

Procurement Data Standard (PDS)

Business Rules

29 October 2015 Version 2.5

Table of Contents

Purpose of this Document.....	1
1. General Business Rules.....	2
2. Compliance Business Rules – All Documents.....	2
2.1. Public Standards Compliance	2
2.2. Date, Time and Percentage Formats	3
2.3. Special Characters.....	3
2.4. Uniform Contract Format (UCF) and Construction Specification Institute (CSI) Document Structures.....	4
2.5. FAR and DFARS Numbering.....	4
2.6. Standard Form 33 and Solicitation Type	4
2.7. Standard Form 252/1442 and Construction	5
2.8. Department of Defense Form 428 and Telecommunications	5
2.9. Modification Identifiers	6
2.10. Document Purpose: Cancellation and Draft	7
2.11. Addresses Requiring a DoDAAC	7
2.12. Addresses Requiring a DoDAAC, MAPAC, CAGE, or DUNS.....	8
2.13. Remit To Address	10
2.14. Acceptance/Inspection Entities.....	10
2.15. Line Item Delivery Addresses	11
2.16. Shipping Postal Code.....	13
2.17. Contact via File Transfer Protocol.....	13
2.18. United Nations Code.....	14
2.19. Clause/Provision Full Text and Fill-In Areas	14
2.20. Wage Determination	15
2.21. Attachment Data Format.....	15
2.22. Attachment Security Attribute (v2.5 and later).....	15
2.23. Request an Attachment	16
2.24. Required Facility Clearance and Safeguard Level.....	16
2.25. Contract Security Classification Specification – Special Access Information (DD Form 254 Dec 1999).....	17
2.26. Information Sub-Line Items and Delivery Schedules.....	18
2.27. Header Amounts: Awards vs Solicitations (v2.5 and later).....	19
2.28. Service Allowances and Charges: Awards vs Solicitations (v2.5 and later)	20
2.29. Recurring Payments: Awards vs Solicitations (v2.5 and later)	22
2.30. Line Item Amounts: Awards vs Solicitations (v2.5 and later).....	23
2.31. Labor Rates: Awards vs Solicitations (v2.5 and later)	24
3. Compliance Business Rules – Awards, Solicitations, and Conformed Documents	26
3.1. Contract and Solicitation Performance Dates	26
3.2. Clause/Provision Requirements	27
3.3. Clause/Provision Requirements - Alternates	31
3.4. Cost Plus Incentive Fee – Clause Requirement	32
3.5. Fixed Price Incentive – Clause Requirement.....	33
3.6. Oral Attestation of Security Responsibilities – Clause Requirement	36

3.7.	Reporting of Government-Furnished Property – Clause Requirement.....	36
3.8.	Agency Office of the Inspector General – Clause Requirement.....	37
3.9.	Combating Trafficking in Persons – Clause Requirement	38
3.10.	Requirements Relating to Compensation of Former DoD Officials – Clause Requirement.....	38
3.11.	Requirements to Inform Employees of Whistleblower Rights – Clause Requirement ..	40
3.12.	Export-Controlled Items – Clause Requirement.....	42
3.13.	Safeguarding of Unclassified Controlled Technical Information – Clause Requirement	43
3.14.	Ordering – Clause Requirement.....	45
3.15.	Government Property – Clause Requirement	47
3.16.	Government Property II – Clause Requirement.....	49
3.17.	Ordering Limits for Indefinite Delivery/Indefinite Quantity (IDIQ) Contracts	51
3.18.	Pipeline DoDAAC	52
3.19.	Product or Service Data	52
3.20.	Federal Supply Classification Code and Product Service Code	53
3.21.	Order Dependent Pricing Arrangement	53
3.22.	Government Obligation to Order.....	55
3.23.	Requirements Documents – Ordering Quantity.....	55
3.24.	Requirements Documents – Acquiring Work.....	57
4.	Compliance Business Rules – Awards, Modifications, and Conformed Award Documents	59
4.1.	Contractor and Issuing Office Addresses	59
4.2.	Order Number	60
4.3.	Ordering Instruments	60
4.4.	Contracting Officer and Document Effective Date	61
4.5.	Lead Time Events (Applicable to versions prior to v2.4).....	62
4.6.	Recurring Payments	63
4.7.	Financial Reference for Obligated Amounts	64
4.8.	Financial Reference for Tax Amounts.....	65
4.9.	Percentage based Discounts.....	66
4.10.	Percentage based Services, Allowances, and Charges.....	67
4.11.	Unit Price when Not Separately Priced (v2.4 and prior)	67
4.12.	Labor Rates	68
4.13.	Information Sub-Line Items and Funded Amount.....	68
4.14.	Line Item Level Solicitation Information	69
5.	Compliance Business Rules – Award and Conformed Award Documents	70
5.1.	Information Sub-Line Items and Funded Amount.....	70
5.2.	Procurement Instrument Identifier of Represented Contract (Award)	70
5.3.	Pricing Arrangement Amount Requirements – Definitized Contract Action.....	70
5.4.	Pricing Arrangement Amount Requirements – Undefinitized Contract Actions	80
5.5.	Contract Line Items and Vehicle	88
5.6.	Contract Line Items and Obligated Amounts	89
5.7.	Contract Line Items and Pricing Arrangement	90
5.8.	Multi-Year Contract - Cancellation Ceiling	92
5.9.	Financial Reference for Obligated Amounts	92
5.10.	Total Contract Amount	93
5.11.	Share Ratio.....	94

5.12.	Contract Vehicle Fee.....	95
5.13.	Small Business Administration (SBA) Contracts	96
5.14.	Payment Instructions.....	97
5.15.	Government Access – Clause Requirement.....	99
6.	Compliance Business Rules – Solicitation, Amendment, and Conformed Solicitation Documents.....	100
6.1.	Issuing Address.....	100
6.2.	Issue Date and Periods.....	100
7.	Compliance Business Rules – Solicitation and Conformed Solicitation Documents.....	102
7.1.	Procurement Instrument Identifier of Represented Solicitation	102
7.2.	Line Item and Quantity	102
7.3.	Option Requirement.....	103
7.4.	Economic Price Adjustment – Basic Steel, Aluminum, Brass, Bronze, or Copper Mill Products – Representation – Clause Requirement.....	103
8.	Compliance Business Rules – Modification and Amendment Documents	104
8.1.	Deleting a Single Element via Attributes.....	104
8.2.	Adding a Single Element via Attributes	104
8.3.	Changing a Single Element via Attributes.....	104
8.4.	Deleting a Set of Elements via Attributes.....	105
8.5.	Adding a Set of Elements via Attributes.....	105
8.6.	Changing a Set of Elements via Attributes	105
8.7.	Changing Amounts via Attributes	106
8.8.	Changing a Choice via Attributes	106
8.9.	Modification Reason, Authority, and Addresses	107
9.	Compliance Business Rules – Modification Documents.....	109
9.1.	Required Procurement Instrument Identifiers.....	109
9.2.	Procurement Instrument Identifier of Represented Contract (Modification)	111
9.3.	Modifying an Obligated Amount to Zero	112
10.	Compliance Business Rules – Amendment Documents.....	113
10.1.	Required Procurement Instrument Identifiers.....	113
10.2.	Procurement Instrument Identifier of Represented Solicitation (Amendment).....	114
11.	Definitions.....	115

Purpose of this Document

The PDS standard format for procurement instruments is an XML Schema Definition (xsd) which can be used to generate an Extensible Markup Language (XML) document. While many of the rules regarding what and when data are required are part of the schema, others must be enforced by validations outside of the schema. This document provides the details about those validations or Business Rules (BR) and unless explicitly stated, applies to all previous PDS schema versions

1. General Business Rules

- 1.1. Contract writing systems must be able to produce either a PDS XML document or a transaction that can be converted to the PDS format that meets all data and business rule requirements.
- 1.2. The PDS XML document must contain all data and text included in the actual signed procurement instrument, except for form field names used on standard forms.
- 1.3. In the Procurement Data Standard, the term “Clause” refers to both provisions and clauses.
- 1.4. The term 'Offer' is utilized throughout for “Quote”, “Bid”, “Proposal”, and “Offer” except when a specific value for a schema element is referenced.
- 1.5. A Requisition Number (used by MILSTRIP, DLMS, and FEDSTRIP) identifies a request to obtain supply support from within DoD and participating Federal agencies from a stock system or supply source. Suffixes are used to relate and identify partial actions taken on the original requisition without duplicating or causing a loss of identity of the original document number. A Purchase Request Number is a number associated with a request to purchase goods or services.

2. Compliance Business Rules – All Documents

2.1. Public Standards Compliance

Rule: Certain public standards need to be followed as part of the PDS business rules. These include enumeration lists for currency, country, etc. as published by a different authoritative source. Always provide names or descriptions of the entity and not the code unless directly specified. Details as follows:

- a. Country: Follow the International Organization for Standardization (ISO) 3166 for providing country names. (http://www.iso.org/iso/english_country_names_and_code_elements)
- b. Currency: Follow the International Organization for Standardization (ISO) 4217 for providing currency details. (http://www.iso.org/iso/support/currency_codes_list-1.htm)
- c. Geographic Location Codes: Follow the General Services Administration (GSA) list of Geographic Locator Codes (GLC). (http://www.gsa.gov/portal/content/104507?utm_source=OGP&utm_medium=print-radio&utm_term=glc&utm_campaign=shortcuts)
- d. Postal Zone Code: Follow the Universal Postal Union for the codes. (<http://www.upu.int/en/resources/postcodes/looking-up-a-postcode.html>)
- e. Telecommunication documents defining formats and values for telecommunication data elements:
 1. Alliance Long Lines Activity (ALLA) Handbook
 2. DISA Circular 310-130-5 Basic Circular (<https://www.disadirect.disa.mil/products/ejad/310-130-5/dc3101305toc.asp>)
 3. DISA Circular 310-65-1

2.2. Date, Time and Percentage Formats

Rule: For currencies, dates, times, and percentages, follow the following formats:

- a) Currency: Provide the textual name of the currency from ISO 4217 from the International Organization for Standardization (ISO).
- b) Date: All dates must be specified as ‘CCYY-MM-DD’ format unless otherwise specified in the annotation in the schema. ‘CCYY’ is the 4 digit year (including century), ‘MM’ is the 2 digit calendar month, and ‘DD’ is the 2 digit Day of the month. Example: 1988-05-22 indicates the 22nd day of May 1988.
- c) Time: Indicate “Time” using a 24 hour clock in ‘HH:MI:SS’ format. ‘HH’ is the hour, ‘MI’ is the minute and ‘SS’ is the seconds. Example: 21-59-03 indicates 57 seconds before 10 PM.
- d) Percentage: For all percentages, include the decimal point. For example, express ‘4.25%’ as ‘4.25’.

2.3. Special Characters

Rule: XML has five characters that have predefined entity references and if they are used in the data carried by an XML transaction, they should be escaped (replaced with their entity references):

Character	Entity Reference	HTML Encoding
<	<	<
>	>	>
&	&	&
"	"	"
'	'	'

In addition, the PDS is defined to use the UTF-8 character set. Any character that is not included in that list must be replaced with either their entity reference if it exists or with their HTML encoding. The use of “CDATA” is not allowed. A few examples are:

Character	Entity Reference	HTML Encoding
¢	¢	¢
£	£	£
½	&frac 12;	½
“	“	“
”	”	”
Σ		Ʃ
˘		ˇ
¸		ƀ

A complete set of characters with both the HTML encoding and the Entity Reference if available may be found at <http://www.utf8-chartable.de/unicode-utf8-table.pl> .

2.4. Uniform Contract Format (UCF) and Construction Specification Institute (CSI) Document Structures

Rule: Whether it is the Uniform Contract Format (UCF), Construction Specification Institute (CSI) Division, or CSI Section structure, only one may be used throughout the procurement instrument document. They cannot be mixed.

2.5. FAR and DFARS Numbering

Rule: Whether the FAR or DFARS numbering is used for the procurement instrument document and its line items, only one may be used throughout the procurement instrument document. They cannot be mixed except when referencing procurement instrument documents.

2.6. Standard Form 33 and Solicitation Type

Rule: When the procurement instrument form is Standard Form 33, the type of solicitation cannot be a request for a quote.

Implementation (Header): If *Procurement Document/ Procurement Instrument Form* = “SF 33” then *.../Procurement Instrument Header/ Basic Information/ Solicitation Offer Information/ Solicitation Type* cannot contain “Request For Quote”.

```
...
<ProcurementInstrumentForm>SF 33</ProcurementInstrumentForm>
...
<AwardInstrument>
  <ProcurementInstrumentHeader>
    ...
    <BasicInformation>
      ...
      <SolicitationOfferInformation>
        ...
        <SolicitationType>Invitation For Bid</SolicitationType>
        ...
      </SolicitationOfferInformation>
    </BasicInformation>
    ...
  </ProcurementInstrumentHeader>
  ...
</AwardInstrument>
...
```


2.7. Standard Form 252/1442 and Construction

Rule: Information about projects in a construction document may be provided only when Standard Form 252 or 1442 is used.

Implementation (Header): If then .../Procurement Instrument Header/ Construction Project Details is provided then Procurement Document/ Procurement Instrument Form must contain “SF 252” or “SF 1442”.

```
...
<ProcurementInstrumentForm>SF 1442</ProcurementInstrumentForm>
...
<AwardInstrument>
  <ProcurementInstrumentHeader>
    ...
    <ConstructionProjectDetails>
      ...
    </ConstructionProjectDetails>
    ...
  </ProcurementInstrumentHeader>
  ...
</AwardInstrument>
...
```

2.8. Department of Defense Form 428 and Telecommunications

Rule: Telecommunication information and rates may be provided only when the Department of Defense Form 428 is used.

Implementation (Header): If .../Procurement Instrument Header/ Telecommunication Details is provided then Procurement Document/ Procurement Instrument Form must contain “DD 428”.

Implementation (Line Item): If then .../Line Items/ Telecommunication Rates is provided then Procurement Document/ Procurement Instrument Form must contain “DD 428”.

Header:

```
...
<ProcurementInstrumentForm>DD 428</ProcurementInstrumentForm>
...
<AwardInstrument>
  <ProcurementInstrumentHeader>
    ...
    <TelecommunicationDetails>
      ...
    </TelecommunicationDetails>
    ...
  </ProcurementInstrumentHeader>
  ...
</AwardInstrument>
...
```

Line Item:

```
...
<ProcurementInstrumentForm>DD 428</ProcurementInstrumentForm>
...
<AwardInstrument>
  ...
  <LineItems>
    ...
    <TelecommunicationRates>
      ...
    </TelecommunicationRates>
  ...
  </LineItems>
...
</AwardInstrument>
...
```

2.9. Modification Identifiers

Rule: A referenced procurement instrument number shall not include a modification identifier when it is one of the following documents:

- Contract being Modified – Award
- Ordering Instrument
- Prior Contract to a Continuation Contract
- Prior Contract to a Follow-on Contract
- Small Business Administration Contract
- Solicitation Number (in an award or modification only)
- Master Solicitation Number

Implementation (Header): If *.../ Award Instrument/ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description* = “(Value from list above)” then neither *.../Order Modification Identifier* nor *.../Procurement Instrument Modification Identifier* may be provided in the corresponding *.../Procurement Instrument Number*.

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>D</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Prior Contract to a Follow-on Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

2.10. Document Purpose: Cancellation and Draft

Rule: The document may be a draft or a cancellation only when it is a telecommunication document.

Implementation (Header): If *.../Procurement Instrument Header/ Basic Information/ Document Purpose* is “Cancellation” or “Draft”, then *Procurement Document/ Procurement Instrument Form* must contain “DD 428”.

Header:

```
...
<ProcurementInstrumentForm>DD 428</ProcurementInstrumentForm>
...
<AwardInstrument>
  <ProcurementInstrumentHeader>
    ...
    <BasicInformation>
      ...
      <DocumentPurpose>Cancellation</DocumentPurpose>
    ...
  </BasicInformation>
  ...
</ProcurementInstrumentHeader>
...
</AwardInstrument>
...
```

2.11. Addresses Requiring a DoDAAC

Rule: A DoDAAC is required for the following addresses:

- Acceptance Location
- Contract Administration Office
- Contract Issuing Office
- Inspection and Acceptance Location
- Requiring Activity

Implementation (Header):

When *.../Procurement Instrument Addresses/ Address Description* contains one of the above list,, *.../Procurement Instrument Addresses/ Address/ Organization ID/ DoDAAC* must be provided.

Implementation (Line Item):

When *.../Line Items/ Addresses/ Address Description* = “Acceptance Location”, “Inspection and Acceptance Location” or “Requiring Activity”, *.../Line Items/ Addresses/ Address/ Organization ID/ DoDAAC* must be provided.

Header:

```
....  
<ProcurementInstrumentAddresses>  
  <AddressDescription >Contract Administrative Office</AddressDescription>  
  <Address>  
    <OrganizationID>  
      <DoDAAC>N20003</DoDAAC>  
    </OrganizationID>  
  ...  
</Address>  
  ...  
</ProcurementInstrumentAddresses>
```

Line Item:

```
....  
<LineItems>  
  Addresses>  
    <AddressDescription >Acceptance Location</AddressDescription>  
    <Address>  
      <OrganizationID>  
        <DoDAAC>N20003</DoDAAC>  
      </OrganizationID>  
    ...  
  </Address>  
  ...  
</Addresses>  
  ...  
</LineItems>
```

2.12. Addresses Requiring a DoDAAC, MAPAC, CAGE, or DUNS

Rule: At least one of DoDAAC, MAPAC, CAGE, 9 digit DUNS, or 13 position DUNS is required for the following addresses. The only exception is that a ‘Ship To’ address on a solicitation or amendment may provide a United States or foreign postal code instead:

- Inspection Location
- Mark for Party
- Outside Inspection Agency
- Party to Receive Inspection
- Place of Performance
- Service Performance Site
- Ship To
- Shipment in Place Location

Implementation (Header):

When *.../Procurement Instrument Addresses/ Address Description* has a value from the above list, *.../Procurement Instrument Addresses/ Address/ Organization ID/ DoDAAC, .../ Organization ID/ Mapac, .../ Organization ID/ Cage, .../ Organization ID/ DunsNumber, or .../ Organization ID/ Duns4Number* must be provided.

Implementation (Line Item):

When .../Line Items/ Addresses/ Address Description = “Contract Administrative Office” or “Contract Issuing Office”, .../Line Items/ Addresses/ Address/ Organization ID/ DoDAAC, .../ Organization ID/ Mapac, .../ Organization ID/ Cage,.../ Organization ID/ DunsNumber, or .../ Organization ID/ Duns4Number must be provided.

Header:

```
....
<ProcurementInstrumentAddresses>
  <AddressDescription>Place of Performance</AddressDescription>
  <Address>
    <OrganizationID>
      <DoDAAC>N20003</DoDAAC>
    </OrganizationID>
    ...
  </Address>
  ...
</ProcurementInstrumentAddresses>
```

Line Item:

```
....
<LineItems>
  Addresses>
    <AddressDescription>Shipment in Place Location</AddressDescription>
    <Address>
      <OrganizationID>
        <Cage>12345</Cage>
        <DunsNumber>123456789</DunsNumber>
      </OrganizationID>
      ...
    </Address>
    ...
  </Addresses>
  ...
</LineItems>
```

2.13. Remit To Address

Rule: A nine or thirteen position DUNS number is required for a remittance address. Both may be provided.

Implementation (Header):

When *.../Procurement Instrument Addresses/ Address Description* = “Remit To”, one or both of *.../Procurement Instrument Addresses/ Address/ Organization ID/ Duns Number* or *.../Procurement Instrument Addresses/ Address/ Organization ID/ Duns4 Number* must be provided.

```
....
<ProcurementInstrumentAddresses>
  <AddressDescription>Remit To</AddressDescription>
  <Address>
    <OrganizationID>
      <DunsNumber>212345678</DunsNumber>
    </OrganizationID>
    ...
  </Address>
  ...
</ProcurementInstrumentAddresses>
```

2.14. Acceptance/Inspection Entities

Rule: When an address is provided for an accepting or inspecting entity, then information on the action (acceptance, inspection, both) to be taken and the location (source, destination, other) must be provided. If the address is not for an accepting or inspecting entity, do not provide information on the action and location. An accepting entity must be provided on an award.

Implementation (Header & Line Item):

When *.../Address Description* is “Acceptance Location”, “Authorized Accepting Official”, “Inspection Location”, “Inspection and Acceptance Location”, or “Outside Inspection Agency” then the *.../Acceptance Inspection/* section must be provided.

Acceptance Location Address (at Header):

```
<ProcurementInstrumentHeader>
  ...
  <ProcurementInstrumentAddresses>
    <AddressDescription>Acceptance Location</AddressDescription>
    <Address>
      ...
    </Address>
    <AcceptanceInspection>
      <Action>Acceptance</Action>
      <Location>Destination</Location>
    </AcceptanceInspection>
  </ProcurementInstrumentAddresses>
  ...
</ProcurementInstrumentHeader>
```

Other than Acceptance/ Inspection Address (at Line Item):

```
<ContractLineItems>
  ...
  <Addresses>
    <AddressDescription>Mark for Party</AddressDescription>
    <Address>
      ...
    </Address>
  </Addresses>
  ...
</ContractLineItems>
```

2.15. Line Item Delivery Addresses

Rule: When providing delivery information at the line item, one of the following addresses is required. An address is not required if it is an unexercised option line item:

- Service Performance Site
- Ship To
- Shipment in Place Location
- Place of Performance

NOTE: In addition, a mark for address may be provided.

Implementation (Line Item):

When *.../ Line Items/ Delivery/ ...* is provided, an instance of *.../ Line Items/ Delivery/ Ship To Address/ ...* must be provided where *.../ Line Items/ Delivery/ Ship To Address/ Address Description* = “Service Performance Site”, “Ship To”, “Shipment in Place Location”, or “Place of Performance” unless *.../ Line Items/Line Item Basic Information/ Option Line Item* = “true” and an iteration of *.../ Line Items/Line Item Dates/ Line Item Date Description* = “Option Exercise Date” is not provided.

Non-Option Line Item:

```
....
<LineItems>
  ...
  <LineItemBasicInformation>
    ...
    <OptionLineItem>>false</OptionLineItem>
  </LineItemBasicInformation>
  ...
  <Delivery>
    ...
    <ShipToAddress>
      <AddressDescription>Ship To</AddressDescription>
    </ShipToAddress>
  </Delivery>
  ...
</LineItems>
```

Exercised Option Line Item:

```
....  
<LineItems>  
  ....  
  <LineItemBasicInformation>  
    ....  
    <OptionLineItem>true</OptionLineItem>  
    ....  
  </LineItemBasicInformation>  
  ....  
  <Delivery>  
    ....  
    <ShipToAddress>  
      <AddressDescription>Ship To</AddressDescription>  
      ....  
    </ShipToAddress>  
  </Delivery>  
  ....  
  <LineItemDates>  
    <LineItemDateDescription>Option Exercise Date</LineItemDateDescription>  
    ....  
  </LineItemDate>  
  ....  
</LineItems>
```

Unexercised Option Line Item:

```
....  
<LineItems>  
  ....  
  <LineItemBasicInformation>  
    ....  
    <OptionLineItem>true</OptionLineItem>  
    ....  
  </LineItemBasicInformation>  
  ....  
  <Delivery>  
    ....  
  </Delivery>  
  ....  
</LineItems>
```


2.16. Shipping Postal Code

Rule: A shipping postal code may only be provided on a solicitation or amendment document on a ship to address.

Implementation:

When *.../Address/ Organization ID/ Shipping Postal Code* is provided, *.../Address Description* must be “Service Performance Site”, “Ship To”, “Shipment in Place Location”, or “Place of Performance” and *.../ Procurement Instrument Identifier/ Procurement Instrument Description/* must be “Represented Solicitation”.

Solicitation:

```
...
<ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
  <AddressDescription >Ship To</AddressDescription>
  <Address>
    <OrganizationId>
      <ShippingPostalCode>
        <USZipCode>22033</USZipCode>
      </ShippingPostalCode>
    </OrganizationId>
    ...
  </Address>
...

```

2.17. Contact via File Transfer Protocol

Rule: When the method for communicating with a contact is “FTP”, a URL must be provided. Contacts may be associated with an address or with a signature.

Implementation (Header & Line Item): When *Contact/Contact Method/Method Description* is “File Transfer Protocol (FTP)”, then *Contact/Contact Method/Method Value* must be a URL.

```
...
<Contact>
  <Name>Shawn Brown</Name>
  <ContactMethod>
    <MethodDescription>File Transfer Protocol (FTP)</MethodDescription>
    <MethodValue>ftp://brown:soagovernance1@ftp.systinet.com/s2/sysse252.iso</MethodValue>
  </ContactMethod>
</Contact>
...

```

2.18. United Nations Code

Rule: Provide the United Nations code for ports and other locations (UN/LOCODE) in accordance with the United Nations Location Code Manual when the Freight on Board (FOB) point is a terminal.

Implementation (Header & Line Item): When .../FoB Details/FoB Point is specified as “Terminal”, then the .../FoB Details/United Nations Code must contain the United Nations code for ports and other locations (UN/LOCODE) of the terminal.

```
...
<FoBDetails>
  <PaymentMethod>Seller</PaymentMethod>
  <FoBPoint>Terminal</FoBPoint>
  <UnitedNationsCode>ZA9B8</UnitedNationsCode>
</FoBDetails>
...
```

2.19. Clause/Provision Full Text and Fill-In Areas

Rule: If a clause or provision with fill in areas is provided as full text and the fill in areas are not filled in, they must be denoted with a minimum of five underline characters.

```
...
<RegulationOrSupplement>FAR</RegulationOrSupplement>
<ClauseNumber>52.247.2</ClauseNumber>
<ClauseTitle>Permits, Authorities, or Franchises</ClauseTitle>
<ClauseEffectiveDate>1997-01</ClauseEffectiveDate>
<ClauseText>
  <ClauseFullText>(a) The Offeror does not hold authorization from the Federal Highway Administration (FHWA) or other cognizant
regulatory body. If authorization is held, it is as follows:
  _____
  (Name of regulatory body)
  _____
  (Authorization No.)
  _____
  (b) The offeror shall furnish to the Government, if requested, copies of the authorization before moving the material under any contract awarded.
In addition, the offeror shall, at the offeror's expense, obtain and maintain any permits, franchises, licenses, and other authorities issued by State
and local governments.</ClauseFullText>
...
```

2.20. Wage Determination

Rule: Wage Determination cannot be under a combination of the Davis Bacon Act and the Service Contract Act. A Wage Determination must be under one or the other

Implementation (Header & Line Item): The .../ *Wage Determination Details* and the .../ *Group Wage Determination/ Wage Determination* must contain either the .../ *Davis Bacon Act* or the .../ *Service Contract Act* section. Modifications to the .../ *Wage Determination* and .../ *Group Wage Determination* sections must result in only .../ *Davis Bacon Act* or the .../ *Service Contract Act* section.

```
...
<WageDetrminationDetails>
  <DavisBaconAct>
    ...
  </DavisBaconAct>
</WageDeterminatonDetails>
...
```

2.21. Attachment Data Format

Rule: When the attachment is included in the procurement instrument document as binary text, the data format of the attachment must be provided.

Implementation (Header & Line Item): When .../ *Attachment Binary Text* is provided then .../ *Attachment Data Format* must be provided.

```
...
<AttachmentDescription>
  <StandardAttachment>Drawings</StandardAttachment>
</AttachmentDescription>
<AttachmentName>H11 HoverCraft Plans</AttachmentName>
<AttachmentBinaryText>JVBERi0xLjQNeJLjz9MNCjE4IDAgb2JqDTw8L0xpbnVhcmI6ZWQgMS9MID10MDIy</AttachmentBinaryText>
...
<AttachmentDataFormat>ArchiCAD 3D Model File (PLN)</AttachmentDataFormat>
...
```

2.22. Attachment Security Attribute (v2.5 and later)

Rule: When an attachment has a security level, it cannot be provided as binary text.

Implementation (Header & Line Item): When .../ *Attachment Name (Attachment Security Level)* is provided then .../ *Attachment Binary Text* cannot be provided.

```
...
<AttachmentDescription>
  <StandardAttachment>Drawings</StandardAttachment>
</AttachmentDescription>
<AttachmentName AttachmentSecurityLevel="Top Secret">H11 HoverCraft Plans</AttachmentName>
...
<AttachmentURL>https://www.secureloc.dod</AttachmentURL>
...
```

2.23. Request an Attachment

Rule: An attachment can be requested as part of a response to a solicitation or amendment document only. If the attachment is to be provided in response to a solicitation, it cannot be provided as binary text nor its location identified.

Implementation (Header & Line Item): When ... /*Include In Response* is provided .../Attachment Binary Text is provided then neither .../Attachment Binary Text nor .../Attachment URL may be provided. In addition, an iteration of .../Procurement Instrument Header/ Procurement Instrument Identifier/ where .../Procurement Instrument Description = “Represented Solicitation” must be provided; an iteration where .../Procurement Instrument Description = “Represented Contract” cannot be provided.

Solicitation:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
  <AttachmentDescription>
    <StandardAttachment>Drawings</StandardAttachment>
  </AttachmentDescription>
  <AttachmentName>H11 HoverCraft Plans</AttachmentName>
  <IncludeInResponse>true</IncludeInResponse>
...

```

2.24. Required Facility Clearance and Safeguard Level

Rule: The required safeguard level cannot be higher than the level of the required facility clearance.

Implementation (Header): The value of .../ Required Safeguard Level cannot be higher than the value of .../ Required Facility Clearance.

```
...
<RequiredFacilityClearance>Top Secret</RequiredFacilityClearance>
<RequiredSafeguardLevel>Top Secret</RequiredSafeguardLevel>
...

```

2.25. Contract Security Classification Specification – Special Access Information (DD Form 254 Dec 1999)

Rule: Special access information requirements may be identified by either a check box or by including specific text but not by both.

Implementation (Header): Either *.../Security Details/ Access Requirements* = “Special Access Information” is provided or *.../Security Details/ Special Access Information* is provided but not both.

Prior to V2.5:

```
...
<SecurityDetails>
  <AccessRequirements>
    <AccessRequirement>Special Access Information</AccessRequirement>
    ...
  </AccessRequirements>
  ...
</SecurityDetails>
...
```

Prior to V2.5:

```
...
<SecurityDetails>
  <AccessRequirements>
    <AccessRequirement>NATO Information</AccessRequirement>
    <AccessRequirement>Restricted Data</AccessRequirement>
    <SpecialAccessInformation>Text text text</SpecialAccessInformation>
    ...
  </AccessRequirements>
  ...
</SecurityDetails>
...
```

V2.5:

```
...
<SecurityDetails1999Form>
  <AccessRequirements>
    <AccessRequirement>Special Access Information</AccessRequirement>
    ...
  </AccessRequirements>
  ...
</SecurityDetails1999Form>
...
```

V2.5:

```
...
<SecurityDetails1999Form>
  <AccessRequirements>
    <AccessRequirement>NATO Information</AccessRequirement>
    <AccessRequirement>Restricted Data</AccessRequirement>
    <SpecialAccessInformation>Text text text</SpecialAccessInformation>
    ...
  </AccessRequirements>
  ...
</SecurityDetails1999Form>
...
```

2.26. Information Sub-Line Items and Delivery Schedules

Rule: An information sub-line item cannot have a delivery schedule.

Implementation (Line Item): When .../Line Item Identifier/ Line Items/ Line Item Type = “INFOSLIN”, neither a .../Delivery/ section nor a .../Line Item Dates/ section where .../Line Item Dates/ Line Item Date Description = “Lease” or “Period of Performance” may be provided.

```
...
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>INFOSLIN</LineItemType>
      <LineItemBase>0003</LineItemBase>
      <LineItemExtension>
        <InfoSlinExtension>11</InfoSlinExtension>
      </LineItemExtension>
    </LineItem>
  </LineItemIdentifier>
...
```

2.27. Header Amounts: Awards vs Solicitations (v2.5 and later)

Rule: Only information on the currency to be used in the response is allowed on a solicitation. This information is not allowed on an award document.

Implementation (Header): When *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Solicitation”, only the *.../Procurement Instrument Amounts/ Header Currency/ Solicitation Currency* section may be provided. When *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Contract”, the *.../Procurement Instrument Amounts/ Header Currency/ Solicitation Currency* section may not be provided.

Solicitation:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<ProcurementInstrumentAmounts>
  <HeaderCurrency>
    <SolicitationCurrency>
      <USDollarsOnly>true</USDollarsOnly>
    </SolicitationCurrency>
  </HeaderCurrency>
</ProcurementInstrumentAmounts>
...
```

Award:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Task Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<ProcurementInstrumentAmounts>
  <HeaderCurrency>
    <AwardCurrency>
      <BuyingCurrency exchangeRate="6.034">Euro</BuyingCurrency>
    </AwardCurrency>
  </HeaderCurrency>
  ...
</ProcurementInstrumentAmounts>
...
```

2.28. Service Allowances and Charges: Awards vs Solicitations (v2.5 and later)

Rule: On a solicitation document, when an allowance or charge for a service is required in the response, do not provide the range and threshold amounts. The range and threshold amounts are required when a service allowance or charge is provided on an award document.

Implementation (Header, Line Item): When *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Solicitation” and the *.../Service Allowance Charges* section is provided, *.../Service Allowance Charges/ SAC Indicator* must contain “Bidder Amount Request” and the *.../Service Allowance Charges/ SAC Range And Value* section cannot be provided. When *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Contract” and the *.../Service Allowance Charges* section is provided, *.../Service Allowance Charges/ SAC Indicator* cannot contain “Bidder Amount Request” and the *.../Service Allowance Charges/ SAC Range And Value* section must be provided.

Solicitation:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<ServiceAllowanceCharges>
  <SACDescription>Bond Charge</SACDescription>
  <SACIndicator>Bidder Amount Request</SACIndicator>
</ServiceAllowanceCharges>
...
<LineItems>
  ...
  <ServiceAllowanceCharges>
    <SACDescription>Cleaning Charge</SACDescription>
    <SACIndicator>Bidder Amount Request</SACIndicator>
  </ServiceAllowanceCharges>
  ...
</LineItems>
...
```


Award:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Task Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<ServiceAllowanceCharges>
  <SACDescription>Bond Charge</SACDescription>
  <SACIndicator>Charge</SACIndicator>
  <SACRangeAndValue>
    <AmountRange>
      <StartValue>0</StartValue>
      <EndValue>500000</EndValue>
    </AmountRange>
    <SACValue>
      <ValueDescription>Percentage</ValueDescription>
      <Value>5</Value>
      <PercentageBasis>Total Purchase Amount</PercentageBasis>
    </SACValue>
  </SACRangeAndValue>
</ServiceAllowanceCharges>
...
<LineItems>
  ...
  <ServiceAllowanceCharges>
    <SACDescription>Cleaning Charge</SACDescription>
    <SACIndicator>Charge</SACIndicator>
    <SACRangeAndValue>
      <AmountRange>
        <StartValue>0</StartValue>
        <EndValue>60000</EndValue>
      </AmountRange>
      <SACValue>
        <ValueDescription>Percentage</ValueDescription>
        <Value>3.5</Value>
        <PercentageBasis>Line Item Total Amount</PercentageBasis>
      </SACValue>
    </SACRangeAndValue>
  </ServiceAllowanceCharges>
  ...
</LineItems>
...
```

2.29. Recurring Payments: Awards vs Solicitations (v2.5 and later)

Rule: Recurring payment information may only be provided on award documents. This information is not allowed on a solicitation document.

Implementation (Header & Line Item): The *.../Recurring Payment* section may only be provided when *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Contract”. It may not be provided when *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Solicitation”.

Award:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Task Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<RecurringPayments>
  <PaymentFrequency>Monthly</PaymentFrequency>
  <RecurringPaymentAmount>100000</RecurringPaymentAmount>
  <PaymentPeriod>
    <StartDate>2006-02-01</StartDate>
    <EndDate>2006-08-01</EndDate>
  </PaymentPeriod>
</RecurringPayments>
...
```

2.30. Line Item Amounts: Awards vs Solicitations (v2.5 and later)

Rule: Amounts and pricing that impact the line item (currency, taxes, obligated and other amounts) cannot be provided on solicitation or amendment documents. They may be provided on award or modification documents.

Implementation (Line Item): When .../Procurement Instrument Identifier/ Procurement Instrument Description = “Represented Solicitation”, the .../Line Item Amounts section cannot be provided. When .../Procurement Instrument Identifier/ Procurement Instrument Description = “Represented Contract”, the .../Line Item Amounts section may be provided.

Solicitation:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<LineItems>
  <LineItemIdentifier>
    ...
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
  </LineItemBasicInformation>
  <RequirementsDescription>Build a mobile operating unit.</RequirementsDescription>
</LineItems>
...
```

Award:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Task Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<LineItems>
  <LineItemIdentifier>
    ...
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
  </LineItemBasicInformation>
  <LineItemAmounts>
    ...
  </LineItemAmounts>
  <RequirementsDescription>Build a mobile operating unit.</RequirementsDescription>
</LineItems>
...
```

2.31. Labor Rates: Awards vs Solicitations (v2.5 and later)

Rule: When requiring labor rates on a response to a solicitation, the rate cannot be provided. The rate must be provided on award or modification documents when labor rates are part of the document.

Implementation (Line Item): When .../Procurement Instrument Identifier/ Procurement Instrument Description = “Represented Solicitation”,. ... /Price Details/ Labor Rates/ Category Rate/ Rate cannot be provided when ... /Price Details/ Labor Rates/ Category Rate/ is provided When .../Procurement Instrument Identifier/ Procurement Instrument Description = “Represented Contract”, ... /Price Details/ Labor Rates/ Category Rate/ Rate must be provided when ... /Price Details/ Labor Rates/ Category Rate/ is provided.

Solicitation:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<LineItems>
  <LineItemIdentifier>
    ...
  </LineItemIdentifier>
  ...
  <PriceDetails>
    <LaborRates>
      <Category>Professional Staff</Category>
      <CategoryRate>
        <RateTitle>Contractor's Site Rate</RateTitle>
      </CategoryRate>
    </LaborRates>
  </PriceDetails>
  ...
</LineItems>
...
```

Award:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Task Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<LineItems>
  <LineItemIdentifier>
    ...
  </LineItemIdentifier>
  ...
  <PriceDetails>
    <LaborRates>
      <Category>Professional Staff</Category>
      <CategoryRate>
        <RateTitle>Contractor's Site Rate</RateTitle>
        <Rate>125</Rate>
      </CategoryRate>
    </LaborRates>
  </PriceDetails>
  ...
</LineItems>
...
```

3. Compliance Business Rules – Awards, Solicitations, and Conformed Documents

3.1. Contract and Solicitation Performance Dates

Rule: If a period of performance, an ordering period, a lease, or a funding period is not expressed as a start and end date; then either a delivery date or a delivery lead time must be provided.

Implementation (Header): When no data is provided for *Procurement Instrument Header/Procurement Instrument Dates/Procurement Instrument Periods*, then at least one occurrence of either *Procurement Instrument Header/ Delivery Details/ Delivery Dates* or *Procurement Instrument Header/ Delivery Details/Delivery Lead Time* must be present.

Delivery Date:

```
...
<ProcurementInstrumentDates>
  <ProcurementInstrumentEffectiveDate>2005-08-13</ProcurementInstrumentEffectiveDate>
  <ContractingOfficer>
    ...
  </ContractingOfficer>
</ProcurementInstrumentDates>
<DeliveryDetails>
  <DeliveryDates>
    <DeliveryDescription>Delivery Before</DeliveryDescription>
    <DeliveryDate>
      <DateElement>2006-02-15</DateElement>
    </DeliveryDate>
  </DeliveryDates>
</DeliveryDetails>
...
```

Delivery Lead Time:

```
...
<ProcurementInstrumentDates>
  <ProcurementInstrumentEffectiveDate>2005-08-13</ProcurementInstrumentEffectiveDate>
  <ContractingOfficer>
    ...
  </ContractingOfficer>
</ProcurementInstrumentDates>
<DeliveryDetails>
  <DeliveryLeadTime>
    <LeadTimeDescription>From date of award receipt to delivery</LeadTimeDescription>
    <DeliveryLeadTime>
      <DurationUnit>Month</DurationUnit>
      <DurationValue>12</DurationValue>
    </DeliveryLeadTime>
  </DeliveryLeadTime>
</DeliveryDetails>
...
```

3.2. Clause/Provision Requirements

Rule: One or more clauses or provisions are required at the procurement instrument level unless one or both of the following is true:

- Awards
 - a. The represented contract is a purchase order
 - b. An ordering instrument number is provided.
- Solicitations
 - a. A master solicitation number is provided.

Implementation (Header): If any of the following is true, the *Procurement Instrument Header/ Clause Information* section is not required but may be provided. If none are true, the *Procurement Instrument Header/ Clause Information* section is required:

Solicitations:

- a. At least one instance of the ... /*Procurement Instrument Identifier* section is provided where .../*Procurement Instrument Description* = “Master Solicitation Number”.

Awards:

- a. .../*Procurement Instrument Description* = “Represented Contract” and .../*Procurement Instrument Number/ Order Number* is provided in the same instance of *Procurement Instrument Header/Procurement Instrument Identifier*.
- b. .../*Procurement Instrument Description* = “Represented Contract” and .../*Procurement Instrument Vehicle* is “Purchase Order” in the same instance of *Procurement Instrument Header/Procurement Instrument Identifier*
- c. At least one instance of the ... /*Procurement Instrument Identifier* section is provided where .../*Procurement Instrument Description* = “Ordering Instrument”.

Solicitation; with Master:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request For Proposal</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00421</EnterpriseIdentifier>
    <Year>08</Year>
    <ProcurementInstrumentTypeCode>R</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>0050</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request For Proposal</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00421</EnterpriseIdentifier>
    <Year>08</Year>
    <ProcurementInstrumentTypeCode>R</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>0051</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Master Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

Solicitation; no Master:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request For Proposal</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00421</EnterpriseIdentifier>
    <Year>08</Year>
    <ProcurementInstrumentTypeCode>R</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>0050</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<BasicInformation>
  ...
</BasicInformation>
<ClauseInformation>
  ...
</ClauseInformation>
...
```


Ordering Number; no Clauses:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Call Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00421</EnterpriseIdentifier>
    <Year>08</Year>
    <ProcurementInstrumentTypeCode>D</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>0050</SerializedIdentifier>
    <OrderNumber>0001</OrderNumber>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<BasicInformation>
  ...
</BasicInformation>
<ProcurementInstrumentDates>
  ...
</ProcurementInstrumentDates>
...
```

Purchase Order; no Clauses:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>P</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<BasicInformation>
  ...
</BasicInformation>
<ProcurementInstrumentDates>
  ...
</ProcurementInstrumentDates>
...
```

Order against an Instrument; no Clauses:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Schedule</ProcurementInstrumentVehicle>
  <NonDoDNumber>GS-03F-00025M</NonDoDNumber>
  <ProcurementInstrumentDescription>Ordering Instrument</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Task Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00421</EnterpriseIdentifier>
    <Year>08</Year>
    <ProcurementInstrumentTypeCode>F</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>0050</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<BasicInformation>
  ...
</BasicInformation>
<ProcurementInstrumentDates>
  ...
</ProcurementInstrumentDates>
...
```

No Ordering Instrument; no Purchase Order:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Basic Ordering Agreement</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00421</EnterpriseIdentifier>
    <Year>08</Year>
    <ProcurementInstrumentTypeCode>G</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>0050</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<BasicInformation>
  ...
</BasicInformation>
<ClauseInformation>
  ...
</ClauseInformation>
<ProcurementInstrumentDates>
  ...
</ProcurementInstrumentDates>
...
```

3.3. Clause/Provision Requirements - Alternates

Rule: A clause or provision and its alternate cannot exist together in a procurement document. Two or more alternates for the same clause cannot separately exist in a procurement document. (Note that a given clause may have two alternates at the same time, e.g. FAR 52.209-3 FIRST ARTICLE APPROVAL- CONTRACTOR TESTING (SEP 1989) - ALTERNATE I (JAN 1997) AND ALTERNATE II (SEP 1989))

Implementation (Header): Multiple instances of .../ *Clause Details*/ ... where .../ *Clause Number* has the same value is not allowed.

Implementation (Line Item): Multiple instances of .../ *Line Item Clauses*/ ... where .../ *Clause Number* has the same value is not allowed. In addition, it is not allowed if the line item clause is found at the document level.

Header – Not Allowed:

```
...
<ClauseInformation>
  ...
  <ClauseDetails>
    ...
    <ClauseNumber>52.247.2</ClauseNumber>
    ...
  </ClauseDetails>
  <ClauseDetails>
    ...
    <ClauseNumber>52.247.2</ClauseNumber>
    ...
  </ClauseDetails>
</ClauseInformation>
...
```

Line Item – Not Allowed:

```
...
<LineItemClauses>
  ...
  <ClauseNumber>52.247.2</ClauseNumber>
  ...
</LineItemClauses>
<LineItemClauses>
  ...
  <ClauseNumber>52.247.2</ClauseNumber>
  ...
</LineItemClauses>
...
```

3.4. Cost Plus Incentive Fee – Clause Requirement

Rule: If the procurement instrument or line item has a cost plus incentive fee pricing arrangement, then FAR clause 52.216-10, Incentive Fee, must be provided. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument.

Implementation (Header & Line Item):

- a. When the *Procurement Instrument Header/ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* = “Cost Plus Incentive Fee (Cost Based)” and *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.216-10”.
- b. When the *Contract Line Items/ Line Items/ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* value is “Cost Plus Incentive Fee (Cost Based)” and *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *Contract Line Items/ Line Items/ Line Item Clauses/* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.216-10”.

At Header:

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>

  <BasicInformation>
    ...
    <PricingArrangement>
      <PricingArrangementBase>Cost Plus Incentive Fee (Cost Based)</PricingArrangementBase>
    </PricingArrangement></BasicInformation>
    ...
  </BasicInformation>

  <ClauseInformation
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.216-10</ClauseNumber>
      <ClauseTitle>Incentive Fee</ClauseTitle>
      <ClauseEffectiveDate>1997-03</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
</ProcurementInstrumentHeader>
```

At Line Item:

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
</ProcurementInstrumentHeader>
<ContractLineItems>
  <LineItems>
    ...
    <LineItemBasicInformation>
      ...
      <PricingArrangement>
        <PricingArrangementBase>Cost Plus Incentive Fee (Cost Based)</PricingArrangementBase>
      </PricingArrangement>
      ...
    </LineItemBasicInformation>
    ...
    <LineItemClauses>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.216-10</ClauseNumber>
      <ClauseTitle>Incentive Fee</ClauseTitle>
      <ClauseEffectiveDate>1997-03</ClauseEffectiveDate>
      ...
    </LineItemClauses>
    ...
  </LineItems>
</ContractLineItems>
```

3.5. Fixed Price Incentive – Clause Requirement

Rule: If the procurement instrument or line item has a fixed price incentive pricing arrangement, then FAR clause 52.216-16, Incentive Price Revision – Firm Target, or 52.216-17, Incentive Price Revision – Successive Targets, must be provided. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument.

Implementation (Header & Line Item):

- a. When the *Procurement Instrument Header/ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* = “Fixed Price Incentive (Cost Based)” or “Fixed Price Incentive (Successive Targets)” and *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description* is “Represented Contract”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.216-16” or “52.216-17”.
- b. When the *Contract Line Items/ Line Items/ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* = “Fixed Price Incentive (Cost Based)” or “Fixed Price Incentive (Successive Targets)” and *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle* is not “Call

Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *Contract Line Items/ Line Items/ Line Item Clauses/* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.216-16” or “52.216-17”.

At Header:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>

  <BasicInformation>
    ...
    <PricingArrangement>
      <PricingArrangementBase>Fixed Price Incentive (Cost Based)</PricingArrangementBase>
    </PricingArrangement>
  </BasicInformation>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.216-16</ClauseNumber>
      <ClauseTitle>Incentive Price Revision – Firm Target</ClauseTitle>
      <ClauseEffectiveDate>1997-10</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
...

```

At Line Item:

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
</ProcurementInstrumentHeader>
<ContractLineItems>
  <LineItems>
    ...
    <LineItemBasicInformation>
      ...
      <PricingArrangement>
        <PricingArrangementBase>Fixed Price Incentive (Successive Targets)</PricingArrangementBase>
      </PricingArrangement>
      ...
    </LineItemBasicInformation>
    ...
    <LineItemClauses>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.216-17</ClauseNumber>
      <ClauseTitle>Incentive Price Revision – Successive Targets</ClauseTitle>
      <ClauseEffectiveDate>1997-10</ClauseEffectiveDate>
      ...
    </LineItemClauses>
    ...
  </LineItems>
</ContractLineItems>
```

3.6. Oral Attestation of Security Responsibilities – Clause Requirement

Rule: If the procurement instrument contains FAR clause 52.204-2, Security Requirements, then DFARS Clause 252.204-7005, Oral Attestation of Security Responsibilities, must be provided.

Implementation (Header):

When an instance of *Procurement Instrument Header/ Clause Information/* exists where ... / *Regulation Or Supplement* = “FAR” and .../ *Clause Number* = “52.204-2”, then an instance of ... *Procurement Instrument Header/ Clause Information/ Clause Details* must be provided where .../ *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.204-7005”.

At Header:

```
...
<ProcurementInstrumentHeader>
  ...
  <ClauseInformation
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.204-2</ClauseNumber>
      <ClauseTitle>Incentive Price Revision – Firm Target</ClauseTitle>
      <ClauseEffectiveDate>1996-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.204-7005</ClauseNumber>
      <ClauseTitle>Oral Attestation of Security Responsibilities</ClauseTitle>
      <ClauseEffectiveDate>2001-11</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
</ProcurementInstrumentHeader>
```

3.7. Reporting of Government-Furnished Property – Clause Requirement

Rule: If the procurement instrument contains FAR clause 52.245-1, Government Property, then DFARS Clause 252.211-7007, Reporting of Government-Furnished Property, must be provided.

Implementation (Header):

When an instance of *Procurement Instrument Header/ Clause Information/* exists where ... / *Regulation Or Supplement* = “FAR” and .../ *Clause Number* = “52.245-1”, then an instance of ... *Procurement Instrument Header/ Clause Information/ Clause Details* must be provided where .../ *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.211-7007”.

At Header:

```
...
<ProcurementInstrumentHeader>
  ...
  <ClauseInformation
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.245-1</ClauseNumber>
      <ClauseTitle>Government Property</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.211-7007</ClauseNumber>
      <ClauseTitle>Oral Attestation of Security Responsibilities</ClauseTitle>
      <ClauseEffectiveDate>2012-08</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
...

```

3.8. Agency Office of the Inspector General – Clause Requirement

Rule: If the procurement instrument contains FAR clause 52.203-13, Contractor Code of Business Ethics and Conduct, then DFARS Clause 252.203-7003, Agency Office of the Inspector General, must be provided.

Implementation (Header):

When an instance of *Procurement Instrument Header/ Clause Information/* exists where ... / *Regulation Or Supplement* = “FAR” and .../ *Clause Number* = “52.203-13”, then an instance of ... *Procurement Instrument Header/ Clause Information/ Clause Details* must be provided where .../ *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.203-7003”.

At Header:

```
...
<ProcurementInstrumentHeader>
  ...
  <ClauseInformation
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.216-16</ClauseNumber>
      <ClauseTitle>Incentive Price Revision – Firm Target</ClauseTitle>
      <ClauseEffectiveDate>1997-10</ClauseEffectiveDate>
      ...
    </ClauseDetails>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.203-7003</ClauseNumber>
      <ClauseTitle>Agency Office of the Inspector General</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
...

```

3.9. Combating Trafficking in Persons – Clause Requirement

Rule: The procurement instrument must contain FAR clause 52.212-5, 52.213-4, or 52.222-50. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument.

Implementation (Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.212-5”, “52.213-4”, or “52.222-50”.

At Header:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.213-4</ClauseNumber>
      <ClauseTitle>Terms and Conditions -- Simplified Acquisitions (Other Than Commercial Items)</ClauseTitle>
      <ClauseEffectiveDate>2013-11</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
  ...
```

3.10. Requirements Relating to Compensation of Former DoD Officials – Clause Requirement

Rule: The procurement instrument must contain DFARS clause 252.203-7000, Requirements Relating to Compensation of Former DoD Officials. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument.

Implementation (Award, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.203-7000”.

Implementation (Solicitation, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.203-7000”.

Award:

```

...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.203-7000</ClauseNumber>
      <ClauseTitle>Requirements Relating to Compensation of Former DoD Officials</ClauseTitle>
      <ClauseEffectiveDate>2011-09</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
...

```

Solicitation:

```

...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.203-7000</ClauseNumber>
      <ClauseTitle>Requirements Relating to Compensation of Former DoD Officials</ClauseTitle>
      <ClauseEffectiveDate>2011-09</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
...

```

3.11. Requirements to Inform Employees of Whistleblower Rights – Clause Requirement

Rule: The procurement instrument must contain DFARS clause 252.203-7002, Requirements to Inform Employees of Whistleblower Rights. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument or to procurement documents issued on SF 1449 - Solicitation/Contract/Order for Commercial Items.

Implementation (Award, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract” and *Procurement Instrument Form* is not “SF 1449”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.203-7002”.

Implementation (Solicitation, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation” and *Procurement Instrument Form* is not “SF 1449”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.203-7002”.

Award:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.203-7002</ClauseNumber>
      <ClauseTitle>Requirements to Inform Employees of Whistleblower Rights</ClauseTitle>
      <ClauseEffectiveDate>2009-01</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...

```

Solicitation:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.203-7002</ClauseNumber>
      <ClauseTitle>Requirements to Inform Employees of Whistleblower Rights</ClauseTitle>
      <ClauseEffectiveDate>2009-01</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
  ...
```

3.12. Export-Controlled Items – Clause Requirement

Rule: The procurement instrument must contain DFARS clause 252.204-7008, Export-Controlled Items. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument.

Implementation (Award, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.204-7008”.

Implementation (Solicitation, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.204-7008”.

Award:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.204-7008</ClauseNumber>
      <ClauseTitle>Export-Controlled Items</ClauseTitle>
      <ClauseEffectiveDate>2010-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
...
```

Solicitation:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.204-7008</ClauseNumber>
      <ClauseTitle>Export-Controlled Items</ClauseTitle>
      <ClauseEffectiveDate>2010-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
  ...
```

3.13. Safeguarding of Unclassified Controlled Technical Information – Clause Requirement

Rule: The procurement instrument must contain DFARS clause 252.204-7012 Safeguarding of Unclassified Controlled Technical Information. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument.

Implementation (Award, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.204-7012”.

Implementation (Solicitation, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation”, then an instance of *.../ Clause Information/ Clause Details* must be provided with the *.../ Regulation Or Supplement* value “DFARS” and *.../ Clause Number* value “252.204-7012”.

Award:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.204-7012</ClauseNumber>
      <ClauseTitle>Safeguarding of Unclassified Controlled Technical Information</ClauseTitle>
      <ClauseEffectiveDate>2013-11</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
  ...
```

Solicitation:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.204-7012</ClauseNumber>
      <ClauseTitle>Safeguarding of Unclassified Controlled Technical Information</ClauseTitle>
      <ClauseEffectiveDate>2013-11</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
  ...
```


3.14. Ordering – Clause Requirement

Rule: DFARS clause 252.216-7006, Ordering, must be provided when a definite quantity, requirements, or indefinite quantity contract is considered or awarded.

Implementation (Header; Award): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is “Indefinite Delivery Indefinite Quantity”, “Indefinite Delivery Definite Quantity”, or “Requirements” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then an instance of *Procurement Instrument Header/ Clause Information/* must be provided where ... / *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.216-7006”.

Implementation (Header; Solicitation): When the *Procurement Instrument Header/ Basic Information/ Solicitation Offer Information/ Expected Award Instrument Vehicle* is “Indefinite Delivery Indefinite Quantity”, “Indefinite Delivery Definite Quantity”, or “Requirements” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation”, then an instance of *Procurement Instrument Header/ Clause Information/* must be provided where ... / *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.216-7006”.

Award:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Indefinite Delivery Indefinite Quantity</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.216-7006</ClauseNumber>
      <ClauseTitle>Ordering</ClauseTitle>
      <ClauseEffectiveDate>2011-05</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
...
```

Solicitation:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request For Quote</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    ...
    <OfferSolicitationInformation>
      <ExpectedAwardInstrumentVehicle>Requirements</ExpectedAwardInstrumentVehicle>
    </OfferSolicitationInformation>
  </BasicInformation>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.216-7006</ClauseNumber>
      <ClauseTitle>Ordering</ClauseTitle>
      <ClauseEffectiveDate>2011-05</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
  ...
```

3.15. Government Property – Clause Requirement

Rule: The procurement instrument must contain FAR clause 52.245-1, Government Property if one of the following pricing arrangements is used on the contract:

- Cost No Fee
- Cost Plus Award Fee
- Cost Plus Fixed Fee
- Cost Plus Incentive Fee (Cost Based)
- Cost Sharing
- Labor Hour
- Time and Materials

This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument.

Implementation (Award, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract” and *Procurement Instrument Header/ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* has a value from the list above, then an instance of either *.../ Procurement Instrument Header/ Clause Information/ Clause Details* or *.../ Line Item Clauses* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.245-1”.

Implementation (Solicitation, Header): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation” and *Procurement Instrument Header/ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* has a value from the list above, then an instance of *.../ Procurement Instrument Header/ Clause Information/ Clause Details* or *.../ Line Item Clauses* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.245-1”.

Implementation (Award, Line): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract” and *.../ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* has a value from the list above, then an instance of either *.../ Procurement Instrument Header/ Clause Information/ Clause Details* or *.../ Line Item Clauses* must be provided with the *.../ Regulation Or Supplement* value “FAR” and *.../ Clause Number* value “52.245-1”.

Implementation (Solicitation, Line): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation” and *.../ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* has a value from the list above, then an instance of either

.../Procurement Instrument Header/ Clause Information/ Clause Details or .../ Line Item Clauses must be provided with the .../ Regulation Or Supplement value “FAR” and .../ Clause Number value “52.245-1”.

Award, Header:

```

...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    ...
    <PricingArrangement>
      <PricingArrangementBase>Cost No Fee</PricingArrangementBase>
    </PricingArrangement>
  </BasicInformation>
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.245-1</ClauseNumber>
      <ClauseTitle>Government Property</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
    </ClauseDetails>
  </ClauseInformation>
...

```

Solicitation, Line:

```

...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
</ProcurementInstrumentHeader>
<ContractLineItems>
  <LineItems>
    ...
    <LineItemBasicInformation>
      ...
      <PricingArrangement>
        <PricingArrangementBase>Cost No Fee</PricingArrangementBase>
      </PricingArrangementBase>
    </LineItemBasicInformation>
    <LineItemClauses>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.245-1</ClauseNumber>
      <ClauseTitle>Government Property</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
    </LineItemClauses>
  </LineItem>
</ContractLineItems>
...

```

3.16. Government Property II – Clause Requirement

Rule: The procurement instrument must contain FAR clause 52.245-1, Government Property, on the same or higher level if DFARS clause 252.245-7000, Government-Furnished Mapping, Charting, and Geodesy Property, is on the document.

Implementation (Header): When an instance of *Procurement Instrument Header/ Clause Information/ Clause Details* exists where .../ *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.245-7000”, then an instance of .../ *Procurement Instrument Header/ Clause Information/ Clause Details* must be provided where .../ *Regulation Or Supplement* = “FAR” and .../ *Clause Number* = “52.245-1”.

Implementation (Line): When an instance of .../ *Line Item Clauses* exists where .../ *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.245-7000”, then an instance of either .../ *Procurement Instrument Header/ Clause Information/ Clause Details* or .../ *Line Item Clauses* in the same line item must be provided where .../ *Regulation Or Supplement* = “FAR” and .../ *Clause Number* = “52.245-1”.

Header:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    <ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.245-7000</ClauseNumber>
      <ClauseTitle>Government-Furnished Mapping, Charting, and Geodesy Property</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.245-1</ClauseNumber>
      <ClauseTitle>Government Property</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
</ProcurementInstrumentHeader>
...
```

LineItem:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.245-1</ClauseNumber>
      <ClauseTitle>Government Property</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
<ContractLineItems>
  <LineItems>
    ...
    <LineItemClauses>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.245-7000</ClauseNumber>
      <ClauseTitle>Government-Furnished Mapping, Charting, and Geodesy Property</ClauseTitle>
      <ClauseEffectiveDate>2012-04</ClauseEffectiveDate>
    </LineItemClauses>
    ...
  </LineItem>
</ContractLineItems>
```

3.17. Ordering Limits for Indefinite Delivery/Indefinite Quantity (IDIQ) Contracts

Rule: When the procurement instrument is an Indefinite Delivery/Indefinite Quantity (IDIQ) Contract, both a minimum and a maximum ordering limit must be provided at the contract level.

Implementation (Header): When *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Description* = “Represented Contract” and *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Vehicle* value = “Indefinite Delivery/Indefinite Quantity” then *Procurement Instrument Header/Basic Information/ Ordering Information/Limits* should have at least one entry with *Limits Description* as “Order Limit” and both *Minimum* and *Maximum* ordering limit values must be provided.

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Indefinite Delivery Indefinite Quantity</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    <DocumentPurpose>Original</DocumentPurpose>
    <PricingArrangement>
      ...
    </PricingArrangement>
    <OrderingInformation>
      <Limits>
        <LimitDescription>Order Limit</LimitDescription>
        <Minimum>10</Minimum>
        <Maximum>100</Maximum>
        <UnitOfMeasure>Each</UnitOfMeasure>
      </Limits>
    </OrderingInformation>
  </BasicInformation>
  ...
</ProcurementInstrumentHeader>
```

3.18. Pipeline DoDAAC

Rule: Provide Department of Defense Activity Address Code (DoDAAC) of the pipeline when transportation method is specified as “Pipeline”.

Implementation (Header & Line Item): When .../ *Transportation Details/Transportation Method* is specified as “Pipeline”, then the .../ *Transportation Details/Pipeline DoDAAC* must contain the Department of Defense Activity Address Code (DoDAAC) of the pipeline.

```
...
<TransportationDetails>
  <PipelineDoDAAC>HQ1034</PipelineDoDAAC>
  <TransportationMethod>Pipeline</TransportationMethod>
</TransportationDetails>
...
```

3.19. Product or Service Data

Rule: Information about the product is required when the purchased item is not a service.

Note: Sub line items, informational sub line items, and exhibit lines may carry the product information or they may inherit it from their parent line item.

Implementation (Line Item): When .../ *Line Item Basic Information/ Product Services Ordered/Product Or Service* is not “Services”, one or more iterations of .../ *Line Item Basic Information/ Product Services Ordered/ Product Service Data* is required.

```
...
<ProductServicesOrdered>
  <ProductOrService>Personal Property</ProductOrService>
  ...
  <ProductServiceData>
    <DataDescription>Color</DataDescription>
    <DataValue>Red</DataValue>
  </ProductServiceData>
</ProductServiceOrdered>
...
```


3.20. Federal Supply Classification Code and Product Service Code

Rule: A Federal Supply Classification (FSC) code or a Product Service Code (PSC) must be provided on deliverable line item.

NOTE: At this time, failure to meet this requirement will generate a warning only. The document will still be considered to be valid if no other errors are found.

Implementation (Line Item): When either the section *.../ Delivery/...* exists or *.../ Line Item Dates/ Line Item Date Description = “Lease” or “Period of Performance”*, there must be an instance of *.../ Reference Number/...* where *.../ Reference Number/ Reference Description = “Federal Supply Classification Code” or “Product Service Code”*.

Same Line Item (CLIN or SLIN):

```
...
<LineItems>
  ...
  <LineItemDates>
    <LineItemDateDescription>Period of Performance</LineItemDateDescription>
  ...
  </LineItemDates>
  ...
  <ReferenceNumber>
    <ReferenceDescription>Product Service Code</ReferenceDescription>
  ...
  </ReferenceNumber>
  ...
</LineItem>
...
```

3.21. Order Dependent Pricing Arrangement

Rule: The procurement instrument’s pricing arrangement may be order dependent only when the procurement instrument is one of the following. For a solicitation document, the pricing arrangement may be order dependent only if the type of award instrument that is expected to be issued is one of the following:

- a. Basic Ordering Agreement
- b. Blanket Purchase Agreement
- c. Indefinite Delivery Definite Quantity
- d. Indefinite Delivery Indefinite Quantity
- e. Requirements

Implementation (Header; Award): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is from the above list when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract”, then *...Basic Information/ Pricing Arrangement/ Order Dependent* may be provided.

Implementation (Header; Solicitation): When the *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation” and *Basic Information/ Solicitation Offer Information/ Expected Award Instrument Vehicle* is from the above list, then *.../ Pricing Arrangement/ Order Dependent* may be provided.

Award:

```

...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Basic Ordering Agreement</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    ...
    <PricingArrangement>
      <OrderDependent>true</OrderDependent>
    </PricingArrangement>
    ...
  </BasicInformation>
  ...
...

```

Solicitation:

```

...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request For Quote</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    ...
    <PricingArrangement>
      <OrderDependent>true</OrderDependent>
    </PricingArrangement>
    ...
    <OfferSolicitationInformation>
      <ExpectedAwardInstrumentVehicle>Basic Ordering Agreement</ExpectedAwardInstrumentVehicle>
    </OfferSolicitationInformation>
  </BasicInformation>
  ...
...

```

3.22. Government Obligation to Order

Rule: When the procurement instrument is an Indefinite Delivery/Indefinite Quantity (IDIQ) Contract, there must be a government obligation to order.

Implementation (Header): When *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle* value is “Indefinite Delivery/Indefinite Quantity” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Contract” or “Represented Solicitation”, then *Procurement Instrument Header/ Base Information/ Ordering Information/ Limits/ Limit Description* = “Government Obligation to Order” must exist.

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    </ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Indefinite Delivery Indefinite Quantity</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    <DocumentPurpose>Original</DocumentPurpose>
    <PricingArrangement>
      ...
    </PricingArrangement>
    <OrderingInformation>
      <Limits>
        <LimitDescription>Government Obligation to Order</LimitDescription>
        <Maximum>100</Maximum>
        <UnitOfMeasure>Each</UnitOfMeasure>
      </Limits>
    </OrderingInformation>
  </BasicInformation>
  ...
```

3.23. Requirements Documents – Ordering Quantity

Rule: If the document is a requirements contract or solicitation, then the estimated total quantity to be ordered must be provided at the contract level or on at least one line item. The actual quantity ordered may be higher or lower.

Implementation (Header): When *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Description* = “Represented Contract” or “Represented Solicitation” and *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Vehicle* = “Requirements” then *Procurement Instrument Header/Base Information/ Ordering Information/Estimated Quantity* must be provided.

Implementation (Line Item): When *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Description* = “Represented Contract” or “Represented Solicitation” and *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Vehicle* = “Requirements” there must be at least one line

item where *Contract Line Items/ Line Items/ Line Item Basic Information/ Ordering Information/ Estimated Quantity* must be provided.

Header:

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Requirements</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    ...
    <OrderingInformation>
      <EstimatedQuantity>
        <QuantityValue>100</QuantityValue>
        <UnitOfMeasure>Each per Month</UnitOfMeasure>
      </EstimatedQuantity>
    </OrderingInformation>
    ...
  </BasicInformation>
  ...
</ProcurementInstrumentHeader>
...
```

Line Item:

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Requirements</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
</ProcurementInstrumentHeader>
<ContractLineItems>
  <LineItems>
    ...
    <LineItemBasicInformation>
      <OrderingInformation>
        <EstimatedQuantity>
          <QuantityValue>100</QuantityValue>
          <UnitOfMeasure>Each per Month</UnitOfMeasure>
        </EstimatedQuantity>
      </OrderingInformation>
      ...
    </LineItemBasicInformation>
    ...
  </LineItem>
</ContractLineItems>
```

3.24. Requirements Documents – Acquiring Work

Rule: If the procurement instrument is used to acquire work (e.g. repair, mod, or overhaul) on existing items of Government property, a Government Property Clause, FAR 52.245-1 or FAR 52.245-2, must be included. This does not apply to call orders, delivery orders, or task orders since the clause may be on the ordering instrument. This does not apply to solicitations that reference a master solicitation document.

Implementation (Solicitation, Header): When *Procurement Instrument Header/Basic Information/Category* is either “Modification or Alteration”, “Overhaul”, or “Repair” and when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Solicitation” and there isn’t an iteration of *Procurement Instrument Header/ Procurement Instrument Identifier* where .../*Procurement Instrument Description/* is “Master Solicitation” then at least one instance of *Procurement Instrument Header/ Clause Information* must be provided with *Procurement Instrument Header/ Clause Information/ Clause Details/ Regulation Or Supplement* = “FAR” and *Clause Number* is either “52.245-1” or “52.245-2”.

Implementation (Contract, Header): When *Procurement Instrument Header/Basic Information/Category* is either “Modification or Alteration”, “Overhaul”, or “Repair” and *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle/* is not “Call Order”, “Delivery Order”, or “Task Order” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description/* is “Represented Contract” then at least one instance of *Procurement Instrument Header/ Clause Information* must be provided with *Procurement Instrument Header/ Clause Information/ Clause Details/ Regulation Or Supplement* = “FAR” and *Clause Number* is either “52.245-1” or “52.245-2”.

Solicitation:

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request For Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  <BasicInformation>
    ...
    <Category>Overhaul</Category>
    ...
  </BasicInformation>
  <ClauseInformation>
    <RegulationURL>farsite.hill.af.mil</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.245-1</ClauseNumber>
      <ClauseTitle>Government Property</ClauseTitle>
      <ClauseEffectiveDate>2007-06</ClauseEffectiveDate>
    </ClauseDetails>
  </ClauseInformation>
  ...
</ProcurementInstrumentHeader>
...
```

Contract:

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Contract (Definitive)</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <BasicInformation>
    ...
    <Category>Overhaul</Category>
    ...
  </BasicInformation>
  <ClauseInformation>
    <RegulationURL>farsite.hill.af.mil</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.245-1</ClauseNumber>
      <ClauseTitle>Government Property</ClauseTitle>
      <ClauseEffectiveDate>2007-06</ClauseEffectiveDate>
    </ClauseDetails>
  </ClauseInformation>
  ...
</ProcurementInstrumentHeader>
...
```

4. Compliance Business Rules – Awards, Modifications, and Conformed Award Documents Contractor and Issuing Office Addresses

Rule: An address for the contractor and an address for the issuing office are required on every award and modification document.

Implementation (Header; Award):

Two instances of *.../Procurement Instrument Addresses* must be provided. One with *.../Procurement Instrument Addresses/ Address Description = “Contractor”* and one with *.../Procurement Instrument Addresses/ Address Description = “Contract Issuing Office”*.

Implementation (Header; Modification):

Two instances of *.../Modification Details/ Modification Addresses* must be provided. One with *.../ Modification Addresses/ Address Description = “Contractor”* and one with *.../ Modification Addresses/ Address Description = “Contract Issuing Office”*.

On Award:

```
....
<ProcurementInstrumentAddresses>
  <AddressDescription >Contractor</AddressDescription>
  ...
</ProcurementInstrumentAddresses>
<ProcurementInstrumentAddresses>
  <AddressDescription >Contract Issuing Office</AddressDescription>
  ...
</ProcurementInstrumentAddresses>
....
```

On Modification:

```
....
<ModificationDetails>
  ...
  <ModificationAddresses>
    <AddressDescription >Contractor</AddressDescription>
    ...
  </ModificationAddresses>
  <ModificationAddresses>
    <AddressDescription >Contract Issuing Office</AddressDescription>
    ...
  </ModificationAddresses>
  ...
</ModificationDetails>
....
```

4.2. Order Number

Rule: If an order number is longer than 4 characters, it must be provided as a Procurement Instrument Number.

Implementation (Header): When the order number is longer than 4 characters, the *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Number/* section must be used to provide the order number.

Order Number:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Delivery Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>F</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

4.3. Ordering Instruments

Rule: If the represented contract is a call order, task order, or delivery order, then at least one of the following ordering instruments must be provided except when the order number is denoted by four characters:

- Agreements including Basic and Loan
- Bailment
- Basic Ordering Agreement
- Blanket Purchase Agreement Under Federal Supply Schedule
- Blanket Purchase Agreement
- Facilities Contract
- Indefinite Delivery Definite Quantity
- Indefinite Delivery Indefinite Quantity
- Requirements
- Schedule

Implementation (Header): When *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Description* = “Represented Contract”; *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Vehicle* = “Call Order”, “Task Order”, or “Delivery Order”; and *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Number/ Order Number* is not populated, one or more instances of the ... */Procurement Instrument Identifier* section must be provided where ... */Procurement Instrument Identifier/Procurement Instrument Description* = “Ordering Instrument” and

.../Procurement Instrument Identifier/Procurement Instrument Vehicle = “[value from list above]”

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Delivery Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>F</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>General Services Administration</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Schedule</ProcurementInstrumentVehicle>
  <NonDoDNumber>GS341X780A</NonDoDNumber>
  <ProcurementInstrumentDescription>Ordering Instrument</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

4.4. Contracting Officer and Document Effective Date

Rule: Every contract and modification document must contain the effective date of the document and the name, contact information, and signature date of the contracting officer.

Implementation (Header): ...Procurement Instrument Dates/ Procurement Instrument Effective Date and ...Procurement Instrument Dates/ Contracting Officer must be provided.

Header:

```
...
<ProcurementInstrumentDates>
  <ProcurementInstrumentEffectiveDate>2015-01-01</ProcurementInstrumentEffectiveDate>
  <ContractingOfficer>
    <SignatureDate>2014-10-31</SignatureDate>
    <SigneeDetails>
      <Name>Gerald Purchaser</Name>
      <ContactMethod>
        ...
      </ContactMethod>
    </SigneeDetails>
  </ContractingOfficer>
</ProcurementInstrumentDates>
...
```

4.5. Lead Time Events (Applicable to versions prior to v2.4)

Rule: If a delivery is scheduled based on date an event occurred, the event must be provided.

Note: V2.4 and later, the schema structure enforces the requirement.

Implementation (Header): If ...*Delivery Details/Deliver Lead Time/Lead Time Description* has one of the listed values, then ...*Delivery Details/Deliver Lead Time/Lead Time Event* must be present.

Implementation (Line Item): If ...*Item Schedule/Item Delivery Lead Time/Lead Time Description* has one of the listed values, then ... *Item Schedule/Item Delivery Lead Time/Lead Time Event* must be present.

Implementation (CDRL): If ...*CDRL Dates/CDRL Lead Time/Lead Time Description* has one of the listed values, then ... *CDRL Dates/CDRL Lead Time/Lead Time Event* must be present.

Lead Time Description Values:

- From date of lead time event to date of latest delivery
- From date of lead time event to delivery
- From date of lead time event to shipment

Header:

```
...
<DeliveryDetails>
  <DeliveryLeadTime>
    <LeadTimeDescription>From date of lead time event to latest delivery</LeadTimeDescription>
    <DeliveryLeadTime>
      ...
    </DeliveryLeadTime>
    <LeadTimeEvent>Acceptance testing passed and signed</LeadTimeEvent>
  </DeliveryLeadTime>
</DeliveryDetails>
...
```

Line Item:

```
...
<ItemSchedule>
  <ItemDeliveryLeadTime>
    <LeadTimeDescription>From date of lead time event to delivery</LeadTimeDescription>
    <DeliveryLeadTime>
      ...
    </DeliveryLeadTime>
    <LeadTimeEvent>Shipping container received</LeadTimeEvent>
  </ItemDeliveryLeadTime>
</ItemSchedule>
...
```

CDRL:

```
...
<CDRLDates>
  <CDRLLeadTime>
    <LeadTimeDescription>From date of lead time event to shipment</LeadTimeDescription>
    <DeliveryLeadTime>
      ...
    </DeliveryLeadTime>
    <LeadTimeEvent>Written request received</LeadTimeEvent>
  </CDRLLeadTime>
</CDRLDates>
...
```

4.6. Recurring Payments

Rule: A procurement instrument may only have recurring payments when each payment is for the same amount. Recurring payments may not be defined if the payment amount varies from one payment to the next.

Implementation (Header & Line Item): Provide data in the *.../Payment Details/Recurring Payment* segment only if *.../Payment Details/Recurring Payment/Recurring Payment Amount* is the same over all payments within the *Payment Period*.

Prior to PDS v2.4:

```
...
<PaymentDetails>
  <RecurringPayments>
    <PaymentFrequency>Monthly</PaymentFrequency>
    <RecurringPaymentAmount>100000</RecurringPaymentAmount>
    <PaymentPeriod>
      <StartDate>2006-02-01</StartDate>
      <EndDate>2006-08-01</EndDate>
    </PaymentPeriod>
  </RecurringPayments>
  <PaymentInstructions>
    <ACRNBased>
      <PaymentInstructionsDescription>Single Funding</PaymentInstructionsDescription>
      <ACRNList>
        <ACRN>AA</ACRN>
      </ACRNList>
    </ACRNBased>
  </PaymentInstructions>
</PaymentDetails>
...
```

PDS V2.4 and later:

```
...
<RecurringPayments>
  <PaymentFrequency>Monthly</PaymentFrequency>
  <RecurringPaymentAmount>100000</RecurringPaymentAmount>
  <PaymentPeriod>
    <StartDate>2006-02-01</StartDate>
    <EndDate>2006-08-01</EndDate>
  </PaymentPeriod>
</RecurringPayments>
...
```

4.7. Financial Reference for Obligated Amounts

Rule: When an obligated amount is provided at the procurement instrument header level, an Accounting Classification Reference Number (ACRN) and either an Agency Accounting Identifier (AAI) or a line of accounting must be provided. When an obligated amount is provided at the line item level, the ACRN must be provided.

Implementation (Header): When *.../Obligated Amounts/Obligated Amount* is provided, then one instance of *.../Obligated Amounts/Financial Reference* must be provided where *Financial Code Description* contains “Accounting Classification Reference Number (ACRN)”.

Implementation (Line Item): When *.../Item Obligated Amount/Obligated Amount* is provided, then *.../Obligated Amount/Financial Reference Code* where *Financial Code Description* contains “Accounting Classification Reference Number (ACRN)” must be present.

Header:

```
....
<ObligatedAmounts>
  <ObligatedAmount>300</ObligatedAmount>
  <FinancialReference>
    <FinancialCodeDescription>Accounting Classification Reference Number (ACRN)</FinancialCodeDescription>
    <FinancialCodeValue>AA</FinancialCodeValue>
  </FinancialReference>
  <AccountingIdentifier>
    <AgencyAccountingIdentifier>012345</AgencyAccountingIdentifier>
  </AccountingIdentifier>
</ObligatedAmounts>
....
```

Line Item:

```
...
<ItemObligatedAmount>
  <ObligatedAmount>200</ObligatedAmount>
  <FinancialReferenceCode>
    <FinancialCodeDescription>Accounting Classification Reference Number (ACRN)</FinancialCodeDescription>
    <FinancialCodeValue>AA</FinancialCodeValue>
  </FinancialReferenceCode>
</ObligatedAmounts>
...
```

4.8. Financial Reference for Tax Amounts

Rule: When a tax amount is not included in the total order amount, an Accounting Classification Reference Number must be provided. In addition, if the line of accounting was represented by an Agency Accounting Identifier (AAI), the AAI must be provided as well.

Implementation (Header & Line Item): When *.../Taxes/Tax Amount/Action* contains “Add” or “Delete”, then *.../Tax Amount/Accounting Classification Reference Number* must be provided. If *.../Procurement Instrument Amounts/Obligated Amount/Accounting Identifier/Agency Accounting Identifier* is provided, *.../Tax Amount/ Agency Accounting Identifier* must be provided.

Line of Accounting provided:

```
...
<Taxes>
  <TaxDescription>Federal Tax</TaxDescription>
  <TaxAmount>
    <TaxAmountValue>120</TaxAmountValue>
    <Action>Add</Action>
    <AccountingClassificationReferenceNumber>AA</AccountingClassificationReferenceNumber>
  </TaxAmount>
</Taxes>
...
<ObligatedAmounts>
  <ObligatedAmount>300</ObligatedAmount>
  <FinancialReference>
    <FinancialCodeDescription>Accounting Classification Reference Number</FinancialCodeDescription>
    <FinancialCodeValue>AA</FinancialCodeValue>
  </FinancialReference>
  <LoadDetails>
    <Blob>179 1506U14B 310 000190 050120 2D 000000</Blob>
  </LoadDetails>
</ObligatedAmounts>
...
```

Line of Accounting represented by Agency Accounting Identifier:

```
...
<Taxes>
  <TaxDescription>Federal Tax</TaxDescription>
  <TaxAmount>
    <TaxAmountValue>120</TaxAmountValue>
    <Action>Add</Action>
    <AccountingClassificationReferenceNumber>AA</AccountingClassificationReferenceNumber>
    <AgencyAccountingIdentifier>012345</AgencyAccountingIdentifier>
  </TaxAmount>
</Taxes>
...
<ObligatedAmounts>
  <ObligatedAmount>300</ObligatedAmount>
  <FinancialReference>
    <FinancialCodeDescription>Accounting Classification Reference Number</FinancialCodeDescription>
    <FinancialCodeValue>AA</FinancialCodeValue>
  </FinancialReference>
  <AccountingIdentifier>
    <AgencyAccountingIdentifier>012345</AgencyAccountingIdentifier>
  </AccountingIdentifier>
</ObligatedAmounts>
...
```

4.9. Percentage based Discounts

Rule: When a discount is provided as a percentage, the base – line item total amount, line item unit price, total purchase amount - against which the percentage is applied, must be provided.

Implementation (Header & Line Item):

- a. When the ... *Other Discounts/ Discount/ Value Description* value is “Percentage”, then ... *Other Discounts/ Discount/ Percentage Basis* must be provided.
- b. When the ... *Range Or Threshold Discounts/Discount Range And Value/ Discount Value/ Value Description* value is “Percentage”, then ... *Range Or Threshold Discounts / Discount Range And Value/ Discount Value/ Percentage Basis* must be provided.

```
...
<OtherDiscounts>
  <OtherDiscountDescription>General Discount</OtherDiscountDescription>
  <Discount>
    <ValueDescription>Percentage</ValueDescription>
    <Value>4.25</Value>
    <PercentageBasis>Total Purchase Amount</PercentageBasis>
  </Discount>
</OtherDiscounts>
<RangeOrThresholdDiscounts>
  <DiscountStructure>StepLadder</DiscountStructure>
  <DiscountRangeAndValue>
    <AmountRange>
      ...
    </AmountRange>
    <DiscountValue>
      <ValueDescription>Percentage</ValueDescription>
      <Value>4.25</Value>
      <PercentageBasis>Total Purchase Amount</PercentageBasis>
    </DiscountValue>
  </DiscountRangeAndValue>
</RangeOrThresholdDiscounts>
...
```

4.10. Percentage based Services, Allowances, and Charges

Rule: When a service, allowance, or charge is provided as a percentage, the base – line item total amount, line item unit price, total purchase amount - against which the percentage is applied, must be provided.

Implementation (Header & Line Item): When the ...*Services Allowances Charges/SAC Range And Value/ SAC Value/ Value Description* value is “Percentage”, then ... *Services Allowances Charges/SAC Range And Value/ SAC Value/ Percentage Basis* must be provided.

```
...
<ServicesAllowancesCharges>
  <SACDescription>Add on - Origin</SACDescription>
  <SACRangeAndValue>
    <AmountRange>
      ...
    </AmountRange>
    <DiscountValue>
      <ValueDescription>Percentage</ValueDescription>
      <Value>4.25</Value>
      <PercentageBasis>Total Purchase Amount</PercentageBasis>
    </DiscountValue>
  </SACRangeAndValue>
</ServicesAllowancesCharges>
...
```

4.11. Unit Price when Not Separately Priced (v2.4 and prior)

Rule: When a line item is not separately priced, the unit price must be zero.

Implementation (Line Item): When value of .../*Unit Price Details/Unit Price Basis* is “Not Separately Priced” then .../*Unit Price Details/Unit Price* must be zero.

Prior to v2.5:

```
<ProductServicesOrdered>
  ...
  <UnitPriceDetails>
    <UnitPrice>0</UnitPrice>
    <UnitPriceBasis>Not Separately Priced</UnitPriceBasis>
  </UnitPriceDetails>
</ProductServicesOrdered>
...
```

V2.5 and later (Unit Price not provided):

```
<ProductServicesOrdered>
  ...
  <PriceBasis>Not Separately Priced</PriceBasis>
  ...
</ProductServicesOrdered>
...
```

4.12. Labor Rates

Rule: When a line item has a labor hour or time & material pricing arrangement, labor rates must be provided.

Implementation (Line Item): When the *Contract Line Items/ Line Items/ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* value is “Labor Hour” or “Time and Materials”, then an instance of *Contract Line Items/ Line Items/ Price Details/ Labor Rates/* must be provided.

```
<ContractLineItems>
  <LineItems>
    ...
    <LineItemBasicInformation>
      ...
      <PricingArrangement>
        <PricingArrangementBase> Time and Materials </PricingArrangementBase>
      </PricingArrangement>
      ...
    </LineItemBasicInformation>
    ...
    <PriceDetails>
      <LaborRates>
        <Category>Professional Staff</Category>
        <CategoryRate>
          <RateTitle>Contractor's Site Rates</RateTitle>
          <Rate>100</Rate>
          <SubCategory>Level 1</SubCategory>
        </CategoryRate>
        <CategoryRate>
          <RateTitle>Contractor's Site Rates</RateTitle>
          <Rate>140</Rate>
          <SubCategory>Level 3</SubCategory>
        </CategoryRate>
        ...
      </LaborRates>
    </PriceDetails>
    ...
  </LineItems>
</ContractLineItems>
```

4.13. Information Sub-Line Items and Funded Amount

Rule: When an obligated amount is provided on an information sub-line item, the funded amount must also be provided. When the funded amount is provided on a sub-line item, the obligated amount must also be provided. These are the only amounts that shall be provided.

Implementation (Line Item): When *.../Line Item Identifier/ Line Items/ Line Item Type* = “INFOSLIN” and *.../ Line Item Amounts/ Item Obligated Amounts* is provided, one and only one iteration of *.../ Line Item Amounts/ Item Other Amounts* where *.../ Line Item Amounts/ Item Other Amounts/ Amount Description* = “Funded Amount” is required.

When *.../Line Item Identifier/ Line Items/ Line Item Type* = “INFOSLIN” and an iteration of *.../ Line Item Amounts/ Item Other Amounts* where *.../ Line Item Amounts/ Item Other*

Amounts/ Amount Description = “Funded Amount” is provided, .../ Line Item Amounts/ Item Obligated Amounts must be provided.

```

...
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>INFOSLIN</LineItemType>
      <LineItemBase>0003</LineItemBase>
      <LineItemExtension>
        <InfoSlinExtension>11</InfoSlinExtension>
      </LineItemExtension>
    </LineItem>
  </LineItemIdentifier>
  ...
  <LineItemAmounts>
    ...
    <ItemObligatedAmount>
      <ObligatedAmount>20000</ObligatedAmount>
    ...
    </ItemObligatedAmount>
    <ItemOtherAmounts>
      <AmountDescription>Funded Amount</AmountDescription>
      <Amount>20000</Amount>
    </ItemOtherAmounts>
  </LineItemAmounts>
...

```

4.14. Line Item Level Solicitation Information

Rule: At the line item level, only conditions from the solicitation that are applicable to the line item may be provided on an award or modification document.

Implementation (Line Item): Only .../Line Item Basic Information/ Line Item Solicitation Information/ Line Item Specific Conditions may be provided when section .../Line Item Basic Information/ Line Item Solicitation Information is provided.

Line Item:

```

...
<LineItems>
  <LineItemIdentifier>
    ...
  </LineItemIdentifier>
  <LineItemBasicInformation>
    <OptionLineItem>>false</OpionLineItem>
    <LineItemSolicitationInformation>
      <LineItemSpecificCondition>Equal Item Allowed</ LineItemSpecificCondition >
    </LineItemSolicitationInformation>
    ...
  </LineItemBasicInformation>
  ...
</LineItems>
...

```

5. Compliance Business Rules – Award and Conformed Award Documents

5.1. Information Sub-Line Items and Funded Amount

Rule: Obligated amount, when provided in a procurement instrument award document, must be greater than zero. Instruments with no funding obligated shall omit the section.

Implementation (Header & Line Item): .../.../Obligated Amount, if provided, must be greater than zero.

```
...
<ObligatedAmount>1110000.00</ObligatedAmount>
...
```

5.2. Procurement Instrument Identifier of Represented Contract (Award)

Rule: The procurement instrument award number of the represented contract cannot contain a modification identifier for an order number or a procurement instrument.

Implementation (Header): If .../ Award Instrument/ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description = “Represented Contract” then neither .../Order Modification Identifier nor .../Procurement Instrument Modification Identifier may be provided in the corresponding .../Procurement Instrument Number.

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>P</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

5.3. Pricing Arrangement Amount Requirements – Definitized Contract Action

Rule: Based on the Pricing Arrangement for a contract that is definitized, various amounts are required and other amounts are prohibited (not allowed). If an amount type is not mentioned, it may or may not be provided. See the following table for what is required and prohibited based on the pricing arrangement:

NOTE: This standard departs from the traditional practice of treating award fee and performance incentive fee as distinct contract types. In accordance with FAR 16.4, 16.305, and 16.202-1, the standard recognizes that award fees and performance incentives are

features that can be added to any of the basic contract types. The standard does not distinguish between performance incentives and delivery incentives, only between cost incentives directly tied to cost performance and those that are not.

Header: The contract level can be provided without any amounts, but if an amount is provided, it must follow the requirements detailed in the table.

In addition, indefinite delivery contracts and contracts subject to the availability of funds do not require a funding threshold.

Line Item: The line item level can be provided without any amounts when it is not separately priced. Also, the line item level can be provided without any amounts when the Procurement Instrument Vehicle is on the following list, but if an amount is provided, it must follow the requirements detailed in the table.

- Agreements including Basic and Loan
- Bailment
- Basic Ordering Agreement
- Facilities Contract

In addition, if the line item is an option line item, then a funding threshold is not required.

Pricing Arrangement	Required Amounts	Prohibited Amounts
Cost No Fee	<ul style="list-style-type: none"> • Estimated Cost • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Cost Plus Award Fee	<ul style="list-style-type: none"> • Award Fee • Estimated Cost • Fixed Fee • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Firm Price • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Cost Plus Fixed Fee	<ul style="list-style-type: none"> • Estimated Cost • Fixed Fee • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Firm Price • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Cost Plus Incentive Fee (Cost Based)	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* • Target Cost • Target Fee 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Profit Ceiling • Profit Floor • Target Profit
Cost Sharing	<ul style="list-style-type: none"> • Estimated Cost • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Firm Fixed Price	<ul style="list-style-type: none"> • Firm Price 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Estimated Cost • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Fixed Price Incentive (Cost Based)	<ul style="list-style-type: none"> • Ceiling Price • Target Cost • Target Profit 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Profit Ceiling • Profit Floor • Target Fee
Fixed Price Incentive (Successive Targets)	<ul style="list-style-type: none"> • Ceiling Price • Initial Target Cost • Initial Target Profit • Profit Ceiling • Profit Floor 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Target Cost • Target Fee • Target Profit
Fixed Price Level of Effort	<ul style="list-style-type: none"> • Firm Price 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Estimated Cost • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Fixed Price Re-determination Prospective	<ul style="list-style-type: none"> • Base Price 	<ul style="list-style-type: none"> • Ceiling Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Fixed Price Re-determination Retrospective	<ul style="list-style-type: none"> • Ceiling Price 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Fixed Price with Economic Price Adjustment – Actual Costs	<ul style="list-style-type: none"> • Base Price 	<ul style="list-style-type: none"> • Ceiling Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Fixed Price with Economic Price Adjustment – Cost Indexes	<ul style="list-style-type: none"> • Base Price 	<ul style="list-style-type: none"> • Ceiling Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding) • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Fixed Price with Economic Price Adjustment – Established Prices	<ul style="list-style-type: none"> • Base Price 	<ul style="list-style-type: none"> • Ceiling Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Not to Exceed Amount (Funding)) • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Labor Hour	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Time and Materials	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Ceiling Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

*Not required for indefinite delivery contracts, for a contract subject to the availability of funds, and for an option line item

Implementation (Header): Specify relevant iterations of *.../Procurement Instrument Amounts/ Other Amounts* and values for *.../Procurement Instrument Amounts/ Other Amounts/ Amount Description* and *.../Procurement Instrument Amounts/ Other Amounts/ Amount* based on the value of *.../ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* when *.../ Procurement Instrument Identifier/ Procurement Instrument Vehicle* is not “Letter Contract” when *.../ Procurement Instrument Identifier/ Procurement Instrument Description* is “Represented Contract”.

Implementation (Line Item): Specify relevant iterations of *.../ Line Item Amounts/ Item Other Amounts* and values for *.../ Line Item Amounts/ Item Other Amounts/ Amount Description* and *.../Line Item Amounts/ Item Other Amounts/ Amount* based on the value of *.../ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* when *.../ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle* is not “Letter Contract” when *.../ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description* is “Represented Contract”. Alternatively, when two or more line items have the same amount values, specify relevant iterations of *.../ Procurement Instrument Header/ Multiple Line Items Information/ Group Other Amounts/ Item Other Amounts/...* where *.../ Procurement Instrument Header/ Multiple Line Items Information/ Group Other Amounts/ Line Item List/ ...* provides the list of line items to which the amounts apply.

Cost Plus Incentive Fee (Cost Based) with Amounts (at Header):

```
...
<ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<BasicInformation>
  ...
  <PricingArrangement>
    <PricingArrangementBase>Cost Plus Incentive Fee (Cost Based)</PricingArrangementBase>
  </PricingArrangement>
</BasicInformation>
...
<ProcurementInstrumentAmounts>
  ...
  <OtherAmounts>
    <AmountDescription>Header Only – Total Contract Value</AmountDescription>
    <Amount>40000</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Target Cost</AmountDescription>
    <Amount>36000</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Target Fee</AmountDescription>
    <Amount>3000</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Minimum Fee</AmountDescription>
    <Amount>2500</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Maximum Fee</AmountDescription>
    <Amount>3500</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Not to Exceed Amount (Funding)</AmountDescription>
    <Amount>40000</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Award Fee</AmountDescription>
    <Amount>1500</Amount>
  </OtherAmounts>
</ProcurementInstrumentAmounts>
...
```

Cost Plus Incentive Fee (Cost Based) without Amounts (at Header):

```
...
<ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<BasicInformation>
  ...
  <PricingArrangement>
    <PricingArrangementBase>Cost Plus Incentive Fee (Cost Based)</PricingArrangementBase>
  </PricingArrangement>
</BasicInformation>
...
<ProcurementInstrumentAmounts>
  ...
  <OtherAmounts>
    <AmountDescription>Header Only – Total Contract Value</AmountDescription>
    <Amount>400000</Amount>
  </OtherAmounts>
</ProcurementInstrumentAmounts>
...
```

Cost Sharing (at Line Item):

```
...
<ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<LineItemBasicInformation>
  ...
  <OptionLineItem>>false</OptionLineItem>
  ...
  <PricingArrangement>
    <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
  </PricingArrangement>
</LineItemBasicInformation>
...
<LineItemAmounts>
  <ItemOtherAmounts>
    <AmountDescription>Estimated Cost</AmountDescription>
    <Amount>470000</Amount>
  </ItemOtherAmounts>
  <ItemOtherAmounts>
    <AmountDescription>Not to Exceed Amount (Funding)</AmountDescription>
    <Amount>500000</Amount>
  </ItemOtherAmounts>
</LineItemAmounts>
...
```

Cost Sharing (at multiple Line Items using Group Other Amounts):

```
...
<ProcurementInstrumentHeader>
  ...
  <ProcurementInstrumentIdentifier>
    ...
    <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
    ...
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <MultipleLineItemsInformation>
```

```

    <GroupOtherAmounts>
      <LineItemList>
        <LineItem>
          <LineItemType>CLIN</LineItemType>
          <LineItemBase>0001</LineItemBase>
        </LineItem>
      </LineItemList>
      <LineItemList>
        <LineItem>
          <LineItemType>CLIN</LineItemType>
          <LineItemBase>0003</LineItemBase>
        </LineItem>
      </LineItemList>
      <ItemOtherAmounts>
        <AmountDescription>Estimated Cost</AmountDescription>
        <Amount>470000</Amount>
      </ItemOtherAmounts>
      <ItemOtherAmounts>
        <AmountDescription>Not to Exceed Amount (Funding)</AmountDescription>
        <Amount>500000</Amount>
      </ItemOtherAmounts>
    </GroupOtherAmounts>
  </MultipleLineItemsInformation>
  ...
</ProcurementInstrumentHeader>
<ContractLineItems>
  <LineItems>
    <LineItemIdentifier>
      <LineItem>
        <LineItemType>CLIN</LineItemType>
        <LineItemBase>0001</LineItemBase>
      </LineItem>
    </LineItemIdentifier>
    <LineItemBasicInformation>
      ...
      <OptionLineItem>false</OptionLineItem>
      ...
      <PricingArrangement>
        <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
      </PricingArrangement>
    </LineItemBasicInformation>
    ...
  </LineItems>
  <LineItems>
    <LineItemIdentifier>
      <LineItem>
        <LineItemType>CLIN</LineItemType>
        <LineItemBase>0003</LineItemBase>
      </LineItem>
    </LineItemIdentifier>
    <LineItemBasicInformation>
      ...
      <OptionLineItem>false</OptionLineItem>
      ...
      <PricingArrangement>
        <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
      </PricingArrangement>
    </LineItemBasicInformation>
    ...
  </LineItems>
</ContractLineItems>
...

```

5.4. Pricing Arrangement Amount Requirements – Undefined Contract Actions

Rule: Based on the Pricing Arrangement for an undefinitezed contract action, various amounts are required and other amounts are prohibited (not allowed). If an amount type is not mentioned, it may or may not be provided. See the following table for what is required and prohibited based on the pricing arrangement:

NOTE: This standard departs from the traditional practice of treating award fee and performance incentive fee as distinct contract types. In accordance with FAR 16.4, 16.305, and 16.202-1, the standard recognizes that award fees and performance incentives are features that can be added to any of the basic contract types. The standard does not distinguish between performance incentives and delivery incentives, only between cost incentives directly tied to cost performance and those that are not.

Header: Indefinite delivery contracts and contracts subject to the availability of funds do not require a funding threshold.

Line Item: The line item level can be provided without any amounts when it is not separately priced. Also, if the line item is an option line item, then a funding threshold is not required.

Pricing Arrangement	Required Amounts	Prohibited Amounts
Cost No Fee	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Cost Plus Award Fee	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Firm Price • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Cost Plus Fixed Fee	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Firm Price • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Cost Plus Incentive Fee (Cost Based)	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Profit Ceiling • Profit Floor • Target Profit
Cost Sharing	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Firm Fixed Price	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Fixed Price Incentive (Cost Based)	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Fee
Fixed Price Incentive (Successive Targets)	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Maximum Fee • Minimum Fee • Target Cost • Target Fee • Target Profit
Fixed Price Level of Effort	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Fixed Price Re-determination Prospective	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Fixed Price Re-determination Retrospective	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Fixed Price with Economic Price Adjustment – Actual Costs	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Fixed Price with Economic Price Adjustment – Cost Indexes	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Fixed Price with Economic Price Adjustment – Established Prices	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

Pricing Arrangement	Required Amounts	Prohibited Amounts
Labor Hour	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit
Time and Materials	<ul style="list-style-type: none"> • Not to Exceed Amount (Funding)* 	<ul style="list-style-type: none"> • Base Price • Estimated Cost • Firm Price • Fixed Fee • Initial Target Cost • Initial Target Profit • Maximum Fee • Minimum Fee • Profit Ceiling • Profit Floor • Target Cost • Target Fee • Target Profit

*Not required for indefinite delivery contracts, for a contract subject to the availability of funds, and for an option line item.

Implementation (Header): Specify relevant iterations of *.../Procurement Instrument Amounts/ Other Amounts* and values for *.../Procurement Instrument Amounts/ Other Amounts/ Amount Description* and *.../Procurement Instrument Amounts/ Other Amounts/ Amount* based on the value of *.../ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* when *.../ Procurement Instrument Identifier/ Procurement Instrument Vehicle* is “Letter Contract” when *.../ Procurement Instrument Identifier/ Procurement Instrument Description* is “Represented Contract”.

Implementation (Line Item): Specify relevant iterations of *.../ Line Item Amounts/ Item Other Amounts* and values for *.../ Line Item Amounts/ Item Other Amounts/ Amount Description* and *.../Line Item Amounts/ Item Other Amounts/ Amount* based on the value of *.../ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* when *.../ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle* is “Letter Contract” when *.../ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description* is “Represented Contract”. Alternatively, when two or more line items have the same amount values, specify relevant iterations of *.../ Procurement Instrument Header/ Multiple Line Items Information/ Group Other Amounts/ Item Other Amounts/...* where *.../ Procurement*

Instrument Header/ Multiple Line Items Information/ Group Other Amounts/ Line Item List/ ... provides the list of line items to which the amounts apply.

Cost Plus Incentive Fee (Cost Based) (at Header):

```
...
<ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentVehicle>Letter Contract</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
<BasicInformation>
  ...
  <PricingArrangement>
    <PricingArrangementBase>Cost Plus Incentive Fee (Cost Based)</PricingArrangementBase>
  </PricingArrangement>
</BasicInformation>
...
<ProcurementInstrumentAmounts>
  ...
  <OtherAmounts>
    <AmountDescription>Target Cost</AmountDescription>
    <Amount>36000</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Target Fee</AmountDescription>
    <Amount>3000</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Minimum Fee</AmountDescription>
    <Amount>2500</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Maximum Fee</AmountDescription>
    <Amount>3500</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Not to Exceed Amount (Funding)</AmountDescription>
    <Amount>40000</Amount>
  </OtherAmounts>
  <OtherAmounts>
    <AmountDescription>Award Fee</AmountDescription>
    <Amount>1500</Amount>
  </OtherAmounts>
</ProcurementInstrumentAmounts>
...
```

Cost Sharing (at Line Item):

```
...
<ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentVehicle>Letter Contract</ProcurementInstrumentVehicle>
  ...
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<LineItemBasicInformation>
  ...
  <OptionLineItem>>false</OptionLineItem>
  ...
  <PricingArrangement>
    <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
  </PricingArrangement>
</LineItemBasicInformation>
...
<LineItemAmounts>
  <ItemOtherAmounts>
    <AmountDescription>Estimated Cost</AmountDescription>
    <Amount>470000</Amount>
  </ItemOtherAmounts>
  <ItemOtherAmounts>
    <AmountDescription>Not to Exceed Amount (Funding)</AmountDescription>
    <Amount>500000</Amount>
  </ItemOtherAmounts>
</LineItemAmounts>
...
```

Cost Sharing (at multiple Line Items using Group Other Amounts):

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    ...
    <ProcurementInstrumentVehicle>Letter Contract</ProcurementInstrumentVehicle>
    ...
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <MultipleLineItemsInformation>
    <GroupOtherAmounts>
      <LineItemList>
        <LineItem>
          <LineItemType>CLIN</LineItemType>
          <LineItemBase>0001</LineItemBase>
        </LineItem>
      </LineItemList>
      <LineItemList>
        <LineItem>
          <LineItemType>CLIN</LineItemType>
          <LineItemBase>0003</LineItemBase>
        </LineItem>
      </LineItemList>
      <ItemOtherAmounts>
        <AmountDescription>Estimated Cost</AmountDescription>
        <Amount>470000</Amount>
      </ItemOtherAmounts>
      <ItemOtherAmounts>
        <AmountDescription>Not to Exceed Amount (Funding)</AmountDescription>
        <Amount>500000</Amount>
      </ItemOtherAmounts>
    </GroupOtherAmounts>
  </MultipleLineItemsInformation>
  ...
</ProcurementInstrumentHeader>
<ContractLineItems>
```

```
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>CLIN</LineItemType>
      <LineItemBase>0001</LineItemBase>
    </LineItem>
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
    <OptionLineItem>>false</OptionLineItem>
    ...
    <PricingArrangement>
      <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
    </PricingArrangement>
  </LineItemBasicInformation>
  ...
</LineItems>
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>CLIN</LineItemType>
      <LineItemBase>0003</LineItemBase>
    </LineItem>
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
    <OptionLineItem>>false</OptionLineItem>
    ...
    <PricingArrangement>
      <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
    </PricingArrangement>
  </LineItemBasicInformation>
  ...
</LineItems>
</ContractLineItems>
...
```

5.5. Contract Line Items and Vehicle

Rule: One or more line items must be present on an award document unless the procurement instrument vehicle is one of the following:

- Agreements including Basic and Loan
- Bailment
- Blanket Purchase Agreement
- Blanket Purchase Agreement Under Federal Supply Schedule
- Lease Agreement

Implementation: When *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Description* = “Represented Contract” and *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Vehicle* is not from the list above, one or more instances of the ... /*Contract Line Items/ Line Items* section must be provided.

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Delivery Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>F</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
<ContractLineItems>
  <LineItems>
    ...
    </LineItems>
  </LineItems>
  ...
  </LineItems>
</ContractLineItems>
...
```

5.6. Contract Line Items and Obligated Amounts

Rule: One or more line items must be present on an award document when there is an obligated amount.

Implementation: When *Procurement Instrument Header/Procurement Instrument Amounts/ Obligated Amounts* exists, one or more instances of the ... */Contract Line Items/ Line Items* section must be provided.

```
...
<ProcurementInstrumentHeader>
  ...
  <ProcurementInstrumentAmounts>
    <ObligatedAmounts>
      ...
    </ObligatedAmounts>
  </ProcurementInstrumentAmounts>
  ...
</ProcurementInstrumentHeader>
<ContractLineItems>
  <LineItems>
    ...
  </LineItems>
  <LineItems>
    ...
  </LineItems>
</ContractLineItems>
...
```

5.7. Contract Line Items and Pricing Arrangement

Rule: The pricing arrangement must appear on either the base contract line item or the corresponding contract sub-line item but not both.

Implementation (Line Item): *.../Pricing Arrangement* must appear on either *.../Line Item Identifier/ Line Items/ Line Item Type = "CLIN"* or *.../Line Item Identifier/ Line Items/ Line Item Type = "SLIN (Separately Identified)"* where *.../Line Item Identifier/ Line Items/ Line Item Base* has the same value for both. *.../Pricing Arrangement* cannot be provided when *.../Line Item Identifier/ Line Items/ Line Item Type = "INFOSLIN"*.

On CLIN:

```
...
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>CLIN</LineItemType>
      <LineItemBase>0003</LineItemBase>
    </LineItem>
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
    <PricingArrangement>
      <PricingArrangementBase>CostSharing</PricingArrangementBase>
    </PricingArrangement>
    ...
  </LineItemBasicInformation>
...
</LineItems>
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>SLIN (Separately Identified</LineItemType>
      <LineItemBase>0003</LineItemBase>
      <LineItemExtension>
        <SlinExtension>AA</SlinExtension>
      </LineItemExtension>
    </LineItem>
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
  </LineItemBasicInformation>
...
</LineItems>
...
```

On SLIN (Separately Identified):

```
...
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>CLIN</LineItemType>
      <LineItemBase>0003</LineItemBase>
    </LineItem>
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
  </LineItemBasicInformation>
...
</LineItems>
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>SLIN (Separately Identified)</LineItemType>
      <LineItemBase>0003</LineItemBase>
      <LineItemExtension>
        <SlinExtension>AA</SlinExtension>
      </LineItemExtension>
    </LineItem>
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
    <PricingArrangement>
      <PricingArrangementBase><CostSharing</PricingArrangementBase>
    </PricingArrangement>
    ...
  </LineItemBasicInformation>
...
</LineItems>
<LineItems>
  <LineItemIdentifier>
    <LineItem>
      <LineItemType>SLIN (Separately Identified)</LineItemType>
      <LineItemBase>0003</LineItemBase>
      <LineItemExtension>
        <SlinExtension>AC</SlinExtension>
      </LineItemExtension>
    </LineItem>
  </LineItemIdentifier>
  <LineItemBasicInformation>
    ...
    <PricingArrangement>
      <PricingArrangementBase><Cost No Fee</PricingArrangementBase>
    </PricingArrangement>
    ...
  </LineItemBasicInformation>
...
</LineItems>
...
```

5.8. Multi-Year Contract - Cancellation Ceiling

Rule: A cancellation ceiling amount shall be provided when the procurement instrument is a multi-year contract (FAR clause 52.217-2).

Implementation (Header): Provide “Cancellation Ceiling” in *.../..Other Amounts/Amount Description*, “FAR” in *... Clause Details/ Regulation Or Supplement*, and “52.217-2” in *... Clause Details/ Clause Number*.

```
...
<ClauseDetails>
  <RegulationOrSupplement>FAR</RegulationOrSupplement>
  <ClauseNumber>52.217-2</ClauseNumber>
  <ClauseTitle>Cancellation Under Multi-Year Contracts</ClauseTitle>
  <ClauseEffectiveDate>1997-10</ClauseEffectiveDate>
  ...
...
<OtherAmounts>
  <AmountDescription>Cancellation Ceiling</AmountDescription>
...
```

5.9. Financial Reference for Obligated Amounts

Rule: When an obligated amount is provided at the line item level, the ACRN must be found with an obligated amount reported at the header level.

Implementation: When *.../Item Obligated Amount/Obligated Amount* is provided, then *.../Item Obligated Amount/Financial Reference Code* where *Financial Code Description* contains “Accounting Classification Reference Number (ACRN)” must be found in *.../Obligated Amounts/Financial Reference* where *Financial Code Description* contains “Accounting Classification Reference Number (ACRN)” with the same value in *Financial Code Value*.

At Header:

```
....
<ObligatedAmounts>
  <ObligatedAmount>300</ObligatedAmount>
  <FinancialReference>
    <FinancialCodeDescription>Accounting Classification Reference Number</FinancialCodeDescription>
    <FinancialCodeValue>AA</FinancialCodeValue>
  </FinancialReference>
  ...
</ObligatedAmounts>
....
```

At Line Item:

```
...
<ItemObligatedAmount>
  <ObligatedAmount>200</ObligatedAmount>
  <FinancialReferenceCode>
    <FinancialCodeDescription>Accounting Classification Reference Number</FinancialCodeDescription>
    <FinancialCodeValue>AA</FinancialCodeValue>
  </FinancialReferenceCode>
</ItemObligatedAmount>
...
</ObligatedAmounts>
...
```


5.10. Total Contract Amount

Rule: The total amount of the contract must be provided unless the contract is one of the following. It must be greater than zero on the original and must be zero or greater on a modification or whole/conformed contract:

- Agreements including Basic and Loan
- Basic Ordering Agreement
- Blanket Purchase Agreement
- Blanket Purchase Agreement under Federal Supply Schedule
- Facilities Contract
- Schedule

Implementation (Header): An occurrence of .../ *Other Amounts* must be provided where *Amount Description* contains “Header Only – Total Contract Value” when *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Contract” and the value of *Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Vehicle* is not on the above list.

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Requirements</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentAmounts>
    <OtherAmounts>
      <AmountDescription>Header Only – Total Contract Value</AmountDescription>
      <Amount>1110000.00</Amount>
    </OtherAmounts>
  </ProcurementInstrumentAmounts>
  ...
```

5.11. Share Ratio

Rule: A share ratio for government and contractor is required when the pricing arrangement is one of the following. A share ratio is not allowed for any other type of pricing arrangement:

- Cost Plus Incentive Fee (Cost Based)
- Cost Sharing
- Fixed Price Incentive (Cost Based)
- Fixed Price Incentive (Successive Targets)

Implementation (Header & Line Item):

- When the *Procurement Instrument Header/ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* value is “Cost Plus Incentive Fee (Cost Based)”, “Cost Sharing”, “Fixed Price Incentive (Cost Based)”, or “Fixed Price Incentive (Successive Targets)”, then an instance of *Share Ratio* must be provided at *Procurement Instrument Header/ Basic Information, Procurement Instrument Header/ Multiple Line Items Information/ Group Share Ratio, or Contract Line Items/ Line Items/ Price Details/ Share Ratio*.
- When the *Contract Line Items/ Line Items/ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* value is “Cost Plus Incentive Fee (Cost Based)”, “Cost Sharing”, “Fixed Price Incentive (Cost Based)”, or “Fixed Price Incentive (Successive Targets)”, then an instance of *Share Ratio* must be provided at *Procurement Instrument Header/ Basic Information, Procurement Instrument Header/ Multiple Line Items Information/ Group Share Ratio, or Contract Line Items/ Line Items/ Price Details/Share Ratio*.

Share Ratio (at Header):

```
<ProcurementInstrumentHeader>
...
<BasicInformation>
...
  <PricingArrangement>
    <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
  </PricingArrangement>
  <ShareRatio>
    <GovernmentShare>
      <SharePercentage>1.5</SharePercentage>
      <MonetaryAmount>5000</MonetaryAmount>
    </GovernmentShare>
    <ContractorShare>
      <SharePercentage>3</SharePercentage>
      <MonetaryAmount>50000</MonetaryAmount>
    </ContractorShare>
  </ShareRatio>
</BasicInformation>
...
</ProcurementInstrumentHeader>
```

Share Ratio (at Line Item):

```
<ContractLineItems>
  <LineItems>
    ...
    <LineItemBasicInformation>
      ...
      <PricingArrangement>
        <PricingArrangementBase>Cost Sharing</PricingArrangementBase>
      </PricingArrangement>
      ...
    </LineItemBasicInformation>
    ...
    <PriceDetails>
      <ShareRatio>
        <GovernmentShare>
          <SharePercentage>1.5</SharePercentage>
          <MonetaryAmount>5000</MonetaryAmount>
        </GovernmentShare>
        <ContractorShare>
          <SharePercentage>3</SharePercentage>
          <MonetaryAmount>50000</MonetaryAmount>
        </ContractorShare>
      </ShareRatio>
    </PriceDetails>
    ...
  </LineItems>
</ContractLineItems>
```

5.12. Contract Vehicle Fee

Rule: A fee for using a contract vehicle can be levied only if the procurement instrument is a Blanket Purchase Agreement or an Indefinite Delivery Contract.

Implementation (Header): Provide “Fee for Using Contract Vehicle” in *.../..Other Amounts/Amount Description* only when *.../Procurement Instrument Identifier/Procurement Instrument Vehicle* is one of the following:

- “Blanket Purchase Agreement”
- “Blanket Purchase Agreement Under Federal Supply Schedule”
- “Indefinite Delivery Definite Quantity”
- “Indefinite Delivery Indefinite Quantity”

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Blanket Purchase Agreement</ProcurementInstrumentVehicle>
    ...
  </ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentAmounts>
    <OtherAmounts>
      <AmountDescription>Fee for using Contract Vehicle</AmountDescription>
      <Amount>3000</Amount>
    </OtherAmounts>
  </ProcurementInstrumentAmounts>
  ...
</ProcurementInstrumentHeader>
```

5.13. Small Business Administration (SBA) Contracts

Rule: When either a Small Business Administration (SBA) contract number or SBA contracting office address is provided, then the other must be provided.

Implementation (Header):

- a. For *Procurement Instrument Header/Procurement Instrument Identifier/Procurement Instrument Description* value “Small Business Administration Contract” at least one instance of *Procurement Instrument Header/ Procurement Instrument Addresses* must be provided with *Address Description* value “SBA Contracting Office”.

- b. When *Procurement Instrument Header/ Procurement Instrument Addresses/Address Description* value is “SBA Contracting Office”, then an instance of *Procurement Instrument Header/Procurement Instrument Identifier/* value must be provided with *Procurement Instrument Description* value “Small Business Administration Contract”.

```
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Indefinite Delivery Indefinite Quantity</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Small Business Administration Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ProcurementInstrumentAddresses>
    <AddressDescription>SBA Contracting Office</AddressDescription>
    <Address>
      <OrganizationID>
        <Cage>12345</Cage>
      </OrganizationID>
      <OrganizationNameAddress>
        <OrganizationName></OrganizationName>
        <OrganizationAddress>
          <DiscreteAddress>
            <CityIdentifier>Fairfax</CityIdentifier>
            <PostalZoneIdentifier>22033</PostalZoneIdentifier>
            <CountryPrimaryDivision>VA</CountryPrimaryDivision>
            <Country>USA</Country>
          </DiscreteAddress>
        </OrganizationAddress>
      </OrganizationNameAddress>
    </Address>
  </ProcurementInstrumentAddresses>
  ...

```

5.14. Payment Instructions

Rule: Payment instructions (DFARS 252.201-0001 through 252.204-0011) are required when one or more of the following is true:

- There are multiple sources of funding on a line item
- Cost Type (contract or line item):
 - Cost No Fee
 - Cost Plus Award Fee
 - Cost Plus Fixed Fee
 - Cost Plus Incentive Fee (Cost Based)
 - Cost Sharing
 - Time and Materials
 - Labor Hour
- Financing payments exist (FAR 52.232-16, -29, -30, -32, or -37)

NOTE: At this time, failure to meet this requirement will generate a warning only. The document will still be considered to be valid if no other errors are found.

Header: At the contract level, if the pricing arrangement is a cost type and/or includes financing payments, then payment instructions must be provided at either the contract level or on each line item.

Line Item: If one or more of the items from the above list are provided at the line item level, then the payment instructions must be provided at the contract level or on that line item.

Implementation (Header): When one or more of the following is true:

- *.../ Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* = “Cost No Fee”, “Cost Plus Award Fee”, “Cost Plus Fixed Fee”, “Cost Plus Incentive Fee (Cost Based)”, or “Cost Sharing”
- *.../ Clause Information/ Clause Details/ Clause Number/ ...* is one of the FAR clause numbers listed above

one or more iterations of *.../ Clause Information/ Clause Details/ ...* where *.../ Clause Number* = all or some of “252.204-0001” through “252.204-0011” must exist or every line item must have one or more iterations of *.../ Line Item Clauses/ ...* where *.../ Clause Number* = all or some of “252.204-0001” through “252.204-0011”.

Implementation (Line Item): When one or more of the following are true:

- *.../ Line Item Basic Information/ Pricing Arrangement/ Pricing Arrangement Base* = “Cost No Fee”, “Cost Plus Award Fee”, “Cost Plus Fixed Fee”, “Cost Plus Incentive Fee (Cost Based)”, or “Cost Sharing”
- *.../ Line Item Clauses/ Clause Number* is one of the FAR clause numbers listed above

- There are two or more iterations of *.../ Line Item Identifier/ Line Item/ Line Item Type* = “INFOSLIN” with the same value of *.../ Line Item Identifier/ Line Item/ Line Item Base* that has an instance of *.../ Line Item Amounts/ Item Obligated Amount/ Financial Reference Code/ Financial Code Reference* = “Accounting Classification Reference Number (ACRN)” where *.../ Line Item Amounts/ Item Obligated Amount/ Financial Reference Code/ Financial Code Value* is different,

one or more iterations of *.../ Clause Information/ Clause Details/ ...* at the header or *.../ Line Item Clauses/ ...* on the same or base line item must exist where *.../ Clause Number* = all or some of “252.204-0001” through “252.204-0011”.

At Header:

```

...
<ProcurementInstrumentHeader>
  ...
  <BasicInformation>
    ...
    <PricingArrangement>
      <PricingArrangementBase>Cost No Fee</PricingArrangementBase>
    </PricingArrangement>
  </BasicInformation>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.204-0006</ClauseNumber>
      ...
    </ClauseDetails>
    ...
  </ClauseInformation>
  ...
...

```

At Line Item:

```

...
<LineItemClauses>
  <RegulationOrSupplement>DFARS</RegulationOrSupplement>
  <ClauseNumber>252.204-0006</ClauseNumber>
  ...
</LineItemClauses>
<LineItemClauses>
  <RegulationOrSupplement>FARS</RegulationOrSupplement>
  <ClauseNumber>52.232-16</ClauseNumber>
  ...
</LineItemClauses>
...

```

5.15. Government Access – Clause Requirement

Rule: If the procurement instrument contains FAR clause 52.241-5, Contractor’s Facilities, then DFARS clause 252.241-7001, Government Access, must be provided.

Implementation (Header):

When an instance of *Procurement Instrument Header/ Clause Information/* exists where ... / *Regulation Or Supplement* = “FAR” and .../ *Clause Number* = “52.241-5” exists, then an instance of ... *Procurement Instrument Header/ Clause Information/ Clause Details* must be provided where .../ *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.241-7001”.

Award:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>FAR</RegulationOrSupplement>
      <ClauseNumber>52.241-5</ClauseNumber>
      <ClauseTitle>Contractor’s Facilities</ClauseTitle>
      <ClauseEffectiveDate>1995-02</ClauseEffectiveDate>
      ...
    </ClauseDetails>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.241-7001</ClauseNumber>
      <ClauseTitle>Government Access</ClauseTitle>
      <ClauseEffectiveDate>1991-12</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
```

6. Compliance Business Rules – Solicitation, Amendment, and Conformed Solicitation Documents

6.1. Issuing Address

Rule: An address for the issuing office is required on every solicitation and amendment document.

Implementation (Header; Solicitation):

Two instances of *.../Procurement Instrument Addresses* must be provided. One with *.../Procurement Instrument Addresses/ Address Description = “Contractor”* and one with *.../Procurement Instrument Addresses/ Address Description = “Contract Issuing Office”*.

Implementation (Header; Amendment):

Two instances of *.../Modification Details/ Modification Addresses* must be provided. One with *.../ Modification Addresses/ Address Description = “Contractor”* and one with *.../ Modification Addresses/ Address Description = “Contract Issuing Office”*.

On Solicitation:

```
....  
<ProcurementInstrumentAddresses>  
  <AddressDescription >Contract Issuing Office</AddressDescription>  
  ...  
</ProcurementInstrumentAddresses>  
....
```

On Amendment:

```
....  
<ModificationDetails>  
  ...  
  <ModificationAddresses>  
    <AddressDescription >Contract Issuing Office</AddressDescription>  
    ...  
  </ModificationAddresses>  
  ...  
</ModificationDetails>  
....
```

6.2. Issue Date and Periods

Rule: Solicitation and amendment documents must contain an issue date. A performance, ordering, lease, or funding period may be provided. They cannot contain an effective date or contracting officer information.

Implementation (Header): *... Basic Information/ Solicitation Offer Information/ Solicitation Issued Date* must be provided. *...Procurement Instrument Dates/ Procurement Instrument Periods* may be provided. *...Procurement Instrument Dates/ Procurement Instrument Effective Date* and *...Procurement Instrument Dates/ Contracting Officer* cannot be provided.

Header:

```
...
<BasicInformation>
  <SolicitationOfferInformation>
    ...
    <Solicitation IssuedDate>2014-05-15</SolicitationIssuedDate>
    ...
  </SolicitationOfferInformation>
</BasicInformation>
...
<ProcurementInstrumentDates>
  <ProcurementInstrumentPeriods>
    <PeriodDescription>Period of Performance</PeriodDescription>
    <StartDate>2014-10-01</StartDate>
    <EndDate>2015-09-30</EndDate>
  </ProcurementInstrumentPeriods>
</ProcurementInstrumentDates>
...
```

7. Compliance Business Rules – Solicitation and Conformed Solicitation Documents

7.1. Procurement Instrument Identifier of Represented Solicitation

Rule: The procurement instrument solicitation number of the represented solicitation cannot contain a modification identifier.

Implementation (Header): If .../ Award Instrument/ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description = “Represented Solicitation” then .../Amendment Number may be provided in the corresponding .../Procurement Instrument Number.

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Invitation For Bids</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>B</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

7.2. Line Item and Quantity

Rule: On a solicitation, a quantity must appear on either the base contract line item or the corresponding contract sub-line item but not both.

CLIN or SLIN:

```
<LineItems>
...
  <LineItemBasicInformation>
    ...
    <ProductServiceOrdered>
      ...
      <Quantity>100</Quantity>
      ...
      <UnitOfMeasure>Bale</UnitOfMeasure>
    </ProductServiceOrdered>
  </LineItemBasicInformation>
  ...
...

```

7.3. Option Requirement

Rule: If there is an option line item, the solicitation must be marked as a multi-year contract or have one of the following clauses:

- Option CLINs: FAR 52.217-3 through 9
- Incremental Funding: FAR 52.232-22
- Provisioned: ???

7.4. Economic Price Adjustment – Basic Steel, Aluminum, Brass, Bronze, or Copper Mill Products – Representation – Clause Requirement

Rule: If the procurement instrument contains DFARS clause 252.216-7000, Economic Price Adjustment-Basic Steel, Aluminum, Brass, Bronze, or Copper Mill Products, then DFARS Clause 252.216-7007, Economic Price Adjustment-Basic Steel, Aluminum, Brass, Bronze, or Copper Mill Products-Representation, must be provided.

Implementation (Header):

When an instance of *Procurement Instrument Header/ Clause Information/* exists where ... / *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.216-7000” exists, then an instance of ... *Procurement Instrument Header/ Clause Information/ Clause Details* must be provided where .../ *Regulation Or Supplement* = “DFARS” and .../ *Clause Number* = “252.216-7007”.

Solicitation:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ClauseInformation>
    <RegulationURL>http://farsite.hill.af.mil/</RegulationURL>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.216-7000</ClauseNumber>
      <ClauseTitle>Economic Price Adjustment-Basic Steel, Aluminum, Brass, Bronze, or Copper Mill
Products</ClauseTitle>
      <ClauseEffectiveDate>2012-03</ClauseEffectiveDate>
      ...
    </ClauseDetails>
    <ClauseDetails>
      <RegulationOrSupplement>DFARS</RegulationOrSupplement>
      <ClauseNumber>252.216-7007</ClauseNumber>
      <ClauseTitle>Economic Price Adjustment-Basic Steel, Aluminum, Brass, Bronze, or Copper Mill Products-
Representation</ClauseTitle>
      <ClauseEffectiveDate>2012-03</ClauseEffectiveDate>
      ...
    </ClauseDetails>
  </ClauseInformation>
  ...
  ...
```

8. Compliance Business Rules – Modification and Amendment Documents

8.1. Deleting a Single Element via Attributes

Rule: When the modification removes a single element whose changes are recorded via XML attributes, populate the element with its value from the procurement instrument document being modified and set the change flag attribute to “Deleted”.

```
...  
<Category changeFlag="Deleted">Services</Category>  
...
```

8.2. Adding a Single Element via Attributes

Rule: When the modification adds a single element whose changes are recorded via XML attributes, populate the element with its desired value and set the change flag attribute to “Added”.

```
...  
<Category changeFlag="Added">Services</Category>  
...
```

8.3. Changing a Single Element via Attributes

Rule: When the modification changes the value of a single element whose changes are recorded via XML attributes, populate the element with its new or desired value, set the change flag attribute to “Modified”, place the old/original value from the procurement instrument document being modified into the ‘previous’ attribute, and provide a description of the change in the change text attribute.

```
...  
<Category changeFlag="Modified" changeText="Changing category from Services to Overhaul"  
previousValue="Services">Overhaul</Category>  
...
```

8.4. Deleting a Set of Elements via Attributes

Rule: When the modification removes a set of elements whose changes are recorded via XML attributes, populate the elements with their values from the procurement instrument document being modified and set the change flag attribute to “Deleted”.

```
...
<AcceptanceInspection changeFlag="Deleted">
  <Action>Inspection</Action>
  <Location>Source</Location>
  <SpecialInstruction>Inspect in full sun</SpecialInstructions>
</AcceptanceInspection>
...
```

8.5. Adding a Set of Elements via Attributes

Rule: When the modification adds a set of elements whose changes are recorded via XML attributes, populate the elements with their desired values and set the change flag attribute to “Added”.

```
...
<AcceptanceInspection changeFlag="Added">
  <Action>Inspection</Action>
  <Location>Source</Location>
  <SpecialInstruction>Inspect in full sun</SpecialInstructions>
</AcceptanceInspection>
...
```

8.6. Changing a Set of Elements via Attributes

Rule: When the modification changes one or more values of the elements in a set and those changes are recorded via XML attributes, populate the elements with its new or desired values, set the change flag attribute to “Modified”, place the old/original values from the procurement instrument document being modified into the ‘previous’ attributes, and provide a description of the change in the change text attribute.

```
...
<AcceptanceInspection changeFlag="Modified" changeText="Changing inspection location from source to destination."
previousAction="Inspection" previousLocation="Source" previousInstruction="Inspect in full sun" >
  <Action>Inspection</Action>
  <Location>Destination</Location>
  <SpecialInstruction>Inspect in full sun</SpecialInstructions>
</AcceptanceInspection>
...
```

8.7. Changing Amounts via Attributes

Rule: When the modification changes the value of an amount, the increase or decrease between the previous and new amount must be provided in a delta amount attribute.

Increase in Amount:

```
...
<OtherAmounts changeFlag="Modified" changeText="Base Price increased by $200,000. From $500,000 to $700,000."
previousAmountDescription="Base Price" previousAmount="500000" deltaAmount="200000">
  <AmountDescription>Base Price</AmountDescription>
  <Amount>700000</Amount>
</OtherAmounts>
...
```

Decrease in Amount:

```
...
<OtherAmounts changeFlag="Modified" changeText="Base Price decreased by $200,000. From $500,000 to $300,000."
previousAmountDescription="Base Price" previousAmount="500000" deltaAmount="-200000">
  <AmountDescription>Base Price</AmountDescription>
  <Amount>300000</Amount>
</OtherAmounts>
...
```

8.8. Changing a Choice via Attributes

Rule: When the modification changes from one choice to another at the contract level, the original choice must be deleted and the other choice added.

Header:

```
...
<BasicInformation>
  <OrderingInformation>
    <OrderVariation>
      <Quantity changeFlag="Added">
        <QuantityOver>10</QuantityOver>
        <UnitOfMeasure>Bale</UnitOfMeasure>
      </Quantity>
      <Percentage changeFlag="Deleted">
        <PercentOver>10</PercentOver>
      <?Percentage>
    </OrderVariation>
  <?OrderingInformation>
  ...
</BasicInformation>
...
```

8.9. Modification Reason, Authority, and Addresses

Rule: A contract modification must provide the reason for the modification and the authority under which the modification is made; neither may be provided on an amendment document. The issuing office must be provided on both modifications and amendments. In addition, the address of the contractor must be provided on a modification; it cannot be provided on an amendment.

Implementation (Amendment, Header):

When *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Solicitation”, then *.../Modification Details/ Modification Addresses* where *.../Modification Description* = “Issuing Office” must be provided. *.../Modification Details/ Modification Reason* and *.../Modification Details/ Modification Authority* cannot be provided.

Implementation (Modification, Header):

When *.../Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Contract”, then two instances of *.../Modification Details/ Modification Addresses* must be provided. One where *.../Modification Description* = “Issuing Office” and one where *.../Modification Description* = “Contractor”. Also, *.../Modification Details/ Modification Reason* and *.../Modification Details/ Modification Authority* must be provided.

Amendment:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Request for Proposal</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ModificationDetails>
    <DocumentsBeingModified>
      ...
    </DocumentsBeingModified>
    <ModificationDescription>Changes to address bidder questions.</ModificationDescription>
    ...
    <ModificationAddresses>
      <AddressDescription>Issuing Office</AddressDescription>
      ...
    </ModificationAddresses>
  </ModificationDetails>
...
```

Modification:

```
...
<ProcurementInstrumentHeader>
  <ProcurementInstrumentIdentifier>
    <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
    <ProcurementInstrumentVehicle>Purchase Order</ProcurementInstrumentVehicle>
    <ProcurementInstrumentNumber>
      ...
    </ProcurementInstrumentNumber>
    <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
  </ProcurementInstrumentIdentifier>
  ...
  <ModificationDetails>
    <DocumentsBeingModified>
      ...
    </DocumentsBeingModified>
    <ModificationDescription>Exercising first year option.</ModificationDescription>
    <ModificationReason>Exercise An Option</ModificationReason>
    ...
    <ModificationAddresses>
      <AddressDescription>Issuing Office</AddressDescription>
      ...
    </ModificationAddresses>
    <ModificationAddresses>
      <AddressDescription>Contractor</AddressDescription>
      ...
    </ModificationAddresses>
    <ModificationAuthority>
      ...
    </ModificationAuthority>
  </ModificationDetails>
  ...
  ...
```


9. Compliance Business Rules – Modification Documents

9.1. Required Procurement Instrument Identifiers

Rule: For a modification document, the preceding procurement instrument identifiers that represent the document that is being modified must be provided. At a minimum, this would be the procurement instrument identifier of the original award document. In addition, the identifiers for the last administrative modification and the last procurement modification, as applicable, should be provided if the modification is being performed against a whole or conformed contract document.

Implementation (Header): If the modification is against the original unmodified contract document, provide the award document identification number in *Procurement Instrument Header/ Modification Details/ Documents Being Modified/... section* and populate *.../Procurement Instrument Description* with “Contract being Modified – Award”. If the modification is against a previously modified contract document, provide the last administrative modification number (e.g. A00002) and last procurement modification number (e.g. P00003) as applicable, populating *.../Procurement Instrument Description* with “Contract being Modified – ACO Modification” and “Contract being Modified – PCO Modification”.

Against Original Contract:

```
...
<ModificationDetails>
  <DocumentsBeingModified>
    <DocumentBeingModified>
      <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
      <ProcurementInstrumentVehicle>Delivery Order</ProcurementInstrumentVehicle>
      <ProcurementInstrumentNumber>
        <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
        <Year>10</Year>
        <ProcurementInstrumentTypeCode>F</ProcurementInstrumentTypeCode>
        <SerializedIdentifier>1004</SerializedIdentifier>
      </ProcurementInstrumentNumber>
      <ProcurementInstrumentDescription>Contract being Modified - Award</ProcurementInstrumentDescription>
    </DocumentBeingModified>
  </DocumentsBeingModified>
  ...
</ModificationDetails>
...
```

Against Whole or Conformed Contract with ACO and PCO Modifications:

```
...
<ModificationDetails>
  <DocumentsBeingModified>
    <DocumentBeingModified>
      <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
      <ProcurementInstrumentVehicle>Delivery Order</ProcurementInstrumentVehicle>
      <ProcurementInstrumentNumber>
        <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
        <Year>10</Year>
        <ProcurementInstrumentTypeCode>F</ProcurementInstrumentTypeCode>
        <SerializedIdentifier>1004</SerializedIdentifier>
        <ProcurementInstrumentModificationIdentifier>P0001
        </ProcurementInstrumentModificationIdentifier>
      </ProcurementInstrumentNumber>
      <ProcurementInstrumentDescription>Contract being Modified – PCO Modification
      </ProcurementInstrumentDescription>
    </DocumentBeingModified>
  </DocumentsBeingModified>
  <DocumentsBeingModified>
    <DocumentBeingModified>
      <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
      <ProcurementInstrumentVehicle>Delivery Order</ProcurementInstrumentVehicle>
      <ProcurementInstrumentNumber>
        <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
        <Year>10</Year>
        <ProcurementInstrumentTypeCode>F</ProcurementInstrumentTypeCode>
        <SerializedIdentifier>1004</SerializedIdentifier>
        <ProcurementInstrumentModificationIdentifier>A0003
        </ProcurementInstrumentModificationIdentifier>
      </ProcurementInstrumentNumber>
      <ProcurementInstrumentDescription>Contract being Modified – ACO Modification
      </ProcurementInstrumentDescription>
    </DocumentBeingModified>
  </DocumentsBeingModified>
</ModificationDetails>
...
```

9.2. Procurement Instrument Identifier of Represented Contract (Modification)

Rule: The procurement instrument award modification number of the represented contract must contain one and only one modification identifier for either an order number or a procurement instrument.

Implementation (Header): If *.../ Award Modification Instrument/ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description = “Represented Contract”* then one and only one of *.../Order Modification Identifier* or *.../Procurement Instrument Modification Identifier* may be provided in the corresponding *.../Procurement Instrument Number*.

Order Modification:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Call Order</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>D</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
    <OrderNumber>0001</OrderNumber>
    <OrderModificationIdentifier>01</OrderModificationIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

Procurement Instrument Modification:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Indefinite Delivery Indefinite Quantity</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>D</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
    <ProcurementInstrumentModificationIdentifier>A00001</ProcurementInstrumentModificationIdentifier>
  </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Contract</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

9.3. Modifying an Obligated Amount to Zero

Rule: When an obligated amount is changed to zero at the contract level, the obligated amount must be deleted. It cannot be changed to zero by changing the dollar amount.

Implementation (Header): To change an obligated amount to zero, provide an instance of *.../ Award Modification Instrument/ Procurement Instrument Header/ Procurement Instrument Amounts/ Obligated Amounts Modification Details/ Deleted Obligated Amounts/* . Do not use *.../ Award Modification Instrument/ Procurement Instrument Header/ Procurement Instrument Amounts/ Obligated Amounts Modification Details/ Changed Obligated Amounts/* .

```
...
<DeletedObligatedAmounts>
  <ObligatedAmount>30000</ObligatedAmount>
  <FinancialReference>
    <FinancialCodeDescription>Accounting Classification Reference Number (ACRN)</FinancialCodeDescription>
    <FinancialCodeValue>BB</FinancialCodeValue>
  </FinancialReference>
  <LoaDetails>
    <Blob>97X449305F20000C101300681422F255000DSAM0086301</Blob>
  </LoaDetails>
</DeletedObligatedAmounts>
...
```

10. Compliance Business Rules – Amendment Documents

10.1. Required Procurement Instrument Identifiers

Rule: For an amendment document, the preceding procurement instrument identifier that represents the document that is being modified must be provided. This would be the procurement instrument identifier of the original solicitation document if it is the first amendment. Or, the identifier of the last solicitation amendment must be provided if the amendment is being performed against a whole or conformed solicitation document.

Implementation (Header): If the amendment is against the original unmodified solicitation document, provide the solicitation document identification number in *Procurement Instrument Header/ Modification Details/ Documents Being Modified/... section*. If the amendment is against a previously modified solicitation document, provide the last amendment number. In both cases, populate *.../Procurement Instrument Description* with “Solicitation being Amended”.

Against Original Solicitation:

```
...
<ModificationDetails>
  <DocumentsBeingModified>
    <DocumentBeingModified>
      <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
      <ProcurementInstrumentVehicle>Request For Proposal</ProcurementInstrumentVehicle>
      <ProcurementInstrumentNumber>
        <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
        <Year>10</Year>
        <ProcurementInstrumentTypeCode>R</ProcurementInstrumentTypeCode>
        <SerializedIdentifier>1004</SerializedIdentifier>
      </ProcurementInstrumentNumber>
      <ProcurementInstrumentDescription>Solicitation being Amended</ProcurementInstrumentDescription>
    </DocumentBeingModified>
  </DocumentsBeingModified>
  ...
</ModificationDetails>
...
```

Against Whole or Conformed Solicitation:

```
...
<ModificationDetails>
  <DocumentsBeingModified>
    <DocumentBeingModified>
      <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
      <ProcurementInstrumentVehicle>Request For Proposal</ProcurementInstrumentVehicle>
      <ProcurementInstrumentNumber>
        <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
        <Year>10</Year>
        <ProcurementInstrumentTypeCode>R</ProcurementInstrumentTypeCode>
        <SerializedIdentifier>1004</SerializedIdentifier>
        <AmendmentNumber>0001</AmendmentNumber>
      </ProcurementInstrumentNumber>
      <ProcurementInstrumentDescription>Solicitation being Amended</ProcurementInstrumentDescription>
    </DocumentBeingModified>
  </DocumentsBeingModified>
  ...
</ModificationDetails>
...
```

10.2. Procurement Instrument Identifier of Represented Solicitation (Amendment)

Rule: The procurement instrument solicitation amendment number of the represented solicitation must contain an amendment identifier.

Implementation (Header): If .../ *Award Modification Instrument/ Procurement Instrument Header/ Procurement Instrument Identifier/ Procurement Instrument Description* = “Represented Solicitation” then .../ *Amendment Number* must be provided in the corresponding .../ *Procurement Instrument Number*.

Amendment:

```
...
<ProcurementInstrumentIdentifier>
  <ProcurementInstrumentOrigin>Department of Defense</ProcurementInstrumentOrigin>
  <ProcurementInstrumentVehicle>Request For Proposal</ProcurementInstrumentVehicle>
  <ProcurementInstrumentNumber>
    <EnterpriseIdentifier>N00019</EnterpriseIdentifier>
    <Year>10</Year>
    <ProcurementInstrumentTypeCode>R</ProcurementInstrumentTypeCode>
    <SerializedIdentifier>1004</SerializedIdentifier>
    <AmendmentNumber>0001</AmendmentNumber>
    </ProcurementInstrumentNumber>
  <ProcurementInstrumentDescription>Represented Solicitation</ProcurementInstrumentDescription>
</ProcurementInstrumentIdentifier>
...
```

11. Definitions

Term	Context	Definition
End Item Program	Reference Number	Type designation or equivalent
Technical Document Number	Product Service Data	Identification number assigned to a self-contained body of information or data that can be packaged for delivery on a single medium. Some examples of documents are: drawings, reports, standards, databases, application software, engineering designs, virtual part-models, etc. Excludes technical manuals.
Technical Manual Number	Product Service Data	Identification number assigned to a technical manual.
Bi-Weekly	Payment Frequency	Occurring every two weeks.
Bi-Annually	Payment Frequency	Occurring every two years.
Semi-Monthly	Payment Frequency	Occurring twice a month.
Semi-Annually	Payment Frequency	Occurring twice a year.
Total Contract Value	Other Amounts	The total of the base and exercised options values (see FPDS).
Total Funded Amount	Header Obligated Amounts	The sum of all obligated amounts.