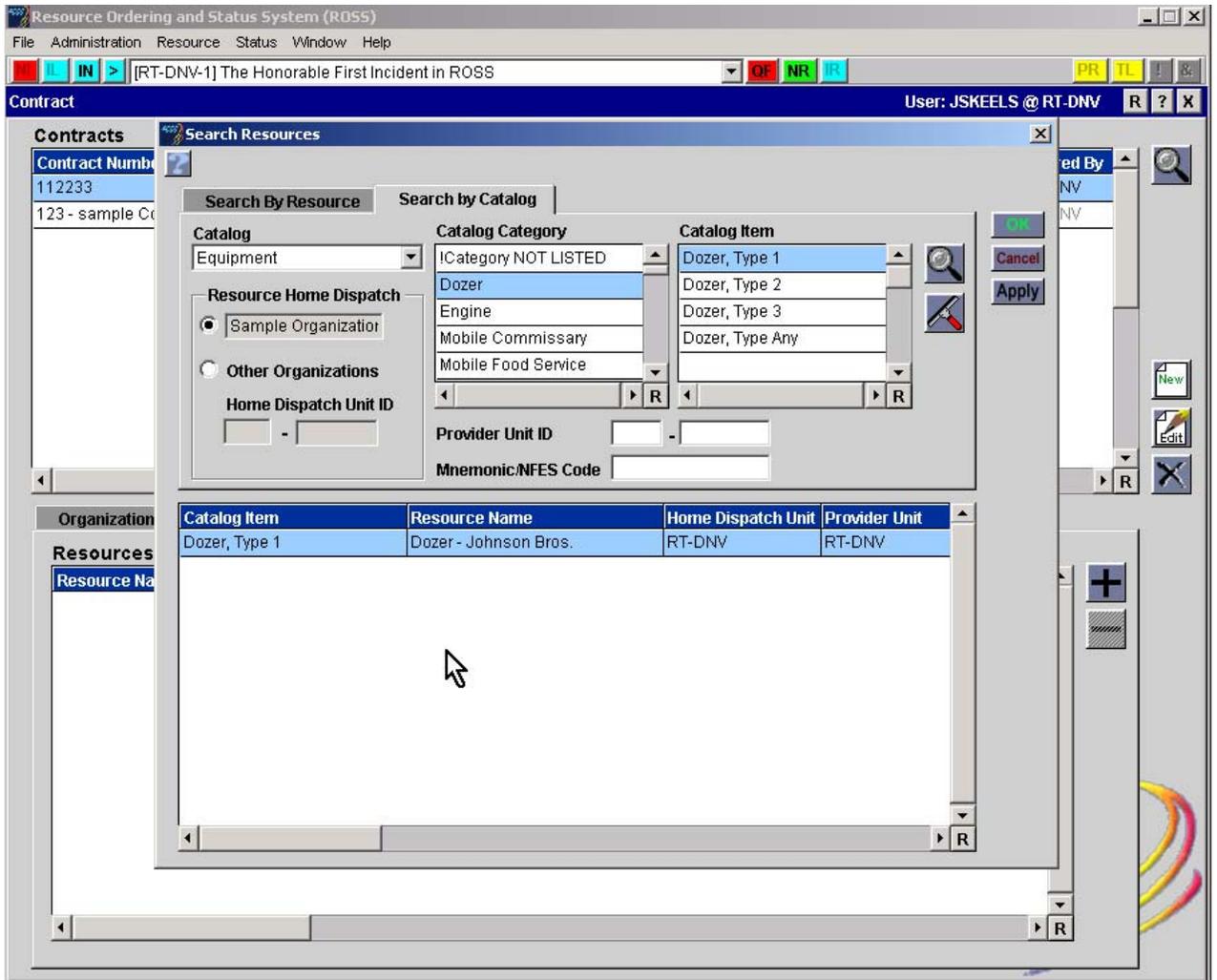
Resources can be added, deleted, and/or modified by dispatch offices displayed here. Click on the "+" if organizations should be added.

Organizations With Direct Access

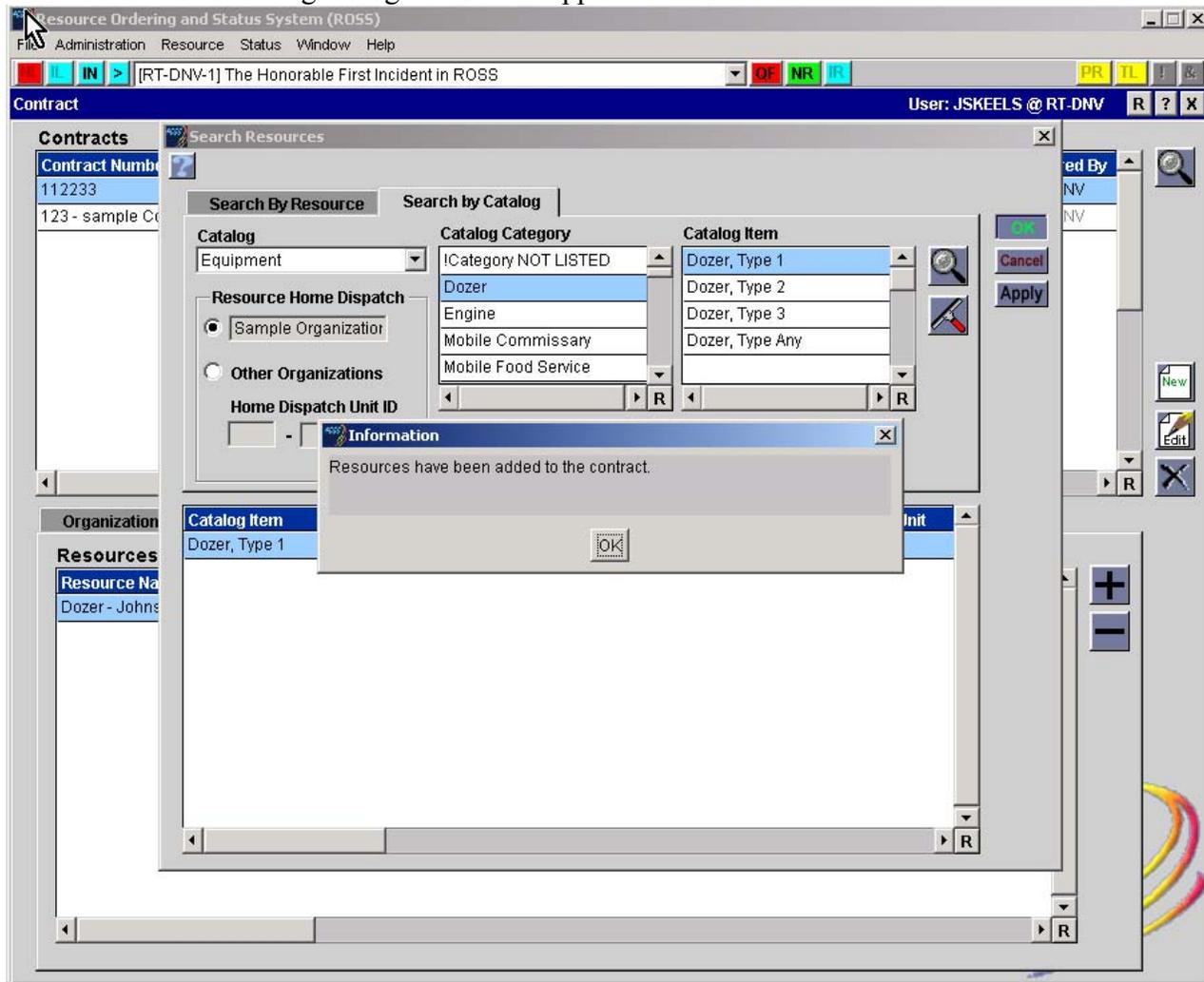
Name
Boise Interagency Logistics Center
Sample Organization

Organizations displayed here are dispatch offices that have direct access to the contracted resources. They may request and assign resources from the contract. Click on the "+" if organizations should be added.

14. Select the Resources Tab on the Contract screen; it is blank in this case.
15. Click the "+" to add the resource.
16. Select the **Search** by Catalog tab.
17. Select **Catalog—Equipment**.
18. Select **Catalog Category—DOZER**.
19. Select **Catalog Item—Type 1**.
20. Click **Search**. If a Search fails to locate the Resource Item, make sure that you followed the procedures in step 2. The resource item should appear in the dialog box as shown below:



21. Click **OK**. The following dialog box should appear:



22. Click **OK**.

This completes the data entry for this EERA.

Contract

Following is a sample Contract for a Non-Service item (crew) followed by a step-by-step description of how to input the information in to ROSS. In this example, the "Sample Organization" entered the information in to ROSS. The contract cover page is the only page included.

**U.S. DEPARTMENT OF AGRICULTURE
FOREST SERVICE**

CONTRACT NO.: (FS) #53-024B-2-2342

ITEM #: 09 – WINEMA NF, OAKRIDGE, OR
ITEM # 16 – FISHLAKE-NF, RICHFIELD, UT
ITEM #: 17 – DIXIE-NF, CEDAR CITY, UT
ITEM #: 20 – WASATCH-CACHE-NF, SALT LAKE

PROJECT: NATIONAL TYPE 2 & 21A HANDCREW SERVICES

CONTRACTOR: SKOOKUM REFORESTATION, INC.
PO BOX 40610
EUGENE, OR 97404

Phone: 541/688-6908
Fax: 541-688-0363

AWARDING OFFICE: USDA-FOREST SERVICE
National Interagency Fire Center - Contracting
Jack F. Wilson Bldg.
3833 South Development Avenue
Boise, ID 83705

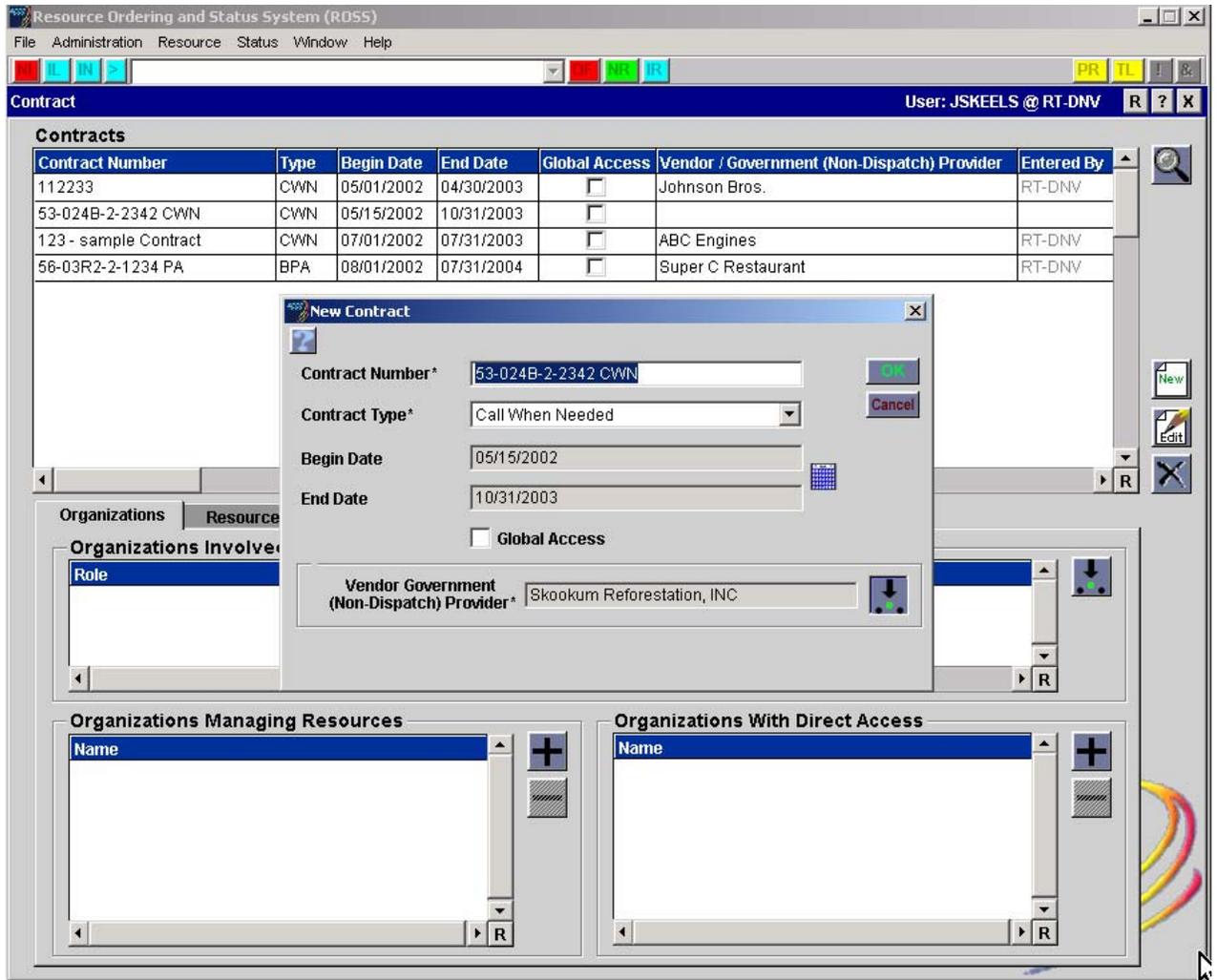


JOHN M. VENAGLIA
CONTRACTING OFFICER
Telephone: 208/387-5695
FAX: 208/387-5384
jvenaglia@fs.fed.us

Steps to enter this Contract information in to ROSS:

NOTE: If you are sure the Organization (Vendor) and Resource Item(s) has been entered in ROSS, proceed to step 3.

1. If you are not sure if the Organization (Vendor) is in ROSS, open the Organization screen in ROSS. Click on the appropriate type (Vendor, etc.). Conduct a **Search** to find the Organization. It is a good idea to use wildcards (*) since you can't be sure exactly how the vendor name was entered. If you are positive that the Organization is not there, click the "?," or "Help," refer to the User's Guide, and/or read ROSS Tips #3-9 if you need assistance entering the Organization. After checking all of those resources and you still have questions, call the ROSS Helpdesk (866-224-7677).
2. If you are not sure if the Resource Item(s) is in ROSS, open on the Resource Item screen in ROSS. Click on the appropriate type (Equipment, etc.). Conduct a **Search** to find the Resource Item. If the Resource Item is in ROSS, look under the Organizations tab and verify that the Vendor is correctly identified as the "Owner" of the Resource Item. If necessary, use the "Pick" button to select the Vendor. If the Resource Item is not in ROSS, click the "?," or "Help" on the Resource Item screen or refer to the User's Guide if you need assistance with this task. After checking all of those resources and you still have questions, call the ROSS Helpdesk (866-224-7677).
3. Open the Contract screen in ROSS.
4. In the Contract screen, click on **New** (Contract).
5. Enter the Contract Number.
6. Enter the Contract Type (Call when Needed for this resource). See ROSS Tip #12 for more information on Contract Type.
7. Enter the **Begin Date** and **End Date** for the Effective Dates of the Contract (this is not shown on the example so we have just entered dates).
8. Pick **Vendor/Provider** for the contract by searching for Skookum Reforestation, Inc.
9. Only check the Global Access check box if all dispatch centers are allowed to order off this contract! This is very rare. An example where the box would be checked is the OAS contract.
10. This is how the dialog box (New Contract) should look:



11. Click **OK**.
12. Ensure the **Contracting Office** and **Managing Dispatch** office are correct. Remember, the Contracting Office is the Government (Non-Dispatch) office where the responsible contracting officer is located. If necessary, click on the appropriate line, click the **Pick** icon, search for the right organization, click on it to select it and click **OK**.
13. Click on the "+" to the right of "Organizations with Direct Access" and add the dispatch offices who could request and assign resources under this contract. Click on the "+" to the right of "Organizations Managing Resources" and add the dispatch offices for the 4 Organizations listed on the Contract—those offices can add, delete, or modify resources under this contract. This is how the screen should look after the dispatch offices are added:

Resource Ordering and Status System (ROSS)

File Administration Resource Status Window Help

Contract User: JSKEELS @ RT-DNV

Contracts

Contract Number	Type	Begin Date	End Date	Global Access	Vendor / Government (Non-Dispatch) Provider	Entered By
112233	CWN	05/01/2002	04/30/2003	<input type="checkbox"/>	Johnson Bros.	RT-DNV
123 - sample Contract	CWN	07/01/2002	07/31/2003	<input type="checkbox"/>	ABC Engines	RT-DNV
53-024B-2-2342 CWN	CWN	05/15/2002	10/31/2003	<input type="checkbox"/>	Skookum Reforestation, INC	RT-DNV
56-03R2-2-1234 PA	BPA	08/01/2002	07/31/2004	<input type="checkbox"/>	Super C Restaurant	RT-DNV

Contracting Office and Managing Dispatch Offices are identified here.

Organizations Involved

Role	Organization
Contracting Office	NIFC - United States Forest Service
Managing Dispatch	National Interagency Coordination Center

Organizations Managing Resources

Name
Cedar City Interagency Fire Center
Eugene Interagency Communication Center
Richfield Interagency Fire Center
Salt Lake Fire Center

Organizations With Direct Access

Name
National Interagency Coordination Center
Sample Organization

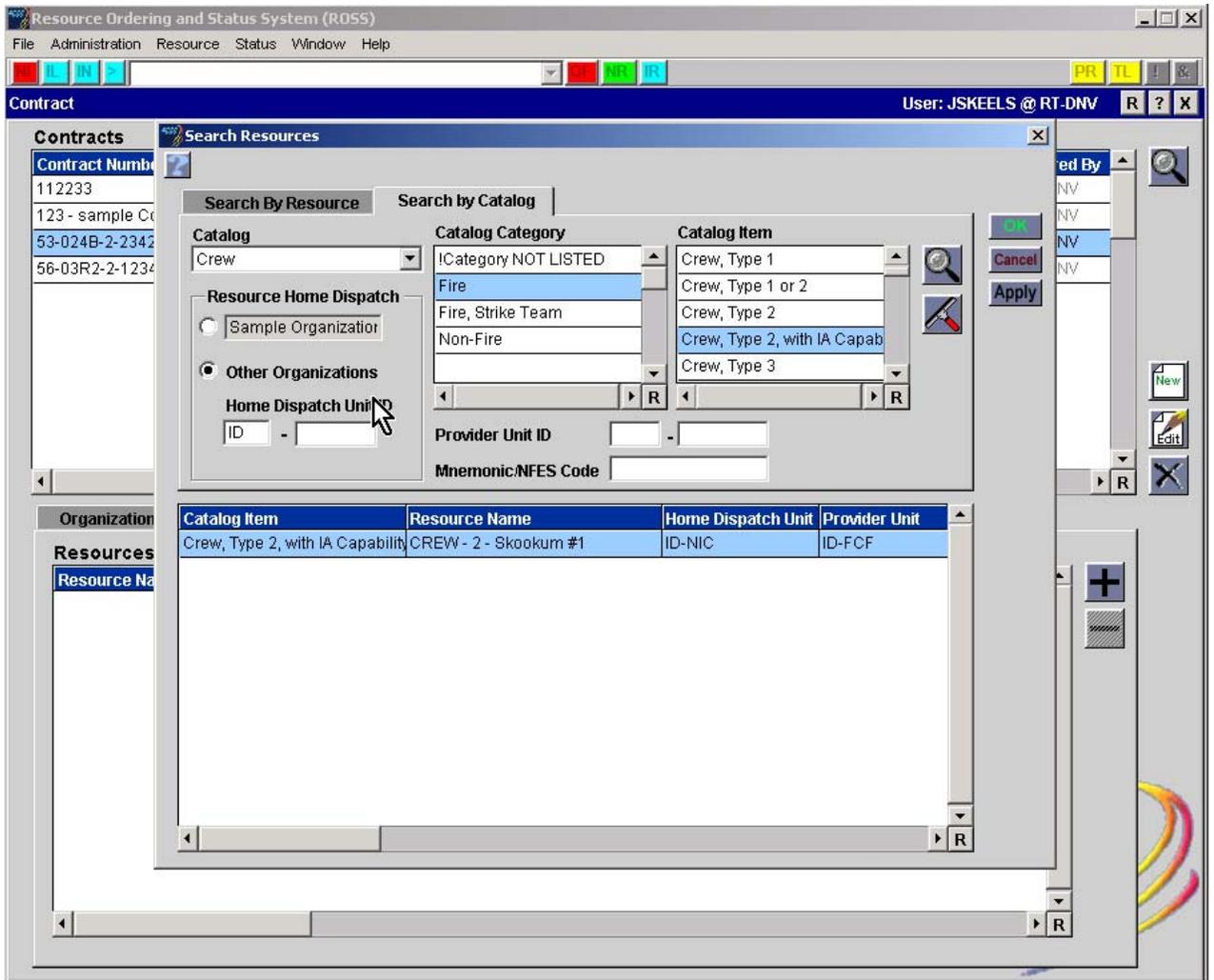
Resources can be added, deleted, and/or modified by dispatch centers displayed here. Click on the "+" if organizations should be added.

Organizations displayed here are dispatch offices that have direct access to the contracted resources. They may request and assign resources from the contract. Click on the "+" if organizations should be added.

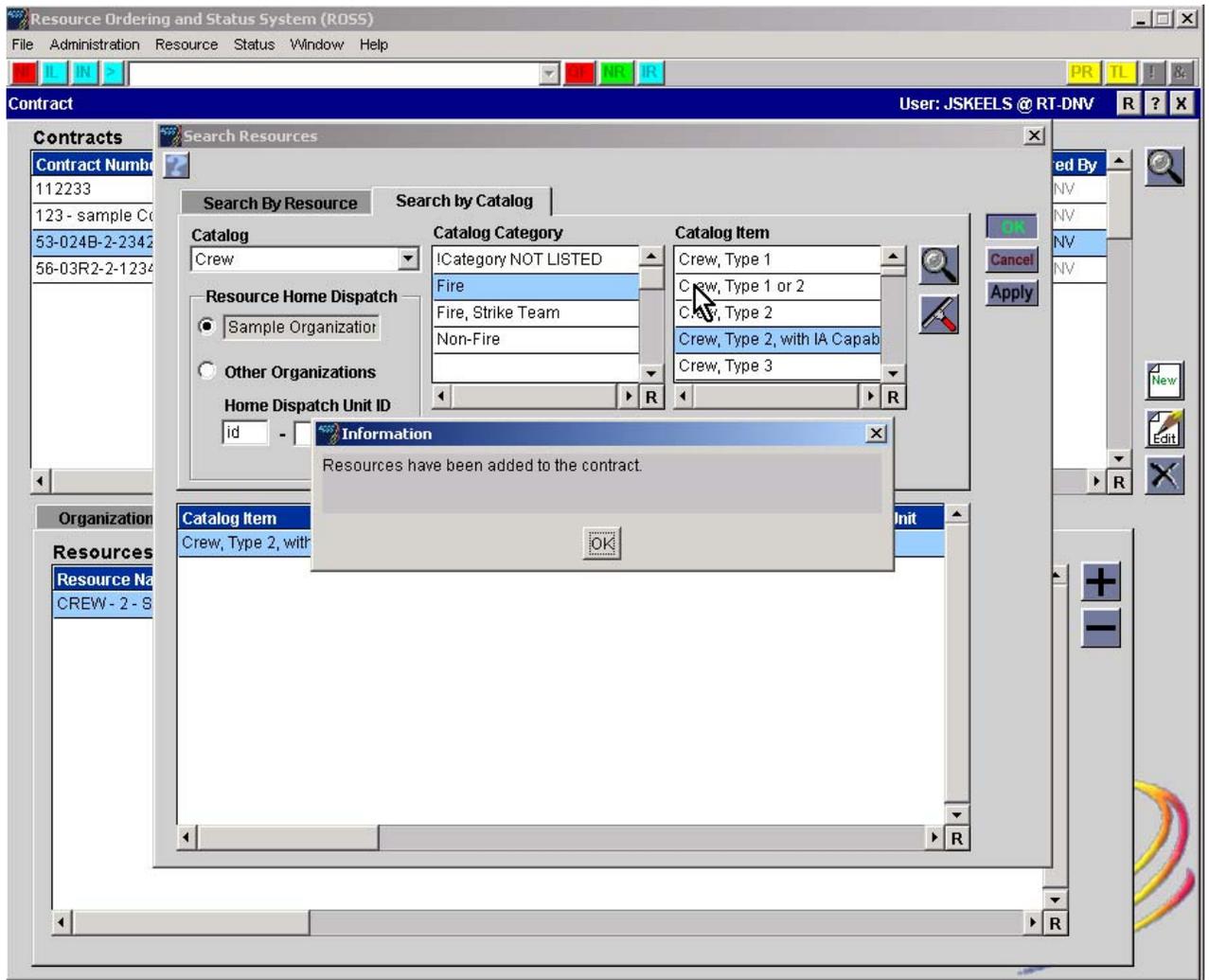
NOTE: In this example, the National Interagency Coordination Center (NICC) would: (1) enter the Organization (Vendor); (2) enter the National Contract; (3) add the "Organizations Managing Resources"—left side at the bottom; and (4) add the "Organizations with Direct Access"—right side at the bottom. The Local Dispatch would then go in to ROSS and add the resources that they dispatch for that Contract.

14. Select the Resources Tab on the Contract screen; it is blank in this case.
15. Click the "+" to add the resource.
16. Select the *Search* by Catalog tab.
17. Select *Catalog—Crew*.
18. Select *Catalog Category—Fire*.
19. Select *Catalog Item—Type 2, with IA Capability*.

20. Click **Search**. If a Search fails to locate the Resource Item, make sure that you followed the procedures in step 2. The resource item should appear in the dialog box as shown below:



21. Click **OK**. The following dialog box should appear:



22. Click **OK**.

This completes the data entry for this Contract.