



Useful Terms

- ◆ **Authenticated** — A new PD² term used to indicate that a CAR is ready to be finalized on release of the associated contract action. To be Authenticated, the CAR must have been validated on the FPDS-NG web site and pass without errors except Date Signed. If either the CAR or its associated contract action is edited, the CAR will lose its Authenticated status.
- ◆ **Contract Action Report (CAR)** — Form used to report contract actions on the FPDS-NG web site.
- ◆ **Exemption to Reporting** — An auditable record indicating that a contract action does not require a CAR and will not be reported to FPDS-NG.
- ◆ **Express-CAR Reporting** — Using one CAR to report more than one contract action.
- ◆ **Finalized** — A new PD² term used to describe an approved CAR in FPDS-NG and PD².
- ◆ **Indefinite Delivery Vehicle (IDV)** — A contract action that has orders placed against it. IDV is the general term for PD² Agreements and Indefinite Delivery Contracts (IDCs).
- ◆ **Multiple-CAR Reporting** — Using more than one CAR to report one contract action.
- ◆ **PIID** — Equivalent to a contract action PIIN for IDVs, Definitive Contracts, and Purchase Orders, and to the order number for Delivery/Task Orders and Calls.
- ◆ **Reason for Release without Reporting** — An auditable record captured when an award that should be reported to FPDS-NG is released without an Authenticated CAR.



Useful Tips

- ◆ PD² will no longer store FPDS validations as it did for DD Form 350s and 1057s. All validations will be maintained within FPDS-NG.
- ◆ PD² users should always open the FPDS-NG web site by launching it through PD². Only System Administrators will need to login directly to the FPDS-NG web site.
- ◆ While editing the CAR on-line in FPDS-NG, remember to click [**Save Draft**] to save your work.
- ◆ Similar to other PD² documents, the CAR can be edited, deleted, searched for, or routed in PD².
- ◆ When creating a CAR for a modification or Order, most PD² and FPDS-NG pre-filled data will be pulled from the base contract.



SPS FPDS-NG Integration How To Guide v3.1 SR01

The SPS FPDS-NG Integration How To Guide v3.1 SR01 is designed to familiarize PD² users with the SPS FPDS-NG solution for reporting contract actions. Business processes, useful terms, and tips will aid users in understanding how to create documents to support the contract action reporting process. This How To Guide should be used in conjunction with the SPS FPDS-NG Integration Quick Reference Guide v3.1 SR01.

Contract Action Reporting Business Processes

This brochure details business processes for the SPS FPDS-NG Integration for contract action reporting:

- I. Adding an Exemption to Reporting:** This business process outlines how to add Exemptions to Reporting, which are used to indicate that the user is not required and does not intend to create a Contract Action Report (CAR) for a contract action. Examples of Exemptions to Reporting include Classified or Below Minimum Reporting Threshold.
- II. Adding a Reason for Release without Reporting:** This business process outlines how to add Reasons for Release without Reporting, which is required when a contract action that should be reported to FPDS-NG must be released without a valid CAR. Examples of Reasons for Release without Reporting include Urgent and Compelling Action or Technical/Connectivity Failure.
- III. Creating a Single CAR:** This business process outlines how to create one CAR to report one contract action.
- IV. Creating a Multiple CAR:** This business process outlines how to create more than one CAR to report one contract action. For example, multiple CARs may be created if a contract action requires reporting of DoD and non-DoD funding on separate CARs.
- V. Creating a Standalone CAR:** This business process outlines how to create a standalone CAR, which is used to report contract actions that were not created in PD².
- VI. Creating an Express CAR Package:** This business process outlines how to report more than one contract action using one CAR. For example, Express-CAR Reporting may be used to report high volume orders against the same IDV.

I. Adding an Exemption to Reporting

Step 1:

Prepare the contract action as necessary.

Step 2:

Highlight the contract action. Select **Procurement** —> **FPDS-NG Reporting** —> **Create / View Exemption to Reporting**.

Step 3:

Select an Exemption from the **Exemption** drop-down list box. Click [**OK**]. The "E" icon displays on the contract action.

Exemptions to Reporting may be added at any time during the procurement process and may be changed until the contract action is released.

Step 4:

Approve and release the contract action in PD².

If the user chooses to create a CAR after adding an Exemption, the user must delete the Exemption before continuing with creation of the CAR.

II. Adding a Reason for Release without Reporting

Step 1:

Prepare and approve the contract action as necessary.

Step 2:

Release the contract action.

Step 3:

When prompted, select a Reason from the **Reason for Release without Reporting** drop-down list box. Click [**OK**].

Step 4:

Continue with release of the contract action in PD².

After release, a CAR may be created. However, the Reason for Release without Reporting may never be deleted and is retained for auditing purposes.

III. Creating a Single CAR

Step 1:

Prepare the contract action as necessary.

Review the *SPS FPDS-NG Integration Quick Reference Guide v3.1 SR01* to see what PD² data should be entered for successful pre-filling and CAR creation.

Step 2:

Highlight the contract action. Select **Procurement** —> **FPDS-NG Reporting** —> **Create CAR**. In the **Create New FPDS-NG Contract Action Report** window, click **[OK]**.

The Create New FPDS-NG Contract Action Report window is populated based on the contract action and in most cases will not need to be changed.

Step 3:

The **FPDS-NG CAR Pre-fill Data** window displays data that is sent. Click the **[Close]** button.

If enabled in the user's Preferences, the FPDS-NG CAR Pre-fill Data window will display every time the CAR is created or updated with data from the PD² contract action.

Step 4:

The **FPDS-NG Connection** window opens. Once the **FPDS-NG Creation Messages** window opens, click the **[Close]** button.

Whenever PD² receives messages from FPDS-NG, the FPDS-NG Creation Messages window will open and display the messages as they were sent by FPDS-NG.

Step 5:

The FPDS-NG web site opens and displays a pre-filled CAR using data from PD² and generated by FPDS-NG. Review the pre-filled data. Click **[Validate]** and correct the CAR until all validations pass except Date Signed.

The Date Signed may not be entered prior to release of the contract action because the date is not available.

Step 6:

Highlight the FPDS-NG CAR. Select **Procurement** —> **FPDS-NG Reporting** —> **Authenticate CAR**. The "A" icon displays on the CAR.

Authentication ensures that the CAR has been validated on the FPDS-NG web site, and there are no errors except for the Date Signed.

Step 7:

Run Preapproval and approve the contract action in PD².

Preapproval checks for the existence of an Exemption, Express CAR Category, or authenticated CAR.

Step 8:

Release the contract action and finalize the CAR.

During the release process, the FPDS-NG Connection window will open several times as PD² updates the CAR with the release date of the contract action, performs a final authentication of the CAR and, once the contract action is successfully released, finalizes the CAR in FPDS-NG and PD².

IV. Creating a Multiple CAR

Step 1:

Repeat Steps 1-2 of the "Creating a Single CAR" Business Process above.

The system will suggest Multiple-CAR Reporting when there is a mixture of FMS and non-FMS funding, DoD and Non-DoD funding (> \$100K), or contract types (> \$500K).

Step 2:

Select the **Multiple CAR** check box. Click **[OK]**.

The Multiple CAR check box is used to specify Multiple-CAR Reporting.

Step 3:

The **Allocate CARs** window opens. Review the line item allocation and click **[OK]**.

Line items are assigned to the multiple CARs based on the system allocation logic and the system will automatically create the suggested CARs. Each CAR is identified with a Transaction ID appended to the end of the CAR Number.

Step 4:

Repeat Steps 3-8 of the "Creating a Single CAR" Business Process above.

Each multiple CAR will display the Finalized stamp upon release of the contract action.

V. Creating a Standalone CAR

Step 1:

Highlight nothing on the PD² Desktop. Select **Procurement** —> **FPDS-NG Reporting** —> **Create CAR**. Click **[OK]** to confirm the creation of a standalone CAR.

Step 2:

If you are copying a CAR in PD², select the **Copy CAR** check box and then click the **[Choose]** button to select a CAR to copy.

Step 3:

Complete the **Create** window as necessary and click **[OK]**.

Enter a valid PIID, Mod, No., and Ref. IDV based on the Award or IDV type selected.

Step 4:

Complete Steps 3-4 of the "Creating a Single CAR" Business Process above for the standalone CAR. Fill in the CAR completely, including the Date Signed field, and then finalize the CAR by highlighting it and selecting **Finalize CAR** from the menu.

Few fields are pre-filled from PD² since no contract action was highlighted to create the CAR.

VI. Creating an Express CAR Package

Step 1:

Prepare the contract action as necessary. Prior to approval and release, highlight the contract action to be reported on the express CAR and select **Procurement** —> **FPDS-NG Reporting** —> **Specify / View Express CAR Category**.

Step 2:

Select the **Express CAR Category** and click **[OK]**.

The category "High Volume Orders and Calls" may only be applied to orders against IDVs. The category "High Volume Vendor" may only be applied using Automatic Ordering.

Step 3:

Approve and release the contract action. Repeat Steps 1-2 for each of the contract actions to be incorporated into the express CAR.

Contract actions that do not meet the minimum reporting threshold guidelines, or that exceed \$25K, should not normally be reported on an express CAR.

Step 4:

Highlight the contract action. Select **Procurement** —> **FPDS-NG Reporting** —> **Create Express CAR**.

The express CAR may also be created without highlighting a contract action.

Step 5:

Complete the information on the **Create New FPDS-NG Express CAR** window. Click **[Select]**.

Depending on the type of express CAR being created, some of the data on the Create window will be pre-filled. CAR numbering may need to be adjusted based on Service-level guidance.

Step 6:

The **Award Incorporation** window opens. Enter a **Start Date** and **End Date** then click **[Search]**. When finished, click **[OK]**.

The search criteria will pre-fill based on the Express CAR Category specified for the action. The system will search for awards released by the Issuing Office entered on the Create window within the specified date range and marked with the specified Express CAR Category.

Step 7:

Click **[OK]** on the **Create New FPDS-NG Express CAR** window. Complete Steps 3-6 of the "Creating a Single CAR" Business Process above.

The express CAR will pre-fill with aggregate data from the incorporated contract actions. Contract actions may be added or removed when the CAR is edited or authenticated.

Step 8:

Finalize the express CAR by highlighting it and selecting **Finalize CAR** from the menu.

The express CAR will display the Finalized stamp. Once the CAR is finalized, the user will not be able to add or remove contract actions on the CAR.