PCM: Purpose Codes and Payment/CAO Office Management

Presented by:
Erik Mims, Lisa Romney, and Kris Humphrey
DoDAAC Changes

• DoDAAC use has expanded beyond the traditional supply function
• Data in the DoDAAC record can now indicate that the DoDAAC is used for other purposes (e.g. Procurement, Grants)
• DPC is centralizing the management of that data at PIEE and placing it under governance of the appropriate functional leads
• Data will be sent from PIEE to DoDAAD to update the DoDAAC record, but PIEE will be the authoritative source for certain data elements
Purpose Codes

• Purpose codes are “flags” that identify organizations (by their DoDAAC) with particular functional capabilities, such as:
  • Procurement
  • Grants
  • Payment
  • Contract Administration

• They have been managed via spreadsheet in a highly manual process

• We need a place to allow the community to look up/view which offices have these capabilities, and to allow the functional owners of these flags to manage them

• New module introduced in November 2018 where these Purpose Codes can be managed.
Contract Administration DoDAACs

- The list of DoDAACs that perform Contract Administration is managed by DCMA
  - Assigned by zip code of the contractor
  - Exceptions based on particular CAGE
- Manual process to maintain and publish this list
- No automated look up (former system (CASD) has been decommissioned)
Why Use PIEE?

• It’s familiar: For those in the Procurement domain, most already have WAWF accounts.
• It has workflow: We can assign workflow routing and approval chains depending on the need.
• It’s available today: And Procurement can have changes made in a reasonable timeframe.
• PIEE will become the authoritative source for this data.
Purpose Code in PIEE Concept

WAWF PIEE Single Sign On

Wide Area Workflow

Purpose Code Look Up
- Find a CAO
- Find a Payment Office
- Confirm a Status

Purpose Code Mgt
- Request a Status
- Workflow/Approvals
- Confirmation of Status
- Direct admin of reference tables

Data Layer

Check reference tables

Validate data (contract info, flag status, etc.)

Send approved requests for flag changes and contractor DoDAACs

Return acknowledgement and any additional data (e.g. Contractor DoDAAC Number)

Purpose Codes managed at PIEE will be Read-Only in DoDAAD

2019 Procure-to-Pay Training Symposium
Purpose Code Management Module in PIEE
# New Roles

<table>
<thead>
<tr>
<th>Application</th>
<th>Role</th>
<th>Group</th>
<th>Location Code/Ext.</th>
<th>Status</th>
<th>Access Approval</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCM</td>
<td>Contractor DoDAAC Manager</td>
<td>Defense Pricing and Contracting</td>
<td>HQ0102/NA</td>
<td>ACTIVE</td>
<td>ATTACHED IN WAWF</td>
<td>View</td>
</tr>
<tr>
<td>PCM</td>
<td>Admin Group Payment Office Purpose Code Manager</td>
<td>Office of the Secretary of Defense</td>
<td></td>
<td>ACTIVE</td>
<td>ATTACHED IN WAWF</td>
<td>View</td>
</tr>
<tr>
<td>PCM</td>
<td>Admin Group Procurement and Grant Purpose Code Manager</td>
<td>Office of the Secretary of Defense</td>
<td></td>
<td>ACTIVE</td>
<td>ATTACHED IN WAWF</td>
<td>View</td>
</tr>
<tr>
<td>PCM</td>
<td>Admin Group Contractor Purpose Code Manager</td>
<td>Office of the Secretary of Defense</td>
<td></td>
<td>ACTIVE</td>
<td>ATTACHED IN WAWF</td>
<td>View</td>
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<tr>
<td>PCM</td>
<td>Admin Group Contract Admin Purpose Code Manager</td>
<td>Office of the Secretary of Defense</td>
<td></td>
<td>ACTIVE</td>
<td>ATTACHED IN WAWF</td>
<td>View</td>
</tr>
</tbody>
</table>
Note – Purpose Code manager should also have “Request Flag Update” option for DoDAACs outside their GAM structure.
### Update DoDAAC Flags

#### DoDAAC Information
- **DoDAAC**: HQ0102
- **Activity Name**: OUSD(AT&L)

#### Flag (Purpose Code) Name

<table>
<thead>
<tr>
<th>Purpose Code</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement</td>
<td>2019-01-28</td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Administration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payment Office</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### COAC
- 097 - DoD

#### Sub Tier
- 9700 - DEPT OF DEFENSE

#### Reason
- 

#### Central Service
- WHS - Other DoD/DoSACD Activities

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2019 Procure-to-Pay Training Symposium

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Change purpose code status here.
Contract Admin DoDAAC Lookup
CASD to PCM Transition

Presented By:
Defense Contract Management Agency
Functional Information Resource Management
DCMA FIRM Center
• CASD (Contract Administration Services Directory)

FAR 42.203
The Defense Contract Management Agency (DCMA) maintains the Federal Directory of Contract Administration Services Components. The directory lists the names and telephone numbers of those DCMA and other agency offices that offer contract administration services within designated geographic areas and at specified contractor plants. Federal agencies may access it on the Internet at https://pubapp.dcma.mil/CASD/main.jsp (under revision)

• PCM (Purpose Code Management)

New Procurement Integrated Enterprise Environment (PIEE) application providing:
  – ECP 1161 – CAO DoDAAC Selection (CASD Replacement)
  – ECP 1162 – Contractor DoDAAC Requests
  – ECP 1163 – DoDAAD Purpose Code Flag Administration
Why and So What

• Previous Environment
  – Incorrect CAO DoDAAC and MOCAS Pay DoDAAC on contracts one of the top data errors found through Procurement Data Standard (PDS) Validations and documented Contract Deficiency Reports (CDR)
  – CAO DoDAAC selection rules not widely or fully known and understood
  – Limited external access (CASD security concerns / decommissioning)
  – Multi-system dependencies (CASD vs CAGE)

• PCM
  – Contracting community has an accurate way to validate the correct Contract Administration DoDAAC (and Pay Office, if appropriate)
  – Leads to effective use of staff time and timely contract administration
  – PDS errors reduced leading to less time fixing contract errors
  – Better contract oversight and prompt payments
  – User satisfaction - an often overlooked aspect of system performance
PCM > CASD

- PCM offers CAGE search capability, whereas CASD required ZIP code to search for cognizant CAO
- Phase 1 - offers initial capability
- Phase 2 - implements advanced reporting supporting routine maintenance and improved data accuracy
- Phase 3 - provides web view to CAO-PAY office details
- PCM Web Service allows direct connectivity to source data and real time updates with no manual maintenance further eliminating potential errors
- PCM streamlines data removing extra data elements which PCOs do not need or care about
Purpose Code Management
CAO/PAY DoDAAC Lookup
Entering Search Criteria
Example 1: CAGE ‘98897’
## Purpose Code Management

### Contract Administration DeDAAC/ Payment Office DeDAAC: by HASC Code

<table>
<thead>
<tr>
<th>CAGE Code: 96897</th>
<th>Activity Name: LOCKHEED MARTIN CORPORATION</th>
<th>State: Georgia</th>
<th>Zip Code: 30063</th>
<th>Country: USA - United States of America [the]</th>
</tr>
</thead>
</table>

**Contract Administration Office**

<table>
<thead>
<tr>
<th>CAGE Code</th>
<th>Activity Name</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>51111A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>401-001</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Payment Office**

<table>
<thead>
<tr>
<th>Payee Office Code</th>
<th>Payment Office Activity Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOS558</td>
<td>DFAS - COLUMBUS CENTER</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Example 2: Zip Code ‘90210’
Contract Administration Office (CGO) DoDAAC | Payment Office DoDAAC - By Zip Code

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Contract Administration Office (CGO) DoDAAC</th>
<th>Payment Office DoDAAC</th>
<th>Activity Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>90310</td>
<td>GAO DoDAAC</td>
<td>HQ01379</td>
<td>DFAS - COLUMBUS CENTER</td>
</tr>
</tbody>
</table>

No CAGE Code Exceptions were found.
Example 3: Zip Code ‘98124’
## Exceptions to Zip Assignment

<table>
<thead>
<tr>
<th>GAO Code</th>
<th>Activity Name</th>
<th>DAC DaAAC</th>
<th>Payment Office DaAAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>87798</td>
<td>BOEING ENGINEERING AND CONSTRUCTION CO</td>
<td>87798</td>
<td>HQ0309</td>
</tr>
<tr>
<td>77898</td>
<td>BOEING LOUISIANA INC SUB OF BOEING MILITARY AIRPLANE CO</td>
<td>77898</td>
<td>HQ0309</td>
</tr>
<tr>
<td>6A031</td>
<td>BOEING DEFENSE ELECTRONICS INCL OF BOEING DO THE</td>
<td>6A031</td>
<td>HQ0309</td>
</tr>
<tr>
<td>1Q920</td>
<td>BOEING INTL CORP</td>
<td>1Q920</td>
<td>HQ0309</td>
</tr>
<tr>
<td>1Q925</td>
<td>BOEING CO THE BOEING COMMERCIAL AIRPLANE GROUP ON-MS-36-65</td>
<td>1Q925</td>
<td>HQ0309</td>
</tr>
<tr>
<td>1Q939</td>
<td>BOEING AEROSPACE CO</td>
<td>1Q939</td>
<td>HQ0309</td>
</tr>
<tr>
<td>2A440</td>
<td>BOEING CO THE FOR OTHER TRANSACTIONS ONLY F30615-00-4-0-402</td>
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<td>2A441</td>
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<td>BOEING CO THE FOR OTHER TRANSACTIONS ONLY F30615-00-4-0-402</td>
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<tr>
<td>36928</td>
<td>BOEING CO THE LARGE AIRCRAFT REPAIRS DEPT B3 9A-84</td>
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<tr>
<td>37989</td>
<td>BOEING COMPUTER SERVICES CO</td>
<td>37989</td>
<td>HQ0309</td>
</tr>
<tr>
<td>4Q351</td>
<td>BOEING SERVICE INTL INC</td>
<td>4Q351</td>
<td>HQ0309</td>
</tr>
<tr>
<td>5R427</td>
<td>BOEING TECHNOLOGY INTL INC</td>
<td>5R427</td>
<td>HQ0309</td>
</tr>
<tr>
<td>5V960</td>
<td>BOEING MIDDLE EAST LTD SUB OF BOEING CO</td>
<td>5V960</td>
<td>HQ0309</td>
</tr>
<tr>
<td>81773</td>
<td>BOEING COMPUTER SUPPORT SERVICES INC DIV OF BOEING CO INC THE</td>
<td>81773</td>
<td>HQ0309</td>
</tr>
</tbody>
</table>
Example 4: ‘Fiji’ Country
Search Results 4
Invalid Search Criteria Example
Web Service Interface

**DoDAAC Table External Interface**

- A SOAP based web service was implemented to provide a service to query Contract Administration Office and Payment Office DoDAACs.
- An X.509 certificate is required to access the web service.
- The web service implements the Web Services Security x509Token profile for the credential check.
- The web service WSDL and schemas is available on the Help/Training section.
- The web service request and response data is in an XML document.
PCM Phase 1 & 2 delivered enhanced CAO-PAY office lookup and reporting capabilities, but through user testing it was determined additional functionality is still required. Some contract awarding activities require the ability to view CAO-PAY office details within the PCM application, as their legacy contract writing systems do not seamlessly pass and populate their contract awards with required information such as DoDAAC, address data, and email. In addition, CAGE details would also prove to be valuable information available in PCM.

Without the ability to view required DoDAAC and CAGE information within PCM directly, the PCO will be required to search many other systems to gather the information thereby increasing the effort and total time to award. Additionally, this introduces increased probability of human error and frustration.
On search results screens, have ability to view CAO-PAY DoDAAC and CAGE details, perhaps via hyperlink which opens that specific data so as to keep the search results ‘minimal and clean’. Note – actual details to be specified.
Restructuring PCM by functionally aligning and segregating the ‘three pillars’ and clearly labeling as such will emphasize CASD existence within PCM ensuring user understanding, acceptance, and utilization while simultaneously reducing user confusion and frustration.
Resources

- https://wawf.eb.mil/pcm/xhtml/unauth/index.xhtml
- https://wawftraining.eb.mil/wbt/xhtml/wbt/portal/overview/whatsnew5.12.2.xhtml
Questions/Comments?

• Michael A. Jacobs (Mike)
  • CASD Administrator
  • PCM DCMA Contract Admin Office (CAO) Manager
  • dcma.lee.hq.mbx.firm-center@mail.mil | Subject = PCM - ....
Purpose Code Status

- **Procurement Office**
  - Active flag in the DoDAAC record since 2008, fully populated
  - PDS edits began in 2017
  - Management of flag in PIEE November 2018 – PIEE Is now the authoritative source

- **Grants Office**
  - Active flag in the DoDAAC record since 2008, mostly populated
  - Management of flag in PIEE November 2018 – PIEE Is now the authoritative source

- **Funding Office**
  - Active flag in the DoDAAC record since 2016

- **Contract Administration Office**
  - Active flag in the DoDAAC record since 2019, fully populated
  - Management of flag in PIEE November 2018 – PIEE Is now the authoritative source

- **Payment Office**
  - Not yet an active flag in the DoDAAD - Business rules have been defined; flag coming soon
  - Management of flag in PIEE November 2018 – PIEE Is now the authoritative source
  - Component POCs will maintain Pay Office Flags for their organization
  - PDS validations will continue to leverage Pay Office DoDAAC flag to generate PDS failures when DoDAACs without Pay Office capabilities are reported as the Pay Office within a contract

Authoritative list of Payment Office DoDAACs is also published at: [https://guidanceweb.ousdc.osd.mil/odcfo_bio.aspx](https://guidanceweb.ousdc.osd.mil/odcfo_bio.aspx)