

Contract - setting up agreements

This chapter explains how to enter agreements between vendors and your organization. It has been reorganized to accommodate both the novice and experienced ROSS user. For the novice, you will find a wealth of information under the last section of this chapter, “Exploring contracts and agreements in detail,” which explains basic information about contracts and purchase agreements and specifics you may need as reference. For the experienced ROSS user, you will find the front of this chapter streamlined to help you work with the Contract screen more effectively. Topics include:

- What’s new for version 2.7
- Working with the Contract screen
- Exploring contracts and agreements in detail.



*Look for this sign to identify new topics and tasks in this chapter. You can also locate new topics and tasks by clicking on any **red bookmark** within the online document!*

What’s new for version 2.7

Changes relating to working with the Contract screen for ROSS version 2.7 include:

- **Printing.** Cognos®¹ is the new printing and reporting utility used in ROSS.

For more information about Cognos see, “Reports - generating and printing reports,” in this ROSS User’s Guide.

Working with the Contract screen

Contracts and purchase agreements allow vendors to supply resources and services for dispatch to incidents. You can enter any type of contract, including multiple contracts between a single vendor and many organizations.

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 then define the resources available through that agreement.

To access the Contract screen

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

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

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Contract screen

Contracts

Contract Number	Type	Begin Date	End Date	Global Access	Vendor / Government (Non-Dispatch) Provider	Entered By
80-ARA-5385	AGR	05/01/2006	05/01/2007	No	Trans Aero	CO-RMC
AG-82X9-C-05-5097	CWN	06/13/2005	06/13/2007	No	Geo-Seis Helicopters, Inc.	CO-RMC
AG-82X9-C-05-5098	CWN	06/13/2005	06/13/2007	No	Trans Aero	CO-RMC
AG-82X9-C-05-5099	CWN	06/13/2005	06/13/2007	No	Sky Aviation Corp.	CO-RMC
AG-82X9-C-05-5100	CWN	06/13/2005	06/13/2007	No	New Air Helicopters	CO-RMC
AG-82X9-C-06-9003	CWN	06/23/2006	06/23/2007	No	Gregg Flying Service, Inc.	CO-RMC
AG-82X9-C-06-9004	AGR	06/23/2006	06/23/2007	No	Eagle Aviation, Inc. - South Dakota	CO-RMC
AG-82X9-C-06-9005	CWN	07/07/2006	07/07/2007	No	France Flying Service	CO-RMC
AG-82X9-C-06-9006	CWN	06/23/2006	06/23/2007	No	Bighorn Airways, Inc.	CO-RMC
AG-82X9-C-06-9007	CWN	07/07/2006	07/07/2007	No	Meeker Airport, Inc.	CO-RMC
AG-82X9-C-06-9008	CWN	07/07/2006	07/07/2007	No	Mountain Aviation, Inc.	CO-RMC
AG-82X9-C-06-9010	AGR	06/23/2006	06/23/2007	No	Houston Air, Inc. - Colorado	CO-RMC

Organizations Involved

Role	Organization
Contracting Office	National Interagency Fire Center - United States Forest Service
Managing Dispatch	Rocky Mountain Area Coordination Center

Organizations Managing Resources

Name
Rocky Mountain Area Coordination Center

Organizations With Direct Access

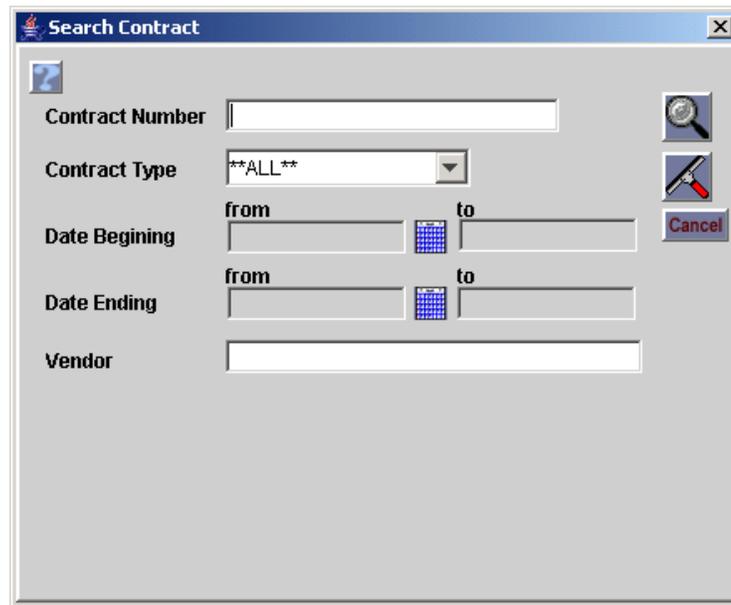
Name
Casper Interagency Dispatch Center
Cody Interagency Dispatch Center
Craig Interagency Dispatch Center
Durango Interagency Dispatch Center
Fort Collins Interagency Dispatch Center
Grand Junction Air Center
Great Plains Interagency Dispatch Center

To search for an existing contract in the ROSS database

To prevent duplicates, be sure to search for and determine whether the contract already exists in the ROSS database before creating a new one.

- 1 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.



To search for a vendor

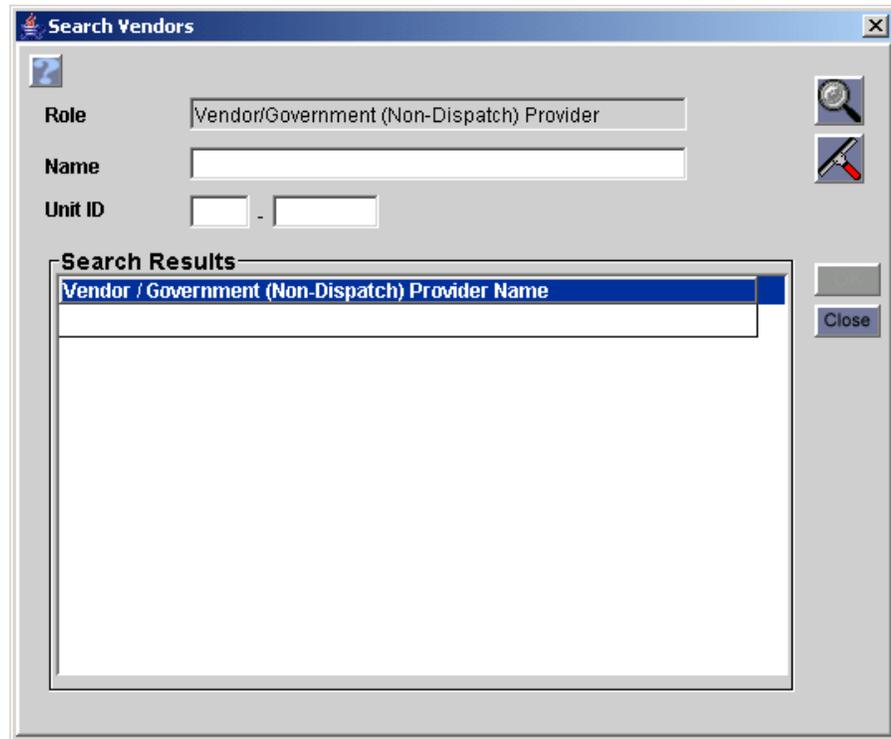


- 1 On the **Contract** screen, click **New** or **Edit**, and then click the **Pick Vendor** button.

*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**.
- 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***: Text input field containing 'AG-1234-C-99-1234'.
- Contract Type***: Dropdown menu showing 'Call When Needed'.
- Begin Date**: Text input field.
- End Date**: Text input field with a calendar icon to its right.
- Global Access**
- Vendor Government (Non-Dispatch) Provider***: Text input field with a dropdown arrow icon to its right.
- OK** and **Cancel** buttons on the right side.

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.

The following diagram shows the Edit Contract dialog box.

To remove a contract or purchase agreement from view

You must have the Data Manager role to remove a contract or purchase agreement. The contract or purchase order must not be associated to any existing open requests.



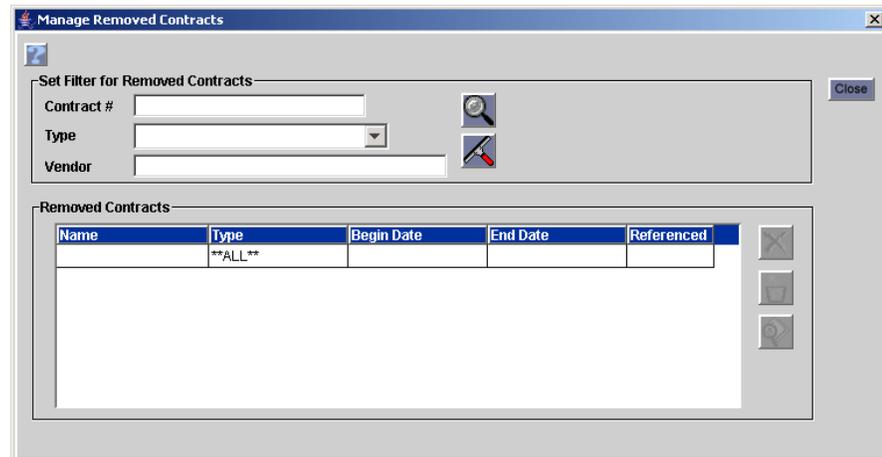
- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice, and then click the **Remove Contract** button.
- 2 On the **ROSS Confirmation Message** dialog box, click **Yes** to confirm or **No** to cancel.

To delete a removed contract or purchase order from the ROSS database



- 1 On the **Contract** screen, click the **Manage Removed Contracts** button.
- 2 On the **Manage Removed Contracts** dialog box under **Set Filter for Removed Contracts**, search for and then click to select the **Removed Contract** of your choice, and then click the **Delete Contract** button.
- 3 On the **Confirm Deletion** dialog box, click **Yes** to confirm or **No** to cancel.

The following diagram shows the Manage Removed Contracts dialog box.



To restore a removed contract or purchase order



- 1 On the **Contract** screen, click the **Manage Removed Contracts** button.
- 2 On the **Manage Removed Contracts** dialog box under **Set Filter for Removed Contracts**, search for and then click to select the **Removed Contract** of your choice, and then click the **Restore Contract** button.

To view contract or purchase order usage

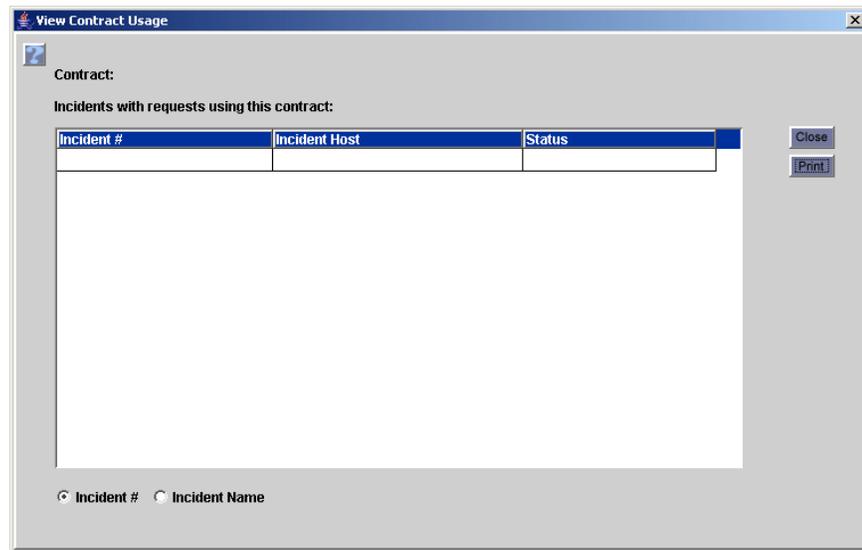


- 1 On the **Manage Removed Contracts** dialog box under **Set Filter for Removed Contracts**, search for and then click to select the **Removed Contract** of your choice, and then click the **View Contract Usage** button.



- 2 To print contract usage information, click **Print**, and then perform the following
 - on the **File** menu, click to select **Print**, or press [CTRL] + P
 - on the **Print** dialog box, review the printer settings and then click **OK**.

The following diagram shows the View Contract Usage dialog box.



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

Use the instructions outlined in this section only where there are both uniquely identifiable and non-uniquely identifiable items on the 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 stasured as a resource item

- 1 On the **Contract** screen, click **New**.
- 2 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.

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



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

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

- 1 On the **Contract** screen, click **New**.
- 2 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**.
- 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 purchase agreement for a non-unique service item such as meals and/or lodging.

Managing organizations for contracts and purchase agreements

The Organizations tab displays a list of organizations with access to resources on contracts and purchase agreements.

Organizations tab

Role	Organization
Contracting Office	National Interagency Fire Center - United States Forest Service
Managing Dispatch	Rocky Mountain Area Coordination Center

Name
Rocky Mountain Area Coordination Center

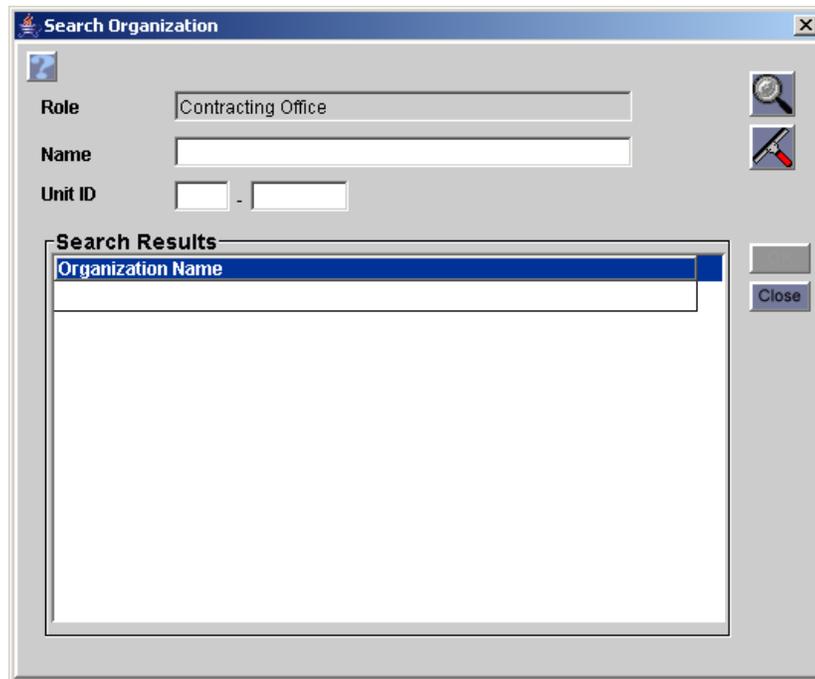
Name
Casper Interagency Dispatch Center
Cody Interagency Dispatch Center
Craig Interagency Dispatch Center
Durango Interagency Dispatch Center
Fort Collins Interagency Dispatch Center
Grand Junction Air Center
Great Plains Interagency Dispatch Center

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 Office” 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**.*

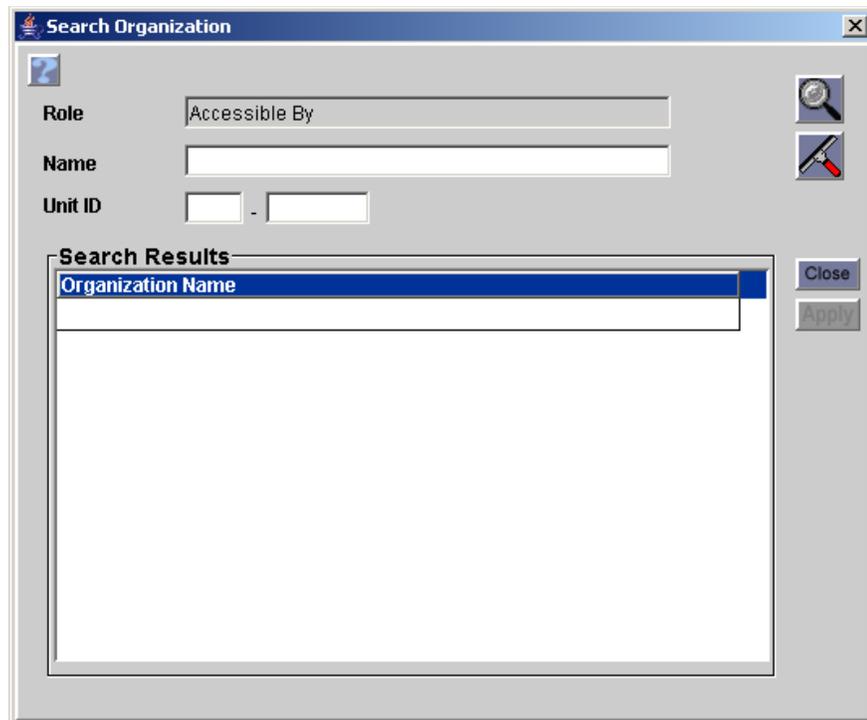
To delete a managing dispatch organization from the contract or purchase agreement

- 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," in this ROSS User's Guide.

Resources tab

Resource Name	Home Dispatch Unit	Provider Unit	Alternate Name	Operator Furnished By	Max # Operators
HELICOPTER Lama SA315...	CO-RMC	CO-R02	N42PL	Not Applicable	0
HELICOPTER Lama SA 315...	CO-RMC	CO-R02	N3128G	Not Applicable	0
HELICOPTER Lama SA315B...	CO-RMC	CO-R02	N58000	Not Applicable	0

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 a dialog box titled "Search Resources". At the top, there is a search icon and the text "A-3 - Airtanker, Any Type". Below this, there are two text boxes: "Inclusion" with the value "None" and "Exclusion" which is empty. A section titled "Set Search Criteria" contains a "Resource Name" text box, a search icon, and two checkboxes: "Do Not Match Features" and "Show Government Provided Resources Only". At the bottom left, there is a checkbox for "Include Advanced Criteria". On the right side, there are "OK" and "Cancel" buttons.

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.

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.

To access 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.*

Exploring contracts and agreements in detail



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.** Organizations Managing Resources organizations must be designated by the Managing Dispatch organization. These dispatch organizations may add, edit, and delete resource items to the contract, but can not edit the contract itself.
- **Organizations With Direct Access.** 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.** Purchase Agreement Items are services entered from the Resource Item screen and classified under a Purchase Agreement (PA).
- **Contract Type.** The Contract Type includes Call When Needed (CWN), Exclusive Use (EXU), Agreement (AGR), and Purchase Agreement (PA).

Contract types are further defined in the next section of this chapter.

- **Global Access.** 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 you must call the vendor prior to assigning that resource item. Emergency Equipment Rental Agreements (EERA) are typically CWN contracts. An exception to this is when a line item listed on an EERA is not unique. These line items may include motel rooms, meals, or other services that do not have a unique identifier, such as a serial number or vehicle identification number.

For example, some EERAs list motel rooms and meals. These types of entries really belong on a purchase agreement.

- **Exclusive Use (EXU).** An “EXU” 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 “PA” is an agreement with a vendor to provide services, such as copy machine rental, grocery purchase, or 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 are national, geographic, regional, or unit in scope. These contracts may identify many items that include some your dispatch office manages and statuses. These contracts are typically Exclusive Use or Call When Needed in nature, and may include:

- National crew contracts
- Engine contracts
- Air Tanker contracts.

The dispatch office that manages the contract is usually responsible for entering it into ROSS. They may be, however, not the unit that enters the

resources *used* on the contract. These contracted resource items may be 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 Coordination Center (NICC). There are 20 crews attached to the contract, which 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.

Understanding organizations, resources, contracts, and purchase agreements

In ROSS, organizations are unique and each exists as a single record. When creating a contract, select the vendor organization that holds the contract.

Before entering a contract or purchase agreement, 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.
- **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.

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 office 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, while the Tennessee Interagency Coordination Center manages a Type 3 helicopter, the actual 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 that manage (add, delete, and edit) resource items for the contract. Use this area when contracts have resource items dispersed through a large area of the nation that specified the units managing the contracted line items. The authority extends only to resource items and does not allowing editing of 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.
