

ROSS TIP

ROSS TIP: CNT-2004-2
Date: May 10, 2004
Subject: Entering Contracts in ROSS

When creating contract records in ROSS it is important to prepare your data ahead of time. Here are some handy tips.

1. What kind of contracts/agreements are you working with?

When creating contract records in ROSS, users are required to determine what kind of contract / agreement is being entered. There are four types of contracts/agreements that ROSS recognizes: Exclusive Use (EXU), Call When Needed (CWN), Agreement (AGR) and Purchase Agreement (PA).

- An Exclusive Use contract is an agreement with a vendor to provide a specific resource (e.g helicopter) for a definite time period to a particular government unit for its exclusive use for incident support. In ROSS, an exclusive use resource is treated like an agency-owned resource, i.e., it is statused and dispatched to incidents exactly the same as an agency resource. Exclusive use resources are displayed on the 'Available' tab (not on the CWN / Agreements tab) of the Pending Request screen. The resource must be entered and classified/typed on the Resource Item screen in ROSS.
- A CWN contract is an agreement with a vendor to provide specific resources, identified in the contract, on an 'as available' basis when called by an authorized ordering dispatch office. In other words, the government is not obliged to order and the vendor is not required to supply. In ROSS, a CWN resource is statused the same as any agency-owned resource. However, filling a request with a CWN resource is different in that a call must be made to the vendor prior to assignment. CWN resources must be entered and classified/typed on the Resource Item screen in ROSS. A CWN Resource is filled in ROSS on the Pending Request Screen (CWN / Agreements tab).
- An Agreement¹ is a signed formal arrangement with a vendor or with another government unit (e.g., rural fire department) to provide specific resources, identified in the agreement, on an 'as available' basis when called by an authorized ordering dispatch office. Agreement resources must be entered and classified/typed on the Resource Item screen in ROSS. Agreement resources are filled the same way that a CWN resource is filled. An agreement resource is treated the same as a CWN resource. A Emergency Equipment Rental Agreement (EERA) is the same as an agreement. Agreement resource do not have to be entered into the system prior to the incident. Requests for agreement resources may be filled at the time of request using the "Fill with Agreement" selection on the Pending Request Screen.

NOTE: Beginning with ROSS version 2.1, all EERAs shall be entered as Agreements. Users should change the contract type (from CWN to Agreement) for any existing CWN contracts that are really EERAs. An exception to this is when a line item on an EERA is not unique (e.g. motel rooms, meals or other services which do not have a unique identifier such as a serial number, license number or VIN).

¹ Agreements were added in ROSS Version 2.1. Within ROSS they function exactly like CWN contracts.

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Agreements for items that are not unique and not stasured should be entered in ROSS as Purchase Agreements.

- A Purchase Agreement is typically used to formalize an agreement with a vendor to provide services (e.g. copy machine rental, rental vehicles, grocery purchases or newspaper delivery) in support of an incident. You may know this as a Blanket Purchase Agreement or BPA. The services on a purchase agreement are not uniquely identified, are not stasured and should not be entered in ROSS on the Resource Item screen. Now that government purchase cards and checks are widely used and accepted, purchase agreements are much less common.

2. How should an EERA or Purchase Agreement that includes both unique and non-specific items be entered into ROSS?

EERAs sometimes include both uniquely identifiable items (e.g. BUS – SCHOOL – D.B. Bus Co. #126) and non-unique items (e.g. numerous 55-pax coaches) on the same EERA. Since ROSS will not permit duplicate contract/agreement numbers, this situation should be documented in the following manner:

- For the unique items that are ordered / provided on an ‘as available’ basis (e.g. bus #126) and will be stasured as resource items, the contract number entered will be of type ‘Agreement’ with the number formatted as: <EERA number> AGR (e.g. 55-43ZP-4-0215 AGR)². The following screen displays this example:

Contract Number 55-43ZP-4-0215 AGR and Contract Type 'Agreement'.

² The contract type ‘Agreement’ (AGR) was added in ROSS Version 2.1. Up until then, unique EERA items were entered on ‘CWN’ contracts. Beginning with ver. 2.1, it is suggested that unique EERA items be entered on the contract type of ‘Agreement’. This is a matter of semantics, since Agreements and CWN contracts function identically within the application.

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- For the non-unique service items that are service related (e.g. 55-pax coaches that are not identified or statused), the contract entered will be of type 'Purchase Agreement' with the number formatted as <EERA number> PA (e.g. 55-43ZP-4-0215 PA). The following screen displays this example:

The screenshot shows a 'New Contract' form with the following fields and values:

- Contract Number*: 55-43ZP-4-0215 PA
- Contract Type*: Purchase Agreement
- Begin Date: 10/01/2003
- End Date: 09/30/2006
- Global Access:
- Vendor Government (Non-Dispatch) Provider*: D.B. Bus Co.

Callout boxes provide additional context:

- A box pointing to the Contract Number and Type fields states: "Contract Number 55-43ZP-4-0215 PA and Contract Type 'Purchase Agreement'."
- A box pointing to the Global Access checkbox states: "Global Access checkbox."

3. When should the Global Access box be checked?

Check this box only when **every** dispatch center has access to the items on the contract / agreement {e.g., any dispatch center can request and assign any resource on the contract). This is not common (an example of where this might be used is with Office of Aircraft Services (OAS) aircraft contracts).

4. Who should manage/enter data for the contract/agreement and its associated resources?

Contracts/agreements may be national, geographic, regional or unit in scope. They may include several line items, some of which your dispatch office may manage and status. Contracts of this type are typically Exclusive Use or Call When Needed in nature. These may include: National Crew Contracts, Engine Contracts, Air Tanker Contracts, etc.

Typically, the dispatch office that manages the contract is responsible for entering the contract into ROSS. They may however not be the unit that enters the resources on the contract. Data entry of the contracted resource items can be done either by the dispatch office that manages the contract or by the dispatch office(s) that manage the resources attached to the contract. To illustrate:

The US Forest Service at the National Interagency Fire Center issues a national crew contract to XYZ Company. There are 20 crews attached to the contract that are managed by 20 different dispatch offices

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around the country. NICC enters the contract in ROSS and then has 2 options for entering the crew resource items:

- NICC may enter the resource items and then move the management of the items to the field dispatch offices; or
- NICC may authorize each of the field dispatch offices to enter their resources and attach them to the contract.

NICC generally will choose to enter the resource items themselves and ‘move’ them to the various dispatch centers by changing the Home Dispatch on the Organization tab of the Resource Item screen.

4. Vendor Organizations that hold contracts (referred to as a Vendor)

Organizations in ROSS are unique and must be created only once. When creating a contract, users are required to pick a vendor organization that holds the contract. The ‘Pick Vendor’ button opens the Search Vendors dialog (see below). If, after careful searching, it is determined that the vendor does not exist in ROSS, it must be created using the Organization screen.³

ABC Grocery Incorporated may represent the National Chain, which may hold a National Contract

Vendor / Other Government Provider Name
ABC Grocery - #121 - Anytown, USA
ABC Grocery Incorporated

ABC Grocery #121 is a unique organization that may be used on a specific contract or agreement

³ Only create a new vendor on your Organization screen after you are convinced that the vendor does not already exist in ROSS. **Vendor organizations must not be duplicated.** If more than one (1) record for the company is displayed when searching for the vendor, immediately notify the ROSS Helpdesk, prior to continuing.

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There are situations that may require multiple, but unique, entries for one vendor. Large store / restaurant chains have many locations. Dispatchers may want to create unique vendor organization records for the specific outlet that they use locally. To make each organization unique, we suggest a naming convention such as 'ABC Grocery - #121 – Anytown, USA'. In this example, ABC Grocery, Inc. has many stores and #121 is the one that is being used on the local contract.

NOTE: There is no need to enter 'ABC Grocery - #121' as a vendor if you do not have a purchase agreement with them (i.e., if you purchase items over the counter with a government purchase card or check). ROSS will allow you to fill a request by entering a short description or more detailed documentation (e.g., a request for 20 sack lunches could be filled by documenting 'Denny's @ exit 26 paid on govt. purchase card by John Smith').

5. Purpose and Use of the Organizations Tab (on the Contract Screen)

Many users have had trouble understanding how the organizations tab works. The tab is comprised of 3 sections (see exhibit below).

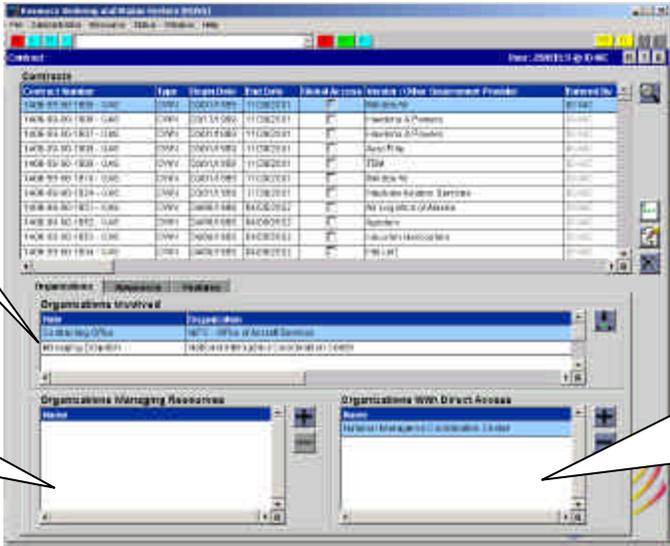
- The **top section** is where the 'Contracting Office' and the 'Managing Dispatch' organizations are set. When a contract is initially created, these entries default to the Dispatch Center creating the contract. Because contracts are tied to agencies and Dispatch Offices do not have agency affiliations, the Contracting Office must be changed to reflect the Government (Non-Dispatch) organization of the contracting office that issued the contract. This organization is also the Provider on the Resource Item screen. For example, the Tennessee Interagency Coordination Center manages a Type 3 helicopter but the contracting office is Southern Region – USFS.
- The **lower left section** is used to authorize other dispatch offices to manage (add, delete, edit) resource items on the contract. This section is often used when contracts have resource items that are dispersed through a large area of the nation with specified units managing a contracted line item (*see the national crew contract example above*). The authority extends only to resource items and does not allow editing of the contract information. NOTE: When authorized, a dispatch office may add / subtract (via the resources tab) any resource on the contract. Dispatch offices should ONLY add / subtract resources for which they are responsible (through the contract). This issue will be cleared up in a future release of ROSS.
- The **lower right section** is used to authorize dispatch offices to directly access resources on the contract. An entry in this area means that any resources that are on the contract and available, can be requested and assigned by any office that is displayed (authorized) in this section. For example, on the screen below, the National Interagency Coordination Center is the only dispatch office that can use the highlighted contract. If the Eugene Interagency Dispatch Center was added to the list, they would also

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have direct access. The default office displayed in this section is the office that is the managing dispatch office for the contract. If the 'Global Access' box is checked this section cannot be edited – you cannot give individual offices access if all offices have access.

NOTE: This section should not be modified for 'Exclusive Use' contracts – by definition, only one office has access to an exclusive use resource.. A change will be made to ROSS in the future to prevent changes to this section when the contract is an exclusive use contract.



The screenshot displays the ROSS software interface. At the top, a table lists contract information with columns for Contract Number, Type, Start Date, End Date, Global Access, and others. Below this, there are several sections for managing resources. Callout boxes provide context for these sections:

- (Top section) Contracting Office and Managing Dispatch Offices are identified here**: Points to the top part of the interface where contract details are listed.
- (Lower left section) Resources can be added, deleted, and or modified by organizations displayed here.**: Points to the 'Organizations Involved' section.
- (Lower right section) Organizations displayed here have direct access to the contracted resources. They may request and assign resources from the contract.**: Points to the 'Organizations With Direct Access' section.

6. Attaching Resources to Exclusive Use and CWN Contracts / Agreements

As discussed in #1 above, Exclusive Use and CWN contract records in ROSS have specific resource items attached to them. These items are attached to the contract using the 'Resources' tab at the bottom of the screen (see below). You may add resources that are managed by another dispatch center to a contract that you manage.

NOTE: In order to add a resource to a contract / agreement, its 'Owner' on the Organization tab of the Resource Item screen must match the vendor organization holding the contract.

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The screenshot shows the ROSS software interface. The top window is titled 'Contracts' and contains a table with the following columns: 'Contract Number', 'Type', 'Begin Date', 'End Date', 'Global Access / Vendor / Other Government Provider', and 'Entered By'. Below this is a 'Resources' window with a 'Resources on Contract' table. The table in the 'Resources on Contract' window has columns for 'Resource Name', 'Resource Number', 'Provider ID#', and 'Alternate Name'. A callout box on the left points to the '+' button in the Resources window, stating 'Resources are added using this tab'. A callout box on the right points to the '-' button, stating 'Use the + button to add resources and the - button to remove resources from the contract. NOTE: Resources must be created on the Resource Item screen before they can be added to a contract.'

Contract Number	Type	Begin Date	End Date	Global Access / Vendor / Other Government Provider	Entered By
1485-ES-ED-1900	CAG	03/01/00	11/03/00		Minden, Jr.
1485-ES-ED-1900	CAG	03/01/00	11/03/00		Newman & Powers
1485-ES-ED-1901	CAG	03/01/00	11/03/00		Newman & Powers
1485-ES-ED-1900	CAG	03/01/00	11/03/00		Auto Title
1485-ES-ED-1900	CAG	03/01/00	11/03/00		TSM
1485-ES-ED-1910	CAG	03/01/00	11/03/00		Minden, Jr.
1485-ES-ED-1904	CAG	03/01/00	11/03/00		Regatta Realty Services
1485-ES-ED-1901	CAG	04/01/00	04/03/00		AF Logistics of Alaska
1485-ES-ED-1902	CAG	04/01/00	04/03/00		AgriData
1485-ES-ED-1903	CAG	04/01/00	04/03/00		PHILCOX PMS01200
1485-ES-ED-1904	CAG	04/01/00	04/03/00		PHILCOX

Resource Name	Resource Number	Provider ID#	Alternate Name
ALTIMAR - ES	AZ4902	10-F07	PHILCOX

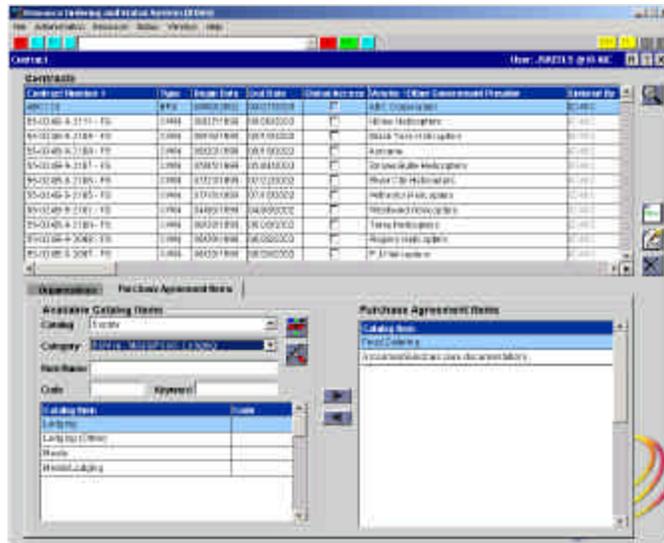
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7. Adding Purchase Agreement Items

When creating a Purchase Agreement in ROSS, you will need to add the Purchase Agreement Items (i.e., services) that are provided by the vendor. In the example below, NICC has a purchase agreement with ABC Corporation who provides 'Food Catering' and 'Groceries / Sundries'. The particular service categories are specified on the agreement.



The ROSS Helpdesk is an excellent source of assistance and can be contacted at 1-866-224-7677 or via e-mail at helpdesk@dms.nwcg.gov.