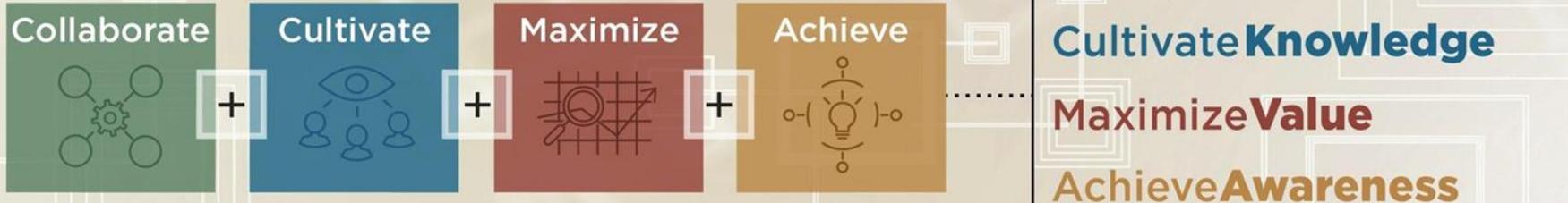


# Professional Services & Human Capital Symposium

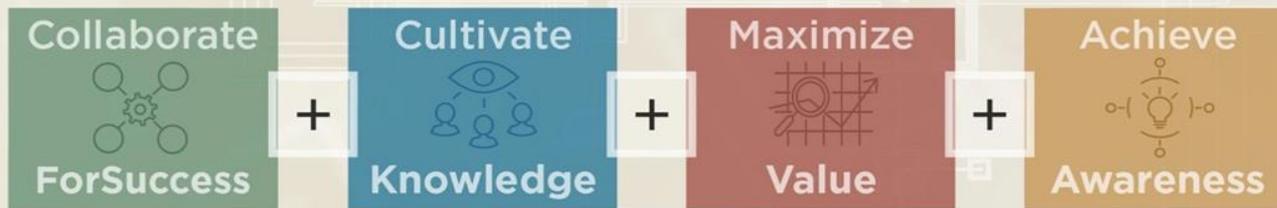
June 6-8, 2017 | Tacoma, WA



## Transactional Data Reporting: What it Means and Why it is important to You?

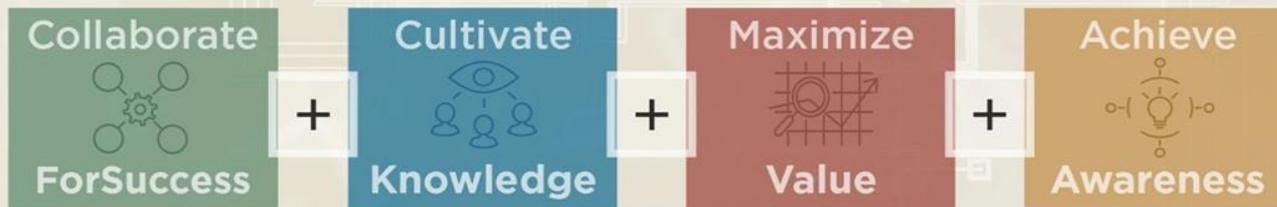
Stephanie Shutt  
MAS PMO PM  
Federal Acquisition Service

June 6, 2017



## What is the Transactional Data Reporting (TDR) Rule?

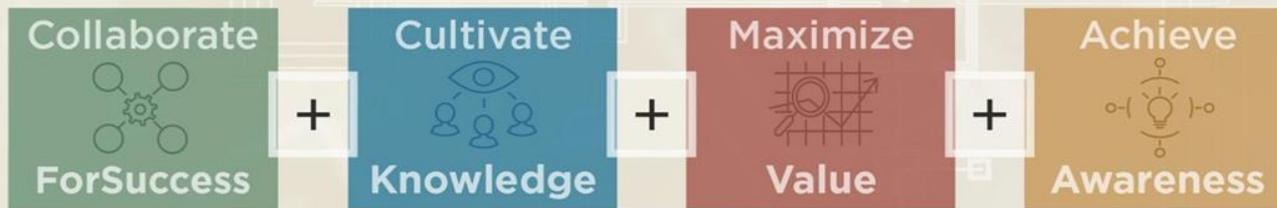
- Allows GSA to update several clauses including 552.238-74 Industrial Funding Fee and Sales Reporting
- Pilot does not impact all Schedules and SINs
- Contractor's have the option to accept or decline the mass modification:
  - The mass modification applies to the entire MAS contract not just the SINs in the Pilot. If a TDR covered SIN is included along with non-TDR SINs then the entire contract becomes subject to TDR reporting.
  - The contract will remain in TDR even if TDR Pilot SINs are later deleted.



## What Contracts are in the TDR Pilot

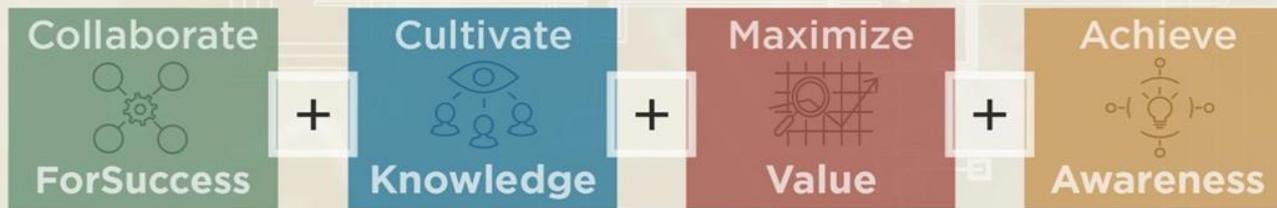
### TDR

Schedule	Description	SINs	Offerings
51V	Hardware Superstore	All	Products
58 I	Professional Audio/Video	All	Products
72	Furnishings & Floor Coverings	All	Products
73	Food Service, Hospitality, Cleaning Equipment	All	Products
75	Office Products/Supplies	All	Products
03FAC	Facilities Maintenance & Management	All	Services
00CORP	Professional Services Schedule (PSS)	Professional Engineering Services SINs	Services
70	Information Technology	132-54 132-55	Satellite Services
		132-32 132-33 132-34	Software
		132-8	Hardware



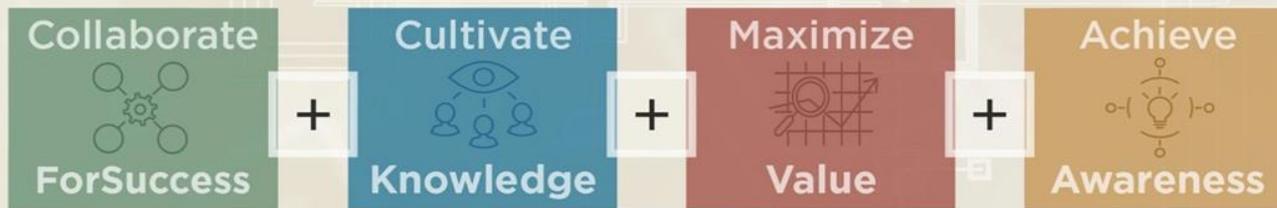
## Pilot Schedules with a Subset of SINs

- The TDR mass modification is at the contract level
- Contract under Schedule 70 or the Professional Services Schedules (PSS) could contain SINs both in the pilot and not
- If a contractor accepts the mass modification for the contract, it includes the entire contract and all SINs even those not on that contract
  - Example a PSS contract holder could have PES and MOBIS SINs on one contract. If the contractor accepts the TDR modification they would report transactionally for all their SINs including both the PES and the MOBIS.



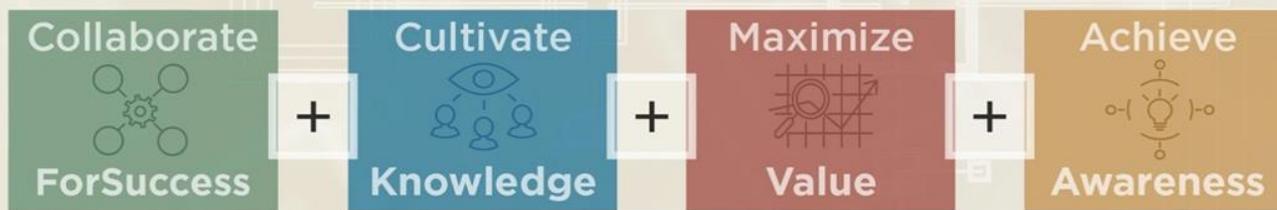
## What Changes in the Contract

- Eliminates the Price Reduction Clause (PRC) monitoring and the Commercial Sales Practice (CSP) requirements
- Changes the way and where contractor's report MAS sales:
  - Sales will be reported monthly rather than quarterly.
  - Sales will be reported at the transactional level rather than summary.
  - IFF will still be remitted quarterly (Electronically only).
  - Move from the 72A reporting system to the [FAS Sales Reporting Portal](#).
  - An active digital certificate.



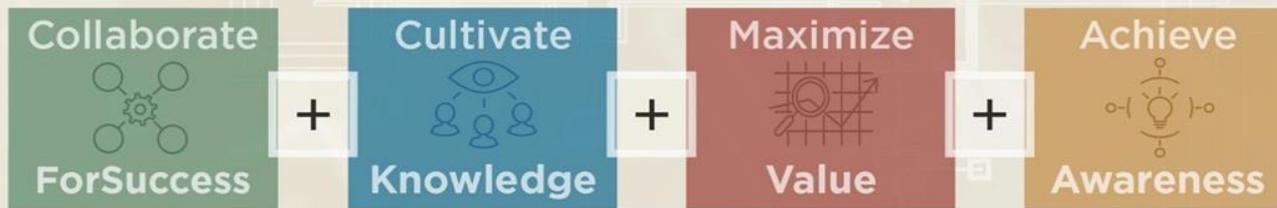
## What Information Needs to be Reported

- Contract Number\*
- Order Number/Procurement Instrument Identifier (PIID)\*
- Description of Deliverable\*
- Manufacturer Name
- Manufacturer Part Number
- Unit of Measure (each, labor hour, etc.)\*
- Quantity of Item Sold\*
- Universal Product Code (UPC)
- SIN
- Price Paid per Unit\*
- Total Price Sold\*
- Non Federal Entity, if applicable\*



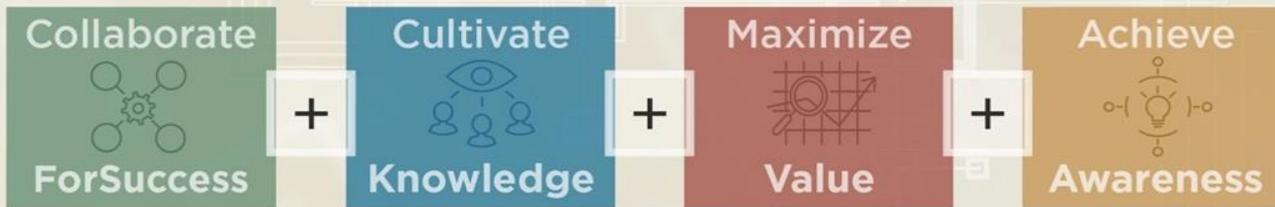
## Ways to Report

- Form: This is where the fields are entered directly in the FAS Sales Reporting Portal
- Excel/CSV Upload: Contractor can download the templates on the homepage of the FAS Sales Reporting Portal, or when they go to report
  - Note that these have an instructions page that should be followed and also kept in the file for the upload. Contractors can also use this download to view the various data definitions.
- EDI and API: If a contractor has purchased EDI or API for other purposes they can reuse here



## What You Report

- Match your invoice:
  - If you are invoicing a Time and Materials Order or a Purchase/Task Order that is itemized you will provide the line items.
  - If you are invoicing a Firm Fix Price Order the contractor should list the summary line item from the invoice.
- Continue to only report those items that are reportable, if they are listed on your approved pricelist



# Resources on the Sales Reporting Portal

## Welcome to FAS Sales Reporting!

This new system supports the collection of transactional-level sales data, reported as part of the recently-published Transactional Data Reporting (TDR) Rule. This final General Services Acquisition Regulation (GSAR) rule supports the governmentwide category management initiatives by producing market intelligence that GSA and its partner agencies can use to make smarter acquisition decisions and save even more taxpayer dollars. TDR also removes burdensome tracking and reporting supplier requirements from the price reduction clause (PRC) and commercial sales practices (CSP) when contractors agree to report transactional data, removing barriers for businesses entering into

-  **REPORT SALES**
-  **TUTORIAL**
-  **ONLINE HELP**



### Helpful Links

- [Frequently Asked Questions](#)
- [TDR Fact Sheet](#)
- [Vendor Support Center](#)
- [eOffer/eMod](#)



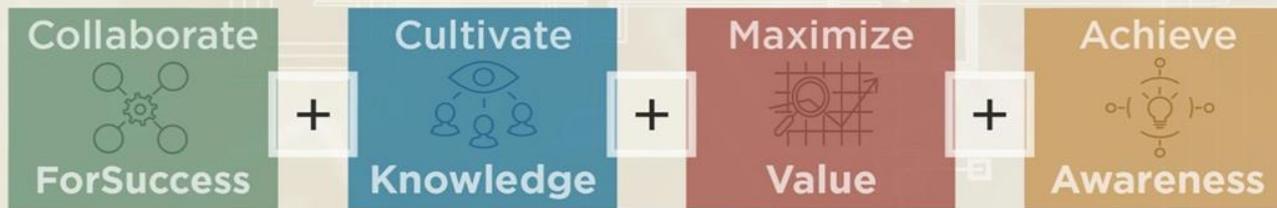
### Need to know

- [TDR Quickstart Guide](#)
- [Federal Register Notice](#)
- [How TDR Authenticates Contractors](#)
- [How to adjust quarterly sales](#)



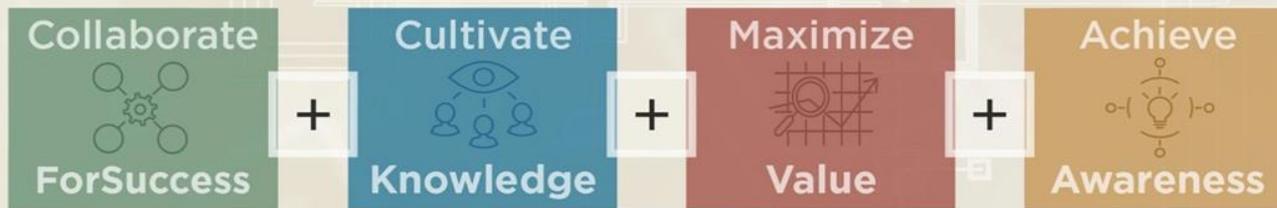
### Data Submission Specifications

- [Specification for EDI](#)
- [Specification for API](#)
- [TDR Excel Template](#)
- [Specification for File Upload \(.csv\) New](#)



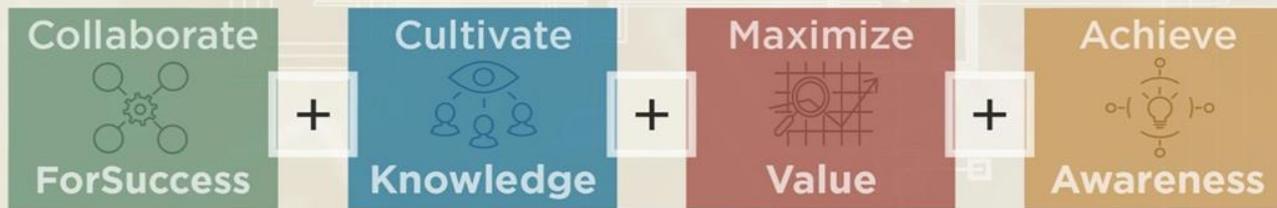
## Lessons Learned

- Know your start date
- Make sure your Digital Certificate is active and matches eMod/eOffer
- Do take the Web Based Training (WBT)
- Do ask for help:
  - You can contact your PCO/ACO/IOA
  - You can contact the [TDRTeam@gsa.gov](mailto:TDRTeam@gsa.gov) email



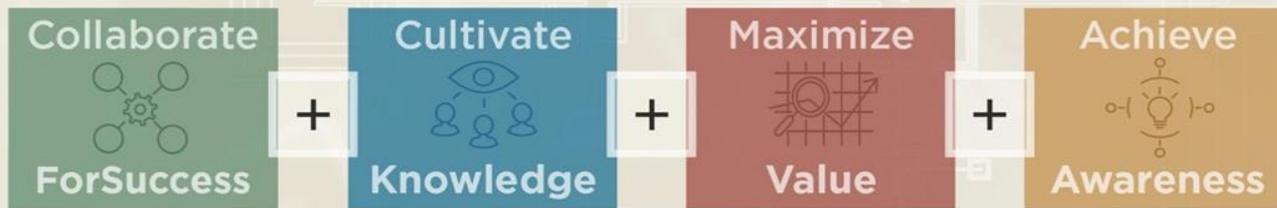
## What Does Optional Mean?

- Contractors that have a contract that is in the pilot group can opt to accept or decline to join TDR
- Options/New Offers that were previously mandatory will be provided a one time opt out
  - Those that opt out will need to provide Commercial Sales Practice to determine a Basis of Award Customer relationship for pricing and are subject to the Price Reductions Clause monitoring again.
- Contractors that signed the mass mod, not at a renew option period or as a new offer, will not be able to change their answer



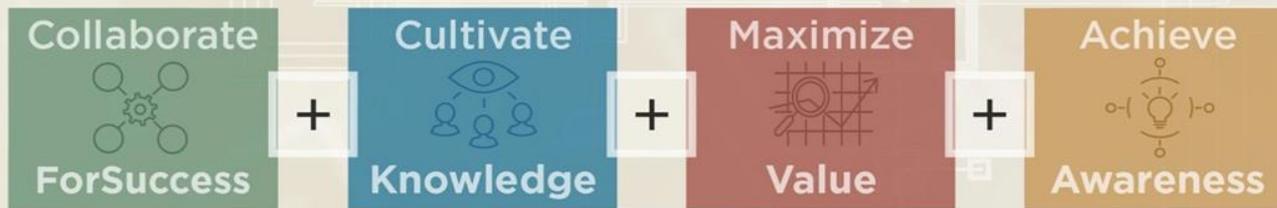
## The Data

- FAS will be using the data to create various tools for the following groups:
  - Category Managers to identify trends in government spend
  - FAS Acquisition Workforce
    - For additional horizontal pricing
    - For Contractor Assessments
  - Industry through a public extract
    - Identify trends in government spending to identify opportunities
    - Identify competitive pricing tools
    - Identify spend through schedules vs FPDS data to identify the market



## Ensuring Integrity

- FAS will be ensuring that the proprietary data is retained:
  - Ensure the pool of data around various items is deep enough to avoid reverse engineering
  - Various fields will not be able to be obtained via public extract or FOIA
  - All Category Managers and Acquisition Workforce will need to sign NDAs and COIs to be able to access data points



## Questions

- TDR Team email box: [tdrteam@gsa.gov](mailto:tdrteam@gsa.gov)
- Join us at Interact at the Multiple Award Schedules Community on [Interact](#)