U.S. Coast Guard FSMS Job Aid

- Version **1.0**
- 13April22
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DRAFT

How Do I Create an Award for Pollution Removal Funding Authorization (PRFA)

HOW DO I CREATE AN AWARD FOR A POLLUTION REMOVAL FUNDING AUTHORIZATION (PRFA)

This portion of the job aid goes over how to create an award for pollution response funding authorizations

The roles required for this portion of the job aid will be:

UCG Miscellaneous Obligation Preparer

HOW DO I CREATE AN AWARD FOR POLLUTION REMOVAL FUNDING AUTHORIZATION

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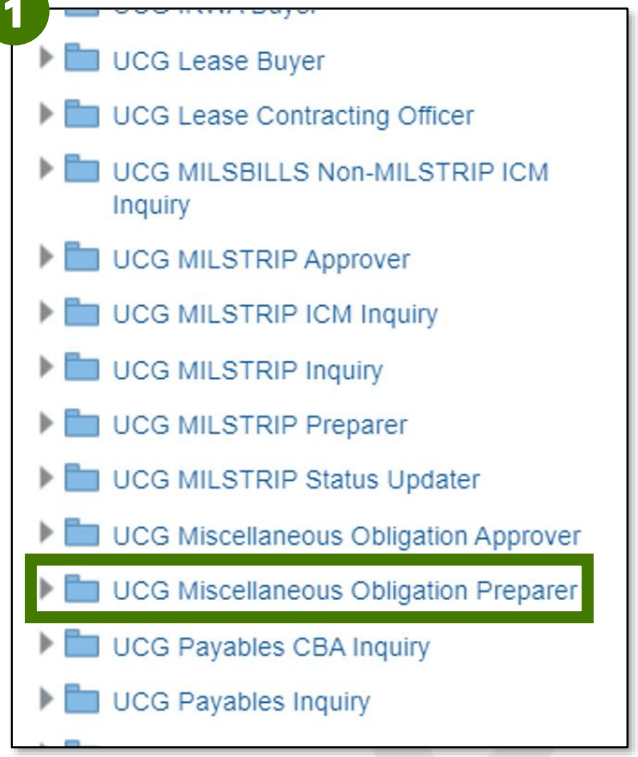
1. **How To Create an Award**
2. How To Complete the Award Header
3. How To Verify Addresses and Suppliers
4. How To Create Award Lines
5. How To Update Award Schedules
6. How To Create Award Distributions

SECTIONS

7. How To Verify Vendor Eligibility on an Award
8. Bypass Creating A FPDS-NG Reporting Detail For An Award
9. How To Check Funds on an Award
10. How To Validate an Award
11. How To Submit an Award for Approval

How To Create An Award– Steps 1, 2, & 3

1



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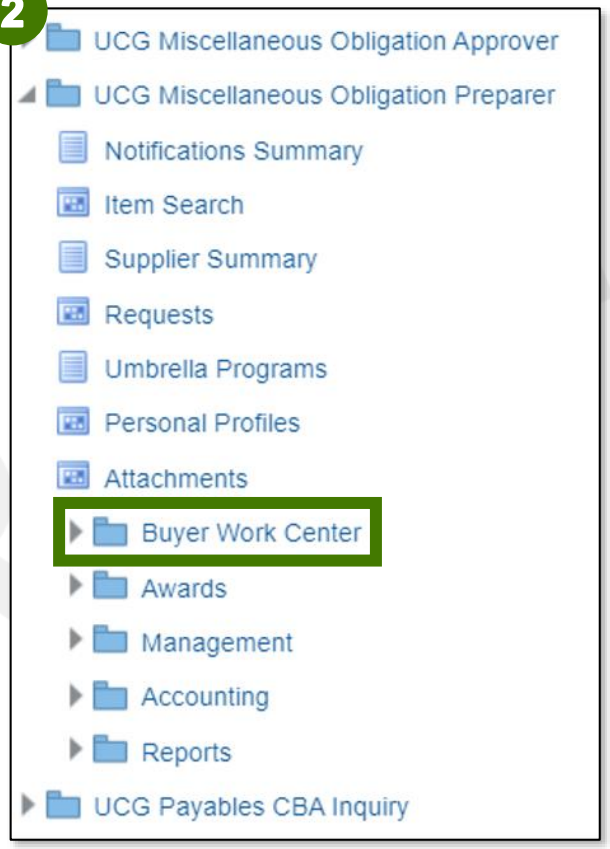

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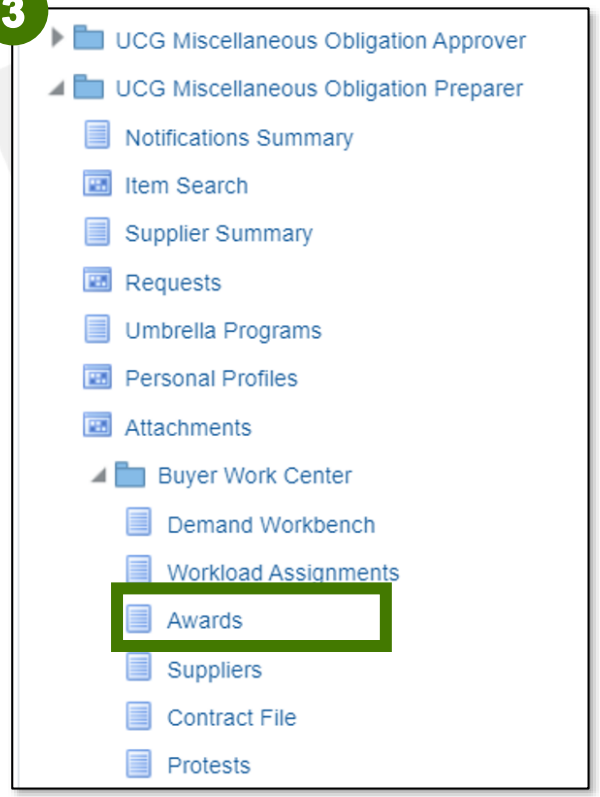
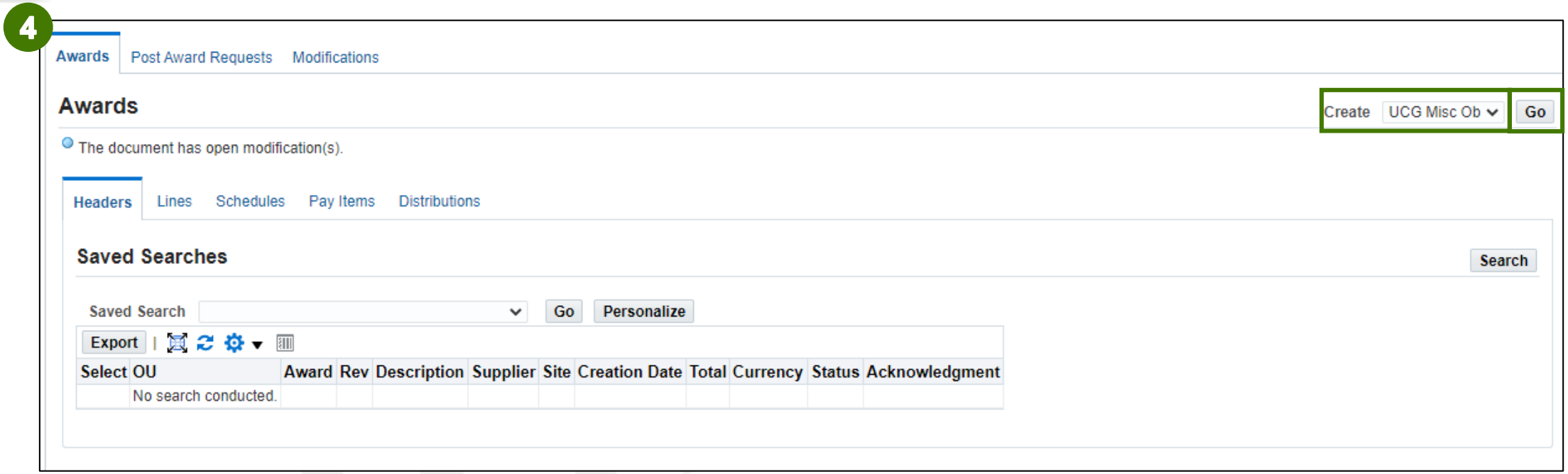


Step 1: Click on the ***UCG Miscellaneous Obligation Preparer*** link

Step 2: Click on the ***Buyer Work Center*** link

Step 3: Click on the ***Awards*** link

How To Create An Award – Step 4



Step 4: Click the ***Create dropdown*** button and select ***UCG Misc Ob***

Click the ***Go*** button to create the award

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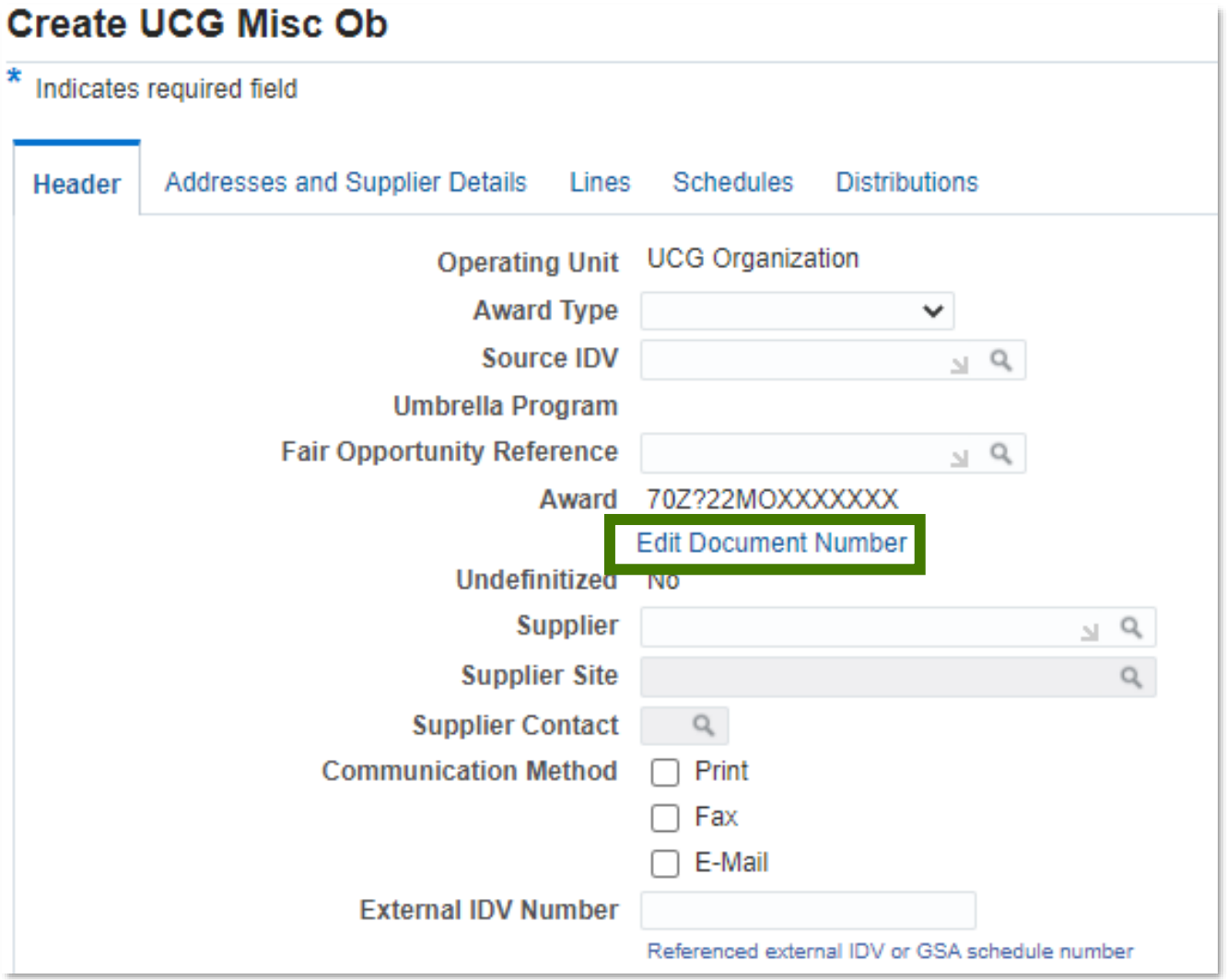
How To Complete The Award Header – Step 1

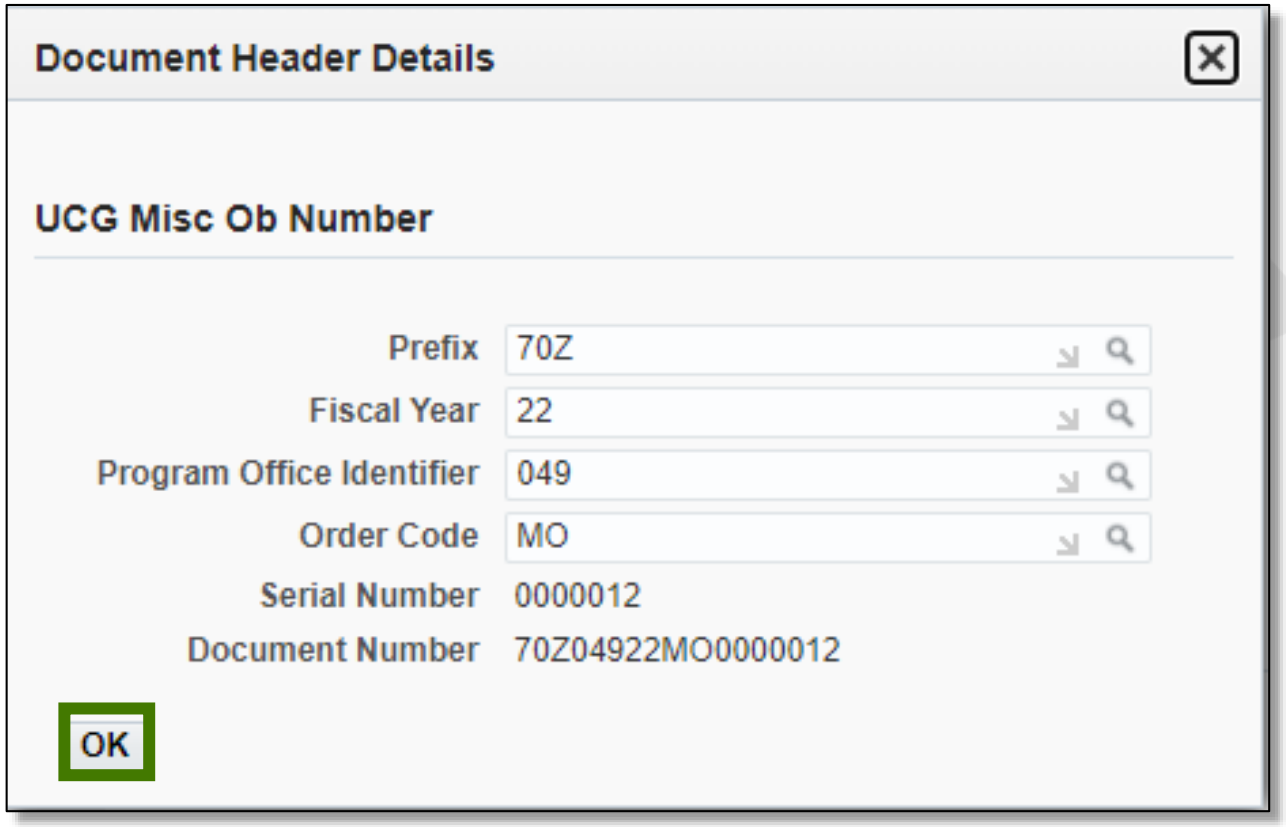
1



Step 1: Click the ***Edit Document Number*** link

How To Complete The Award Header – Step 2

2



The Lease Buyer will fill out the UCG Misc Ob Number fields

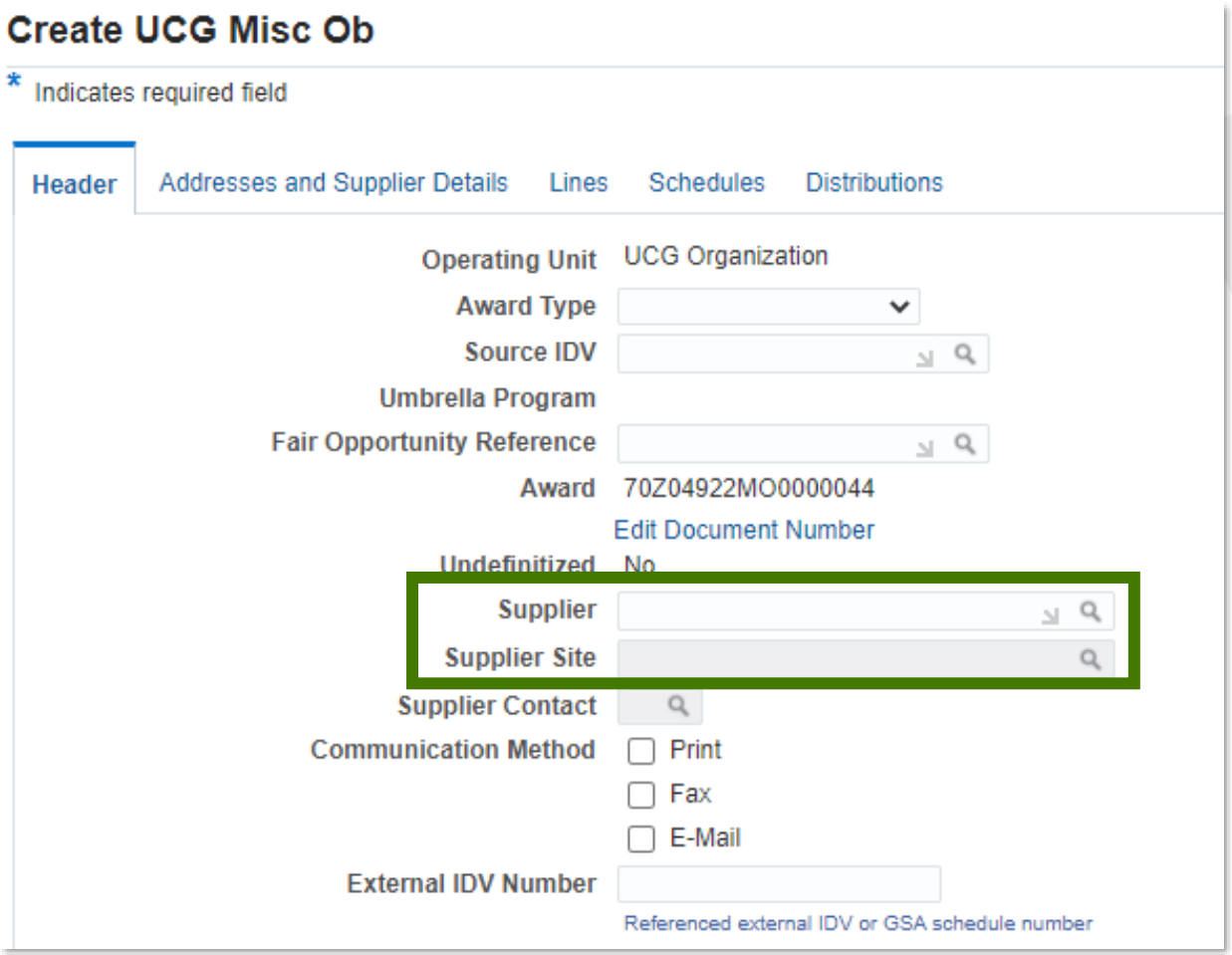
The Lease Document Number is made up of five segments:

1. *Prefix* – 70Z for all leases
2. *Fiscal Year* – This field will default to the current fiscal year
3. *Program Office Identifier* – This field is program office ID for the office making the award
4. *Order Code* – This will always be MO for Miscellaneous Obligations
5. *Serial Number* – Will automatically populate the serial number based on the amount of awards made by program office ID

Step 2: Click the ***Ok*** button to apply the document number to the award

How To Complete The Award Header – Step 3

3



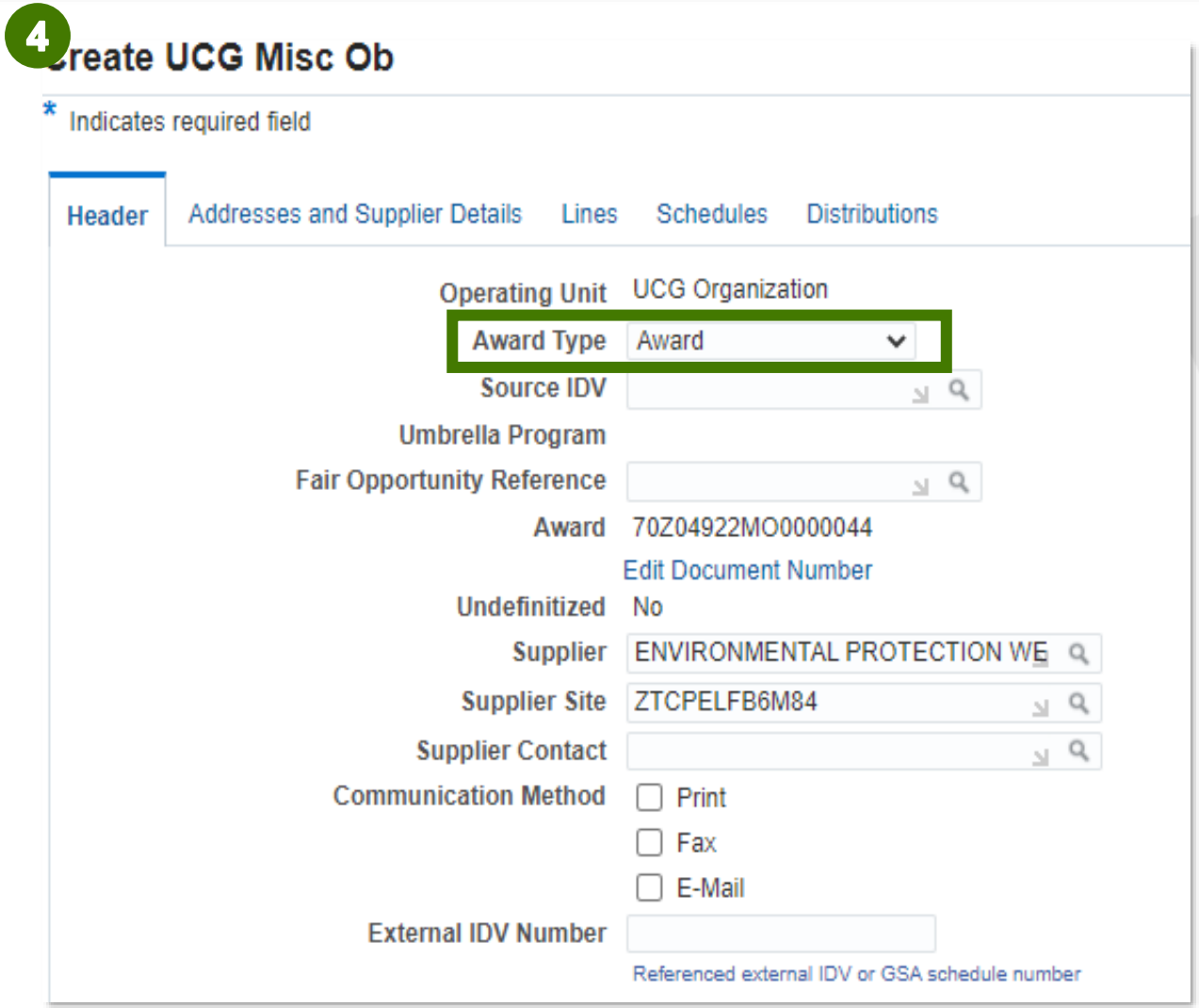
Step 3: Use the search and select feature to enter the supplier details*

Note – For Federal Entities, Select the appropriate supplier (i.e. Federal Trading Partner – Servicing Agency) by clicking the corresponding quick select button

Note – Federal Trading Partners start with an ALC, user should either search by ALC or put a % before the name of the Federal Trading Partner (example: %Department of Homeland Security)

Note – If the Federal or Non-Federal Entity does not come up when using the Search and Select tool, you will need to submit a Supplier Request Form to FIN-SMB-FSMS-Vendorsupport@uscg.mil

How To Complete The Award Header – Step 4

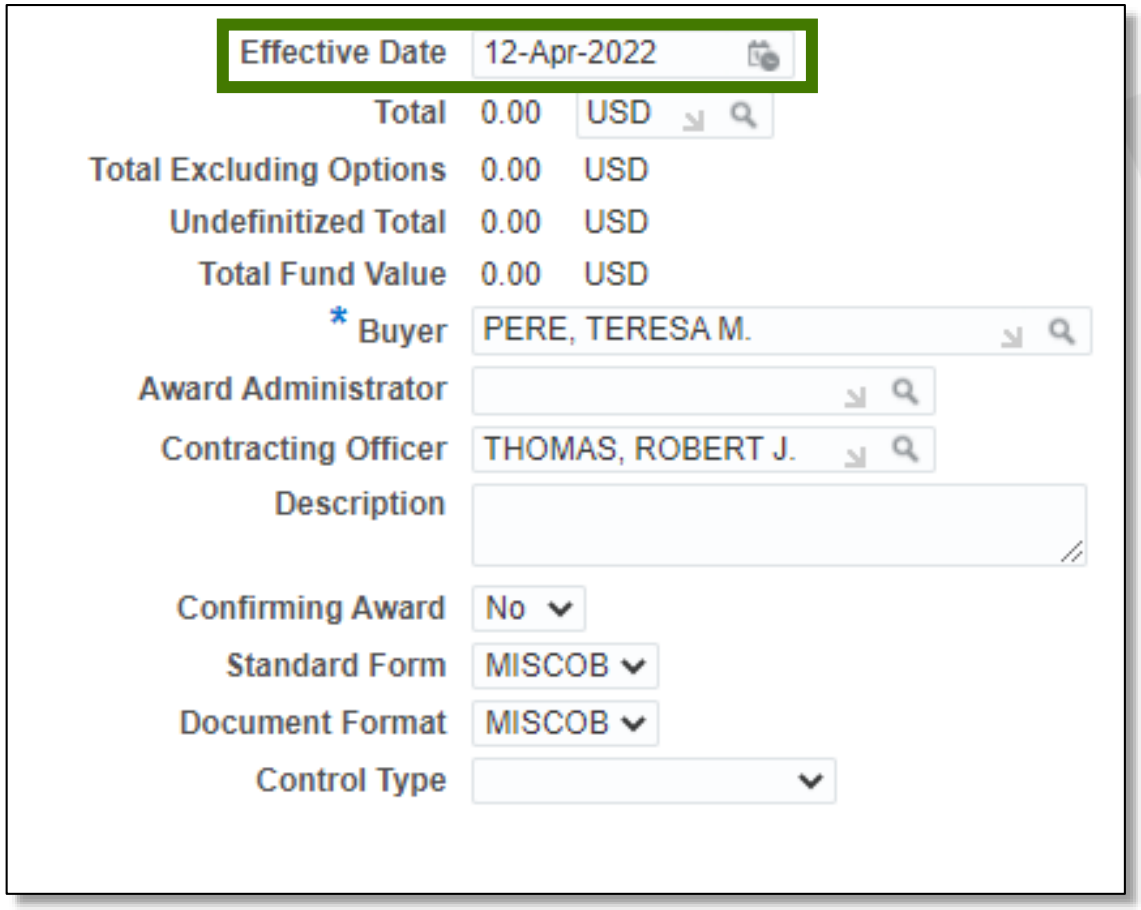


Step 4: Click the Award Type dropdown and Select Award*

Note – The Award Type for all Misc. Obligations shall always be Award

How To Complete The Award Header – Step 5

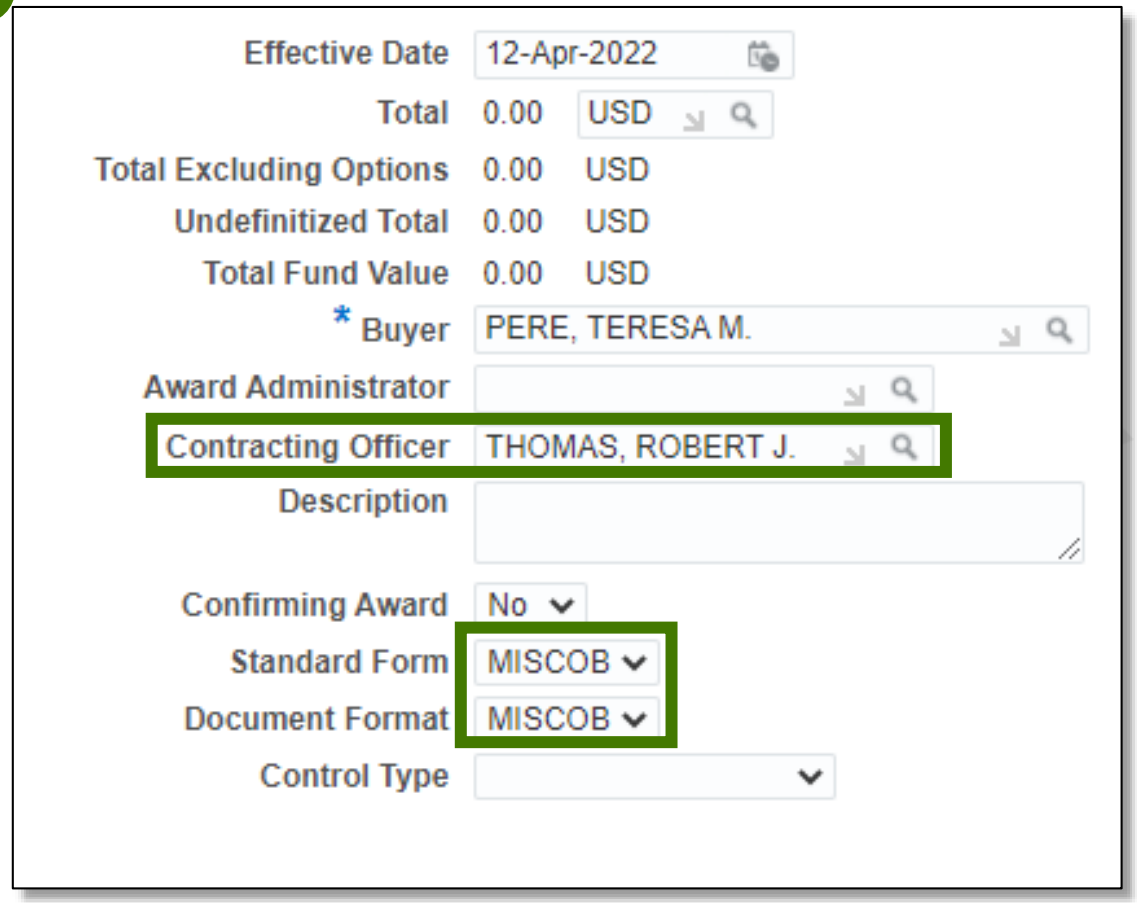
5



Step 5: Click in the ***Effective Date*** field and select the date of the award

How To Complete The Award Header – Step 6

6



Step 6: Verify that the name listed in the contracting officer field is the person who will be approving the Misc. Obligation award (i.e. obligation) as the Misc. Obligation Approver

Verify that the Standard Form and Document Format have ***MISCOB*** selected

NOTE: This does **not** have to be the same person who signs the funded order as the Obligation Approving Official per policy

How To Complete The Award Header – Steps 7 & 8

7

Step 7: Enter ***Immediate*** into the Payment Terms field

Step 8: Verify the Ship-To Location

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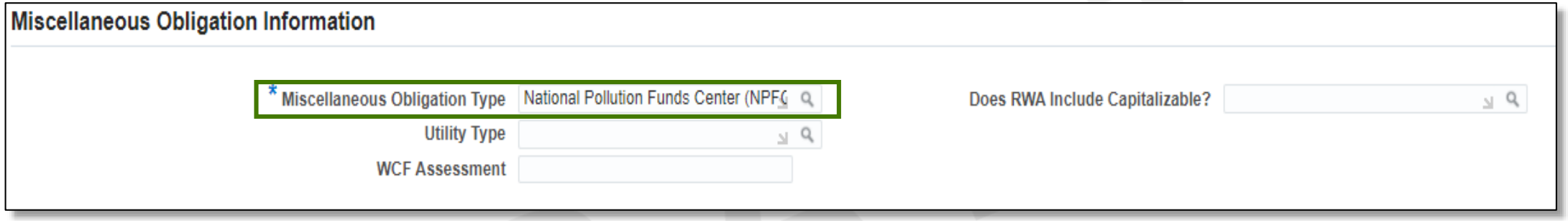
How To Complete The Award Header – Step 9

9



Step 9: Ensure the ***Miscellaneous Obligation Type*** *selected is National Pollution Funds Center PRFA/INRDA*

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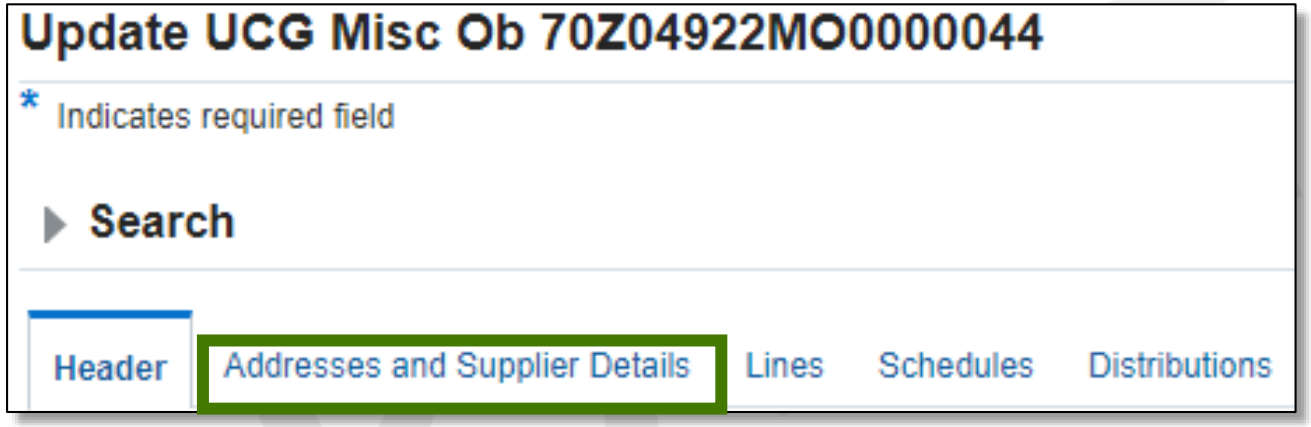
How To Verify Addresses And Suppliers – Step 1

1



Step 1: Click on the ***Addresses and Supplier Details*** link

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How To Verify Addresses And Suppliers – Step 2

2

Addresses

Show All Details | Hide All Details

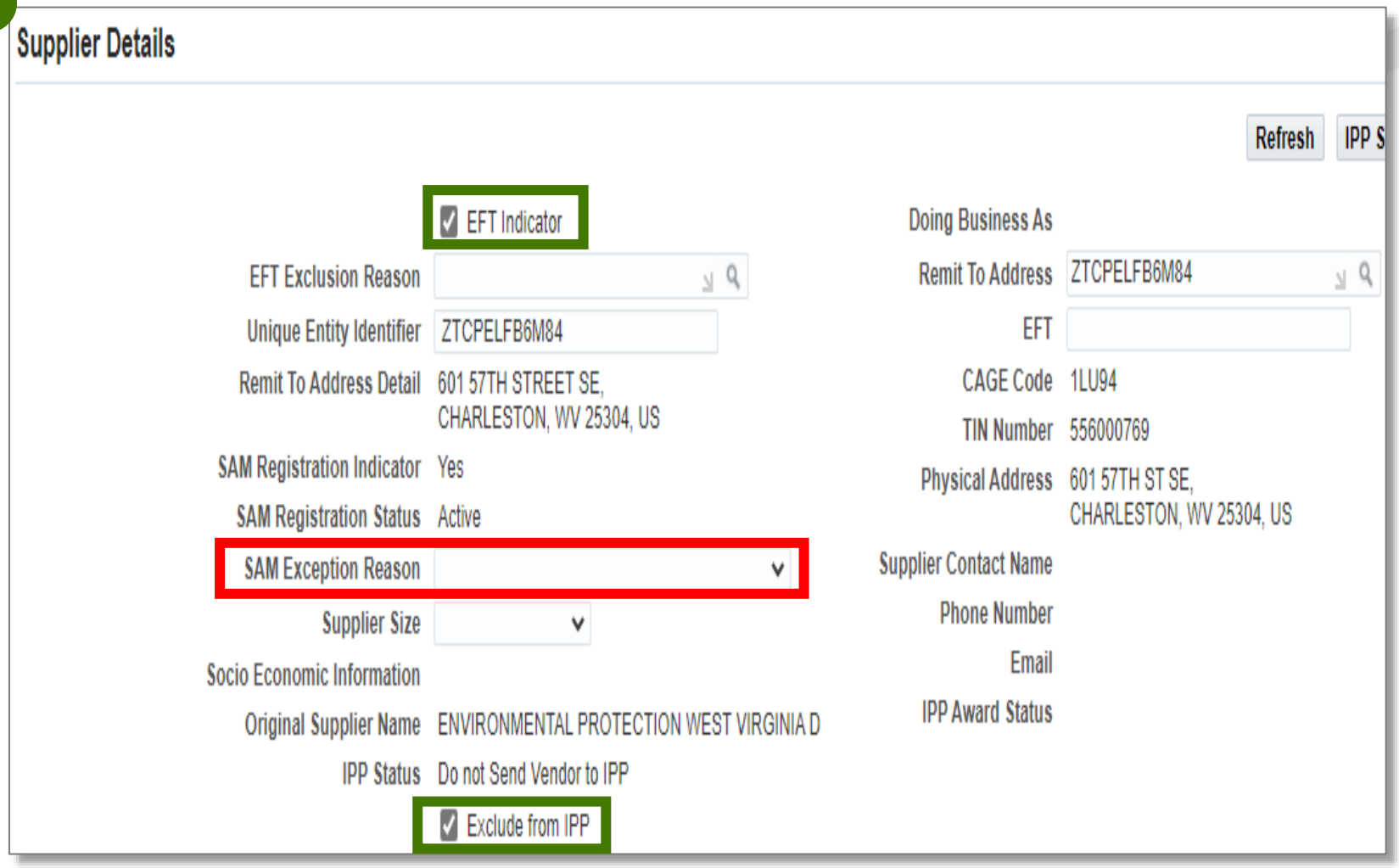
Details	Address Type	Location	Address Code	Contact
	Issuing Office	31150 BASE CHARLESTON PROC &	Z31150	PERE, TERESA M.
	COR Office	31150 COR BASE CHARLESTON FA(	Z31150	
	Administration Office	70Z036 Regional Support Team (RST-	70Z036	PERE, TERESA M.
	Requesting Office	37090 SECTOR CHARLESTON PREV	Z37090	FOSTER, DERRIO D.
	SBA Office			
	Property Administration Office			
	Invoice Office	USCG FINANCE CENTER	Z51800	
	Payment Office	USCG FINANCE CENTER	Z51800	

Step 2: Enter the appropriate information in the required ***Address*** fields as required using the ***Search and Select*** icon:

- **Administration Office**: This will be the contracting office administering the Assisted Acquisition. The location name will start with 70Z0XX
- **COR Office**:Will be the OPFAC who will be managing the award, if applicable. (**Note –** A POC shall not be entered for Misc Ob's, however will cause a warning during validation. The Award will still be able to be submitted)
- **Invoice Office**: Will be USCG Finance Center
- **Issuing Office**: Will be the OPFAC and POC for who is issuing the award (Same as the Administration Office)
- **Payment Office**: Will be USCG Finance Center
- **Property Administration Office**: Not applicable
- **Requesting Office**: Will be the OPFAC and POC for who put in the requisition
- **SBA Office**: Not required for Misc Ob Awards

How To Verify Addresses And Suppliers – Step 3

3



Step 3: Federal Entities

1. Ensure the ***EFT Indicator*** is selected

2. Verify the address information is correct

3. Select US Federal Vendor for SAM Exception Reason

4. Ensure Exclude from IPP is selected

5. Click the ***Save*** button

Step 3: Non-Federal Entities

1. Ensure the ***EFT Indicator*** is selected

2. Verify the address information is correct

3. Verify Supplier IPP Status and Select Exclude for IPP if applicable

4. Click the ***Save*** button

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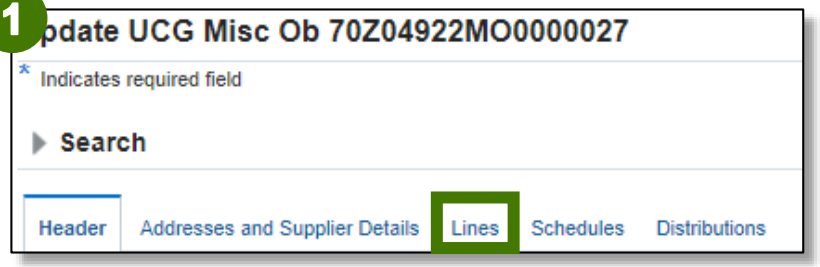
How to Create Lines on an Award – Steps 1 & 2

1



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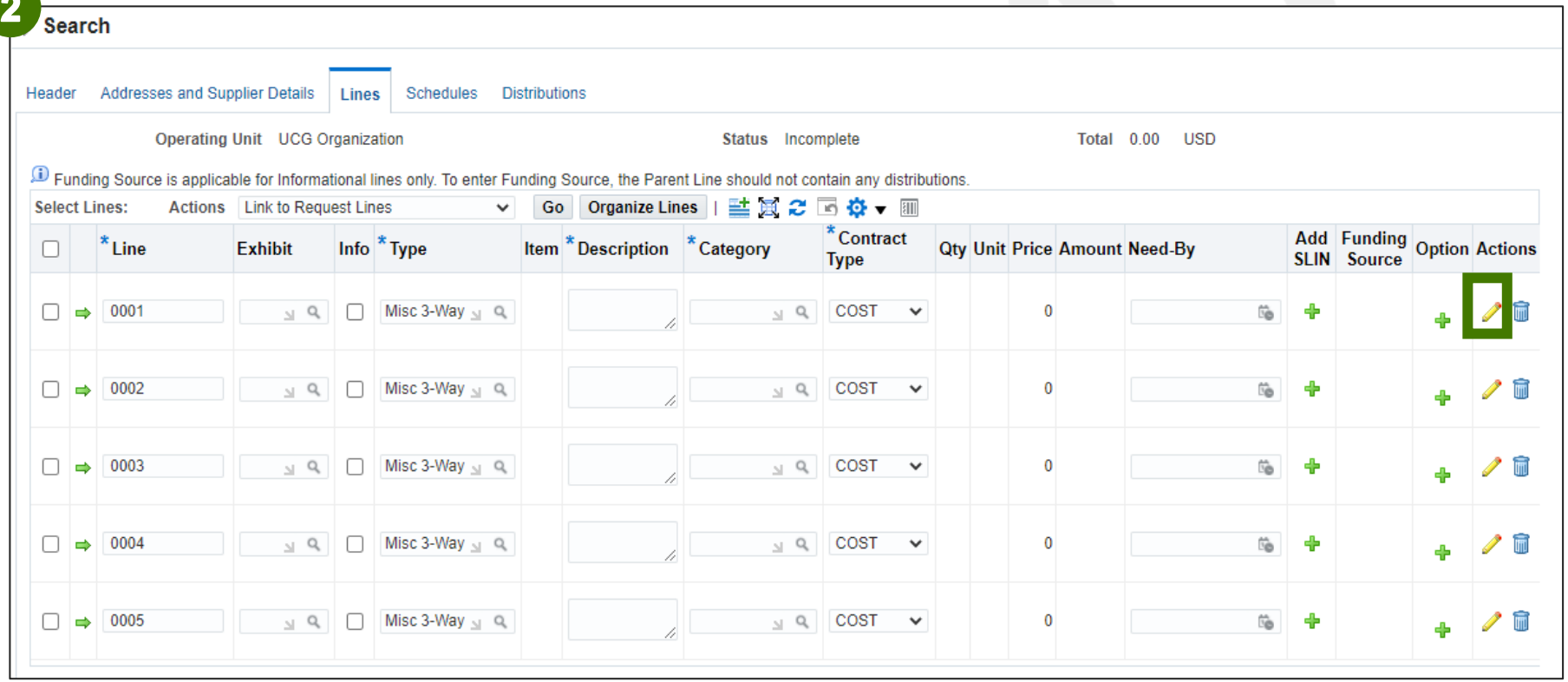
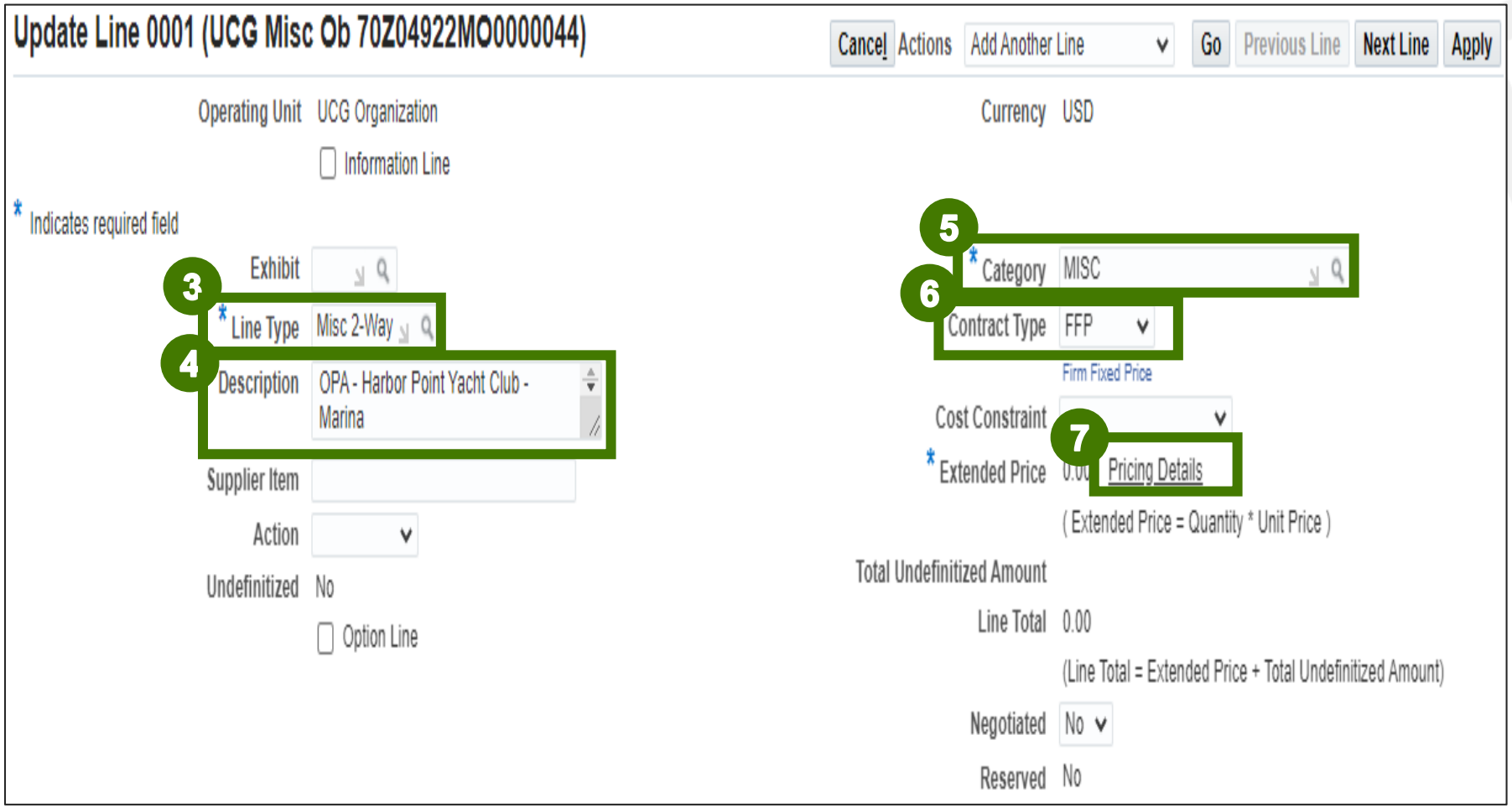


Step 1: Click the ***Lines*** link

Step 2: Click the Edit Lines button to edit line details

How to Create Lines on an Award – Steps 5 - 7



Step 3: Ensure Misc 2-Way is selected for the Line Type

Step 4: The Description shall include the following items:

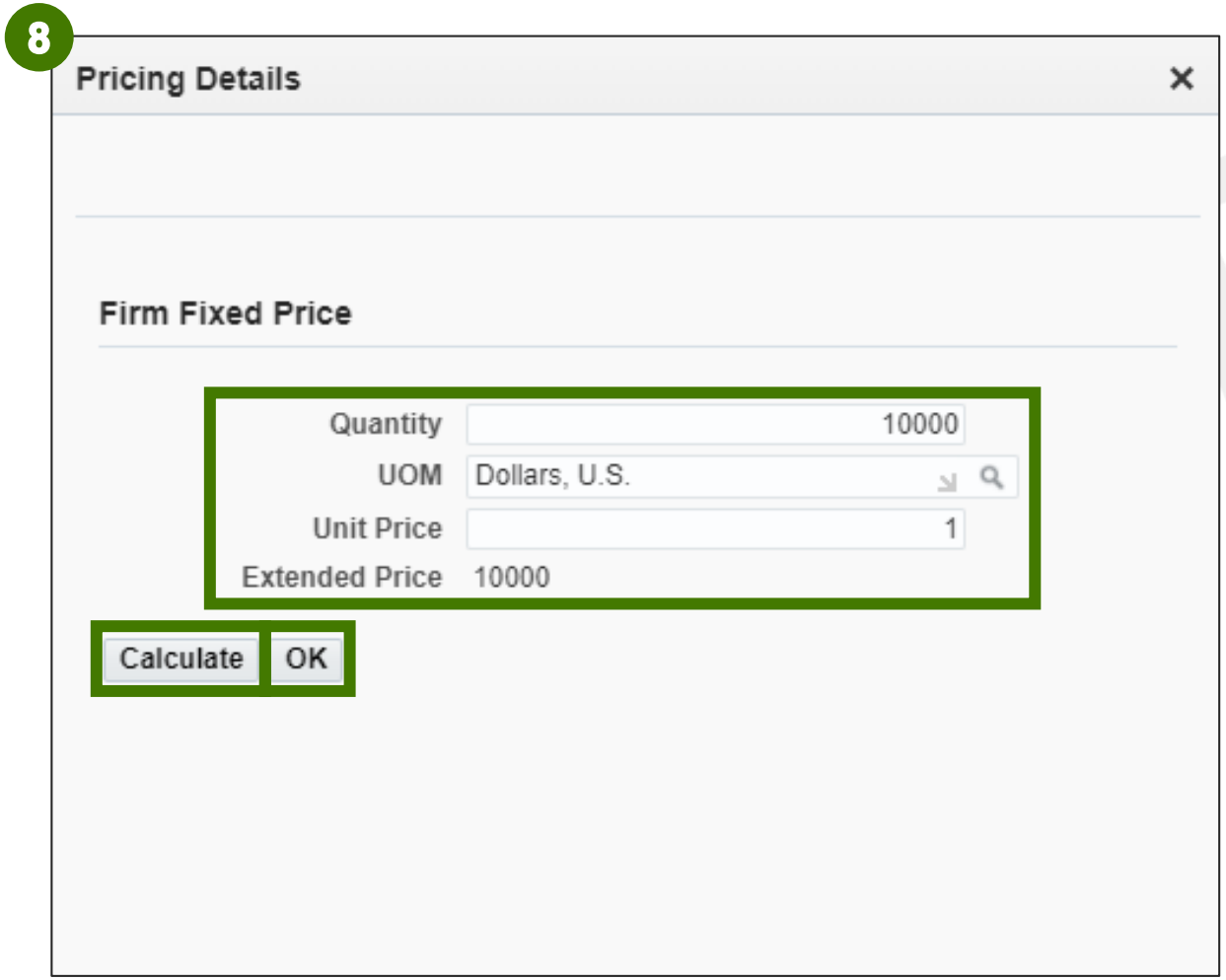
PRFA – Project Name and Federal Project Number
Recipient Agency Name
Address
Unique Entity Identifier
Tax ID Number

Step 5: Category shall be MISC

Step 6: Contract Type shall be FFP

Step 7: Click the Pricing Details Link

How to Create Lines on an Award – Step 8



Step 8: Complete the pricing details, Pricing details must always be in the below format

Quantity = Total Cost
UOM = Dollars, U.S.
Unit Price = 1

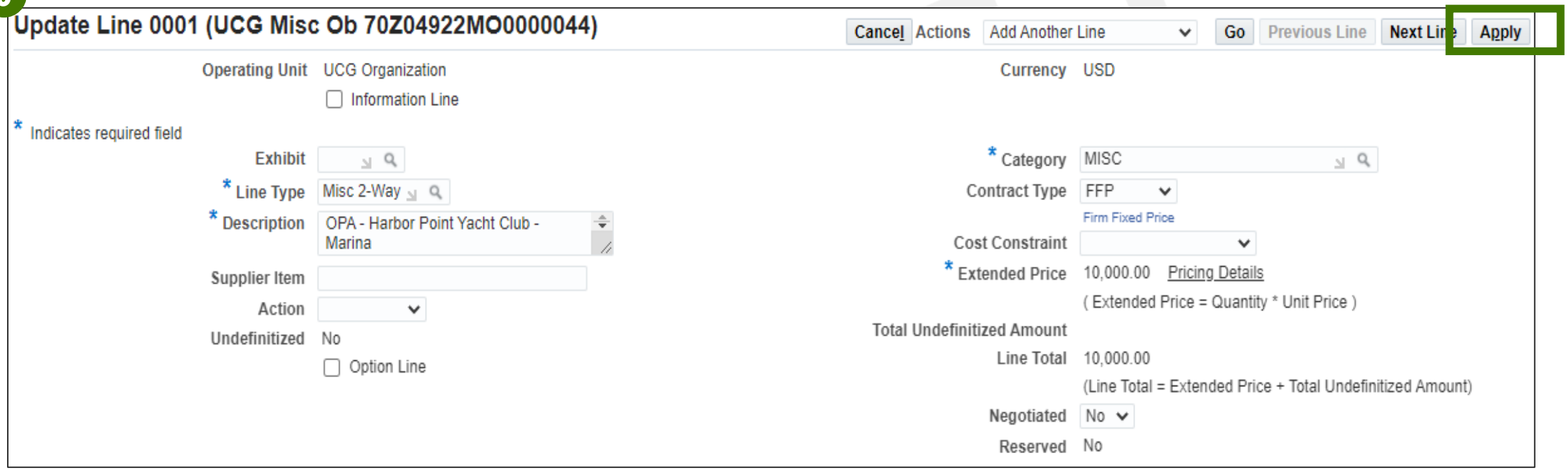
Click the Calculate button

Click the Ok button

How to Create Lines on an Award – Step 9

Step 9: Click the Apply button

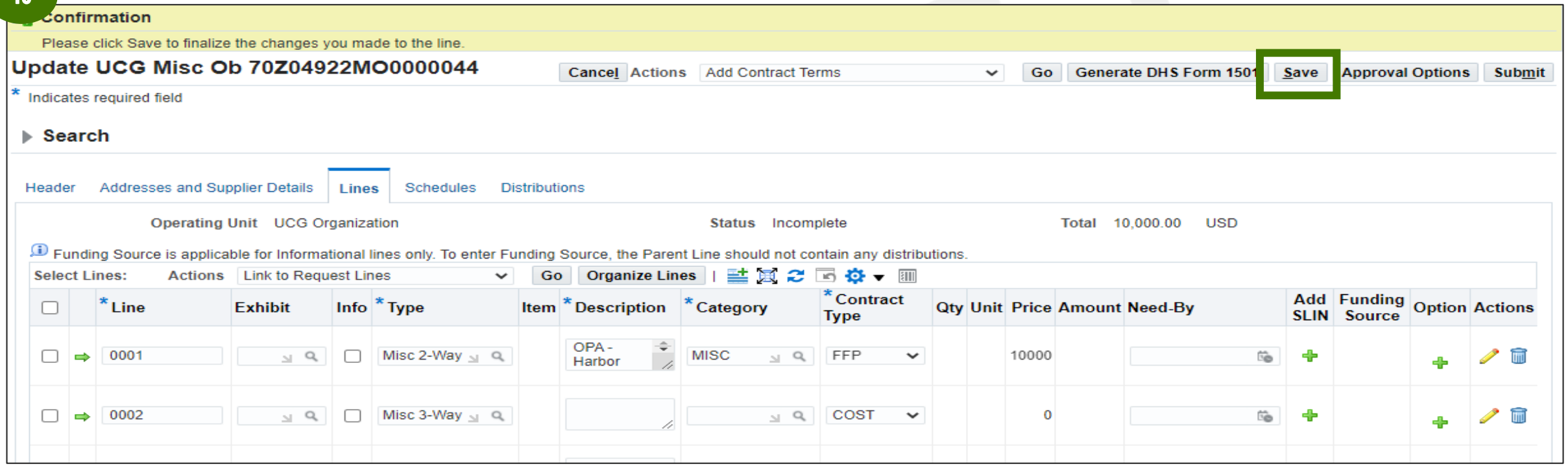
9



How to Create Lines on an Award – Step 10

Step 10: Click the Save button to apply the changes you made

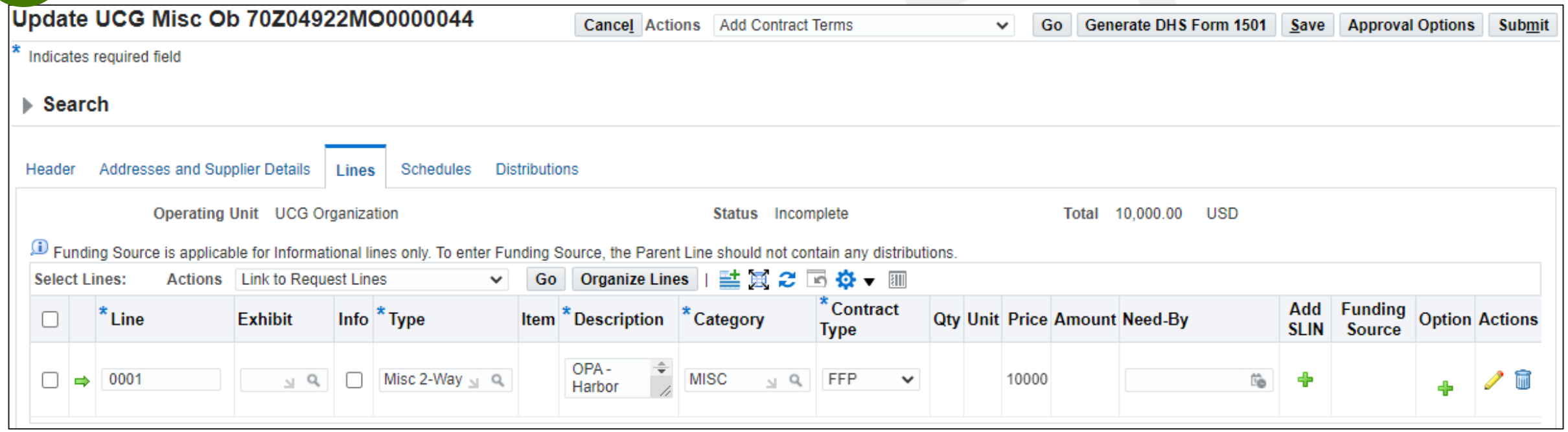
10



How to Create Lines on an Award – Step 11

Step 11: Changes will be applied and unused lines will be deleted

11



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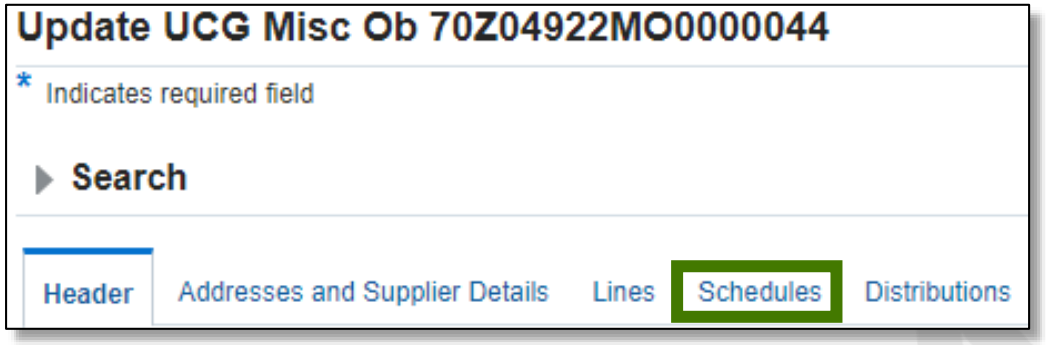
How to Update Award Schedules – Steps 1 & 2

1



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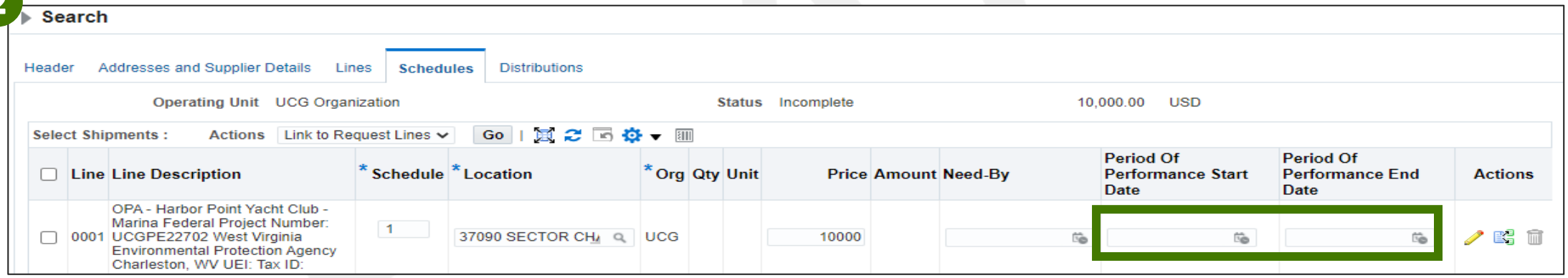
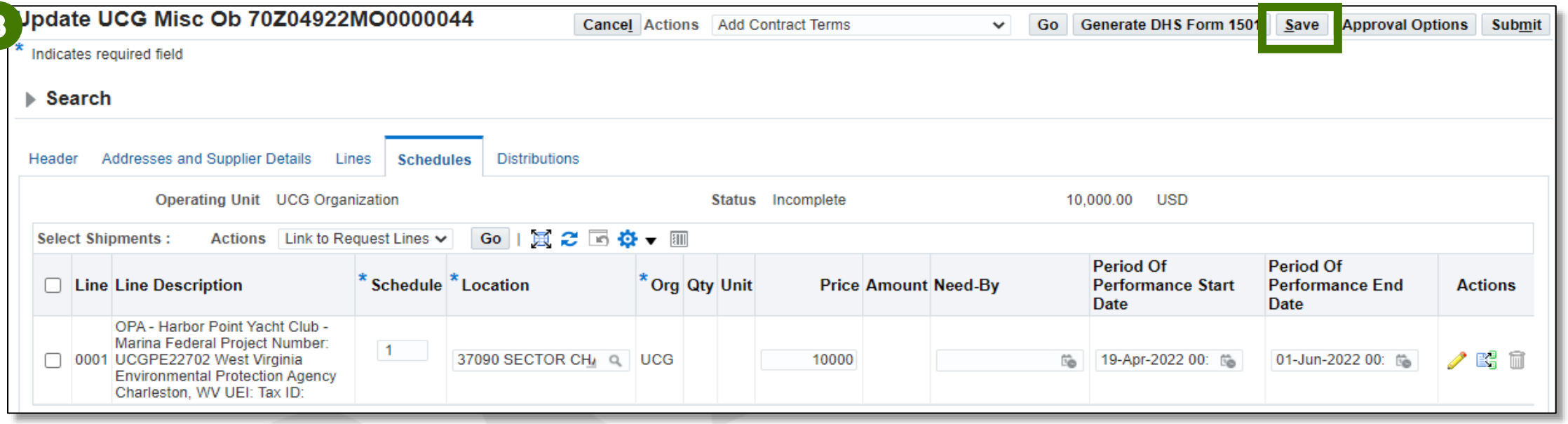


Step 1: Click the ***Schedules*** link

Step 2: The details for the award schedules will display showing the Delivery Location. The Period of Performance Dates should be updated to reflect the period of performance for the PRFA

How to Update Award Schedules – Step 3



Step 3: Click the Save button to apply changes

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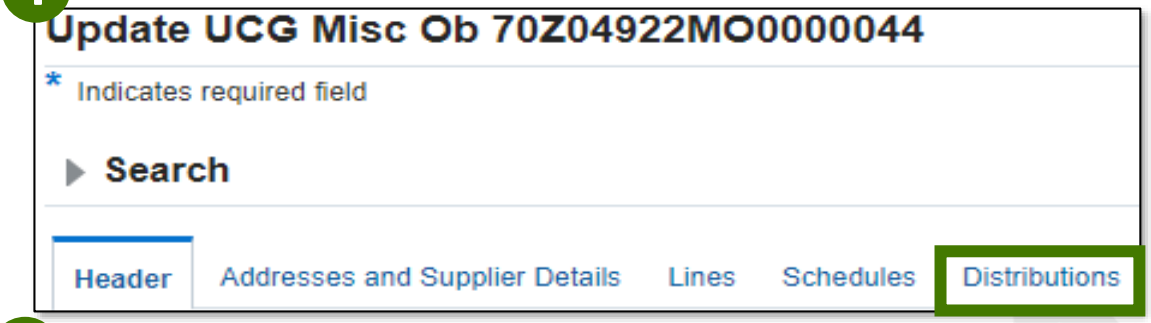
Create Award Distributions – Steps 1 & 2

1



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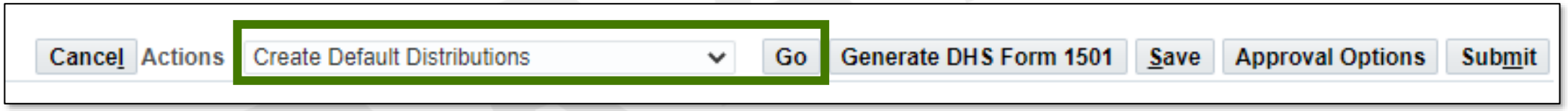

Step 1: Click the ***Distributions*** link

Step 2: On the Actions dropdown Select ***Create Default Distributions*** and Click the Go button

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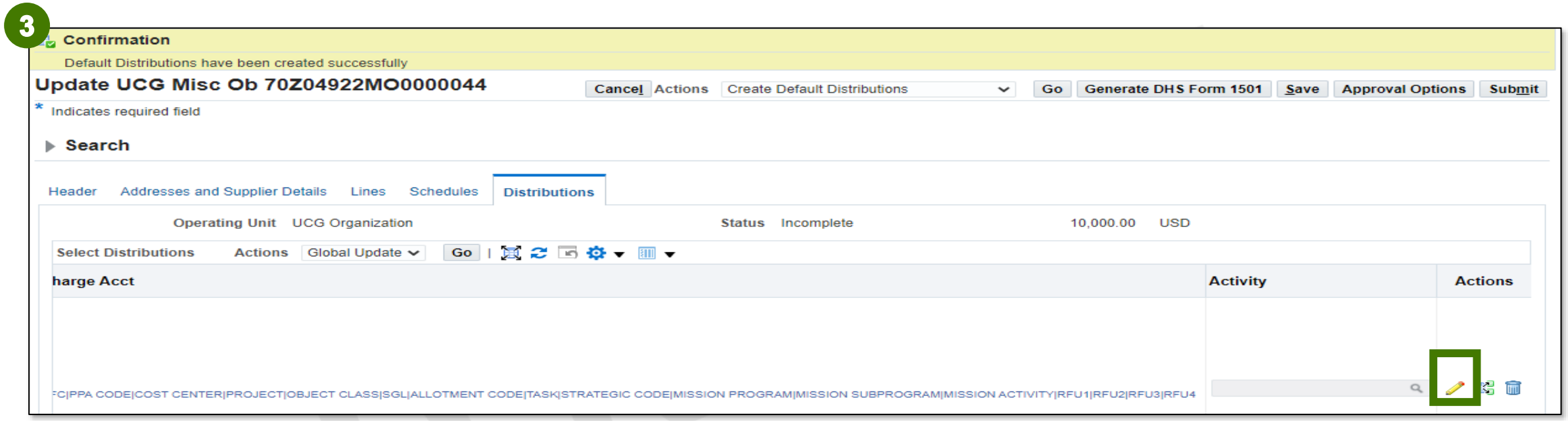
Create Award Distributions – Step 3



Step 3: A new distribution line will be created, Click the Edit icon

Create Award Distributions – Step 4

4

Project	UCGITC1OPS
* Task	22OPRTNS
* Expenditure Type	252046.Other_Driver Servic
* Expenditure Org	37090 SECTOR CHARLES
* Expenditure Item Date	12-Apr-2022

Step 4: Enter the correct POET information for the new award line

Note – The Expenditure Type for all Non-Federal Entities is 252046

Note – The Expenditure Type for all Federal Entities is 253014

Note – The Expenditure Item Date must be the date that the modification is being created

Click the Apply button

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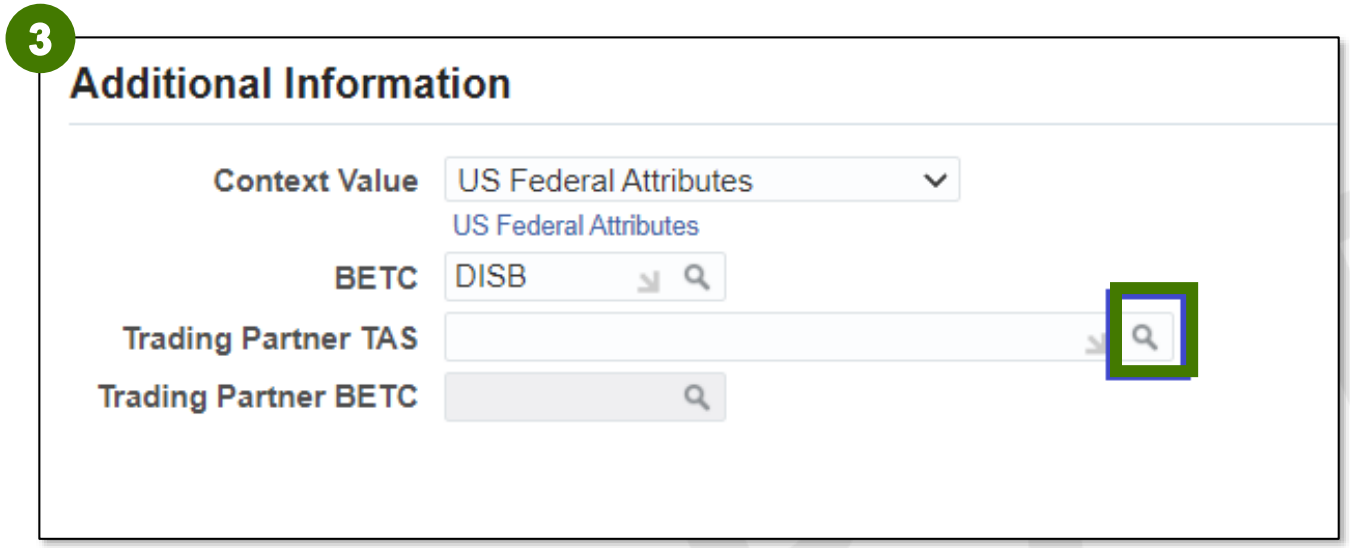
Create Award Distributions – Step 5 (For Federal Entities Only)



Step 5: Scroll to the ***Additional Information*** section, the Context Value will display US Federal Attributes, Click the dropdown and select the blank Context Value, then select US Federal Attributes again

Note: Since Assisted Acquisitions actions are done with a Federal Agency, the user will need to enter the Trading Partner Treasury Account Symbol (TAS) and Business Event Type Code (BETC) information. The BETC will populate based off the Trading Partner TAS Code chosen

Click the ***Trading Partner TAS Search and Select*** button, Utilize the Search and Select feature to select the appropriate Trading Partner TAS for the Assisted Acquisition

Note – This step will not be completed if using a Non-Federal Entity

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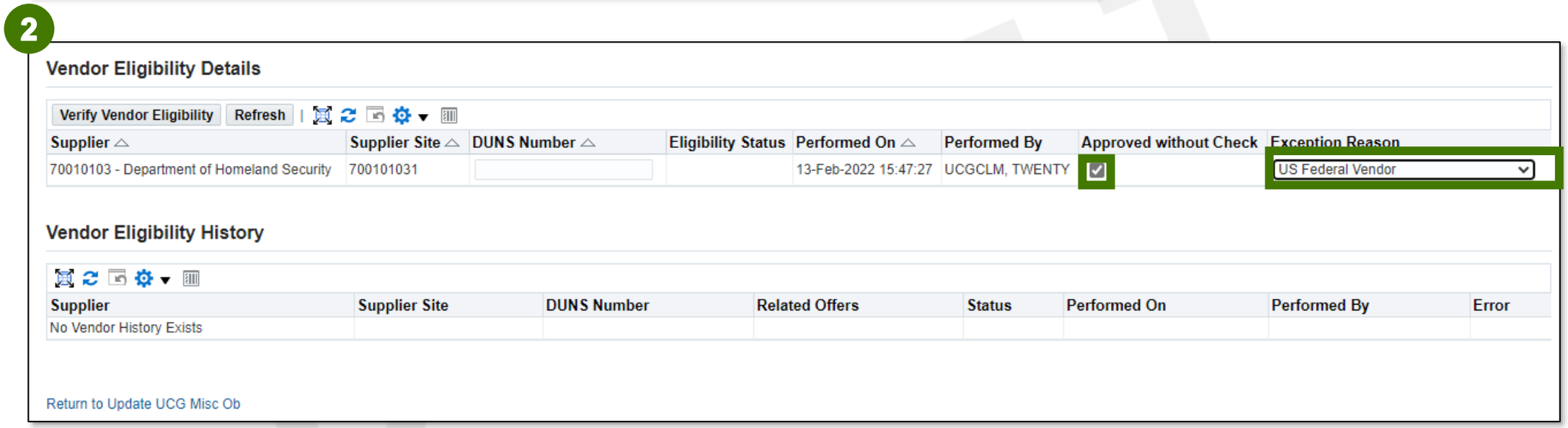
HOW TO VERIFY VENDOR ELIGIBILITY FOR FEDERAL ENTITIES

How To Verify Vendor Eligibility For An Award for Federal Entities– Steps 1 & 2



Step 1: Click on the ***Actions Dropdown*** button and select ***Verify Vendor Eligibility*** and Click the ***Go*** button

Step 2: The Verify Vendor Eligibility page will display. Click the ***Approved Without Check*** checkbox.

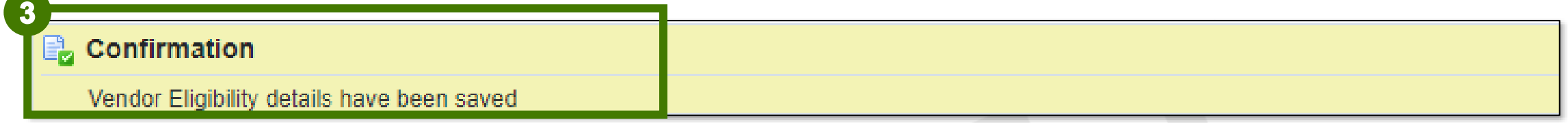
Note: The Performed On and Performed By fields will populate with the current date and name of the user

Click the ***Exception Reason*** dropdown button and select ***Us Federal Vendor***

Click the ***Save*** button

How To Verify Vendor Eligibility For An Award for Federal Entities – Step 3

3



Step 3: A confirmation message will display.

Click the Return to Update UCG Misc Ob link

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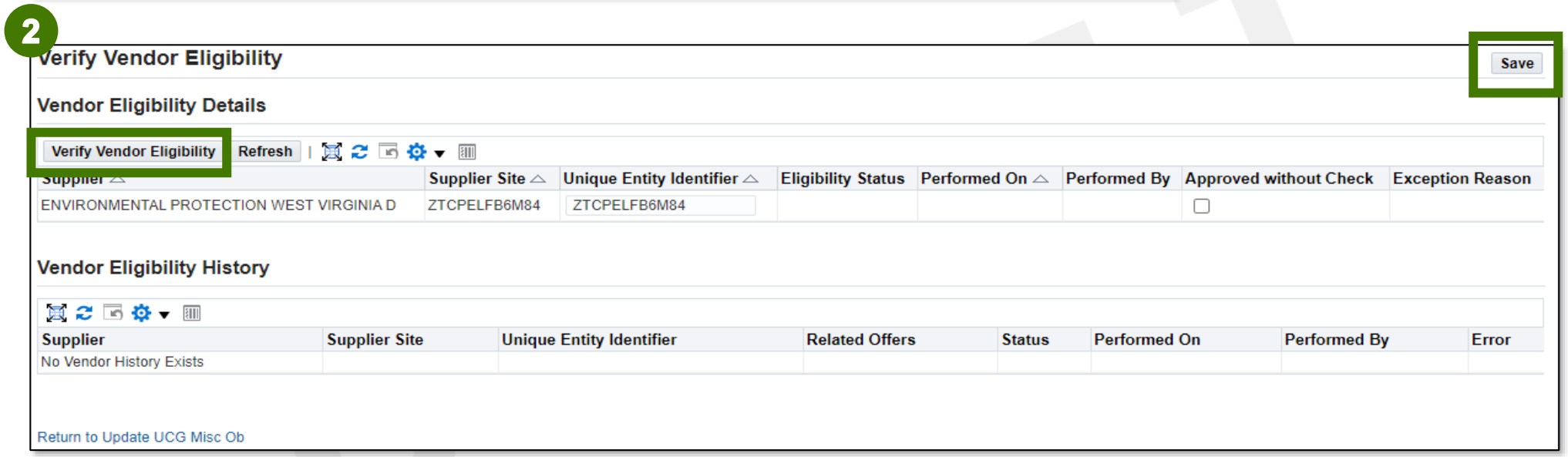
HOW TO VERIFY VENDOR ELIGIBILITY FOR NON-FEDERAL ENTITIES

How To Verify Vendor Eligibility For An Award for Non-Federal Entities – Steps 1 & 2



Step 1: Click on the ***Actions Dropdown*** button and select ***Verify Vendor Eligibility*** and Click the ***Go*** button

Step 2: The Verify Vendor Eligibility page will display. Click the ***Verify Vendor Eligibility*** button

Click the Save button

How To Verify Vendor Eligibility For An Award for Non-Federal Entities – Step 3

3

Confirmation

Vendor Eligibility check details have been refreshed for the supplier

Verify Vendor Eligibility

Save

Vendor Eligibility Details

Verify Vendor Eligibility | Refresh

Supplier	Supplier Site	Unique Entity Identifier	Eligibility Status	Performed On	Performed By	Approved without Check	Exception Reason
ENVIRONMENTAL PROTECTION WEST VIRGINIA D	ZTCPELFB6M84	ZTCPELFB6M84	Eligible	12-Apr-2022 13:06:21	THOMAS, ROBERT J.	☐	

Vendor Eligibility History

Supplier	Supplier Site	Unique Entity Identifier	Related Offers	Status	Performed On	Performed By	Error
ENVIRONMENTAL PROTECTION WEST VIRGINIA D	ZTCPELFB6M84	ZTCPELFB6M84		Submitted	12-Apr-2022 13:06:20	THOMAS, ROBERT J.	
ENVIRONMENTAL PROTECTION WEST VIRGINIA D	ZTCPELFB6M84	ZTCPELFB6M84		Eligible	12-Apr-2022 13:06:20	THOMAS, ROBERT J.	

Return to Update UCG Misc Ob

Step 3: Click the Return to Update UCG Misc Ob link

HOW DO I CREATE AN AWARD FOR POLLUTION REMOVAL FUNDING AUTHORIZATION

SECTIONS

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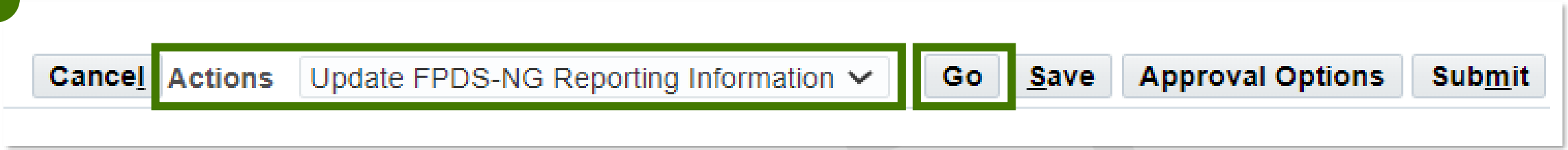
3. How To Verify Addresses and Suppliers
4. How To Create Award Lines
5. How To Update Award Schedules
6. How To Create Award Distributions

SECTIONS

7. How To Verify Vendor Eligibility on an Award
8. **Bypass Creating A FPDS-NG Reporting Detail For An Award**
9. How To Check Funds on an Award
10. How To Validate an Award
11. How To Submit an Award for Approval

Bypass Creating A FPDS-NG Reporting Detail For An Award – Step 1

1



Step 1: Click the ***Actions Dropdown*** button and select ***Update FPDS-NG Reporting Information***

Click the ***Go*** button

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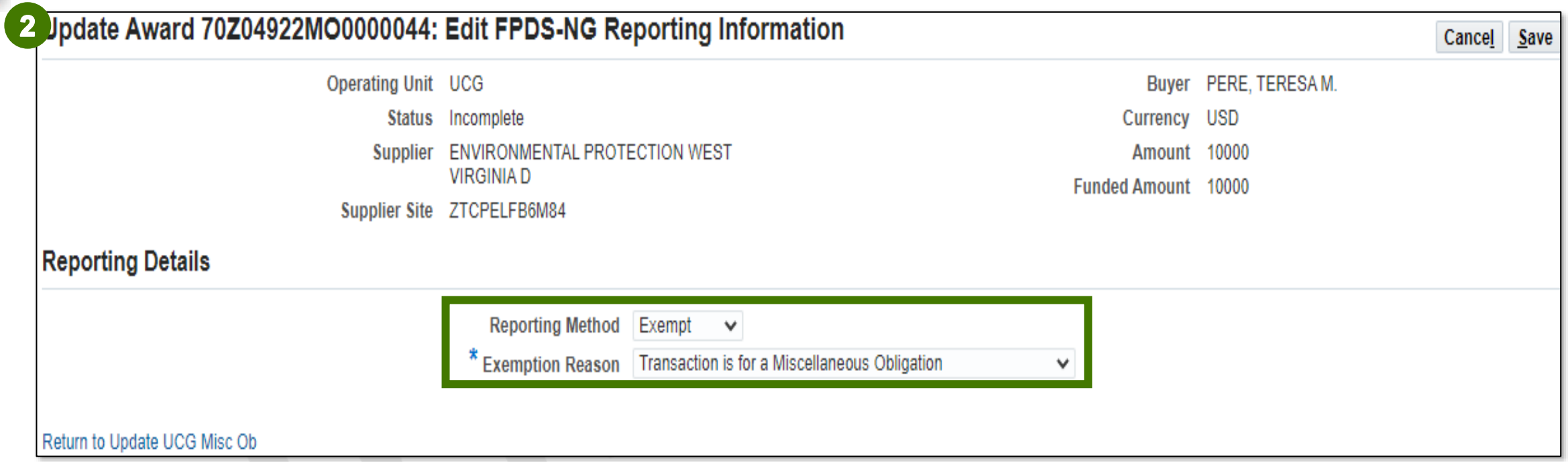
Bypass Creating A FPDS-NG Reporting Detail For An Award – Step 2

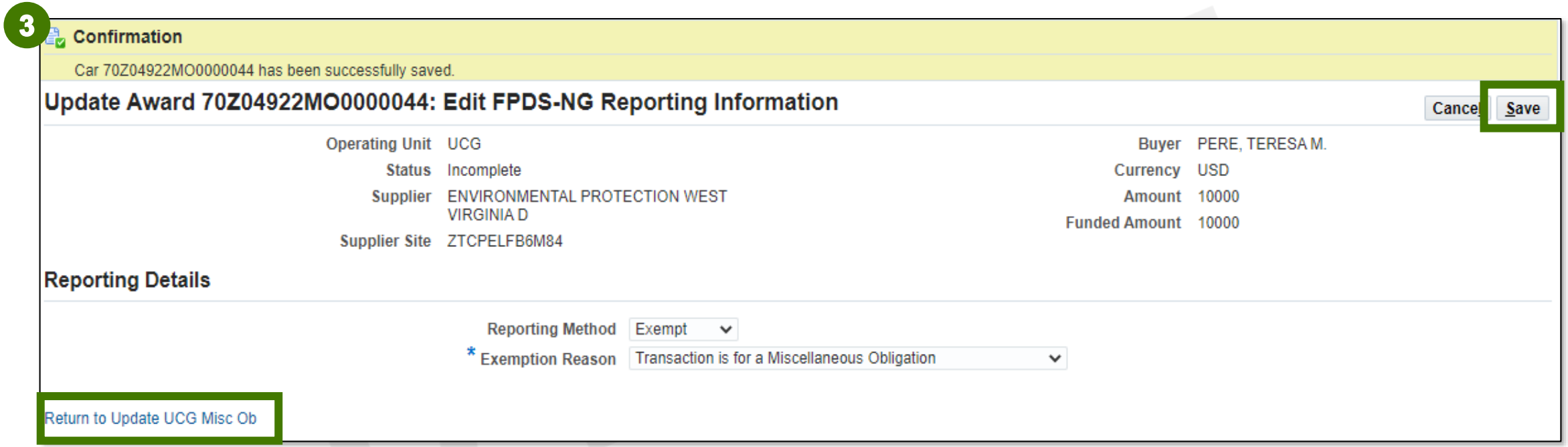


The Preparer will scroll to the Reporting Details section:

Step 2: Click the ***Reporting Method dropdown*** button and select ***Exempt***

Click the ***Exemption Reason dropdown*** button and select ***Transaction is for a Miscellaneous Obligation***

Bypass Creating A FPDS-NG Reporting Detail For An Award – Step 3



Step 3: Click the ***Save*** button. A confirmation message will display stating the FPDS-NG Reporting Detail has been saved.

Click the ***Return to Update UCG Misc. Ob*** link

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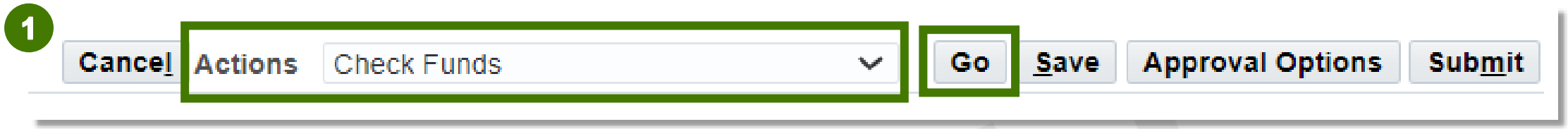
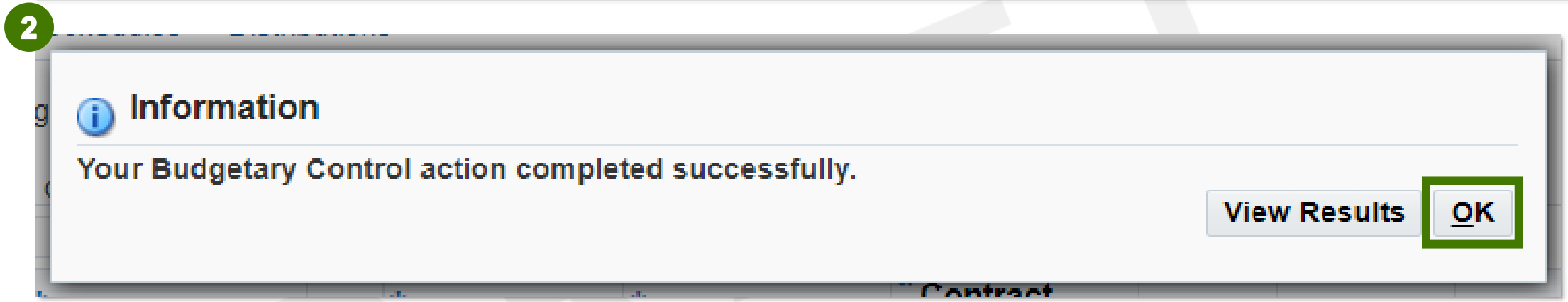
How To Perform A Funds Check On An Award – Steps 1 & 2





Step 1: Click on the ***Actions Dropdown*** button and select ***Check Funds***

Click the ***Go*** button

Note**:** If funding is available, an information message will display in a new window confirming that the Budgetary Control action has completed successfully.

Step 2: Click the ***Ok*** button

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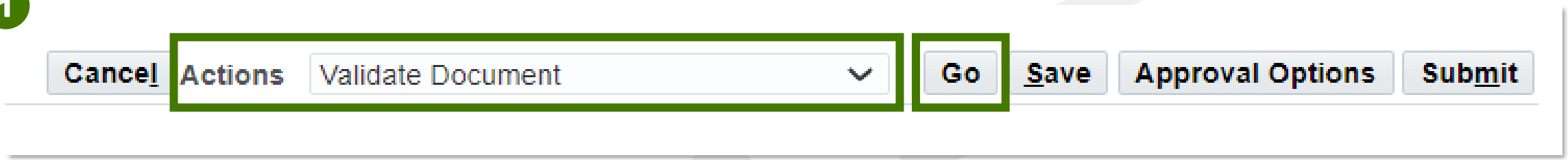
How To Validate An Award Document – Step 1

1



Step 1: Click the ***Actions Dropdown*** button and select ***Validate Document***

Click the ***Go*** button

Note: If the award document has no errors, you will get a confirmation that the Award has been validated

Note: If there are errors on the award document, the errors will be listed and you will not be able to proceed to the next step until the errors are corrected

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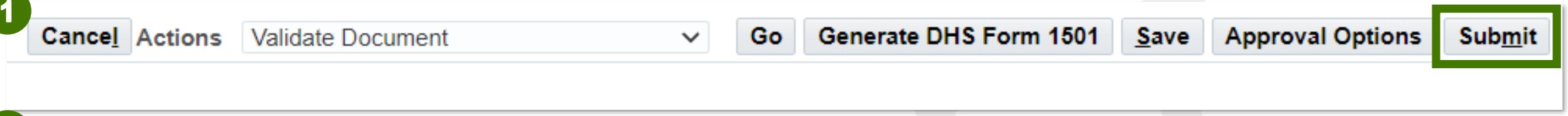
How To Submit An Award For Approval – Steps 1 & 2

1



2

Step 1: Click the ***Submit*** button

Step 2: A pop-up box will display asking if you want to continue, click the ***Yes*** button

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Note: You will be returned back to the Demand Workbench page and a Confirmation will display stating that 'UCG Misc Obligation (70ZXXX22MO000000X) has been submitted for approval

Note: If you have additional PRFA Obligations to award, return back to Slide 4 and re-start the award process

COMMON ERRORS WHEN COMPLETING THE AWARD PROCESS

The following is a list of common issues when creating an award for Miscellaneous Obligations

1. **COR Contact in Addresses and Suppliers:** The COR contact shall not be entered for any Misc Obligations, however this will display a warning during award validation and the award shall still be submitted

2. **IPP Exempt:** IPP Exempt shall be selected for all PRFA Awards for Federal Vendors, Obligation Preparers shall verify if the non-federal supplier is exempt when checking supplier details

3. **Amount Based Lines:** **ALL** Misc Obligations are required to be Amount Based, no exceptions

4. **2-Way Match:** Misc Obligations are required to be set to 2-way match in schedules for payment to be processed by FINCEN

5. **Error: Warrant Not Found:** This error populates if the person listed in the Contracting Officer field does not have the appropriate warrant set up in the system. The proper setup for the MILSTRIP Approver Role is: UCG Miscellaneous Obligation Approver - should have USCG Non Contracting Unlimited for warrant type. Submit a SNOW ticket to fix this error

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NEXT STEPS & AVAILABLE TRAININGS

You have reviewed Version 1.0. For the latest Job Aid versions, please click here.

You may access any **available trainings, if applicable,** on the Common Core Learning Platform**.**

Stay informed on the latest FSMS-related updates by visiting the FMPS Homepage and subscribing *to The FSMS Fix*.

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