United States Department of Agriculture

Office of the Assistant Secretary for Administration

Office of Contracting and Procurement

Procurement Operations Division

301 S. Howes Street
Fort Collins, CO
80521

February 8, 2021

ACQUISITION OPERATING PROCEDURE (AOP)

FROM: Richard R. Jiron
Mission Area Senior Contracting Officer

RICHARD JIRON

Digitally signed by RICHARD JIRON
Date: 2021.02.08 09:32:35 -07'00'

SUBJECT: AOP No. 22: Reassignment of Requisitions, Solicitations and Contracts to Contracting Officers and Buyers

◆**PURPOSE:** This Acquisition Operating Procedure is issued to help with identifying open requisitions, solicitations and contracts for the purposes of issuing an award, contract administration, processing invoices for payment in the Invoice Payment Platform (IPP), completing the performance assessment in the Contractor Performance Assessment Reporting System, contract closeout, preparation of file destruction, etc. The requisitions, solicitations and contracts may be reassigned from the originating Contracting Officer (CO) or Buyer to a different CO or Buyer to manage the action through completion of contract file destruction.

◆**SCOPE:** This AOP applies to the Departmental Administration and Staff Offices for acquisitions issued by the contracting officers under the authority of the MASCO.

◆**EFFECTIVE DATE:** This AOP is effective on 02/08/2021.

◆ **REVISIONS:** *Revised in its entirety.*

This AOP replaces the previous version of AOP No. 22, dated Aug. 20, 2014.

◆**AUTHORITIES:** Not applicable.

◆**REFERENCES:** OIG Audit No. 92501-0001-12, Review of Procurement Operations, dated September 27, 2013, Recommendation 12, *Issue a modification for all contracts where the contracting officer has changed*; and OIG Audit No. 92-501-0001-12 (1), Fourth Data Center in Support of the USDA eMail Consolidation, dated November 16, 2011, Recommendation 7, *Issue a modification for all contracts where the contracting officer has changed*.

◆ **PROCESS:**

1. The Contracting Branch Chiefs and transferring CO identify the items that need to be transferred. The following tools are suggested for use when identifying requisitions, solicitations, and contracts for re-assignment.

a) Integrated Acquisition System (IAS), Discoverer Reporting (screenshots demonstrating how to pull the reports are below):

   i) Unawarded Requisitions by Buyer *(Requisitions not associated with released awards).*
   ii) Award Header Netview Report by Owner (*Assigned awards).*

b) Internal Workload Tracking Report, if applicable *(office shared drive).*

2. Transferring Contracting Officers will:

   a) Ensure a paper file or an e-file uploaded to IAS in accordance with AOP 7 is complete to include copies of invoices, payment images, all modifications, relevant emails, etc.

   b) Resolve any outstanding issues on the contract (examples include but are not limited to PoP extensions, exercise an option, de-obligations, etc.). Contracts transferred should be free of immediate administrative action.

   c) Complete the modification within thirty (30) business days to change the CO, ACO, IPP approver and will **route the mod to the gaining CO for award,** thereby changing the CO in IAS. Sample wording for a "CO Change" administrative modification is provided below:

      "The purpose of Modification XXXX is to identify a new Contracting Officer under the subject contract. As a result of this modification, the Contracting Officer is hereby changed from John Adams to Thomas Jefferson, effective the date of this modification.

      All other terms and conditions of the contract remain unchanged."

   d) Submit a copy of the modification to the COR/Technical contact and Contractor; place a copy in the contract electronic file.

   e) The transferring CO will request that their Branch Chief "Change Owner" in IAS using the Utility correction function (screen shots below).

   f) Process or reassign any invoices to the gaining CO.

   g) Complete any outstanding CPARS. If CPARS is due during the current period or within 3 months of the contract transfer, prior Assessing Official (AO) shall assist the gaining CO/AO with rating information for that period.

   h) Notify the CPARS Focal Point (FP) of contract transfer via email, provide the new AO's information to the FP; FP shall update the record to reflect new AO.

i) Complete any assigned close-outs, responsibility for close-outs stays with the transferring CO. See paragraph 5.

3. Gaining COs will, upon receipt of the file, review the paper or IAS e-file for completion and document the contract file with a memo of any items that are missing (sample memo below).

4. Branch Chiefs will:

   a) Ensure unawarded requisitions are reassigned as necessary.

   b) Identify transferring and gaining COs in a timely manner.

   c) Assist as necessary with reassignment of Ownership in IAS (see screenshots).

   d) Ensure that gaining COs approve transfer mods in IAS within 3 business days.

   e) If the transferring CO is not available, follow the steps outlined below or contact the IPP Helpdesk <IPPCustomerSupport@fiscal.treasury.gov> to request invoices currently in the transferring CO's inbox be routed to the gaining CO. Invoices received in IPP prior to the IAS data fix or modification issue will not automatically route to the gaining CO.

   f) Assign transferred CO's close-out workload as applicable. See paragraph 5.

5. Close-outs – COs are responsible for contract close-outs under their name. If a CO is transferring to another position in the same office, responsibility for their close-out workload will transfer with them until complete or otherwise coordinated with the applicable Branch Chief. If a CO is leaving the assigned office, responsibility for their close-out workload will stay with the Branch they were assigned to.

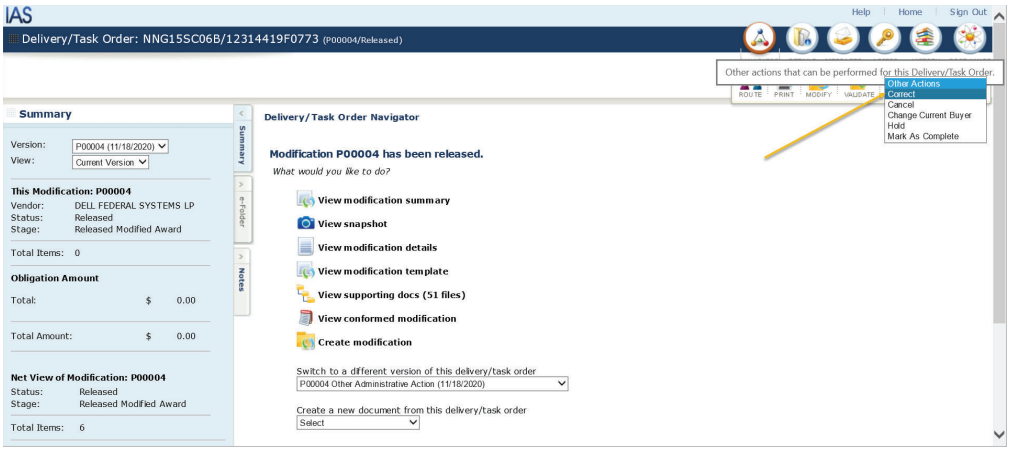
◆ **EXPIRATION DATE:** This AOP will remain in effect until canceled.

(END)

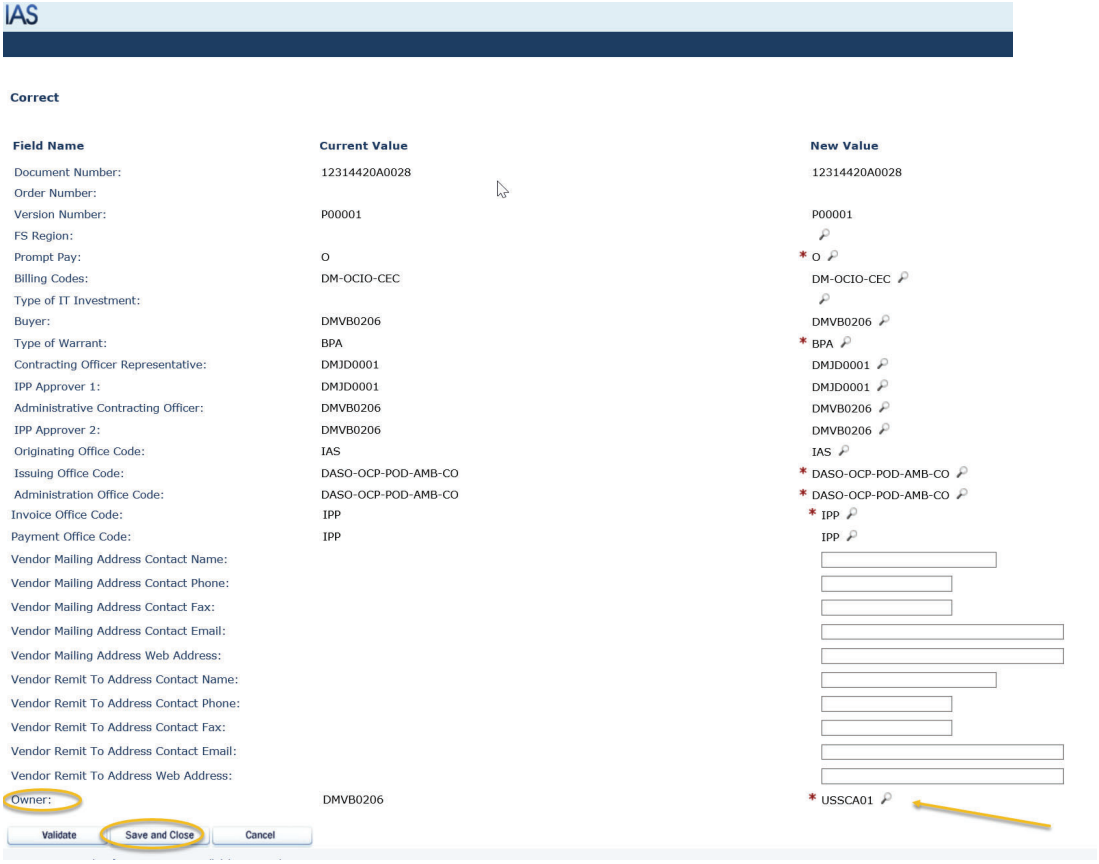
Screenshots

How to "correct" the owner using the Utilities function:

1. Using the Other Actions drop down in the award, select "Correct".



2. Once inside the "Correct" utility function, scroll to the bottom to change the owner. Search with the magnifying glass, select the new owner, then save and close.



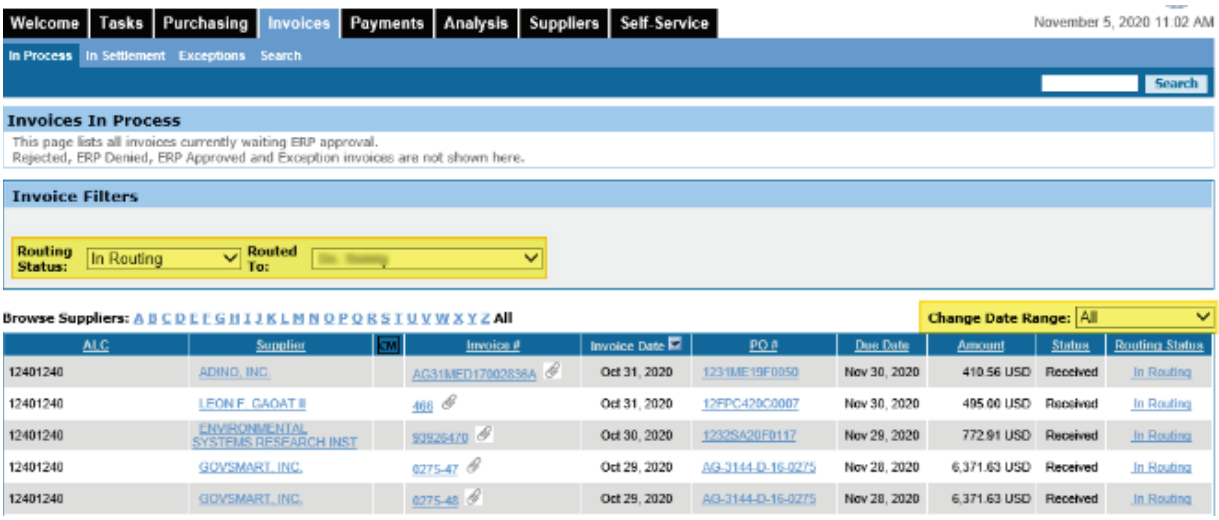
https://ias.usda.gov/attachments/guidance/Reassigning%20Documents%20in%20IAS%20-%2020181130%20v1%201.pdf

How to view a user's pending invoices in IPP and reassign:

1) Within IPP, navigate into ***Invoice > In Process*** section
2) Update the ***Routing Status*** and ***Routed To*** sections to the following:

   Routing Status: In Routing

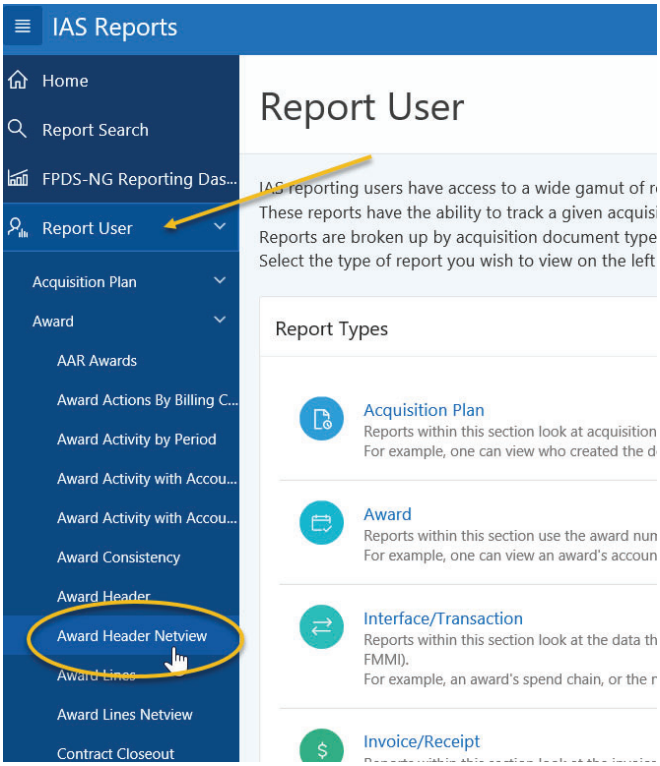
   Routed To: <*Last Name, First Name*> of desired user
3) Update the ***Change Date Range*** filter to **ALL** to view all invoices.
4) You should then be left with all invoices pending with the selected user.
   The IPP Helpdesk (this helpdesk) can assist with reassigning these users to an alternate IPP Approver.



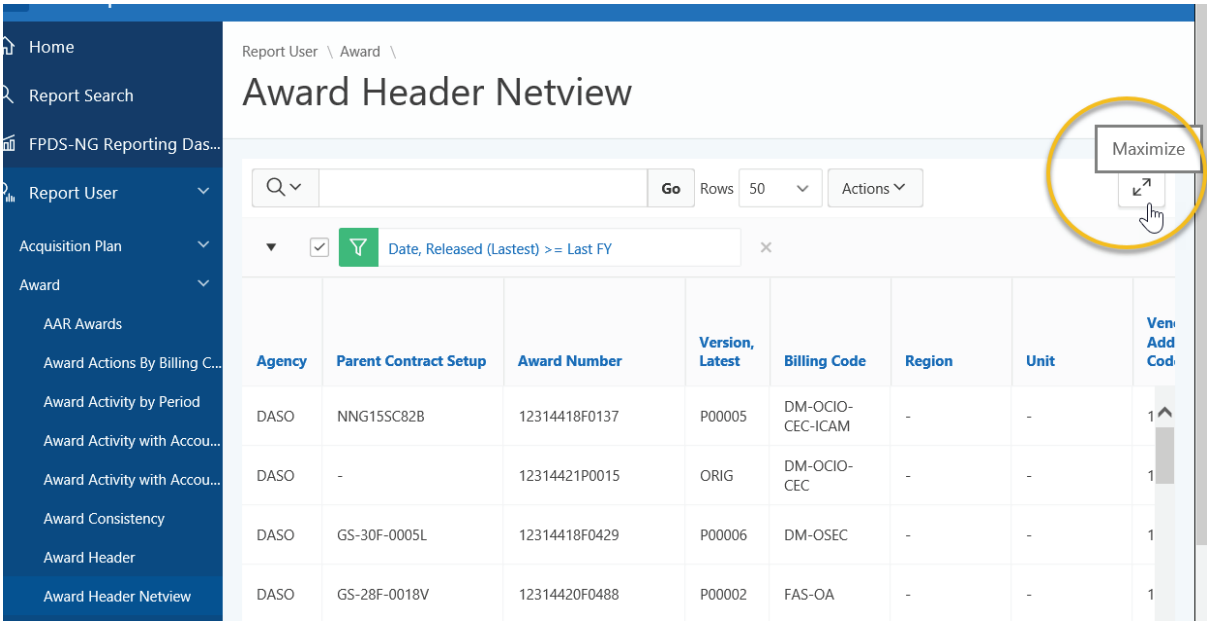
How to pull the Award Header Netview report:

1) Locate the IAS Reporting Tool from the IAS home page

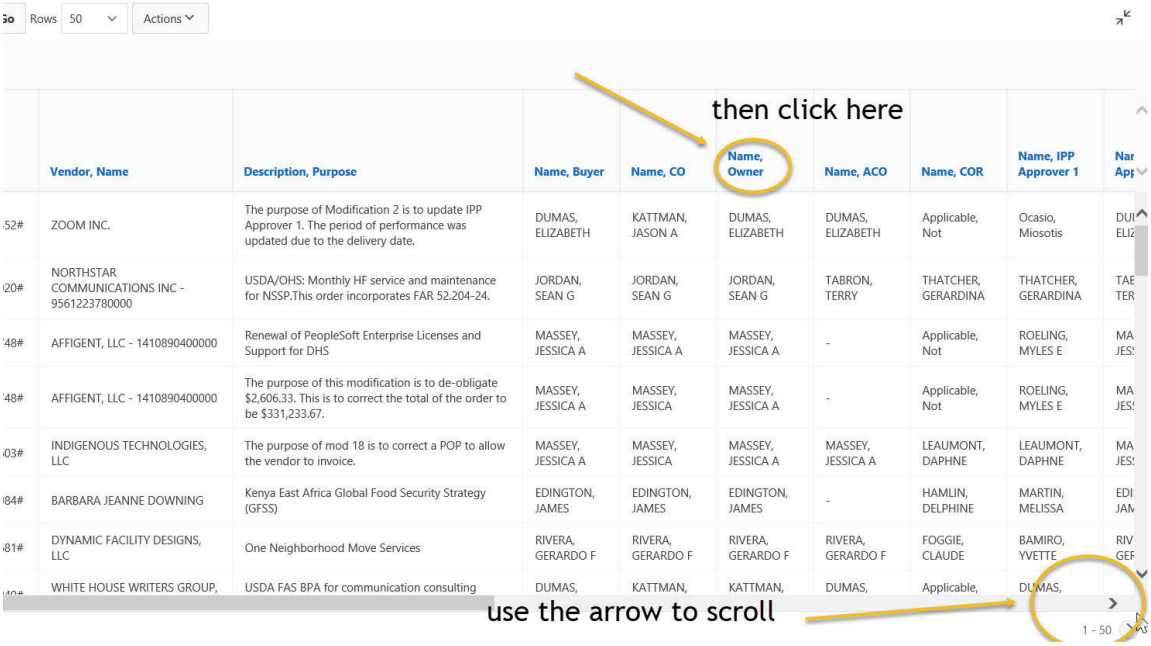
2) Pull Award Header Netview Report from the Report User section



3) Maximize the screen using the button in the upper right-hand corner.

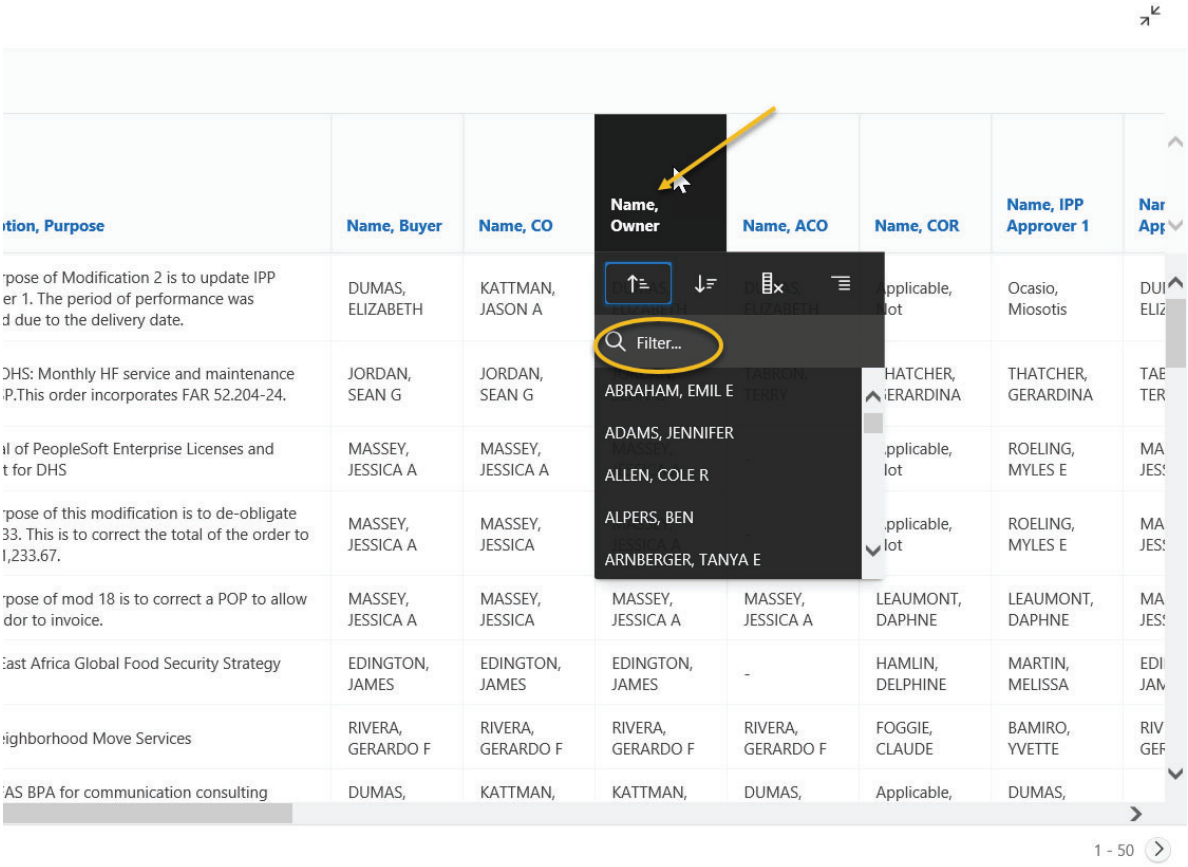


4) Use the bottom right arrow to scroll until you see the Name, Owner header.



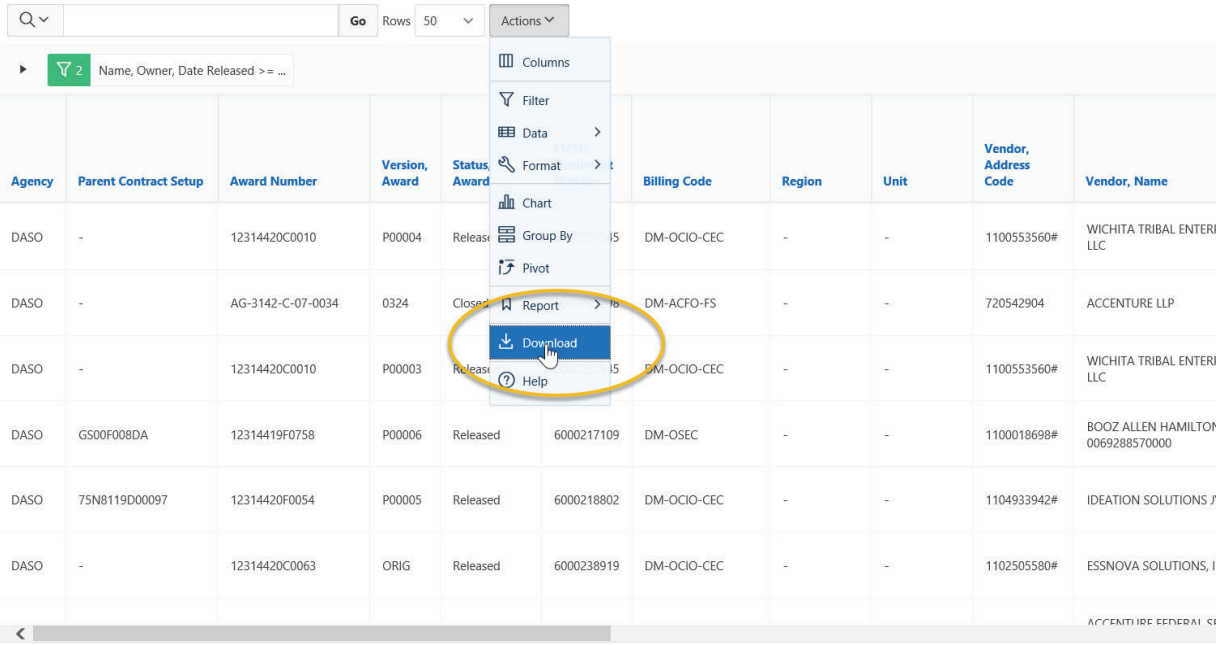
	Vendor, Name	Description, Purpose	Name, Buyer	Name, CO	Name, Owner	Name, ACO	Name, COR	Name, IPP Approver 1	Nar App
52#	ZOOM INC.	The purpose of Modification 2 is to update IPP Approver 1. The period of performance was updated due to the delivery date.	DUMAS, ELIZABETH	KATTMAN, JASON A	DUMAS, ELIZABETH	DUMAS, ELIZABETH	Applicable, Not	Ocasio, Miosotis	DUI ELIZ
20#	NORTHSTAR COMMUNICATIONS INC - 9561223780000	USDA/OHS: Monthly HF service and maintenance for NSSP.This order incorporates FAR 52.204-24.	JORDAN, SEAN G	JORDAN, SEAN G	JORDAN, SEAN G	TABRON, TERRY	THATCHER, GERARDINA	THATCHER, GERARDINA	TAE TER
48#	AFFIGENT, LLC - 1410890400000	Renewal of PeopleSoft Enterprise Licenses and Support for DHS	MASSEY, JESSICA A	MASSEY, JESSICA A	MASSEY, JESSICA A	-	Applicable, Not	ROELING, MYLES E	MA JES
48#	AFFIGENT, LLC - 1410890400000	The purpose of this modification is to de-obligate $2,606.33. This is to correct the total of the order to be $331,233.67.	MASSEY, JESSICA A	MASSEY, JESSICA	MASSEY, JESSICA A	-	Applicable, Not	ROELING, MYLES E	MA JES
03#	INDIGENOUS TECHNOLOGIES, LLC	The purpose of mod 18 is to correct a POP to allow the vendor to invoice.	MASSEY, JESSICA A	MASSEY, JESSICA	MASSEY, JESSICA A	MASSEY, JESSICA A	LEAUMONT, DAPHNE	LEAUMONT, DAPHNE	MA JES
84#	BARBARA JEANNE DOWNING	Kenya East Africa Global Food Security Strategy (GFSS)	EDINGTON, JAMES	EDINGTON, JAMES	EDINGTON, JAMES	-	HAMLIN, DELPHINE	MARTIN, MELISSA	EDI JAM
81#	DYNAMIC FACILITY DESIGNS, LLC	One Neighborhood Move Services	RIVERA, GERARDO F	RIVERA, GERARDO F	RIVERA, GERARDO F	RIVERA, GERARDO F	FOGGIE, CLAUDE	BAMIRO, YVETTE	RIV GER
	WHITE HOUSE WRITERS GROUP,	USDA FAS BPA for communication consulting	DUMAS,	KATTMAN,	KATTMAN,	DUMAS,	Applicable,	DUMAS,	

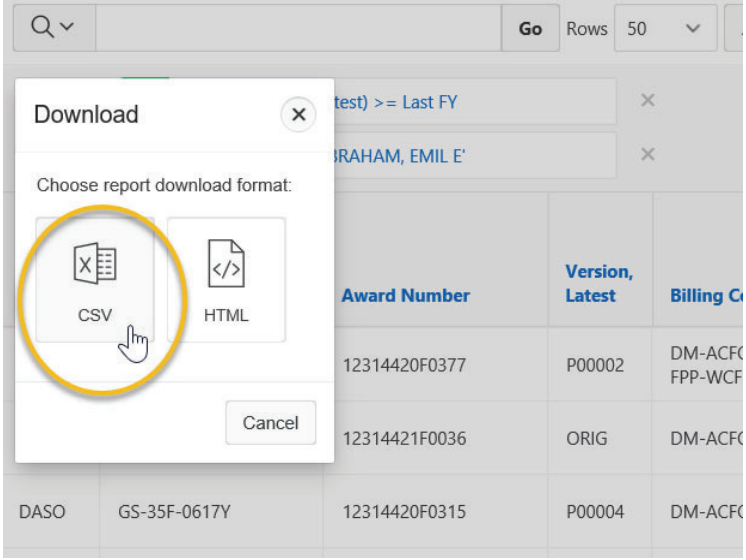
5) Search and Filter by Owner



tion, Purpose	Name, Buyer	Name, CO	Name, Owner	Name, ACO	Name, COR	Name, IPP Approver 1	Nar App
pose of Modification 2 is to update IPP er 1. The period of performance was d due to the delivery date.	DUMAS, ELIZABETH	KATTMAN, JASON A			pplicable, lot	Ocasio, Miosotis	DUI ELIZ
DHS: Monthly HF service and maintenance P.This order incorporates FAR 52.204-24.	JORDAN, SEAN G	JORDAN, SEAN G		TABRON, TERRY	HATCHER, ERARDINA	THATCHER, GERARDINA	TAE TER
l of PeopleSoft Enterprise Licenses and t for DHS	MASSEY, JESSICA A	MASSEY, JESSICA A			pplicable, lot	ROELING, MYLES E	MA JES
pose of this modification is to de-obligate 33. This is to correct the total of the order to 1,233.67.	MASSEY, JESSICA A	MASSEY, JESSICA			pplicable, lot	ROELING, MYLES E	MA JES
pose of mod 18 is to correct a POP to allow dor to invoice.	MASSEY, JESSICA A	MASSEY, JESSICA	MASSEY, JESSICA A	MASSEY, JESSICA A	LEAUMONT, DAPHNE	LEAUMONT, DAPHNE	MA JES
East Africa Global Food Security Strategy	EDINGTON, JAMES	EDINGTON, JAMES	EDINGTON, JAMES	-	HAMLIN, DELPHINE	MARTIN, MELISSA	EDI JAM
ighborhood Move Services	RIVERA, GERARDO F	RIVERA, GERARDO F	RIVERA, GERARDO F	RIVERA, GERARDO F	FOGGIE, CLAUDE	BAMIRO, YVETTE	RIV GER
AS BPA for communication consulting	DUMAS,	KATTMAN,	KATTMAN,	DUMAS,	Applicable,	DUMAS,	

6) Download the results into a spreadsheet showing what is assigned to the CO





SAMPLE MEMORANDUM FOR THE FILE

Date: XXX

Contract #: XXX

Subject: *Contract file folder contents following transfer of ownership*

This memorandum documents the contract file contents upon transfer of ownership. The list below may not be all-inclusive but represents what was noted upon initial review of the electronic file contents.

Paper Contract File:

No paper contract file was available for transfer.

Electronic Contract File:

The following information was not included in the contract file.

- *Example list, add/delete as applicable upon receiving and reviewing the transferred file*
- File Indexes.
- Market research documentation.
- Applicable Acquisition Planning
- Determination of Fair and Reasonable Pricing.
- Award justification.
- Modifications.
- Payment log and invoices.

The gaining CO will pull and save any electronic information available (e.g. via IAS or IPP) to further complete the file, this information be uploaded into IAS in accordance with AOP 07.

Contracting Officer