**Contract Transfer Template – 170 Internal Version**

This document provides guidance for transferring a contract from one Contract Specialist (CS)/Contracting Officer (CO) to another CS/CO within an installation. A transfer means that all future responsibilities for a contract are transferred or reassigned. Installation to installation contract transfer is governed by NFS 1804.70. For approvals of those transfers see NFS 1804.7002 and the Agency template. One of the templates is required for all transfers (both within an installation and to another installation) above the simplified acquisition threshold.

When transferring a contract, coordination with customers and those groups providing support to the contracting effort is imperative. The transferring CS/CO should ensure that customers for the contract to include program personnel, quality support, property administration, security/safety, other administrative support offices, and financial support are notified of the transfer. The transferring CS/CO must provide the receiving CS/CO points of contact (POC) information for these customers and support group. The transferring CS/CO must rescind delegations that will not be continued after the transfer. Upon completion of the transfer the receiving CS/CO issues the modification to the contract and this should be distributed to effected customers.

**References to the Federal Acquisition Regulations (FAR) and NASA FAR Supplement (NFS) can be found at:**

**FAR -**[**https://www.acquisition.gov/browse/index/far**](https://www.acquisition.gov/browse/index/far)

**NFS -** [**https://www.hq.nasa.gov/office/procurement/regs/NFS.pdf**](https://www.hq.nasa.gov/office/procurement/regs/NFS.pdf)

* NFS Part 1804.70

**Additional Instructions:**

**Delete these instruction pages, including the document history log, once the document is ready for review (if required) or signature.**

**Digital signatures are the Office of Procurement preferred method for signing documents.  Please see the** [**digital signature instructions**](https://ooptechportal.hq.nasa.gov/Documents/Digital%20Signature%20Instructions.docx) **for assistance with digitally signing a document. If for some reason digital signature is not possible, add a date to the signature block of the template.**

The red double-underlined text in the template indicates prescriptions/instructions that must be deleted prior to printing the document and submitting it for review.

The *yellow highlighted areas with italicized text* on the template represent places that require fill-ins/completion.

The **blue highlighted areas with bold text** contain thoughts to consider, example wording, or other information related to the areas of template that require completion.  For example, choose the applicable contract type and exception.  When example language is provided, ***it is critical that you tailor the language to be specific to your procurement action being addressed***.

The green highlighted areas with underlined text on the template represent requirements that may not apply to your specific procurement and should be deleted.  If applicable, remove the green highlighting prior to printing the document and submitting it for review.

**NOTE:  All red double-underlined text; yellow highlighted areas with italicized text, blue highlighted areas with bold text, and green highlighted areas with underlined text need to be removed/deleted and changed to regular font prior to completing the document and submitting it for review.**

**Document History Log**

**Base Issuance Date: 10/07/2020**

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| **Revision Effective Date** | **Description of Change** |
| XX/2021 | Added guidance for use of the template for transfers of contracts within installations. Revised to accommodate deletion of NFS sections 1804.7003-1, 2, 3,4 and 5 and 1804.7004-1 and 2 |
| 6/2021 | Tailored agency template for 210H. |
| 7/2021 | 210H specific. Clarified the transition modification language. |
| 9/2021 | Removed 210H references. Added clarity for updates to the invoice approver and outstanding invoices. |
| 10/2021 | Added transition of Clarizen preaward/contracts/BPAs, etc. |
| 3/2023 | Added row for the period of performance/effective ordering period. Added log sheet to TO/DO/Call requirement. Minor grammatical edits. |
| 10/2023 | Clarified PPS/SAP system reassignment actions and IRIS impacts |
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**NOTE: The template version identifier is in the lower left corner in the footers of both the instructions and the template. For audit/review purposes, the template version identifier shall not be removed/deleted. The version identifier includes month/year (i.e., XX/XXXX).**

# Contract Transfer Template

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| --- | --- |
| **Contract Number and last modification number:** | *(Insert contract number and last modification number)* |
| **Contract Type:** | *(Completion/IDIQ/BPA and Cost/FFP/T&M/CP??/etc.)* |
| **POP/Eff. Ordering Pd.** | *(If BPA/IDIQ, this is period of performance only for the umbrella contract. TOs/DOs/Calls are covered below.)* |
| **Task/Delivery Orders/Calls, if any:** | *(Insert, attach, or reference a list of applicable task/delivery orders-incl POP, value, funding, allotment date. Log sheet can be used instead of creating a separate document.)* |
| **Contractor Name:** |  |
| **Contractor Point of Contact (POC), phone and email:** |  |
| **Contracting Officer Representative (COR) name, phone and email:** |  |
| **Resource/Financial Analyst name, phone, and email:** |  |
| **Transferring CS/CO name, phone, and email:** |  |
| **Receiving CS/CO name, phone, and email:** |  |

Is this a complete Electronic File? \_\_\_\_Yes \_\_\_\_No

If No, plan for shipping of any hard copy files:

If Yes, Location of electronic files:

Is award administered in: \_\_\_\_SAP \_\_\_\_ PPS

Receiving CS/CO has access to, or has been provided, all electronic contract documents from the preaward documents through modification Date:\_\_\_\_\_\_\_\_

The receiving CS/CO has access to electronic systems needed for administration of the contract (to include the task order monitoring system and work processing system if applicable): Date: \_\_\_\_\_\_\_

All applicable procurement systems (e.g., Procurement for Public Sector (PPS), System Applications and Products (SAP), NASA Task Order Management System (TOMS) and Federal Procurement Data System (FPDS)), are updated through modification number (Insert mod number here)(note if there are no clause updates with the change, this may be only an administrative unnumbered mod).

***Outstanding invoices*** in NASA’s Invoice Routing and Approval System (IRIS) reassigned as of *(Insert date)*. (Contact the Systems Team for reassignment as needed).

All contract administration items (e.g., Contractor Performance Assessment Reporting System (CPARS) evaluations and POCs updated, funding issues addressed, Award Fee Evaluation processes updated, etc.) are completed as of *(Insert date)*.

All customers for the contract have been notified of the transfer and all pertinent points of contact have been provided to the receiving CS/CO. CS/CO can tailor this paragraph to the particular action.

An administrative modification has been completed to the contract that documents the transfer of contract administration and distributed to the Contractor and all interested NASA and administrative customer offices. **\***  Note task/delivery orders/calls should also be modified as applicable.

Yes \_\_ No \_\_\_\_ (If No, explain why)

**\*At a minimum, system reassignments are required as follows to ensure future invoices are routed correctly. System reassignments are complete as of:** *(Insert date)*.

**SAP:** U*pdate* the applicable POC fields:1) Purchasing Group (PGrp) **and** associated Buyer GSID; 2) CO GSID; 3) Invoice Approver POC *if applicable* (CO, CS, or COR).

**PPS:** *Create a Change Version* to update the applicable POC fields: 1) Buyer PGrp; 2) CO Name; 3) Invoice Approver POC *if applicable* (CO, CS, COR). **The PPS action must be fully Released/Ordered by a Contracting Officer to become effective.**

**Open Actions to be completed:** (List or describe actions below for each responsible individual.)

|  |
| --- |
| By Transferring Contract Specialist/Contracting Officer: Administrative items for transition:Setup meeting two weeks in advance of departure date with receiving CS/CO and include Manager and CO for both transferring and receiving CS.Additional items to consider for covering in meeting, as applicable: task order status and renewal timeframes; contract deliverables; fee and any exceptions; 533 reporting; T&M Summary reporting; frequency of invoicing; frequency of funding actions; Service Contract reporting required; eSRS reporting required; property included, reporting required; all log sheets are up to date; is there a conformed contract; any unique aspects to the contract; CPARS – info. on when the next CPARS will be due if within three months of transition, don’t forget to include task orders; any previous issue that may present itself again (ex. bona fide need funding issue, schedule slips, performance concerns, etc.); etc.Coordinate with receiving CS/CO on the issuance of contract administrative modification to provide for the administrative changes resulting from the transfer action (e.g., identifying CS/CO responsible for performing contract administration).After transition meeting and checklist signed off by both transferring and receiving CS/CO, notify via email COR, RA, and Ktr. and cc: the new CS/CO. Preaward/Contracts/BPAs, etc. in Clarizen Provide receiving CS/CO insight into actions in Clarizen.Notify FAS of new CS/CO. |
| By Receiving Contract Specialist/Contracting Officer:1. Coordinate with transferring CS/CO on the issuance of contract administrative modification to provide for the administrative changes resulting from the transfer action (e.g., identifying offices responsible for performing contract administration and the office to which contract deliverables are to be submitted).
2. Signed checklist emailed to transferring and receiving PMs.
3. The documentation of the transfer to include approvals and concurrences on this transfer document, and any additional documents necessary for a complete summary of the transfer action is contained in the contract file. This includes emails notifying any party of the transition (i.e. email to COR, RA, Ktr, etc.). Signed checklist filed in the contract folder under Tab 72 – Modification Supporting Documentation (per NF1098 ver. 08/17), Subfolder “Contract Transfers”. This subfolder will likely have to be created by the receiving CS/CO.
4. Meet with the COR/Tech. Rep. to gain your own understanding of contract requirements from their perspective.
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The requirements necessary to transfer this contract have been completed and the responsibility for this contract is hereby transferred.

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Transferring Contract Specialist/Contracting Officer

The responsibility for this contract is accepted by the Contract Specialist/Contracting Officer of the receiving office.

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Receiving Contract Specialist/Contracting Officer