

Contract - setting up agreements

The Contract screen allows you to enter agreements between vendors and your organization. You can enter any type of contract, including multiple contracts between a single vendor and many organizations. Topics include:

- Understanding contracts and purchase agreements
- Managing contracts and purchase agreements
- Managing access to resources.

You can also use the Contract screen to record agreements between government organizations. For example, you can record a cooperative fire protection agreement between two agencies and define the resources available through that agreement.

Understanding contracts and purchase agreements

Contracts and purchase agreements allow vendors to supply resources and services to be dispatched to incidents.

You must have the Data Administrator user role to enter contract and purchase agreements.

Terms and concepts

There are several terms and concepts that are specific to the ROSS Contract screen:

- **Contracting Office.** The government (non-dispatch) organization with contract authority of the contract. The Contracting Office “holds the paper.”
- **Managing Dispatch.** The Managing Dispatch organization has all privileges for managing and editing the contract, adding resource items, designating other organizations that can manage, review, and add resource items, and allowing viewing and ordering access to other offices. The Managing Dispatch organization designates Organizations Managing Resources and Organizations With Direct Access.
- **Organizations Managing Resources.** Must be designated by the Managing Dispatch Organization. These dispatch organizations may add, edit, and delete resource items to the Contract. These organizations can not edit the Contract.
- **Organizations With Direct Access.** Must be designated by the Managing Dispatch Organization. An Organization with Direct Access may view and assign resource items using the ROSS Pending Request screen.
- **Resources.** Resources include resource items and services supplied by the vendor that are available for ordering under the contract.
- **Purchase Agreement Items.** Services are entered using the Resource Item screen and classified as PA (Purchase Agreement).

- **Contract Type.** The contract agreement type, including Call When Needed (CWN), Exclusive Use (EXU), Agreement (AGR), and Purchase Agreement (PA).
- **Global Access.** Must be designated by the Managing Dispatch organization. When selected, the Global Access check box allows all dispatch organizations to assign resources from a contract using the ROSS Pending Request screen.

Contract types

When creating a contract in ROSS, you must first determine the contract type. In ROSS, there are three types of contracts/purchase agreements, including:

- **Agreement (AGR).** An “AGR” includes agreements with vendors, such as an Emergency Equipment Rental Agreement, or an agreement with a government non-dispatch organization. The process for creating an agreement and adding individual resource items to it is the same as for CWN contracts. Filling a service or non-service request with an “AGR” contract resource is the same as for a “CWN” contract resource.
- **Call When Needed (CWN).** 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 ROSS, a “CWN” resource item is statused the same way as any agency-owned resource item. However, filling an order with a CWN resource is different, in that a call must be made to the vendor prior to assignment. Emergency Equipment Rental Agreements (EERA) are typically entered as CWN contracts. An exception to this is when a line item listed on an EERA is not unique, such as motel rooms, meals, or other services that do not have a unique identifier, like a serial number or vehicle identification number.

For example, on some EERAs we have seen motel rooms and meals. This type of entry is more appropriate for a purchase agreement.

- **Exclusive Use (EXU).** An “Exclusive Use” contract is an agreement with a vendor to provide a resource item on an “Exclusive Use” basis to a specific unit for incident support. In ROSS, an “Exclusive Use” resource is treated like any other agency resource. It is statused and dispatched to incidents exactly the same way as an agency-owned resource item.
- **Purchase Agreement (PA).** A Purchase Agreement is an agreement with a vendor to provide services, such as copy machine rental, a grocery purchase, or a newspaper delivery, in support of an incident. Services on a purchase agreement are not statused and need 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.

Many contracts and agreements may be national, geographic, regional, or unit in scope. These contracts may identify many 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.

Usually, 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 used on the contract. Contracted resource items are entered either by:

- the dispatch office that manages the contract
- the dispatch office that manages the resources attached to the contract.

For example...

A National Crew contract is issued by the US Forest Service at the National Interagency Fire Center. There are 20 crews attached to the contract that are managed by 20 different dispatch offices around the country. NICC enters the contract in ROSS and then has two options for entering the crew resource items:

1. NICC may enter the resource items and then move the management of the items to the field dispatch office.
2. NICC may authorize the field dispatch office to enter their resources and attach them to the contract.

Generally, NICC will choose to enter the their own resource items and then move them to the field units.

Managing contracts and purchase agreements

In ROSS, organizations are unique and exist as a single record. When creating a contract, you must pick the vendor organization that holds the contract.

Before entering a contract or purchase agreement you must first verify that the following information exists in the ROSS database:

- **Vendor.** If the vendor does not already exist in the ROSS database, access the Organization screen and create it. Be sure to enter a unique Vendor name.

For more information about searching for an existing vendor organization, see "To search for a vendor," later in this chapter. For more information about creating a vendor, see, "Working with vendors," in "Organization - defining ROSS organizations," in this ROSS User's Guide.

- **Resources and Services.** If the vendor's resources and/or services do not already exist in the ROSS database, access the Resource Item screen and enter them. Remember to designate the vendor organization as the owner

of the resources/services so that you can link them to the vendor's contract.

For more information about searching for an existing resource item and entering resources and services, see "Resource Item - working with resources," later in this ROSS User's Guide.

To access the Contract screen

- On the **Resource** menu, click **Contract**.

Contract screen

Contracts - (Resource Privileges Only)

Contract Number	Type	Begin Date	End Date	Global Access	Vendor / Government (Non-Dispatch) Provider	Entered By
1406-01-80-2125 EXU	EXU	12/17/2001	12/31/2004	<input type="checkbox"/>	Hawkins & Powers Aviation, Inc.	ID-NIC
1406-02-80-2234	CWN	04/01/2004	06/30/2004	<input checked="" type="checkbox"/>	Fischer Spraying Inc	CO-RMC
1406-02-81-2234	CWN	08/11/2004	08/11/2005	<input checked="" type="checkbox"/>	Abel Fire Equipment	CO-RMC
1406-03-80-2403-Item 2	EXU	05/15/2003	09/12/2003	<input type="checkbox"/>	Airwork Enterprises of Florida	CO-RMC
43-82x9-2-0007	PA	06/13/2002	06/13/2003	<input type="checkbox"/>	RMC - Sheraton Denver West	CO-RMC
45-82x9-0-8077	CWN			<input type="checkbox"/>	West Star Aviation	CO-RMC
45-82x9-2-0003	PA	06/13/2002	06/13/2003	<input type="checkbox"/>	RMC - Fairfield Inn	CO-RMC
45-82x9-2-0013	PA			<input type="checkbox"/>	RMC - Perkins Restaurant	CO-RMC
45-82x9-2-0014	PA	07/17/2002	07/17/2003	<input type="checkbox"/>	RMC - La Quinta Inns Inc.	CO-RMC
45-82x9-2-8103	CWN	08/27/2003	12/31/2003	<input type="checkbox"/>	Key Lime Air	CO-RMC
45-82x9-3-8000	PA	07/15/2004	07/17/2005	<input type="checkbox"/>	B and R Tools	CO-RMC
45-82x9-3-8001	PA	04/14/2004	04/14/2005	<input type="checkbox"/>	RMC - Candlewood Suites	CO-RMC

Organizations Involved

Role	Organization
Contracting Office	NIFC - Office of Aircraft Services
Managing Dispatch	National Interagency Coordination Center

Organizations Managing Resources

Name
Alaska Interagency Coordination Center
Eastern Great Basin Coordination Center
Northern Rockies Coordination Center
Rocky Mountain Area Coordination Center

Organizations With Direct Access

Name
Alaska Interagency Coordination Center
Eastern Great Basin Coordination Center
National Interagency Coordination Center
Northern Rockies Coordination Center
Rocky Mountain Area Coordination Center

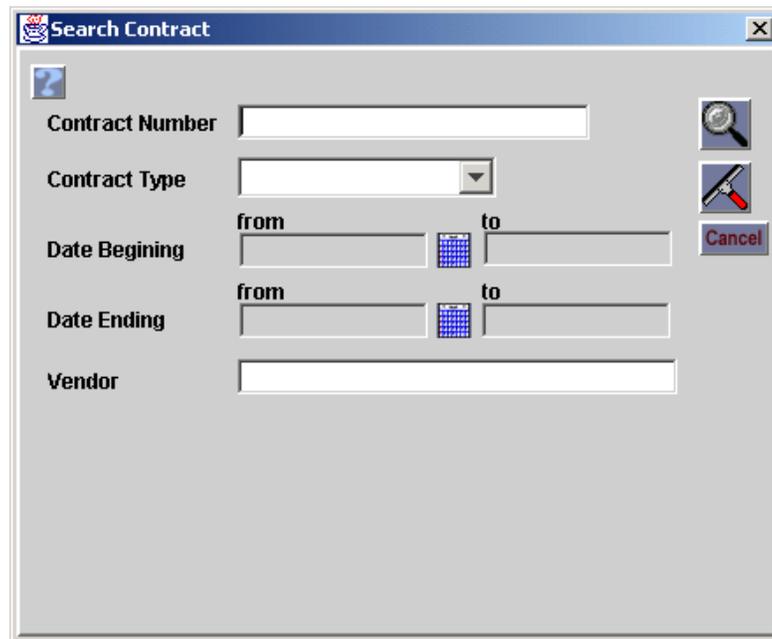
To search for an existing contract in the ROSS database

To prevent duplicates, be sure to search for an existing contract before creating a new one.

- On the **Contract** screen, click **Search**.

- 2 On the **Search Contract** dialog box, type information into as many text boxes as possible to narrow your search, and then click **Search**.

The following diagram shows the Search Contract dialog box.



The screenshot shows a dialog box titled "Search Contract". It features a help icon (question mark) in the top left, a search icon (magnifying glass) in the top right, a pick vendor icon (pencil and eraser) in the middle right, and a "Cancel" button in the bottom right. The main area contains the following fields: "Contract Number" (text input), "Contract Type" (dropdown menu), "Date Beginning" (text input with "from" label and a calendar icon), "Date Ending" (text input with "to" label and a calendar icon), and "Vendor" (text input).

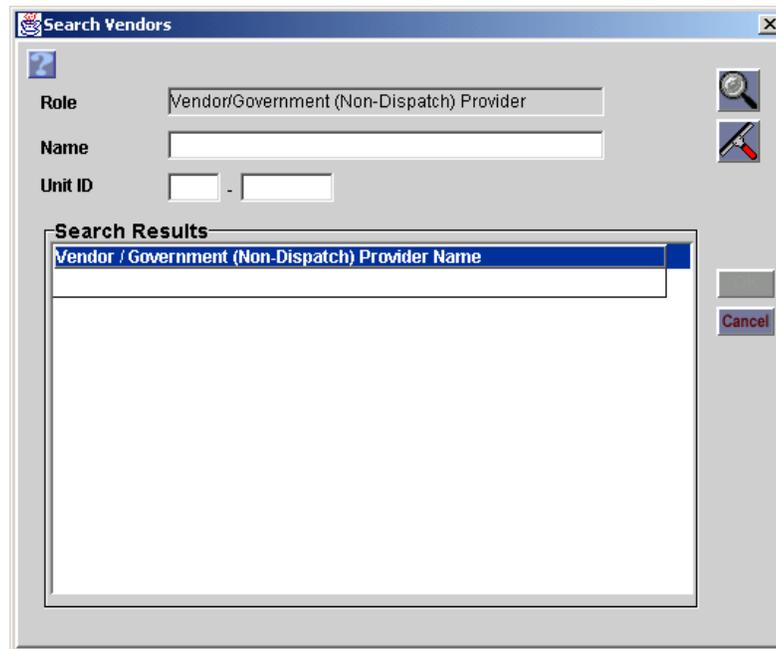
To search for a vendor

- 1 On the **Contract** screen, click **New** or **Edit**, and then click the **Pick Vendor** button.

*For a new contract, you must first type the **Contract Number** before you can click the **Pick Vendor** button.*

- 2 On the **Search Vendors** dialog box, click **Search**.
- 3 Click to select the **Vendor** of your choice, and then click **OK**.

The following diagram shows the Search Vendors dialog box.



To enter a contract into the ROSS database

- 1 On the **Contract** screen, click **New**.
- 2 In the **Contract Number** box, type the new **Contract Number**.
- 3 Click the **Contract Type** drop-down arrow, and then select the **Contract Type** of your choice.
- 4 Click the **Select Dates** button, and then select the **Begin Date** and **End Date** for the new contract, and then click **Done**.

For more information about using the Select Dates button, see "Using the Select Dates function" in "Getting started with ROSS."

- 5 To allow global access to the contract for all organizations, click the **Global Access** check box.
- 6 To select from a list of existing vendors, click the **Pick Vendor** button and then select the **Vendor** of your choice.
- 7 To return to the **Contract** screen, click **OK**.
- 8 Complete the **Contract** tabs as appropriate.

The following diagram shows the New Contract dialog box.

The screenshot shows a 'New Contract' dialog box with the following fields and controls:

- Contract Number***: A text input field.
- Contract Type***: A dropdown menu currently showing 'Call When Needed'.
- Begin Date**: A text input field with a calendar icon to its right.
- End Date**: A text input field with a calendar icon to its right.
- Global Access**: A checkbox that is currently unchecked.
- Vendor Government (Non-Dispatch) Provider***: A text input field with a dropdown arrow icon to its right.
- Buttons**: 'OK' (green) and 'Cancel' (red) buttons are located on the right side of the dialog.

For more information about completing the tabs on the Contract screen, see “Completing Contract screen tabs,” later in this chapter.

To allow global access to resources on the contract or purchase agreement

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice, and then click **Edit**.
- 2 On the **Edit Contract** dialog box, click the **Global Access** check box, and then click **OK**.

To modify contract information

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice, and then click **Edit**.
- 2 Type or replace the following **Contract** information, as appropriate
 - Contract Number
 - Contract Type
 - Global Access.
- 3 To change the **Begin Date** and **End Date**, click the **Select Dates** button, and then select the new dates as appropriate, and then click **Done**.
- 4 To change the **Vendor**, click the **Pick Vendor** button and then select the **Vendor** of your choice.
- 5 To return to the **Contract** screen, click **OK**.

- 6 Modify the information on the **Contract** tabs as appropriate.

Before you can add new resources to a contract, those resource items must exist in the ROSS database. For more information about adding resource items, see "Resource Item - working with resources," later in this ROSS User's Guide.

The following diagram shows the Edit Contract dialog box.

To delete a contract

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice, and then click **Delete**.
- 2 On the **Confirm Deletion** dialog box, click **Yes** to confirm or **No** to cancel.

Entering an EERA or purchase agreement that includes both unique and non-unique items - an example

Use the instructions in this section only where there are both uniquely identifiable and non-uniquely identifiable items on an EERA!

ROSS does not allow you to create duplicate contract/agreement numbers. For example, a single EERA often documents both uniquely identifiable items, such as "bus #126," and non-unique items, such as meals and lodging. To accommodate these two items, create an "AGR" for the unique item, and a "PA" for the non-unique item.

To enter a unique item that will be statused as a resource item

- 1 On the **Contract** screen, click **New**.

- In the **Contract Number** box, type the new **Contract Number**, in the format **<EERA contractnumber>** .

For example, "EERA 56-82X9-2-0067" is a valid EERA contract number. The "EERA" suffix makes it unique.

- Click the **Contract Type** drop-down arrow, and then select **Agreement**.
- Click the **Select Dates** button, and then select the **Begin Date** and **End Date** for the new contract, and then click **Done**.

For more information about using the Select Dates button, see "Using the Select Dates function" in "Getting started with ROSS."

- To allow global access to the contract for all organizations, click the **Global Access** check box.
- To select from a list of existing vendors, click the **Pick Vendor** button and then select the **Vendor** of your choice.
- To return to the **Contract** screen, click **OK**.

The following diagram shows the New Contract screen for creating a unique, EERA item.

According to Section 24, 3-4 in the "Interagency Incident Business Management Handbook," stusing a CWN item as a resource item is not advised.

To enter a non-unique service item such as meals and/or lodging

- On the **Contract** screen, click **New**.
- In the **Contract Number** box, type the new **Contract Number**, in the format **<EERA number> PA**.

For example, "R2-34567AB PA" is a valid EERA contract number.

- 3 Click the **Contract Type** drop-down arrow, and then select **Purchase Agreement**.
- 4 Click the **Select Dates** button, and then select the **Begin Date** and **End Date** for the new contract, and then click **Done**.

For more information about using the Select Dates button, see "Using the Select Dates function" in "Getting started with ROSS."

- 5 To allow global access to the contract for all organizations, click the **Global Access** check box.
- 6 To select from a list of existing vendors, click the **Pick Vendor** button and then select the **Vendor** of your choice.
- 7 To return to the **Contract** screen, click **OK**.

The following diagram shows the New Contract screen for creating a non-unique service item such as meals and/or lodging.

Managing access to resources

This section explains how to manage organization access to resources on contracts and purchase agreements. Topics include:

- Understanding the Organizations tab
- Attaching resources to Exclusive Use and CWN contracts
- Adding catalog items to a Purchase Agreement.

Understanding the Organizations tab

The Organizations tab identifies three areas:

- **Organizations Involved.** The top area of the Organizations tab allows you to set the “Contracting Office” and the “Managing Dispatch” organization. When creating a contract, these entries default to the Dispatch Center where the contract is entered. Change the Contracting Office to reflect the Government (Non-Dispatch) organization of the

contracting officer who signed the contract. This organization is also the Provider on the Resource Item screen.

Remember, contracts are tied to agencies. Dispatch offices do not have agency affiliations. For example, the Tennessee Interagency Coordination Center manages a Type 3 helicopter, but the contracting office is Southern Region - USFS. For more information, see "To change the Contracting Office designation," later in this section.

- **Organizations Managing Resources.** The lower left area of the Organizations tab identifies the other dispatch offices to manage (add, delete, and edit) resource items for the contract. Use this area when contracts have resource items that are dispersed through a large area of the nation which specified units managing a contracted line item. The authority extends only to resource items and does not allowing you to edit contract information. This authority extends only to resource items, and does not allow those authorized dispatch offices to edit contract information.

When authorized, a dispatch office may use the Resources tab to add/subtract any of their designated resources on the contract. Dispatch offices should ONLY add/subtract resources for which they are responsible, through the contract.

- **Organizations with Direct Access.** The lower right area of the Organizations tab is used to authorize dispatch offices to directly access resources on the contract. An organization displayed in this area means that it is authorized to request and assign available resources which are on the contract.

For exclusive use contracts, you cannot modify Organizations with Direct Access.

Organizations tab

The screenshot displays the 'Organizations' tab interface. At the top, there are two tabs: 'Organizations' (selected) and 'Resources'. Below the tabs, the interface is divided into three main sections:

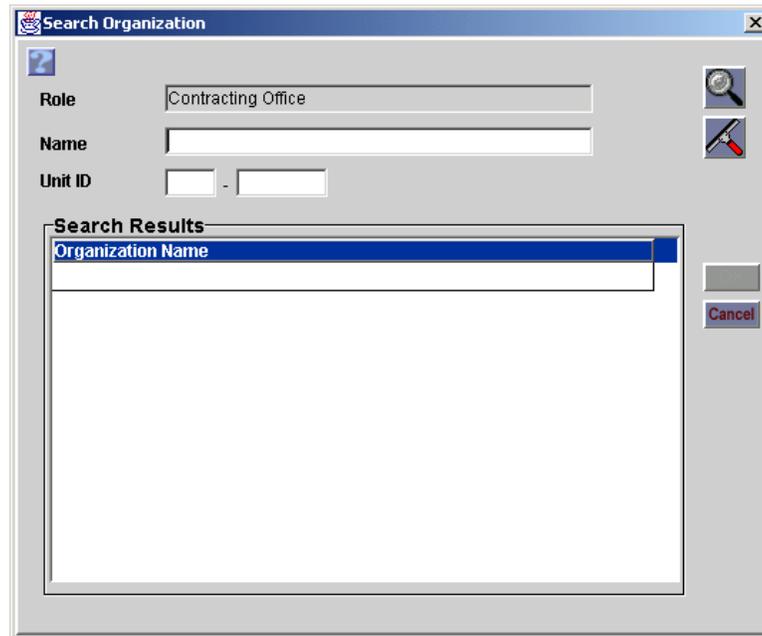
- Organizations Involved:** A table with two columns: 'Role' and 'Organization'.

Role	Organization
Contracting Office	Rocky Mountain Area Coordination Center
Managing Dispatch	Rocky Mountain Area Coordination Center
- Organizations Managing Resources:** A section with a 'Name' header and a plus sign (+) button. It is currently empty.
- Organizations With Direct Access:** A section with a 'Name' header, a plus sign (+) button, and a minus sign (-) button. It contains one entry: 'Rocky Mountain Area Coordination Center'.

To designate a single managing dispatch organization

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
- 2 Under **Organizations Managing Resources** on the **Organizations** tab, click the **Add Organization(s)** button.
- 3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click **OK**.
- 4 On the **Information** dialog box, click **OK**.

The following diagram shows the Search Organizations dialog box for the “Contracting Officer” Role.



To designate more than one managing dispatch organization

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
- 2 On the **Organizations** tab under **Organizations Managing Resources**, click the **Add Organization(s)** button.
- 3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click **Apply**.
- 4 Click to select another organization of your choice. Click **Apply**, and then click **OK** on the **Information** dialog box.

- 5 Add additional organizations as appropriate. When finished, click **OK** on the Search Organizations dialog box, and then click **OK** on the **Information** dialog box.

*To add multiple managing dispatch organizations, you can also press the CTRL key, click to select all organizations of your choice, and then click **Apply** or **OK**.*

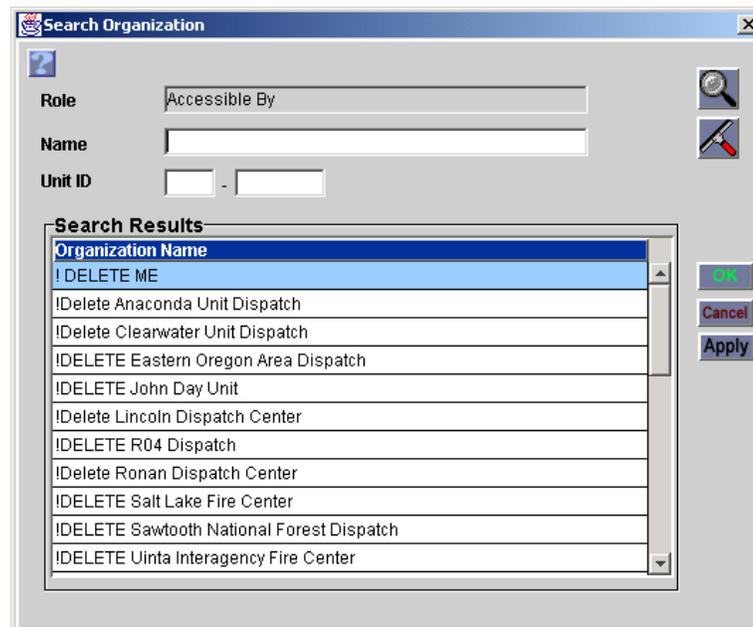
To delete a managing dispatch organization from the contract or purchase agreement

- On the **Organizations** tab under **Organizations Managing Resources**, click the **Remove Organization(s)** button.

To designate an organization with direct access

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
- 2 On the **Organizations** tab under **Organizations With Direct Access**, click the **Add Organization(s)** button.
- 3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click **OK**.
- 4 On the **Information** dialog box, click **OK**.

The following diagram shows the Search Organizations dialog box for the “Accessible By” Role.



To designate more than one organization with direct access

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
- 2 On the **Organizations** tab under **Organizations with Direct Access**, click the **Add Organization(s)** button.
- 3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click **Apply**.
- 4 Click to select another organization of your choice. Click **Apply**, and then click **OK** on the **Information** dialog box.
- 5 Add additional organizations as appropriate. When finished, click **OK** on the Search Organizations dialog box, and then click **OK** on the **Information** dialog box.

*To add multiple organizations with direct access, you can also press the CTRL key, click to select all organizations of your choice, and then click **Apply** or **OK**.*

To delete an organization with direct access from the contract or purchase agreement

- On the **Organizations** tab under **Organizations With Direct Access**, click the **Remove Organization(s)** button.

Attaching resources to Exclusive Use and CWN contracts

The Resources tab allows you to assign specific resources to an Exclusive Use or CWN contract. You can locate these resources by name or by catalog number.

Before you can add a resource to a contract, that resource item must exist in the ROSS database. For more information about adding resource items, see "Resource Item - working with resources," later in this ROSS User's Guide.

Resources tab

Organizations		Resources	
Resources on Contract			
Resource Name	Home Dispatch Unit	Provider Unit	Alternate Name
FIXED WING-Piper Cheyenne I	CO-RMC	CO-R02	N37TW

To search by resource item

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
- 2 Click the **Add Resource(s)** button, and then select the **Catalog** of your choice on the **Search By Resource** tab.
- 3 To change the **Resource Home Dispatch** organization, click **Other Organizations**, and then type the **Home Dispatch Unit ID** of your choice.
- 4 Type information into as many text boxes as possible to narrow your search, and then click **Search**.

The following diagram shows the Search By Resources tab on the Search Resources dialog box.

The screenshot shows the 'Search Resources' dialog box with the 'Search By Resource' tab selected. The dialog contains several input fields and buttons. The 'Catalog' dropdown is set to 'Aircraft'. The 'Resource Home Dispatch' section has 'Rocky Mountain Area' selected. The 'Resource Name', 'Alternate Name', and 'Provider Unit ID' fields are empty. The 'Home Dispatch Unit ID' field is also empty. There are 'OK', 'Cancel', and 'Apply' buttons on the right side. Below the input fields is a table with the following columns: 'Catalog Item', 'Resource Name', 'Home Dispatch Unit', and 'Provider Unit'.

Catalog Item	Resource Name	Home Dispatch Unit	Provider Unit

To search by catalog

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
- 2 Click the **Add Resources** button, click the **Search by Catalog** tab, and then select the **Catalog** of your choice.
- 3 To change the **Resource Home Dispatch** organization, click **Other Organizations**, and then type the **Home Dispatch Unit ID** of your choice.
- 4 Click to select the **Catalog Category** and **Catalog Item** of your choice, and then click **Search**.

The following diagram shows the Search by Catalog tab on the Search Resources dialog box.

Catalog Item	Resource Name	Home Dispatch Unit	Provider Unit

To add resources to a contract

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
- 2 Click the **Add Resource(s)** button.
- 3 On the **Search Resources** dialog box, search for and then click to select the **Catalog Item** of your choice, and then click **Apply**.
- 4 Click to select additional **Catalog Items** as appropriate and click **Apply**.

*To select more than one **Catalog Item** at a time, press **CTRL** while selecting each **Catalog Item**, and then click **Apply**.*

- 5 When finished, click **OK** to return to the **Resources** tab.

To remove a resource from a contract

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
- 2 Click to select the **Resource Name** you want to remove, and then click **Remove Resource(s)**.

Adding catalog items to a Purchase Agreement

The Purchase Agreement Items tab displays only for “PA” contract types. Purchase agreement items exist within the catalog, but are not specific resource items. These items include temporary towers, porta potties, and bus rentals. When queried for dispatch, available purchase agreement items display on the Pending Request screen.

Purchase Agreement Items tab

To add Catalog Items to a purchase agreement

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Purchase Agreement Items** tab.

*You must select a **PA** contract type.*

- 2 Under **Available Catalog Items**, click the **Catalog** drop-down arrow, and then click to select the **Catalog** of your choice.
- 3 Click the **Category** drop-down arrow, and then click to select the **Category** of your choice, and then click **Filter**.
- 4 Click to select the **Catalog Item(s)** of your choice, and then click the **Add** button.

*To add more than one **Catalog Item** at a time, press [CTRL], click to select all **Catalog Items** of your choice, and then click the **Add** button.*

To remove Catalog Items to a purchase agreement

- 1** On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Purchase Agreement Items** tab.
- 2** Under **Available Catalog Items**, click the **Catalog** drop-down arrow, and then click to select the **Catalog** of your choice.
- 3** Click the **Category** drop-down arrow, and then click to select the **Category** of your choice, and then click **Filter**.
- 4** Under **Purchase Agreement Items**, click to select the **Catalog Item(s)** of your choice, and then click the **Remove** button.

*To remove more than one **Catalog Item** at a time, press [CTRL], click to select all **Catalog Items** of your choice, and then click the **Remove** button.*
