

Contract - setting up agreements

This User Guide explains how to enter agreements between vendors and your organization. Topics include:

- Working with the Contract screen
- Exploring contracts and agreements in detail.

Working with the Contract screen

Contracts and purchase agreements allow vendors to supply resources and services to be dispatched to incidents. The Contract screen allows you to enter your agency's contract and purchase agreements, including multiple contracts between a single vendor and many organizations.

You can also use the Contract screen to record agreements between government organizations. For example, you can record a cooperative fire protection agreement between two agencies and then define the resources available through that agreement.

To access the Contract screen

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

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

Contract screen

The screenshot displays the ROSS interface for contract management. The main table lists various contracts with the following columns: Contract Number, Type, Begin Date, End Date, Global Access, Vendor / Government (Non-Dispatch) Provider, and Entered By. Below the table, there are three sections for organization management:

- Organizations Involved:** A table with columns 'Role' and 'Organization'. It lists 'Contracting Office' for 'Alaska Regional Office - USFS' and 'Managing Dispatch' for 'Craig Interagency Dispatch Center'.
- Organizations Managing Resources:** A list box containing 'Craig Interagency Dispatch Center'.
- Organizations With Direct Access:** A list box containing 'Craig Interagency Dispatch Center'.

To search for an existing contract in the ROSS database

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

- 1 On the **Contract** screen, click the **Search Contracts** button.
- 2 On the **Search Contract** dialog box, type information into as many text boxes as possible to narrow your search, and then click the **Search** button.

The following graphic shows a sample Search Contract dialog box.

To view contract or purchase agreement usage

You can also view contract or purchase agreement usage anywhere the View Contract Usage button displays!



- 1 Search for and then click to select the **Contract** of your choice, and then click the **View Contract Usage** button.
- 2 To print contract usage information, click **Print**, and then perform the following
 - on the **File** menu, click to select **Print**, or press [CTRL] + P
 - on the **Print** dialog box, review the printer settings and then click **OK**.

The following graphic shows the View Contract Usage dialog box.

Incident #	Incident Host	Status
CO-WRD-000429	CO-WRD	Open
CO-WRD-000579	CO-WRD	Closed
NM-LNF-000023	NM-LNF	Closed
NV-WID-020243	NV-WID	Open
VA-GDR-011005	VA-GDR	Open

To search for a vendor



- 1 On the **Contract** screen, click **New** or **Edit**, and then click the **Pick Vendor/Provider** button on the **New Contract** or **Edit Contract** dialog box.

*To enter a new contract, you must first type the **new Contract Number** before clicking the **Pick Vendor/Provider** button.*

- 2 On the **Search Vendors** dialog box, click **Search**.
- 3 Click to select the **Vendor** of your choice, and then click **OK**.

The following graphic shows the New Contract dialog box. The arrow points to the Pick Vendor/Provider button.

New Contract

Contract Number* AG-84

Contract Type* Call When Needed

Begin Date

End Date

Global Access

Vendor / Government (Non-Dispatch) Provider*

The following graphic shows the Search Vendors dialog box.

Search Vendors

Role Vendor/Government (Non-Dispatch) Provider

Name

Unit ID

Search Results

Vendor / Government (Non-Dispatch) Provider Name

To enter a contract into the ROSS database

-  1 On the **Contract** screen, click **New**.
- 2 In the **Contract Number** box, type the new **Contract Number**.
- 3 Click the **Contract Type** drop-down arrow, and then select the **Contract Type** of your choice.
-  4 Click the **Select Dates** button, and then select the **Begin Date** and **End Date** for the new contract, and then click **Done**.
- 5 To allow global access to the contract for all organizations, click the **Global Access** check box.
-  6 To select from a list of existing vendors, click the **Pick Vendor** button and then select the **Vendor** of your choice.
- 7 To return to the **Contract** screen, click **OK**.
- 8 Complete the **Contract** tabs as appropriate.

The following graphic shows the New Contract dialog box. The arrow points to the Global Access check box.



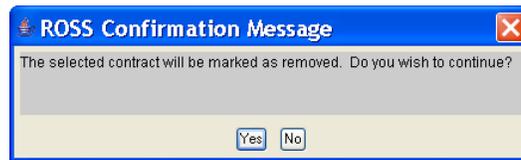
The screenshot shows the 'New Contract' dialog box. A pink arrow points from the left side of the page to the 'Global Access' checkbox, which is currently unchecked. The dialog box contains the following fields and controls:

- Contract Number***: Text box containing 'AG-84'
- Contract Type***: Dropdown menu showing 'Call When Needed'
- Begin Date**: Text box
- End Date**: Text box with a calendar icon to its right
- Global Access**: Check box (unchecked)
- Vendor / Government (Non-Dispatch) Provider***: Text box with a 'Pick Vendor' icon to its right
- OK** and **Cancel** buttons on the right side

To allow global access to resources on the contract or purchase agreement

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice, and then click **Edit**.
- 2 On the **Edit Contract** dialog box, click the **Global Access** check box, and then click **OK**.

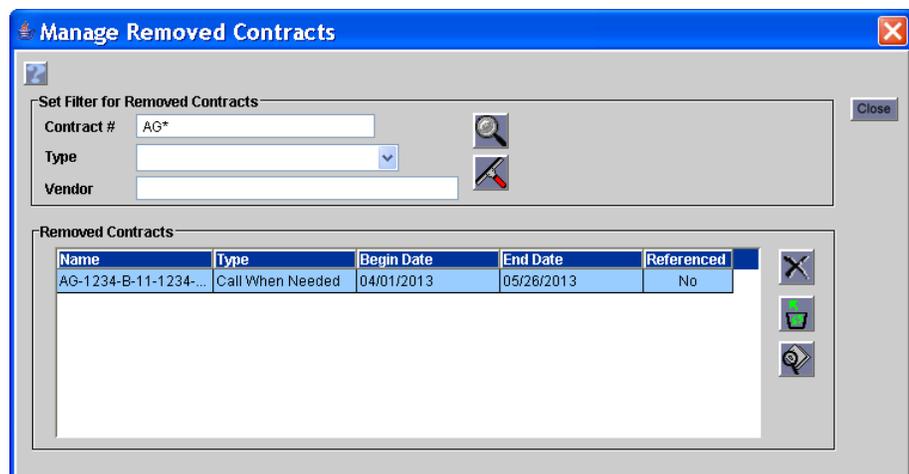
The following graphic shows the ROSS Confirmation Message that displays when removing a contract.



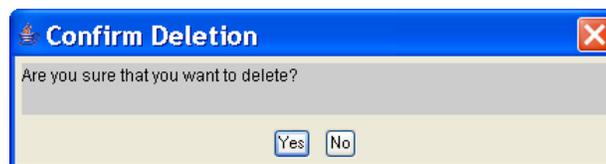
To delete a removed contract or purchase agreement from the ROSS database

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

The following graphic shows the Manage Removed Contracts dialog box.



The following graphic shows the Confirm Deletion dialog box.

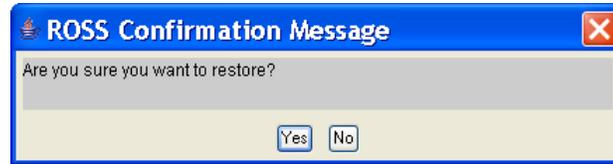


To restore a removed contract or purchase agreement

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

- 3 On the **ROSS Confirmation Message** dialog box, click **Yes** to confirm or **No** to cancel.

The following graphic shows the ROSS Confirmation Message for restoring a contract.



Entering an Emergency Equipment Rental Agreements (EERA) or Purchase Agreement (PA) that includes both unique and non-unique items - an example

Use the instructions outlined in this section only where there are both uniquely identifiable and non-uniquely identifiable items on the EERA or PA!

A single EERA often documents both uniquely identifiable items, such as “Bus #126,” and non-unique items, such as Meals and Lodging. To accommodate both unique and non-unique items, create an “AGR” for the unique item and a “PA” for the non-unique items.

You cannot create duplicate contract/agreement numbers in ROSS.

To enter a unique item that will be statused as a resource item



- 1 On the **Contract** screen, click **New**.
- 2 In the **Contract Number** box, type the new **Contract Number**.

For example, “EERA 56-82X9-2-0067” is a valid EERA contract number. The “EERA” prefix makes it unique!

- 3 Click the **Contract Type** drop-down arrow, and then select **Agreement**.
- 4 Click the **Select Dates** button, and then select the **Begin Date** and **End Date** for the new contract, and then click **Done**.
- 5 To allow global access, click the **Global Access** check box.
- 6 Click the **Pick Vendor** button and then select the **Vendor** of your choice.
- 7 When finished, click **OK**.

The following graphic shows the New Contract screen for creating a unique, EERA item.



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

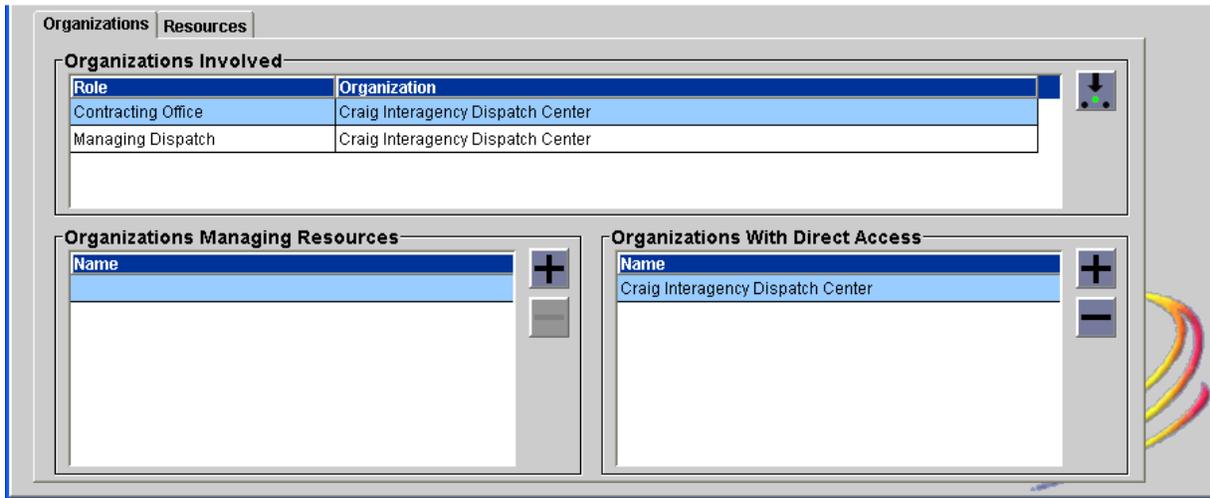
To enter a non-unique service item such as meals and/or lodging

- 1 On the **Contract** screen, click **New**.
- 2 In the **Contract Number** box, type the new **Contract Number**.
- 3 Click the **Contract Type** drop-down arrow, and then select **Purchase Agreement**.
- 4 Click the **Select Dates** button, and then select the **Begin Date** and **End Date** for the new contract, and then click **Done**.
- 5 To allow global access to the contract for all organizations, click the **Global Access** check box.
- 6 To select from a list of existing vendors, click the **Pick Vendor** button and then select the **Vendor** of your choice.
- 7 To return to the **Contract** screen, click **OK**.

Managing organizations for contracts and purchase agreements

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

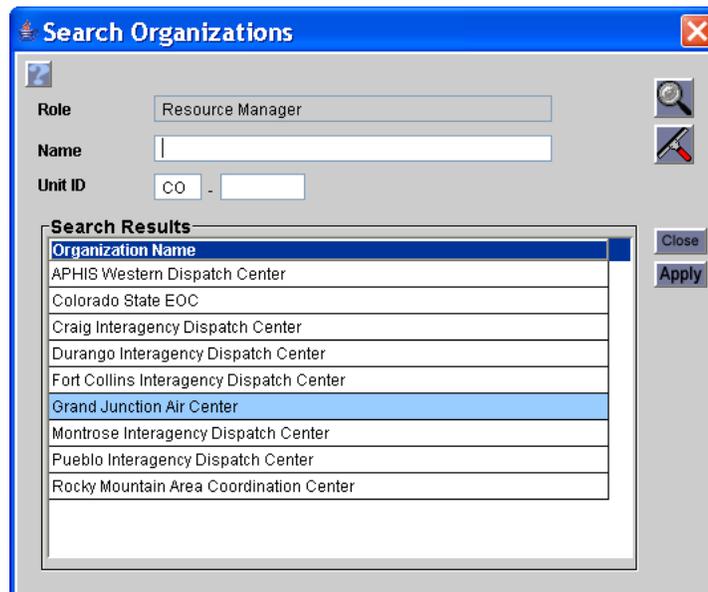
Organizations tab



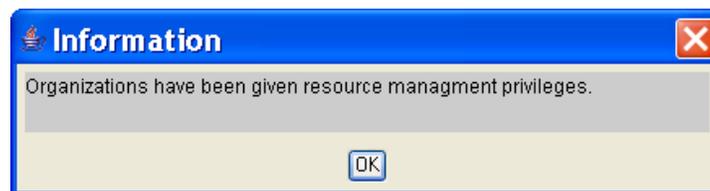
To designate a single managing dispatch organization

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
- 2 Under **Organizations Managing Resources** on the **Organizations** tab, click the **Add Organization(s)** button. 
- 3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click the **Apply** button. 
- 4 On the **Information** dialog box, click **OK**.

The following graphic shows the Search Organizations dialog box for the Resource Manager Role.



The following graphic shows the Information dialog box.



To designate more than one managing dispatch organization

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
- 2 On the **Organizations** tab under **Organizations Managing Resources**, click the **Add Organization(s)** button.
- Apply 3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click **Apply**.
- 4 Click to select another organization of your choice. Click **Apply**, and then click **OK** on the **Information** dialog box.
- 5 Add additional organizations as appropriate.
- Close 6 When finished, click the **Close** button on the **Search Organizations** dialog box, and then click **OK** on the **Information** dialog box.

*To add multiple managing dispatch organizations, you can also press the CTRL key, click to select all organizations of your choice, and then click the **Apply** button.*

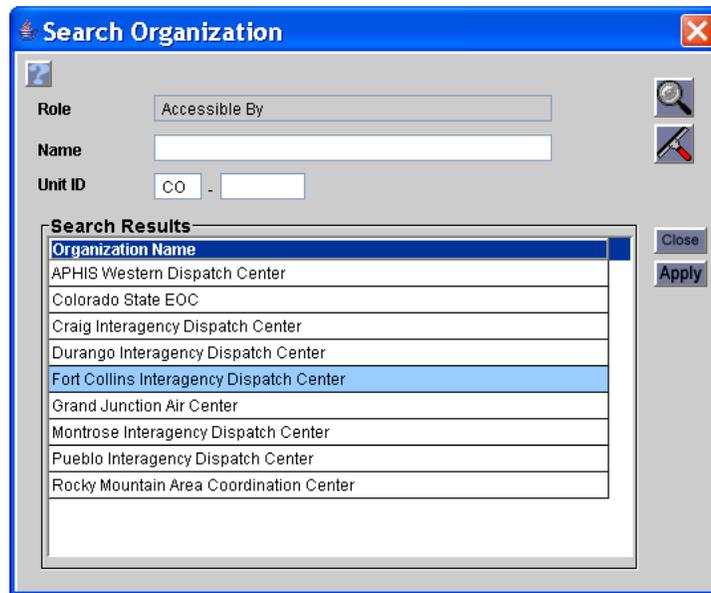
To delete a managing dispatch organization from the contract or purchase agreement

-  On the **Organizations** tab under **Organizations Managing Resources**, click the **Remove Organization(s)** button.

To designate an organization with direct access

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
- 2 On the **Organizations** tab under **Organizations With Direct Access**, click the **Add Organization(s)** button.
-  3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click the **Apply** button.
- 4 On the **Information** dialog box, click **OK**.

The following graphic shows the Search Organizations dialog box for the “Accessible By” Role.



Organization Name
APHIS Western Dispatch Center
Colorado State EOC
Craig Interagency Dispatch Center
Durango Interagency Dispatch Center
Fort Collins Interagency Dispatch Center
Grand Junction Air Center
Montrose Interagency Dispatch Center
Pueblo Interagency Dispatch Center
Rocky Mountain Area Coordination Center

To designate more than one organization with direct access

- 1 On the **Contract** screen, search for and click to select the **Contract** of your choice.
-  2 On the **Organizations** tab under **Organizations with Direct Access**, click the **Add Organization(s)** button.
-  3 On the **Search Organizations** dialog box, search for and then click to select the organization of your choice, and then click **Apply**.
- 4 Click to select another organization of your choice. Click **Apply**, and then click **OK** on the **Information** dialog box.

- 5 Add additional organizations as appropriate. When finished, click **OK** on the **Search Organizations** dialog box, and then click **OK** on the **Information** dialog box.

*To add multiple organizations with direct access, you can also press the CTRL key, click to select all organizations of your choice, and then click **Apply** or **OK**.*

To delete an organization with direct access from the contract or purchase agreement

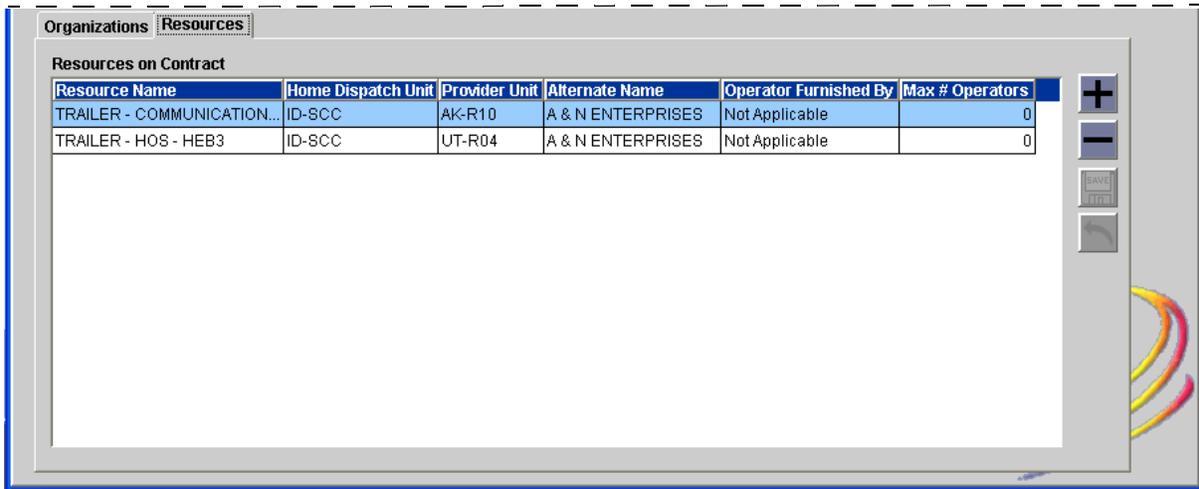
-  On the **Organizations** tab under **Organizations With Direct Access**, click the **Remove Organization(s)** button.

Attaching resources to Agreements, Exclusive Use, and CWN contracts

The Resources tab allows you to assign specific resources to Agreements, Exclusive Use, or CWN contracts. Locate these resources by name or by catalog number.

Before you can add a resource to a contract, that resource item must exist in ROSS. For more information about adding resource items see, "Resource Item - working with resources," in this ROSS User's Guide.

Resources tab



Resource Name	Home Dispatch Unit	Provider Unit	Alternate Name	Operator Furnished By	Max # Operators
TRAILER - COMMUNICATION...	ID-SCC	AK-R10	A & N ENTERPRISES	Not Applicable	0
TRAILER - HOS - HEB3	ID-SCC	UT-R04	A & N ENTERPRISES	Not Applicable	0

To search by resource item

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
- 2  Click the **Add Resource(s)** button, and then select the **Catalog** of your choice on the **Search By Resource** tab.

- 3 To change the **Resource Home Dispatch** organization, click **Other Organizations**, and then type the **Home Dispatch Unit ID** of your choice.
- 4 Type information into as many text boxes as possible to narrow your search, and then click **Search**.

The following graphic shows the Search By Resource tab on the Search Resources dialog box.

The screenshot shows a dialog box titled "Search Resources" with a blue header and a close button in the top right. Below the title bar, there are two tabs: "Search By Resource" (selected) and "Search by Catalog". The main area contains several input fields and controls:

- A "Catalog" dropdown menu set to "Aircraft".
- A "Resource Home Dispatch" section with two radio buttons: "Craig Interagency D" (selected) and "Other Organizations".
- A "Home Dispatch Unit ID" field with a hyphen separator.
- Text input fields for "Resource Name", "Alternate Name", and "Provider Unit ID" (with a hyphen separator).
- Search icons (magnifying glass and pencil) next to the "Resource Name" and "Alternate Name" fields.
- "Close" and "Apply" buttons on the right side.

At the bottom of the dialog, there is a table with three columns: "Resource Name", "Home Dispatch Unit", and "Provider Unit". The table is currently empty.

To search by catalog

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
-  2 Click the **Add Resource(s)** button, click the **Search by Catalog** tab, and then select the **Catalog** of your choice.
- 3 To change the **Resource Home Dispatch** organization, click **Other Organizations**, and then type the **Home Dispatch Unit ID** of your choice.
- 4 Click to select the **Catalog Category** and **Catalog Item** of your choice, and then click **Search**.

The following graphic shows the Search by Catalog tab on the Search Resources dialog box.

Resource Name	Home Dispatch Unit	Provider Unit

To add resources to a contract

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
-  2 Click the **Add Resource(s)** button.
-  3 On the **Search Resources** dialog box, search for and then click to select the **Catalog Item** of your choice, and then click **Apply**.
- 4 Click to select additional **Catalog Items** as appropriate and click **Apply**.

*To select more than one catalog item at a time, press CTRL while selecting each **Catalog Item**, and then click **Apply**.*

- 5 When finished, click **OK** to return to the **Resources** tab.

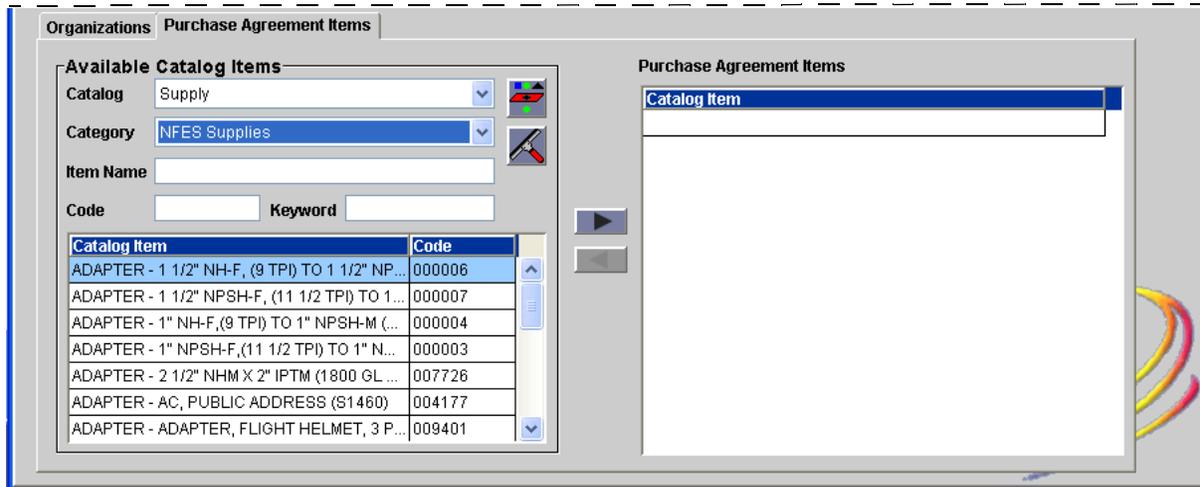
To remove a resource from a contract

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Resources** tab.
- 2 Click to select the **Resource Name** you want to remove, and then click the **Remove Resource(s)** button.

Adding catalog items to a purchase agreement

The Purchase Agreement Items tab displays only for “PA” contract types. Purchase agreement items exist within the catalog, but are not specific resource items. These items include temporary towers, porta potties, and bus rentals. When queried for dispatch, available purchase agreement items display on the Pending Request screen.

Purchase Agreement Items tab



To add catalog items to a purchase agreement

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Purchase Agreement Items** tab.

To access the Purchase Agreement Items tab, you must select a “PA” contract type.

- 2 Under **Available Catalog Items**, click the **Catalog** drop-down arrow, and then click to select the **Catalog** of your choice.
- 3 Click the **Category** drop-down arrow, and then click to select the **Category** of your choice, and then click **Filter**.
- 4  Click to select the **Catalog Item(s)** of your choice, and then click the **Add** button.

*To add more than one catalog item at a time, press [CTRL], click to select all **Catalog Items** of your choice, and then click the **Add** button.*

To remove catalog items from a purchase agreement

- 1 On the **Contract** screen, search for and then click to select the **Contract** of your choice, and then click the **Purchase Agreement Items** tab.

- 2 Under **Available Catalog Items**, click the **Catalog** drop-down arrow, and then click to select the **Catalog** of your choice.
- 3 Click the **Category** drop-down arrow, and then click to select the **Category** of your choice, and then click **Filter**.
-  4 Under **Purchase Agreement Items**, click to select the **Catalog Item(s)** of your choice, and then click the **Remove** button.

*To remove more than one catalog item at a time, press [CTRL], click to select all **Catalog Items** of your choice, and then click the **Remove** button.*

Exploring contracts and agreements in detail

This section explains background information specific to the ROSS Contract screen. Topics include:

- Understanding contract terms and concepts
- Understanding contract types
- Removing and deleting a contract.

Understanding contract terms and concepts

The terms and concepts specific to the ROSS Contract screen include the following:

- **Contract and agreement numbers.** Contract and agreement numbers are determined and provided by the Contracting Officer for that contract and vary according to agency and/or organization.
- **Contracting Office.** The government (non-dispatch) organization with contract authority of the contract. The Contracting Office “holds the paper.”
- **Contract Type.** The Contract Type includes Call When Needed (CWN), Exclusive Use (EXU), Agreement (AGR), and Purchase Agreement (PA).

Contract types are further defined in the next section, “Understanding contract types.”

- **Global Access.** Global Access must be designated by the Managing Dispatch organization. When selected, the Global Access check box allows all dispatch organizations to assign resources from a contract using the ROSS Pending Request screen.
- **Managing Dispatch.** The Managing Dispatch organization has all privileges for managing and editing the contract, adding resource items, designating other organizations that can manage, review, and add resource items, and allowing viewing and ordering access to other offices. The Managing Dispatch organization designates Organizations Managing Resources and Organizations With Direct Access.
- **Organizations Involved.** The top area of the Organizations tab allows you to set the “Contracting Office” and the “Managing Dispatch”

organization. When creating a contract, these entries default to the dispatch office where the contract is entered. Change the Contracting Office to reflect the Government (Non-Dispatch) organization of the contracting officer who signed the contract. This organization is also the Provider on the Resource Item screen.

Remember, contracts are tied to agencies. Dispatch offices do not have agency affiliations. For example, while the Tennessee Interagency Coordination Center manages a Type 3 helicopter, the actual contracting office is Southern Region - USFS. For more information see, "To change the Contracting Office designation," later in this section.

- **Organizations Managing Resources.** The lower left area of the Organizations tab identifies the other dispatch offices that manage (add, delete, and edit) resource items for the contract. Use this area when contracts have resource items dispersed through a large area of the nation that specified the units managing the contracted line items. The authority extends only to resource items and does not allowing editing of contract information.

When authorized, a dispatch office may use the Resources tab to add/subtract any of their designated resources on the contract. Dispatch offices should ONLY add/subtract resources for which they are responsible, through the contract.

- **Organizations with Direct Access.** The lower right area of the Organizations tab is used to authorize dispatch offices to directly access resources on the contract. An organization displayed in this area is authorized to request and assign available resources which are on the contract.

For exclusive use contracts you cannot modify the Organizations with Direct Access.

- **Purchase Agreement Items.** Purchase Agreement Items are services entered from the Resource Item screen and classified under a Purchase Agreement. Purchase Agreement Items refer to catalog categories, not specific resources items. These items will display when queried on the Pending Request screen.

- **Resources.** In contacts and agreements, resources are supplied and available for ordering from the vendor. A non-service vendor-owned resource has a specific identifier, for example, ENGINE - T6 - ABC Engines - #121.
A vendor-owned service resource does not have a specific identifier, for example "copy machine rental." Its resource status is not maintained in ROSS. Vendor-owned services are typically ordered in the Aircraft, Equipment, and Supply catalogs.

If the vendor's resources and/or services do not already exist in the ROSS database, access the Resource Item screen and enter them. Remember to designate the vendor organization as the owner of the resources/services so that you can link them to the vendor's contract.

- **Vendor.** Like other organizations, vendors are unique and each exists as a single record in ROSS. When creating a contract, select the vendor organization that holds the contract *before* entering a contract or purchase agreement, first verify that vendor exists in ROSS.

If the vendor does not already exist in the ROSS database, access the ROSS website at <http://ross.nwcg.gov>, and then click [Request Organization Update](#).

Understanding contract types

Many contracts and agreements are national, geographic, regional, or unit in scope. These contracts may identify many items that include some your dispatch office manages and statuses. These contracts are typically Exclusive Use or Call When Needed in nature, and may include:

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

The dispatch office that manages the contract is usually responsible for entering it into ROSS. This may be, however, not the unit that enters the resources *used* on the contract. These contracted resource items may be entered either by:

- the dispatch office that manages the contract
- the dispatch office that manages the resources attached to the contract.

When creating a contract in ROSS, you must first determine the contract type. In ROSS there are three types of contracts/purchase agreements, including:

- **Agreement (AGR).** An “AGR” includes agreements with vendors, such as an Emergency Equipment Rental Agreement, or an agreement with a government non-dispatch organization. The process for creating an agreement and adding individual resource items to it is the same as for CWN contracts. Filling a service or non-service request with an “AGR” contract resource is the same as for a “CWN” contract resource.
- **Call When Needed (CWN).** A “CWN” contract is an agreement with a vendor to provide specific resources identified in the contract, on an as-available basis when called by an authorized ordering dispatch office. In ROSS, a “CWN” resource item is statused the same way as any agency-owned resource item. However, filling an order with a CWN resource is different, in that you must call the vendor prior to assigning that resource item. Emergency Equipment Rental Agreements (EERA) are typically CWN contracts. An exception to this is when a line item listed on an EERA is not unique. These line items may include motel rooms, meals, or other services that do not have a unique identifier, such as a serial number or vehicle identification number.

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

- **Exclusive Use (EXU).** An “EXU” contract is an agreement with a vendor to provide a resource item on an “Exclusive Use” basis to a specific unit for incident support. In ROSS, an “Exclusive Use” resource is treated like any other agency resource. It is statused and dispatched to incidents exactly the same way as an agency-owned resource item.
- **Purchase Agreement (PA).** A “PA” is an agreement with a vendor to provide services, such as copy machine rental, grocery purchase, or newspaper delivery in support of an incident. Services on a purchase agreement are not statused and need not be entered in ROSS on the Resource Item screen.

Now that government purchase cards and checks are widely used and accepted, purchase agreements are much less common.

For example...

A National Crew contract is issued by the US Forest Service at the National Interagency Coordination Center (NICC). There are 20 crews attached to the contract, which are managed by 20 different dispatch offices around the country. NICC enters the contract in ROSS and then has two options for entering the crew resource items:

1. NICC may enter the resource items and then move the management of the items to the field dispatch office.
2. NICC may authorize the field dispatch office to enter their resources and attach them to the contract.

Generally, NICC will choose to enter the their own resource items and then move them to the field units.

Removing and deleting a contract

You must have the Data Manager role to remove and delete a contract or purchase agreement. In addition, be sure to verify the following contract information:

- **Open requests.** The contract or purchase agreement must not be associated to any existing open request.
- **Expired End Date.** You cannot remove a contract from view until the End Date has expired. You can edit the contract and change the End Date to force the expiration.
- **Organizations.** Organizations Managing Resources and Organizations With Direct Access are removed when the contract is removed. If the contract is restored, this access is not automatically reinstated.
- **Contract resources and services.** When removing a contract, all related resources and services are removed from the contract. If you restore that contract, those **resources and services are not automatically restored** to the contract.