Impacted Business Area	Acquisition
NBS Role	Buyer-Acquisition, Buyer-Contract
File Name	Create a Task- Delivery Order from an
r ne manie	External Award
Last Modified	5/9/2014
Document Controller	NBS Change Management
Status	FINAL

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

PRISM			He	lp i My Profile i	Sign Out 🔺
Welcome COURTNEY A BRACEY			i 🖉	1 (1)	02
Quick Open: 60 C	Create Document:	HOME Go	INBOX TASKS	DOCS REPORTS	UTILITIES
Inbox There are no messages in your inbox. Workload (2) Assigned Date Requisition Number	Delivery/Task Order Recent Doct Purchase Order DO/TO: HHSP23320100005WB/HHSN2 (BASE/In Progress) TEST Stuff	63201300005U	Quick Li Contract Cl Excluded Pa Federal Bus GSA Advan	nks necklist for Using ARRA arties List System iness Opportunities tage!	▲ Funds
08/13/2013 2752786 0 08/12/2013 2752671 0			NBS Acquis PPIRS Wage Deter	ition Document Numbe	r Search
You have no tasks due in the next 7 days.			Regulation FAR	ion Databases Current Through FAR FAC 2005-66 Ap	ril 1, 2013
			HHSAR	F.R. Mar 9, 2005	
			You currentl Click here to	nformation y do not have a proxy configure.	
©2012 Compusearch Software Systems, Inc. All right	ts reserved.	Accessibility Tool	s A	bout PRISM v. 71.70.05.0	02.COTS.004
			Local intranet Protecte	d Mode: On 🛛 🖗 🗸	100% -

Step	
1.	From the Prism Home Page click the Delivery/Task Order list item. Delivery/Task Order
2.	Click the Go button.



DDICM	?
PRISM	Document Create
	Document Type
	Delivery / Task Order
	Contract Number
	External Contract
	Create From
	Requisition
	Delivery / Task Order Numbering Masks
	OD/OLAO TO/DO off Internal Contracts (HHSN263#)
	Section Template
	(None)
	Continue Cancel
2	
Done	j j j j j j j j j j j j j j j j j j j

Step	
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	
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. Continue

Search Criteria			
Requisition Number			
Site			
OD/OLAO	-		
Include Related Sites:			
Requisitioner _			
Buyer _			
BRACEYCA_NIH			
Originating Office			
Released Date Range			
Start Date			
End Date			
Sort by			
Results per Page			
5 -			
	1		
Done		Local intranet Protected Mode: On	🖓 🗸 🔍 100

Step	
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.



Step	
13.	Click the Create button.
	Create
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: <i>Contemporaries</i>
	Contracting Officer: Gregory Holliday
	Period of Performance: 9/12/13 to 9/11/14
	The following steps show how to complete this screen.

DRISM	Route Delete Cancel FPDS Renumber 🖴 ?
FRISH	Delivery/Task Order Information
Delivery/Task Orde	Order Number: HHSN263201300072U Stage: Award Obligation: \$4,000.00
	Contract Number: HHSP23320100005WB Net View: Off Total Amount without Options: \$4,000.00
Main	Version: BASE-In Progress Vumber of Items: 1 Total Amount: \$4.000.00
General	
Additional Info	
Funds Tracking	
Text	External Contract Number: HHSP23320100005WB
Payments	Requisition Number: 2906019
Summary	
Items	Award Date: 09/12/2013
Vendor	Effective Date: 09/12/2013
Synopsis	Admin Office: ADM-OD/OLAO Edit
Package	Issuing Office: IO-OD/OLAO Edit
Supporting Docs	Invoice Office: INV-OFM
Summary Report	Vendor: 1108183 CONTEMPORARIES INC:1108183
Protests	Buyer: BRACEYCA_NIH
Claims	
Validations	
Route History	
Status History	Period of Performance: 09/12/2013 🛛 🕸 to 09/11/2014 🖉 🖻
Notifications	
Suspense Items	
Ownership	
Navigator	
Return to Home	
•	
https://nbrssdev.cit.nih.gov:8813	3/prism/deliveryorder/nav/nav.asp?option=general&submit=yes# 🔰 🔰 🚺 Local intranet Protected Mode: On 👘 🐴 🔍 100% 👻



Step	
15.	Click the Additional Info link. Additional Info
16.	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 :
	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.

PRISM	Route Delete Cancel FPDS Renumbe	r 📕 ?	
Delivery/Task Orde	Order Number: HHSN263201300072U	Stage: Award Obligation: \$4,000.00	•
	Contract Number: HHSP23320100005WB	Net View: Off Total Amount without Options: \$4,000.00	
Main	Version: BASE-In Progress -	Number of Items: 1 Total Amount: \$4.000.00	•
General		• • • • • • • • • • • • • • • • • • •	
Additional Info	Additional Information		•
Funds Tracking	NTP / Vendor Signed On:		-
Text	Site:	OD/OLAO	
Payments	Project Title:		
Summary	Confirmed With:		
Items	Defense Van Tert		
Vendor	Reference Your Text:		
Synopsis	NAICS Code:	(None) <u>Clear</u>	
Package	Size Standard:	(None)	
Supporting Docs	Payment Office:		
Summary Report	Originating Office:	ORACLE Edit	
Protests	Is this an IT-related purchase?:	No 💌	
Claims	Potential Amount:		
Validations	Supplies or Services:	•	
Route History	Construction:	No 💌	
Status History	GWAC / GSA Purchase:		
Notifications	6F - Performance-Based Service Acq:	(Select)	
Suspense Items	6L - Cost Acctg Standards Clause:	(Select)	
Ownership	6N - Purchase Card Payment Method:	(Select) •	
Navigator	8L - Recovered Materials/Sustainability:	(Select)	
Return to Home	10H - Commercial Item Acq. Procedures:	(Select)	
	114 CO's Determination of Rus Size	(Select)	•
Done		📢 Local intranet Protected Mode: On 🖉 👻 100% 👻	



Step	
17.	Click the NAICS Code LOV () button.

?	
NAICS Code Selection	
Search: Code For	Display Cancel
Max Results: 100 V Results per Page: 10 V	
Max results. 100 Tresults per rage. 10	
Selection Criteria	
Code Description	Size Standard
<u>111110</u> Soybean Farming	\$0.75
111120 Oilseed (except Soybean) Farming	\$0.75
111130 Dry Pea and Bean Farming	\$0.75
111140 Wheat Farming	\$0.75
111150 Corn Farming	\$0.75
111160 Rice Farming	\$0.75
<u>111191</u> Oilseed and Grain Combination Farming	\$0.75
111199 All Other Grain Farming	\$0.75
111211 Potato Farming	\$0.75
<u>111219</u> Other Vegetable (except Potato) and Melon Farmi	ing \$0.75
Next Page 1 of 10 (Too many results: Only 100 retr	ieved. Use Search options to limit results.)
Done	📢 Local intranet Protected Mode: On 🛛 🖓 👻 100% 🔹

Step	
18.	Enter the desired information into the For: field. Enter a valid value e.g. " 541611 ".
19.	Click the Display button. Display



Nuclei Code For: 541611 Display Cancel Max Results: 100 Results per Page: 10 Code Description Size Standard 541611 Administrative Management and General Management Consulting Services \$14.0 Page 1 of 1 (1 results found) 20re Que tool intenst Potested Mode: On False False	?					
Operating Tools Point Provide Tools Max Results 100 Results per Page: 10 Results Code Description Size Standard 541611 Administrative Management and General Management Consulting Services \$14.0 Page 1 of 1 (1 results found) Page 1 of 1 (1 results found) Image: Tools and tools an	NAICS Code Selection	on		Display	Cancel	
Code Description Size Standard 541611 Administrative Management and General Management Consulting Services \$14.0 Page 1 of 1 (1 results found) Open Open 2010	Max Results: 1	00 V Results per Page: 10 V		Diopidy	Guilder	
Code Description Size Standard 541611 Administrative Management and General Management Consulting Services \$14.0 Page 1 of 1 (1 results found) 11 (1 results found) Size Standard 11 (1 results found) Size Stan						
541611 Administrative Management and General Management Consulting Services \$14.0 Page 1 of 1 (1 results found)	Code Descrip	otion			Size Standard	
Page 1 of 1 (1 results found)	541611 Admin	istrative Management and Gene	ral Management Consultir	ng Services	\$14.0	
Done	Page 1 of 1	(1 results found)				
Done						
Done						
Done Generated Mode: On 🍕 - 🍕 100% - J						
Done						
Done						
Done						
Done						
Done						
Done						
Done						
Done						
Done						
Done						
Done						
Done View Conal Intranet Protected Mode: On View Conal View Cona						
Done 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이						
	Done				Local intranet Protected Mode: On	

Step	
20.	A link for the corresponding NAICS code will display. Click the 541611 link. <u>541611</u>



Delivery/Task Orde Order Number: HHSN263201300072U Stage: Award Obligation: \$4,000.00 Main Version: BASE-In Progress V Number of Items: 1 Total Amount without Options: \$4,000.00 General Additional Info Additional Information Additional Information Yersion: BASE-In Progress V Number of Items: 1 Total Amount: \$4,000.00 General Additional Information Yersion: BASE-In Progress V Number of Items: 1 Total Amount: \$4,000.00 Additional Information Additional Information Yersion: BASE-In Progress V Number of Items: 1 Total Amount: \$4,000.00 General Additional Information Yersion: BASE-In Progress V Number of Items: 1 Total Amount: \$4,000.00 Additional Information Version: BASE-In Progress V Number of Items: 1 Total Amount: \$4,000.00 Additional Information NTP / Vendor Signed On: Vendor Yersion: Status History OD/OLAO Payments Discount Status History Confirmed With: Clear Supplies or Services: Vendor Yersion: Status History Originating Office: ORACLE Edit Subporting Docs Originating Office: ORACLE Vendor Supplies or Services: Vendor Yersion	PRISM	Route Delete Cancel FPDS Renumber	er 📕 ?
Contract Number: HHSP23320100005WB Net View: Off Total Amount without Options: \$4,000.00 Main Version: BASE-In Progress Number of Items: 1 Total Amount without Options: \$4,000.00 General Additional Information Additional Information Additional Information Funds Tracking Text NTP / Vendor Signed On: Image: Contract Number: Image: C	Delivery/Task Orde	Order Number: HHSN263201300072U	Stage: Award Obligation: \$4,000.00
Main Version: BASE-In Progress Number of Items; 1 Total Amount: \$4,000.00 General Additional Information Additional Information Additional Information NTP / Vendor Signed On: Image: Construction of the state of the	-	Contract Number: HHSP23320100005WB	Net View: Off Total Amount without Options: \$4,000.00
General Additional Information Additional Info Information Additional Information Site: Funds Tracking NTP / Vendor Signed On: Text Site: Payments OD/OLAO Discount Site: Summary Confirmed With: Items Reference Your Text Vendor NAICS Code: Synopsis Size Standard: Supporting Docs Originating Office: Supplies or Services: Notifications Route History Construction: Validations 6F - Performance-Based Service Acq; Suspense Items 6L - Cost Acctg Standards Clause;	Main	Version: BASE-In Progress -	Number of Items: 1 Total Amount: \$4.000.00
Additional Information Funds Tracking Text Payments Discount Discount Summary Confirmed With: Items Reference Your Text. Vendor Synopsis Size Standard: Supporting Docs Originating Office: NH COMMERCIAL ACCTS Edit Supporting Docs Originating Office: Namary Report Is this an IT-related purchase?: No Protests Claims Validations Supplies or Services: Y Validations Supplies or Services: Notifications 6F - Performance-Based Service Acq; Suspense Items 6L - Cost Acctg Standards Clause;	General		•
Funds Tracking NTP / Vendor Signed On: Image: Construct on the system of the syst	Additional Info	Additional Information	<u>1</u>
Text Site: OD/OLAO Payments Project Title: Discount Project Title: Summary Confirmed With: Items Reference Your Text: Vendor NAICS Code: Synopsis Size Standard: Supporting Docs Originating Office: Supporting Docs Originating Office: Supporting Docs Originating Office: Vendor Is this an IT-related purchase?: No Potential Amount: Validations Supplies or Services: Route History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Acq; Suspense Items 6L - Cost Acctg Standards Clause:	Funds Tracking	NTP / Vendor Signed On:	
Payments Project Title: Discount Confirmed With: summary Confirmed With: Items Reference Your Text: Vendor NAICS Code: Synopsis Size Standard: Synopsis Size Standard: Package Payment Office: Supporting Docs Originating Office: Supporting Docs Originating Office: Summary Report Is this an IT-related purchase?: Protests Is this an IT-related purchase?: Validations Supplies or Services: Route History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Accq: Suspense Items 6L - Cost Acctg Standards Clause:	Text	Site:	OD/OLAO
Discount Confirmed With: Items Reference Your Text: Vendor NAICS Code: Synopsis Size Standard: Synopsis Size Standard: Supporting Docs Payment Office: Supporting Docs Originating Office: Supporting Docs Originating Office: Summary Report Is this an IT-related purchase?: Protests Is this an IT-related purchase?: Claims Potential Amount: Validations Supplies or Services: Route History GWAC / GSA Purchase: Status History 6F - Performance-Based Service Accq: Notifications 6L - Cost Acctg Standards Clause:	Payments	Project Title:	
Summary Committee with Items Reference Your Text. Vendor NAICS Code: Synopsis Size Standard: Synopsis Size Standard: Supporting Docs Payment Office: Supporting Docs Originating Office: Supporting Docs Originating Office: Summary Report Is this an IT-related purchase?: Protests Is this an IT-related purchase?: Claims Potential Amount: Validations Supplies or Services: Route History GWAC / GSA Purchase: Status History 6F - Performance-Based Service Accq: Notifications 6L - Cost Acctg Standards Clause: Supperse Items 6L - Cost Acctg Standards Clause:	Discount	Confirmed With:	
Reference Your Text: Vendor NAICS Code: 541611 Clear Synopsis Size Standard: \$14.0 Package Payment Office: NIH COMMERCIAL ACCTS Edit Supporting Docs Originating Office: ORACLE Edit Support Is this an IT-related purchase?: No • Claims Potential Amount: Validations Supplies or Services: • Route History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Acc; (Select) • Suspense Items 6L - Cost Acctg Standards Clause: (Select) •	Summary	Conirmed with.	
Vendor NAICS Code: 541611 Clear Synopsis Size Standard: \$14.0 Package Payment Office: NIH COMMERCIAL ACCTS Supporting Docs Originating Office: ORACLE Summary Report Is this an IT-related purchase?: No • Protests Is this an IT-related purchase?: No • Claims Potential Amount:	Vondor	Reference Your Text:	
Synopsis Size Standard: \$14.0 Package Payment Office: Supporting Docs Originating Office: Summary Report Is this an IT-related purchase?: Protests Is this an IT-related purchase?: Claims Potential Amount: Validations Supplies or Services: Route History Construction: Status History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Acq; Suspense Items 6L - Cost Acctg Standards Clause:	Vendor	NAICS Code:	541611 Clear
Package Payment Office: NIH COMMERCIAL ACCTS Edit Supporting Docs Originating Office: ORACLE Edit Summary Report Is this an IT-related purchase?: No • Protests Potential Amount: Validations Supplies or Services: • Route History Construction: No • Status History GWAC / GSA Purchase: • Notifications 6F - Performance-Based Service Acq; (Select) • Suspense Items 6L - Cost Acctg Standards Clause: (Select) •	Synopsis	Size Standard:	\$14.0
Supporting Docs Originating Office: ORACLE Edit Summary Report Is this an IT-related purchase?: No Protests Potential Amount: Image: Supplies or Services: Claims Supplies or Services: Image: Supplies or Services: Validations Supplies or Services: Image: Supplies or Services: Route History Construction: No Status History GWAC / GSA Purchase: Image: Supplies or Service Acq: Notifications 6F - Performance-Based Service Acq: (Select) Image: Supplies or Service Acq: Suspense Items 6L - Cost Acctg Standards Clause: Image: Supplies or Service Acq: Image: Supplies or Service Acq:	Раскаде	Payment Office:	NIH COMMERCIAL ACCTS Edit
Summary Report Is this an IT-related purchase?: No Protests Is this an IT-related purchase?: No Claims Potential Amount: Image: Supplies or Services: Image: Supplies or Services: Validations Supplies or Services: Image: Supplies or Services: Image: Supplies or Services: Image: Supplies or Services: Route History Construction: No Image: Supplies or Services: Image: Supplies or Services: Status History GWAC / GSA Purchase: Image: Supplies or Service Acq: Image: Supplies or Services: Image: Supplies or Services: Notifications 6F - Performance-Based Service Acq: Image: Supplies or Services: Image: Supplies or Services: Image: Supplies or Services: Suspense Items 6L - Cost Acctg Standards Clause: Image: Service Acct I	Supporting Docs	Originating Office:	ORACLE Edit
Protests Is this affinitive parents of it. Claims Potential Amount. Validations Supplies or Services: Route History Construction: Status History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Acq: Suspense Items 6L - Cost Acctg Standards Clause:	Summary Report	Is this an IT-related nurchase?	
Claims Potential Arriount. Validations Supplies or Services: Route History Construction: Status History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Acq: Suspense Items 6L - Cost Acctg Standards Clause:	Protests	Detential Amount	
Validations Supplies or Services: Route History Construction: No • Status History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Acq: (Select) Suspense Items 6L - Cost Acctg Standards Clause: (Select)	Claims	Polential Amount.	
Route History Construction: No Status History GWAC / GSA Purchase: Image: Construction: Notifications 6F - Performance-Based Service Acq: (Select) Suspense Items 6L - Cost Acctg Standards Clause: (Select)	Validations	Supplies or Services:	
Status History GWAC / GSA Purchase: Notifications 6F - Performance-Based Service Acq: (Select) Suspense Items 6L - Cost Acctg Standards Clause: (Select)	Route History	Construction:	No 💌
Notifications 6F - Performance-Based Service Acq: (Select) Suspense Items 6L - Cost Acctg Standards Clause: (Select)	Status History	GWAC / GSA Purchase:	
Suspense Items 6L - Cost Acctg Standards Clause: (Select)	Notifications	6F - Performance-Based Service Acq:	(Select)
	Suspense Items	6L - Cost Acctg Standards Clause:	(Select)
Ownership 6N - Purchase Card Payment Method: (Select)	Ownership	6N - Purchase Card Payment Method:	(Select) -
Navigator 8L - Recovered Materials/Sustainability: (Select)	Navigator	8L - Recovered Materials/Sustainability:	(Select)
Return to Home 10H - Commercial Item Acg. Procedures: (Select)	Return to Home	10H - Commercial Item Acg. Procedures:	(Select)
110 CO's Determination of Bus Size (Select)		114 CO's Determination of Bus Size	(Select)
Conn			Incel interpret Protected Media On Incel Incel

Step	
21.	Click the Payment Office LOV () button.



	?				
ľ	Payment Office Address Selec	ction			
	Search: Code	For:	Display Cancel		
	Max Results: 100 -	Pesults per Page: 10 V Pegion: US GLB			
	Max Nesults. 100	Results per l'age. [10] Region: [00_02b]	-		
ľ	Code	Name	Address 1	Address 2	1
	NLM COAC INV	Approved By, NLM COAC Invoice Notif	Paid By: NIH Commercial Accounts Br	2115 East Jefferson St, MSC 8500	ī
	OA OLAO-BR-1	Approved By, OA-OLAO - Branch 1	Paid By: NIH Commercial Accounts Br	2115 East Jefferson St, MSC 8500	1
	OA OLAO-BR-2	Approved By, OA-OLAO - Branch 2	Paid By: NIH Commercial Accounts Br	2115 East Jefferson St, MSC 8500	
	OA OLAO-BR-3	Approved By, OA-OLAO - Branch 3	Paid By: NIH Commercial Accounts Br	2115 East Jefferson St, MSC 8500	
	OA OLAO-BR-4	Approved By, OA-OLAO - Branch 4	Paid By: NIH Commercial Accounts Br	2115 East Jefferson St, MSC 8500	
	OA OLAO-BR-5	Approved By, OA-OLAO - Branch 5	Paid By: NIH Commercial Accounts Br	2115 East Jefferson St, MSC 8500	
	ORF OA INV(ORS)	Approved By, ORF/OA Invoice NIH/ORS	Paid By: NIH Commercial Accounts Bi	2115 East Jefferson St, MSC 8500	1
	TESTING RECEIVER	LOV NORMAN, ERIC D	lesung	a	
	Prev Page 4 of 4	(38 rocults found)			
	Fage 4 01 4	(So results round)			
	•			1	Þ
h	ttps://nbrssdev.cit.nih.gov:8813/p	orism/select/addr/addr_b.asp?tblkey=5923	Local intranet Prot	ected Mode: On 🛛 🖓 🔹 🔍 100% 🔹	1
					-

Step	
22.	Click the OA OLAO-BR-1 link. OA OLAO-BR-1



PRISM	Route Delete Cancel FPDS Renumbe	r 🖴 ?		
Delivery/Task Orde	Order Number: HHSN263201300072U	Stage: A	Award	Obligation: \$4,000.00
-	Contract Number: HHSP23320100005WB	Net View: 0	Off Total Amount wit	hout Options: \$4,000.00
Main	Version: BASE-In Progress -	Number of Items: 1	1	Total Amount: \$4.000.00
General				
Additional Info	Additional Information			
Funds Tracking	Is this an IT-related purchase?:	No 🔻		
Text	Potential Amount			
Payments				
Discount	Supplies or Services:			
Summary	Construction:	No 🔽		
items	GWAC / GSA Purchase:			
Vendor	6F - Performance-Based Service Acq:	(Select)	•	
Synopsis	6L - Cost Acctg Standards Clause:	(Select)	•	
Package	6N - Purchase Card Payment Method	(Select) -		
Supporting Docs	81 - Recovered Materials/Sustainability:	(Select)		
Summary Report	1011 Commercial Itam Aca Drasaduras:	(Soloct)	-	
Protests	TOH - Commerciantem Acq. Procedures.			
Claims	11A - CO's Determination of Bus. Size:	(Select)		
Validations	Invoice Matching:	(Select)		
Route History				
Status History	Preterences			
Notifications	SBA Contract Number:			
Suspense Items	FPDS NG			
Ownership	PIID Referenced PIID FPDS Approval N	umber Date Finalized		
Navigator	(None)			
Return to Home	<u>x ·····</u>			
•	•			
			🙀 Local intranet Protected Mode: On	🖓 🔹 🔍 100% 👻 /

Step	
23.	Click the Invoice Matching: list. (Select)



PRISM	Route	Delete	Cancel	FPDS	Renumbe	r 💾 ?							
FRISH	Delivery/	Task Order	r Informatio	n									
Delivery/Task Orde	Orc	der Numb	ber: HHS	N26320	1300072U		S	stage: .	Award		Obligation:	\$4,000.00	0
	Contra	act Numb	ber: HHS	P233201	100005WB		Net	View:	Off	Total Amount witho	ut Options:	\$4,000.00	0
Main		Vers	ion: BA	SE-In Pr	ogress -	N	umber of l	tems:	1	To	tal Amount:	\$4.000.00	ູ້
General	Additions	l Informati	0.0			_		_	_				
Additional Info	Additiona	armormau	on	ongina	ing once.		-						-
Funds Tracking		ls th	nis an IT-r	elated p	ourchase?:	No 💌							
l ext Devroente				Potentia	al Amount:								
Discount			Su	oplies or	Services		-						
Summary				Co	nstruction	No 🚽							
Items			GWAG		Purchase								
Vendor	65	Dorfor	manco B			(Select	t)			•			
Synopsis	0		nance-Di	aseu oe	a Clauser	(Soloci	-) -)						
Package			SI ACCIU	Stanuard	is Clause.								
Supporting Docs	6N	- Purcha	ase Card	Payme	nt Method:	(Select) <u> </u>						
Summary Report	8L -	Recover	ed Mater	ials/Sus	tainability:	(Select	t)						
Protests	10H -	Comme	rcial Item	Acq. Pr	ocedures:	(Select	t)			•			
Claims	11A	- CO's I	Determin	ation of	Bus. Size:	(Select	t)		•				
Validations				Invoice	Matching:	(Select	t) 💌	1					
Route History						(Select)						-
Status History	Prefe	rences				2-way 3-Way							
Notifications	SBA (Contract	Number:			Define	at Item]					
Suspense Items	FPDS	NG											
Ownership	PIID	Refere	nced PIID	FPDS	Approval N	ımber	Date Final	ized					
Navigator	(None	2)		1									
Return to Home		/											
		-											
	•								Griland	Linkensek Deckested Medee On	0-	1008/	•
									Local	ninu anec Protected Mode: On	4 8 ▲	100%	• /

Step	
24.	Click the 3-Way list item. 3-Way



PRISM	Delivery/Task Order Information	
Delivery/Task Orde	Order Number: HHSN263201300072U Stage: Award Obligation: \$4,000.00	0 4
	Contract Number: HHSP23320100005WB Net View: Off Total Amount without Options: \$4,000.00	0
Main	Version: BASE-In Progress V Number of Items: 1 Total Amount: \$4.000.00	0
General	Additional Information	-
Additional Info	6N - Purchase Card Payment Method (Select)	1
Funds Tracking	81 Perovered Materials/Sustainability (Select)	-
l ext Devroente		
Discount		
Summary	11A - CO's Determination of Bus. Size: (Select)	
Items	Invoice Matching: 3-Way	
Vendor	Preferences	-
Synopsis		
Package		_
Supporting Docs	FPDS NG	
Summary Report	PIID Referenced PIID FPDS Approval Number Date Finalized	
Protests	(None)	
Claims		
Validations		
Route History	Inventory Org GDC Gither Distribution Center	
Status History	ADB Document#	
Notifications	ADB Source#	
Suspense Items	Contracting Procedure	
Ownership	Acquisition Procedure	
Navigator		-
Return to Home		
•	4	Þ
	🛛 🔽 🙀 Local intranet Protected Mode: On 🖉 🗣 💐 100%	•

Step	
25.	Click the Contracting Procedures button.



Contracting Procedure Selection Search: Code Max Results: 100 Results: 100 Results: 100 Results: 10 Code Description NON R AND D non R and D R AND D R and D Do Not Use - NBS Only Page 1 of 1 (3 results found)
Search: Code For: Display Cancel Max Results: 100 Results per Page: 10 Code Description NON R AND D non R and D R AND D R and D Do Not Use - NBS Only Page 1 of 1 (3 results found)
Max Results: 100 ▼ Results per Page: 10 ▼ Code Description NON R AND D non R and D R AND D R and D D D Not Use - NBS Only Page 1 of 1 (3 results found)
Code Description NON R AND D non R and D R AND D R and D Do Not Use - NBS Only Page 1 of 1 (3 results found)
Code Description NON R AND D non R and D R AND D R and D Do Not Use - NBS Only Page 1 of 1 (3 results found)
NON R AND D ON R and D RAND D R and D Do Not Use - NBS Only Page 1 of 1 (3 results found)
Page 1 of 1 (3 results found)
Page 1 of 1 (3 results found)
Page 1 of 1 (3 results found)
https://phrssdey.cit.nih.gov/8813/prism/select/gistom/gistom.h.asp?row=1

Step	
26.	Click the NON R AND D link. NON R AND D



PRISM	Route Delete Cancel FPDS Renumbe	r 🖷 ?	
Delivery/Task Orde	Order Number: HHSN263201300072U	Stage: Award	Obligation: \$4,000.00
	Contract Number: HHSP23320100005WB	Net View: Off	Total Amount without Options: \$4,000.00
Main	Version: BASE-In Progress •	Number of Items: 1	Total Amount: \$4.000.00
General			
Additional Info	Additional Information		
Funds Tracking	NTP / Vendor Signed On:	· · · · · · · · · · · · · · · · · · ·	
Text	Site:	OD/OLAO	
Payments	Project Title:		
Summary	Confirmed With:		
Items			
Vendor	Reference Your Text:		
Synonsis	NAICS Code:	541611 Clear	
Package	Size Standard:	\$14.0	
Supporting Docs	Payment Office:	OA OLAO-BR-1	Edit
Supporting Docs	Originating Office:	ORACLE	Edit
Drotocto	Is this an IT-related purchase?:	No 💌	
Claima	Potential Amount		_
Claims	Supplies or Sonicos:		
Validations	Supplies of Services.		
Route History	CWAC / CSA Burchaso:		
Status History	GWAC/ GSA Fulciase.	(Select)	
Notifications	бЕ - Penormance-Based Service Acq.		
Suspense Items	6L - Cost Acctg Standards Clause:	(Select)	•
Ownership	6N - Purchase Card Payment Method:	(Select)	
Navigator	8L - Recovered Materials/Sustainability:	(Select)	
Return to Home	10H - Commercial Item Acq. Procedures:	(Select)	
	114 CO's Datarmination of Rus Siza	(Select)	
https://nbrssdev.cit.nih.gov:881	3/prism/delivervorder/nav/nav.asp?option=additional&submit=v	/es#	al intranet Protected Mode: On

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 (<u>https://my.nih.gov/portal/server.pt/community/nbs_acquisition/1057</u>)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

PRISM	Route Delete Cancel FPDS Renumber Image: Concel information
Delivery/Task Orde	Order Number: HHSN263201300072U Stage: Award Obligation: \$4,000.00
Delivery/Task Orde	Contract Number: HHSP23320100005WB Net View: Off Total Amount without Options: \$4,000.00
Main	Version: BASE-In Progress V Number of Items: 1 Total Amount: \$4,000.00
General	
Additional Info	Funds Tracking
Funds Tracking	Treesury Account Symbol
Text	Treasury Account Symbol
Payments	Prodominant Troacum Account Symbol: * 75 * 0846
Discount	Program Name
Itoms	* Required Field when providing TAS
Vendor	
Synonsis	Funds Summary
Package	· · · · · · · · · · · · · · · · · · ·
Supporting Docs	USD - US Dollar
Summary Report	Obligation
Protests	Net View Total: \$4,000.00
Claims	
Validations	
Route History	
Status History	
Notifications	
Suspense Items	
Ownership	
Navigator	
Return to Home	
•	
Done	tig Local intranet Protected Mode: On An + the transformed to the t



Step	
29.	Click the Text link. Text

PRISM	Route Delete Cancel FPDS Renumber 🚇 ?	
Delivery/Task Orde	Order Number: HHSN263201300072U Stage: Award	Obligation: \$4,000.00
	Contract Number: HHSP23320100005WB Net View: Off	Total Amount without Options: \$4,000.00
Main	Version: BASE-In Progress Vumber of Items: 1	Total Amount: \$4.000.00
General		
Additional Info	Text	-
Funds Tracking	(Does not print on Form)	
Text	TECH WRITER	A
Payments		
Summary		
Items		Statements
Vendor	Header Text	
Synopsis	TECH WRITER	A
Package		_
Supporting Docs		
Summary Report		Statements
Protests	Footer Text	
Claims		
Validations		
Route History		
Status History		 Statements
Notifications	Nata	
Suspense Items	Notes	
Ownership		
Navigator		
Return to Home		Jest Statements
•		
	Local in	tranet Protected Mode: On 🛛 🖓 👻 100% 👻



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:
	 Closely Associated Functions (IGF::CL::IGT) Critical Functions (IGF::CT::IGF) 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)
	Select this link (<u>https://fpds.gov/fpdsng_cms/index.php/newsroom/108-nherently-governmental-functions</u>) to learn more information about the Inherently Governmental Functions Code.
31.	Click in the Text Description Statements field.
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. ".



-		
PRISM	Route Delete Cancel FPDS Renumber 🖷 ?	
	Periveryn ask order momination	0.00
Delivery/Task C	Contract Number: HHSP2320100005WB Net View: Off Total Amount without Options: \$4.00	0.00
Main		0.00
Conorol	Version, Torac-in Progress I Number of items. 1 Total Amount. 54.00	• 0.00
Additional Info	Text	
Funds Trackir	Description	
Text	(Does not print on Form)	
Payments	IGF::OT::IGF TECH WRITER services to be provided for	
Discount	pending ALDS special publication.	
Summary	Statemonte	
Items	Jatenens	
Vendor	Header Text	
Synopsis	TECH WRITER	
Package		
Supporting Docs	5	
Summary Repor	t Statements	
Protests	Footer Text	
Claims		
Validations		
Route History		
Status History	y Statements	
Notifications	Notes	
Suspense Items		
Ownership		
Navigator		
Return to Home	✓ Statements	
A	u 1991 2 Jarien Maliueruerder Janu an Zantion-taut Saubnit-une #	▼ •
nt polynoloode vid dhinigo		
Step		

Step	
33.	Click the Items link.



PRISM	Add Edit Delete Copy Renumber Change Status Item History	y 📮 ?
Delivery/Task Orde	Order Number: HHSN263201300072U Stage: A	Award Obligation: \$4,000.00
	Contract Number: HHSP23320100005WB Net View: C	Off Total Amount without Options: \$4,000.00
Main	Version: BASE - In Progress Number of Items: 1	1 Total Amount: \$4,000.00
Items		
Vendor	items	
Synopsis	Item Description	Uption Item Status Quantity Amount Version Action
Package	1 TECH WRITER	Item Active \$4,000.00 BASE Add
Supporting Docs	Total Items: 1	
Summary Report	1	
Protests		
Claims		
Validations		
Route History		
Status History		
Notifications		
Suspense Items		
Ownership		
Navigator		
Return to Home		
۰. ۱		
https://nbrssdev.cit.nih.gov:881	13/prism/items_intems_open.asp?dockey=1628092&verkey=1349164⁢	📭 Local intranet Protected Mode: On 🛛 🖓 👻 🔍 100% 👻 //

Step	
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. Package



DDICM		Change Form ?					
PRISM		Delivery/Task Order Info	rmation				
Delivery/Task Or	rde	Order Number:	HHSN263201300072U	Stage:	Award	Obligation:	\$4,000.00
		Contract Number:	HHSP23320100005WB	Net View:	Off	Total Amount without Options:	\$4,000.00
Main		Version:	BASE - In Progress	Number of Items:	1	Total Amount:	\$4,000.00 🗸
Items		1					
Vendor		Cover Page					
Synopsis							
Package			There is no form a	associated with t	this Deliv	/ery/Task Order.	
Cover Page			Choose C	hange Form to a	issociate	a form.	
Body							
Attachments							
Supporting Docs							
Summary Report							
Protests							
Claims							
Validations							
Route History							
Status History							
Notifications							
Suspense Items							
Ownership							
Navigator							
Return to Home							
•	Þ						
https://nbrssdev.cit.nih.gov	:8813	/prism/formfillin/changeform	/changeform_f.asp		👊 Local in	tranet Protected Mode: On 🛛 🖓 🗸	🔍 100% 👻 //

Step	
37.	Click the Change Form link. Change Form



?				
Form Selection Search: Form	For:	Display Cance	91	
Form OF 347 (2/2012) SF 1449 (2/2012) SF 26 (5/2011) SF 26 (5/2011) SF 33 Page 1 of 1	Description Order For Supplies (2/2012) Solicitation / Order (Commercial) (2/2012) Award / Contract (05/2011) Modification of Contract Award Schedule A Only			
		Search Results		
https://nbrssprod.cit.nih.gov	:8816/prism/formfillin/changeform/changeform_b.asp?formkey=	18300	🙀 Local intranet Protected Mode: On	🐴 🔹 🔍 100% 👻 //

Step	
38.	Click the OF347 (2/2012) link. OF347 (2/2012)
39.	Click the Main link. Main
40.	 To attach files to the Award: a. Refer to the NAV, <i>Add an Attachment in PRISM</i>, to add an attachment. b. Refer to the NAV, <i>Add a Supporting Document to Prism</i>, to add a supporting document. c. Refer to the NAV, <i>Add an Attachment or Supporting Document or Supporting Document from the PRISM Library</i>, in order to add a file document form the PRISM database. d Refer to the NAV, <i>Check Out or Check In an Attachment or Supporting Document</i>, in order to Check Out or Check In an Attachment or Supporting Document.



PRISM	Route Delete Cancel FPDS Renumber Image: Cancel Percention
Delivery/Task Orde	Order Number: HHSN263201300072U Stage: Award Obligation: \$4,000.00
Denvery/rusk orde	Contract Number: HHSP23320100005WB Net View: Off Total Amount without Options: \$4,000.00
Main	Version: BASE-In Progress Number of Items: 1 Total Amount: \$4.000.00
General	
Additional Info	General Information
Funds Tracking	Owner: COURTNEY A BRACEY
Text	External Contract Number: HHSP23320100005WB
Payments	Requisition Number: 2906019
Discount	Solicitation Number: (None)
Summary	Award Date: 09/12/2013 🕸 🖻
Nender	Effective Date: 09/12/2013
vendor	Admin Office: ADM-OD/OLAO Edit
Synopsis	
Package	
Supporting Docs	Invoice Office: INV-OFM
Summary Report	Vendor: 1108183 CONTEMPORARIES INC:1108183
Protests	Buver: BRACEYCA NIH
Claims	
Validations	
Route History	Primary Product / Service Code: (R699
Status History	Period of Performance: 09/12/2013 🕸 to 09/11/2014 🕸 🖻
Notifications	
Suspense Items	
Ownership	
Navigator	
Return to Home	
ristanto nomo	
•	
https://nbrssdev.cit.nih.gov:8813	3/prism/deliveryorder/general/gen_bb.asp?submit=yes&option=gener

Step	
41.	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 <u>prior to routing the award document for approval</u> . 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.
42.	Click the FPDS button. FPDS



PRISM	Delivery/Task Order Information Order Number: HHSN263201300072U Contract Number: HHSP23320100005WB Version: BASE - In Progress	Stage: Award Net View: Off Number of Items: 1	Obligati Total Amount without Optic Total Amo	on: \$4,000.00 Ins: \$4,000.00 unt: \$4,000.00
your data.	Set PIID	et PIID - Base Document	s.	
	Contract Number not found in FPDS-NG. Contract Number: HHSP233201 Contract Number Agency ID: 7529	00005WB		
		Submit Cancel		
Dana			internet Destanted Media: On	0 - 0 10087

Step	
43.	 The Set PIID screen will display. 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".



Step	
46.	Click the Submit button.

Contract Information - Windows Internet E	xplorer	<u>_8×</u>				
	Contract Action Information	_				
Documont Status: Draft						
	Document status, Drait					
	Verify Save Draft Logout FPDS-NG					
Contract Number HHSP23320100005WB	Order Number Mod Number HHSN263201300072U 0000					
1A. <u>Procurement Instrument Identifier (</u> HHSN263201300072U	PIID) 1B. <u>Modification Number</u> 0000					
1C. <u>Referenced PIID</u> HHSP23320100005WB	1D. <u>Transaction Number</u> 0					
1E. Solicitation Identifier						
1F. Agency Identifier	7529 NATIONAL INSTITUTES OF HEALTH					
1G. Referenced IDV Modification Numb	<u>19</u>					
1H. Referenced IDV Agency Identifier	7555 OFFICE OF ASST SECRETARY FOR HEALTH EXCEPT NATIONAL CENTERS					
2A. <u>Date Signed</u> (YYYYMMDD)	> 20130912 2B. Effective Date (YYYYMMDD) > 20130912					
2C. <u>Current Completion</u> Date (YYYYMMDD)	> 20140911 2D. <u>Ultimate Completion</u> > 20140911 Date (YYYYMMDD)					
2E. Indefinite Delivery Vehicle Last Date (YYYYMMDD)	e To Order					
3A. Base and All Options Value	\$ 4,000 3AT. Total Base and All Options Value \$ 4,000					
3B. Base and Exercised Options Value	\$ 4,000 3BT. Total Base and Exercised Options \$ 4,000 Value					
3C. Action Obligation	\$ 4,000 3CT. Total Action Obligation \$ 4,000					
4A. Contracting Agency Code	7529 DHRN 💌					
4B. Contracting Office Code	00263 NIH, OD, OM OALM OALMMP OFC ACQUISITION MGMT AND POLICY, Bethesda MD					
4C. Program/Funding Agency - Code	7529 NATIONAL INSTITUTES OF HEALTH					
4D. Program/Funding Office - Code	00263					
4F. Foreign Funding	X Not Applicable					
🍂 🚺 🎇 🚺 🎼		2:01 PM 9/12/2013				

Step	
47.	DCIS will launch and display .Update the draft record with the appropriate values.
	Click the Verify button.
	Verify
48.	Note: The record will state"This action passes the validations." when the record is error free.
	Click the Save Draft button. Save Draft
49.	Click the Logout button.



DDISM	Route Delete Cancel FPDS Renumber 🚇 ?			
FRISH	Delivery/Task Order Information			
Delivery/Task Orde	Order Number: HHSN263201300072U Stage: Award Obligation: \$4,000.00			
	Contract Number: HHSP23320100005WB Net View: Off Total Amount without Options: \$4,000.00			
Main	Version: BASE-In Progress V Number of Items: 1 Total Amount: \$4,000.00			
General				
Additional Info				
Funds Tracking				
Text	External Contract Number: HHSP23320100005WB			
Payments	Requisition Number: 2906019			
Discount				
Itoms	Award Date: 09/12/2013 🖉 🖻			
Vondor	Effective Date: 09/12/2013			
Currensia	Admin Office: ADM-OD/OLAO Edit			
Synopsis	Issuing Office: IO-OD/OLAO			
Раскаде				
Supporting Docs				
Summary Report	Vendor: 1108183 CONTEMPORARIES INC:1108183			
Protests	Buyer: BRACEYCA_NIH			
Claims	Contracting Officer HOLLIDG NIH			
Validations				
Route History				
Status History	Period of Performance: 09/12/2013 🛛 🕸 to 09/11/2014 🖓 🖻			
Notifications				
Suspense Items				
Ownership				
Navigator				
Return to Home				
•				
https://hbrssdev.cit.nih.gov:8813/prism/deliveryorder/nav/nav.asp?option=general&submit=yes# 🛛 🙀 🕼 Local intranet Protected Mode: On 🦓 📲 👯 100% 🍷				

Step	
50.	Click the Validations link. Validations
51.	The validations process identifies errors within the in process document. Review the results of the validation process, correct any errors received.
	<u>Note</u> : 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, <i>Route a Document in Prism for Review using a Template</i> .
	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	
53.	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.