



Creating IDIQ Contracts

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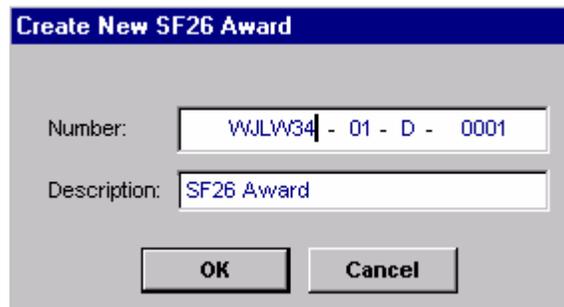
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1. CREATING IDIQ CONTRACTS

1.1 Getting Started

To create an award, highlight the associated solicitation and select **Procurement** → **Pre-Award/Award** → **Award** from the menu bar. Click the award type of the document in the **Award** menu. Update the Default PIIN in the **Number** field and update the description in the **Description** field.

Note: Refer to *DFARS 204.7003*, for elements of the number. Recall, the ninth position indicates the type of instrument. **SF 26** awards always default to a “C” in the ninth position. Change the “C” to a “D” in the ninth position if it is an indefinite delivery contract.



The screenshot shows a dialog box titled "Create New SF26 Award". It has two text input fields. The first field is labeled "Number:" and contains the text "WJLW34 - 01 - D - 0001". The second field is labeled "Description:" and contains the text "SF26 Award". At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

If a solicitation has been highlighted to create the award, the information from the solicitation will pull forward to various fields on the award. Be certain to click through all the tabs to fill out any appropriate blocks, especially:

- **Block 3**-Effective Date
- **Block 7**-Name and Address of Contractor

When building the CLINs, in the **Line Item Detail** window, proceed using the options in the following sections.

Note: Mark the **IDC Type** field on the CLIN with **Indefinite Quantity** from the drop-down list box in the *Detail* tab of the **Line Item Detail** window.

1.2 Option #1 – Using Dollars as the Unit of Issue

Within this work solution, the key points the user must remember are:

- Total Dollars must be entered in the **Max Quantity** field on the *Pricing* tab in the **Line Item Detail** window, for each CLIN.
- **Dollars, U.S** must be selected from the **Unit of Issue** drop-down list box on the *Detail* tab in the **Line Item Detail** window, for each CLIN.
- The value “1” must be entered in the **Unit Price** field on the *Detail* tab in the **Line Item Detail** window, for each CLIN.

See illustration below. If “638,000” is entered in the **Max Quantity** field and “1” is entered in the **Unit Price** field in the *Detail* tab of the **Line Item Detail** window, the **Max Line Item Cost** should read \$638,000.00. On all subsequent delivery orders, the user must be certain that the line items created on the associated **PR**, follow the same methodology, outlined in the three bullets above. This work solution allows the Contracting Office to always track the total dollars spent on each CLIN on an IDIQ type contract.

The screenshot shows the 'Line Item Detail' window with the 'Detail' tab selected. The window has a title bar with a close button (X) and a tabbed interface with 'Detail', 'Description', 'Pricing', 'Funding', 'Shipping', 'Payment', and 'Local Info'. The 'Detail' tab contains the following fields and controls:

- Line Item Number:** 0001
- Contract Type:** FFP
- IDC Type:** Indefinite Quantity
- Hand Carry:**
- Delivery Date:** (Month, Day, Year dropdowns)
- CLIN Type:** Priced, Info Only
- Description:** Concrete Services
- Extended Description:** IDIQ Concrete Services for Air Force Runways
- Item Calculation:** Max Quantity: 638,000.00, Unit Price: 1.00, Max Line Item Cost: 638,000.00. A large 'X' is overlaid on the Max Line Item Cost field.
- Period of Performance:** Start Date, End Date, Period: Base, Option, Opt #, Cost Constraint
- Unit of Issue:** Dollars, U.S.
- Test Type:** No Test
- Exhibit:**
- Include Sublines:**
- Stepladder Pricing:**

On the right side of the window, there is a vertical column of buttons: Global Chg, Test Info, Copy, Add, Insert, Add, Insert, Delete, Associate, OK, and Cancel.

1.3 Option #2 – Estimate the Maximum Number of Delivery Orders for this Contract

By making a “high-ball” estimate on the total number of DO/TO’s that may be cut on this IDIQ (i.e. 1000), a user can estimate the **Max Quantity** to enter on the *Detail* tab.

The next required step is to divide the **Total Cost** (\$638,000.00) by the **Max Quantity** (1000) to determine the value to enter in the **Unit Price** field (638). The **Max Line Item Cost** field is not editable. It is automatically calculated when the **Max Quantity** and **Unit Price** fields are populated.

The user has the liberty to choose any **Unit of Issue** that he/she finds appropriate. The quantity on the associated **PR** and **DO/TO** is most often 1. This is the practice most often followed when creating a **DO/TO** from an IDIQ type contract.

The screenshot displays the 'Line Item Detail' window with the 'Detail' tab selected. The interface includes several input fields and buttons:

- Line Item Number:** 0001
- Contract Type:** FFP
- IDC Type:** Indefinite Quantity
- Hand Carry:**
- Delivery Date:** () () ()
- CLIN Type:** Priced Info Only
- Description:** Concrete Services
- Extended Description:** DIQ Concrete Services for Air Force Runways
- Item Calculation:** Max Quantity: 1,000.00; Unit Price: 638.00; Max Line Item Cost: 638,000.00
- Period of Performance:** Start Date: (), End Date: (), Period: Base Option, Opt #: (), Cost Constraint: ()
- Unit of Issue:** Lot
- Test Type:** No Test
- Exhibit:** **Include Sublines:**
- Stepladder Pricing:**

Buttons on the right side include: Global Chg, Test Info, Copy, Add, Insert, Add, Insert, Delete, Associate, OK, and Cancel.

1.5 Clauses

Add any applicable clauses by auto-selecting clauses.

Note: See pages 133-136 in the *Procurement Desktop-Defense User's Guide, Version 4.1* for instruction on how to delete and add automatically selected clauses and how to re-run auto-clause selection.

1.6 Generating the Document

Select **Document Options** → **Generate CLINs** to generate CLINs.

Select **Document Options** → **Generate Section J** to generate section J, if **Attachments** have been created. See KB article <http://kb.amsinc.com/ID/37748/> for instruction on how to add **Attachments** to Section J.

Select **Document Options** → **Generate Document** to generate the final document.

Note: If changes are made to the CLINs or the document after they have been generated, it is essential that the CLINs and document be re-generated. The changes will only be incorporated into the final *generated* document.

Save and close the document.

1.7 Approve and Release

To approve the document, highlight the award icon and click on the red approval checkmark on the toolbar. Select the appropriate approval template in the **Approval** window. Click **[OK]**.

Note: In the **Approval Sheet** window, click the **[Preapproval]** button to run pre-approval checks before selecting **Approved** from the **Approval types** drop-down list.

Note: If more than one signature is need on this award, route the document to obtain the other signatures by highlighting the document icon and selecting the mail slot icon on the toolbar. Select the names of the applicable recipients and route the document. See pages 48-54 in the *Procurement Desktop-Defense User's Guide, Version 4.1* for instruction on routing and approving documents.

Once the document has been approved the document is not editable. To unapprove the document select the approval icon in the toolbar, and click **[OK]** before selecting **Approved** from the **Approval types** drop-down list.

To release the document, select **Procurement** → **Pre-Award/Award** → **Award** → **Release Award** to release the document. Once the document has been released, it is indelible.

Note: Only users with a sufficient warrant may release documents See page 173 in the *Procurement Desktop-Defense User's Manual, Version 4.1* for a list of validations that PD² runs when a document is released. If all of these criteria are not met the document will not release.
