Create a Task- Delivery Order from an External Award

Background:
Buyers should use the following navigational aid to order from contracts and agreements maintained outside of NIH PRISM. This guide will outline the steps necessary to issue an order against an external award and report it successfully to DCIS/FPDS.

Concept:

This document provides the steps required to create a BPA Call against the Health and Human Services (HHS) and General Service Administration Federal Strategic Sourcing Blanket Purchase Agreements (BPA) against strategic sourcing Blanket Purchasing Orders (BPAs).

Additional Information:
Most NBS step by step process instructions (computer-based training or Navigations) begin with the presumption that the user has first located the appropriate NBS Portal page and has then accessed the NBS Production link for the appropriate business area. For assistance with this process see the NBS Log On Instructions portlets within the NBS Share Point Portal pages. All references to “clicking” or other mouse actions are written with the presumption that the user’s mouse has a right hand configuration. For supportive information on how to view recorded simulations of this process using User Productivity Kit (UPK) go to the NBS Portal pages, NBS Support Resources portlet, Simulations and Computer Based Training link. Open the Introduction to UPK link.
## Procedure

1. From the Prism Home Page click the **Delivery/Task Order** list item.
2. Click the **Go** button.
3. The Document Create Screen will display. On this screen you will need to:

1. Click box next to the External Contract field
2. Input the External BPA # into the Contract Number Field and,
3. Select the numbering mask for the Delivery task order for the corresponding fiscal year.

Note: Create from a Requisition is a default value. The selection of the appropriate requisition is also required.

The following steps detail the process required to complete the Document Create Screen.

4. Click the **Contract Number External Contract** option.

5. Click in the **Contract Number** field.

6. Enter the desired information into the **Contract Number** field. Enter a valid value e.g. "HHSP23320100005WB".
Step | Description
--- | ---
7. | Click the **Delivery / Task Order Numbering Masks** list.
8. | Point to the **FY13 OD/OLAO TO/DO off External Contracts (HHSN2632013#U)** list item.
9. | Click the **Continue** button.
10. | The search screen will display. Enter the desired information into the **Requisition Number** field. Enter a valid value e.g. "2906019".
11. | The Requisition will appear on the right side of the screen. Click the **Y** link next to the desired Requisition Number.
12. | The Line Item Selection will appear on the bottom section of the screen. Click the **1** checkbox next to the desired Line Item number.
<table>
<thead>
<tr>
<th>Step</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>Click the <strong>Create</strong> button.</td>
</tr>
</tbody>
</table>
| 14.  | The General Information screen will display. Fields may pre-populate with data from the prior screens.  

**NOTE:** Every field on this screen needs to be filled with the corresponding data. After the selection of each value the General Information screen will display. In this example the sample values are:  

Invoice Office: **INV-OFM**  
Vendor: **Contemporaries**  
Contracting Officer: **Gregory Holliday**  
Period of Performance: **9/12/13** to **9/11/14**  

The following steps show how to complete this screen.
<table>
<thead>
<tr>
<th>Step</th>
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<tr>
<td>15.</td>
<td>Click the <strong>Additional Info</strong> link.</td>
</tr>
<tr>
<td>16.</td>
<td>The Additional Information screen will display. Some of the Additional Information fields may pre-populate with data values input in prior screens. The required fields and the sample values for them are:</td>
</tr>
</tbody>
</table>

**NAICS code:** 541611  
**Payment Office:** OA OLAO-BR-1  
**Invoice Matching:** 3-Way  
**Contracting Procedures:**

**NOTE:**  
In order for 2-Way invoices to be routed for approval and paid, an Institute or Center specific Central Point of Distribution (CPD) must be selected from the “Payment Office” field in PRISM for all 2-Way Awards. Completion of the field will not impact a 3-way award.

The following steps show how to complete this screen.
<table>
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<tr>
<th>Step</th>
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<tr>
<td>17.</td>
<td>Click the <strong>NAICS Code LOV (...)</strong> button.</td>
</tr>
<tr>
<td>18.</td>
<td>Enter the desired information into the <strong>For</strong> field. Enter a valid value e.g. &quot;541611&quot;.</td>
</tr>
<tr>
<td>19.</td>
<td>Click the <strong>Display</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>A link for the corresponding NAICS code will display. Click the <strong>541611</strong> link.</td>
</tr>
<tr>
<td>------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>

**541611**
Step 21. Click the Payment Office LOV (…) button.
<table>
<thead>
<tr>
<th>Step</th>
<th>22. Click the <strong>OA OLAO-BR-1</strong> link.</th>
</tr>
</thead>
</table>

**OA OLAO-BR-1**
<table>
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<tr>
<th>Step</th>
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<tbody>
<tr>
<td>23.</td>
<td>Click the <strong>Invoice Matching</strong>: list.</td>
</tr>
<tr>
<td>Step</td>
<td>24. Click the <strong>3-Way</strong> list item.</td>
</tr>
<tr>
<td>------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="PRISM screenshot" /></td>
</tr>
</tbody>
</table>
Step 25. Click the **Contracting Procedures...** button.
Step 26. Click the **NON R AND D** link.

**NON R AND D**
Step 27. Click the **Funds Tracking** link.

**Funds Tracking**
### Step 28.

**The Funds Tracking screen appears.**

A Treasury Account Symbol (TAS) is the receipt, appropriation, expenditure and other fund account symbols and titles as assigned by the Department of the Treasury used for Government wide Accounting purposes. Some ICs have multiple TAS for different projects. The Treasury Account Symbol field is reported to DCIS. You must enter the TAS for every award over $3000 and verify the TAS for the specific project.

**Note:** At this time reporting to DCIS is not required for micro-purchases (under $3000).

Each IC has at least one Treasury Account Symbol. To find the TAS for your IC and project, access the NBS Acquisitions Portal (https://my.nih.gov/portal/server.pt/community/nbs_acquisition/1057) and select the User Table of Treasury Symbols and Fund Segments under Community Links and Resources.

In this example the appropriate value is **75-0846**
29. Click the **Text** link.
### Step 30. The Text window appears.

The Inherently Governmental Functions Code is a government method of identifying records more efficiently. It is mandatory for any Product Service Code (PSC) that begins with an alpha. The Inherently Governmental Code will need to be stated in DCIS item 6M Description of Requirement.

The PSC for this Purchase Order is R699

Any award associated with PSC that begins with an alpha must be assigned to one of the following categories:

1. Closely Associated Functions (IGF::CL::IGT)
2. Critical Functions (IGF::CT::IGF)
3. Other Functions (IGF::OT::IGF)
4. Closely Associated, Critical Function where the service(s) is/are more Closely Associated, however it is still Critical Function (IGF::CL,CT::IGF)
5. Critical Function, Closely Associated where the service(s) is/are more of a Critical Function, however it is still Closely Associated (IGF::CT,CL::IGF)


### Step 31. Click in the Text Description Statements field.

### Step 32. Delete the contents of the field.
Enter the desired information into the Statements... field. Enter a valid value e.g. "IGF::OT::IGF TECH WRITER services to be provided for pending AIDS special publication.".
<table>
<thead>
<tr>
<th>Step</th>
<th>Click the <strong>Items</strong> link.</th>
</tr>
</thead>
<tbody>
<tr>
<td>33.</td>
<td>Items</td>
</tr>
</tbody>
</table>
Step | Description
--- | ---
34. | The available line items will display. Click the 1 link that corresponds with the desired line item.
35. | The Items General screen will display. Confirm the accuracy of the information displayed. Make corrections as needed.
36. | Click the **Package** link.

[Image of PRISM interface](https://library.nih.gov)
<table>
<thead>
<tr>
<th>Step</th>
<th>Click the <strong>Change Form</strong> link.</th>
</tr>
</thead>
<tbody>
<tr>
<td>37.</td>
<td><strong>Change Form</strong></td>
</tr>
</tbody>
</table>
### Step

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>38.</td>
<td>Click the <strong>OF347 (2/2012)</strong> link.</td>
</tr>
<tr>
<td>39.</td>
<td>Click the <strong>Main</strong> link.</td>
</tr>
</tbody>
</table>
| 40.         | To attach files to the Award:  
  a. Refer to the NAV, *Add an Attachment in PRISM*, to add an attachment.  
  b. Refer to the NAV, *Add a Supporting Document to Prism*, to add a supporting document.  
  c. Refer to the NAV, *Add an Attachment or Supporting Document or Supporting Document from the PRISM Library*, in order to add a file document form the PRISM database.  
  d Refer to the NAV, *Check Out or Check In an Attachment or Supporting Document*, in order to Check Out or Check In an Attachment or Supporting Document. |
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<td>41.</td>
<td>All awards greater than $3,000 must be reported to the Federal Procurement Data System (FPDS) Next Generation. The HHS Departmental Contracts Information System (DCIS) feeds contract data to FPDS-NG. Buyers must submit data into DCIS via PRISM. Buyers must complete an error free Draft DCIS record prior to routing the award document for approval. The FPDS button launches the DCIS record in a browser page. Some fields on this page are pre-populated. The following steps show the selection of the FPDS button, the update of the Procurement Instrument Identifier (PIID) value and the opening of the DCIS interface.</td>
</tr>
<tr>
<td>42.</td>
<td>Click the <strong>FPDS</strong> button.</td>
</tr>
</tbody>
</table>
| Step | The Set PIID screen will display.  
|------|--------------------------------------------------------------------------|
| 43.  | **Note:** The message “Contract Number not found in FPDS-NG” will display because the parent contract is not an NIH contract.  
|      | The default Contract Number Agency ID in PRISM is 7529 on all documents except GSA. When the procurement is a GSA purchase, then the default Contract Number Agency ID is 4730.  
|      | Contracting Number Agency ID values:  
|      | GSA Purchase: 4730 or 4732  
|      | HHS External BPA: 7555  
|      | In this example the BPA is an External HHS, with a Contract Number Agency ID of **7555**.  
| 44.  | Press the left mouse button and drag the mouse to select the desired text.  
| 45.  | Enter the desired information into the **Contract Number Agency ID:** field. Enter a valid value e.g. *7555*.  

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Step 46. Click the **Submit** button.

Step 47. DCIS will launch and display . Update the draft record with the appropriate values.

Click the **Verify** button.

Step 48. Note: The record will state "This action passes the validations." when the record is error free.

Click the **Save Draft** button.

Step 49. Click the **Logout** button.
50. Click the **Validations** link.

51. The validations process identifies errors within the in process document. Review the results of the validation process, correct any errors received.

   **Note:** Any "warning messages' are optional to correct. All "error messages" are mandatory to correct before the document can be routed for Approval.

52. If the document is to be reviewed and or Approved by others:

   a. Refer to NAV, **Route a Document in Prism for Review using a Template**.

   b. Refer to NAV, **Route a Document in PRISM for Approval Using a New Route**

   c. Refer to NAV, **Route a Document in PRISM for Review or Approval Using a Template**.
| Step | Congratulations!  
You have successfully completed Create a Task Delivery Order from an External Award. You should now be able to create a Task Delivery Order against an External GSA or HHS Agreement.  
**End of Procedure.** |