

Establish Case – PLCO/Support PLCO

Reference Guide

Homepage

GFP Module

Plant Clearance

Schedule Workload/Search

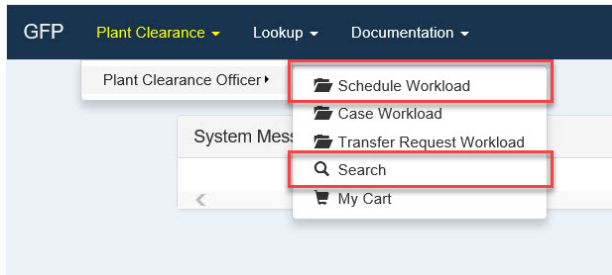
This guide demonstrates how to Establish a Plant Clearance Inventory Schedule document as a Plant Clearance Officer (PLCO) or Support PLCO. Inventory Schedules are submitted to PLCO/Support PLCO from a Contractor Property Manager and after they are accepted a Case can be established.

Roles

The role required to Establish a Case from an accepted Inventory Schedule in the GFP Module.

- Plant Clearance Officer
- Support Plant Clearance Officer

Log into PIEE as a PLCO/Support PLCO and access the GFP module. In the GFP module go to **Plant Clearance > Plant Clearance Officer/Support Plant Clearance Officer > Schedule Workload**. Alternatively navigate to the GFP module go to **Plant Clearance > Plant Clearance Officer/Support Plant Clearance Officer > Search**.



Schedule Workload Search Results:

The Schedule Workload displays all Inventory Schedules assigned to the PLCO/Support PLCO user. Clicking the Create Case link under the Action(s) column will open the Establish Case Process.

Navigation

Inventory Schedules that have been accepted but have not had a case established within 1 days are displayed with a clock icon.

Schedule Reference Number	Contract Number	Property Location State	Line Item Count	Total Acquisition Cost	Termination	DoDAAC	Document Status	Submitted Date	Processing Days	Action(s)
2AAE1-064812020082011	20082011	CA	2	200	Y	S0512A	Accepted	2020-11-02	🕒	🔽 Open ➕ Create Case
06481-02008201034	20082010	CA	1	100	Y	S0512A	Submitted	2020-08-20	85 🕒	🔽 Open
06481-1012	1012	CA	1	50	N	S0512A	Accepted- Established to Case	2020-10-12		👁 View
06481-102900	102900	VA	0	100	N	S0512A	Submitted	2020-10-26	18 🕒	🔽 Open
06481-100900	100900	CA	1	50	N	S0512A	Submitted	2020-10-27	17 🕒	🔽 Open
06481-101301	101301	CA	0	80000000	N	S0512A	Submitted	2020-10-28	16 🕒	🔽 Open
06481-1112	1112	CA	0	100	N	S0512A	Submitted	2020-11-12	1	🔽 Open

Showing 1 to 7 of 7 entries

Search Criteria:

On the Search Criteria screen check the Inventory Schedule and enter at least one input field then click the Search button.

Plant Clearance Officer - Search Criteria

Please select the type of Plant Clearance Document to search for: *

Inventory Schedule
 Case
 Transfer Request

Contract Number Contract Order Number Prime CAGE

Case Number Schedule Reference Number Alternative Schedule Reference Number

DoDAAC Property Location CAGE Code Schedule Status

Plant Clearance Officer First Name Plant Clearance Officer Last Name

Date Submitted Start Date Submitted End Date Established Start Date Established End

You are required to fill in at least one input field.

The **Search Results** will display all Inventory Schedules assigned to the PLCO/Support PLCO user. Clicking the Create Case link under the Action(s) column will open the Establish Case Process.

Plant Clearance Officer - Search Results - Inventory Schedules

Show entries Previous 1 2 Next

Schedule Reference Number	Case Number	Contract Number	Contract Order Number	Prime CAGE Code	Property Location CAGE Code	Property Location State	Line Item Count	Total Acquisition Cost	Termination	Plant Clearance Officer	Document Status	Submitted Date	Processing Days	Action(s)
06481-102600		102600		06481	1QU78	VA	2	100	No	Olivene PLCO	Submitted	2020-10-26	9	Open
06481-09189865653476		1013		06481	06481	CA	0	30000000	No	Bebop Bebop	Submitted	2020-10-13	22	View
06481-1026		1026		06481	06481	CA	1	50	No	Bebop Bebop	Submitted	2020-10-26	9	View
06481-102601		102601		06481	06481	CA	2	100	No	Bebop Bebop	Submitted	2020-10-27	8	View
06481-100900		100900		06481	06481	CA	1	50	No	Olivene PLCO	Submitted	2020-10-27	8	Open
06481-101301		101301		06481	06481	CA	1	60000000	No	Olivene PLCO	Submitted	2020-10-28	7	Open
06481-102800		102800		06481	06481	CA	4	8090	No	Bebop Bebop	Submitted	2020-10-28	7	View
06481-SRN16071030		JUL25888C1030		06481	06481	CA	2	7552630	No	Ernst Pons	Submitted	2020-10-30	5	View
06481-110200		110200		06481	06481	CA	2	55	No	Anthony Barretta	Submitted	2020-11-02	2	View
06481-SRN14121102		FA303022D1102		06481	06481	CA	20	1402952.88	No	Ernst Pons	Submitted	2020-11-02	2	View

Showing 1 to 10 of 13 entries Previous 1 2 Next

Case – Header

The Case Header screen displays the Contract Information, Case Information, and Schedules being used for establishing of the Case. Contract Information is not editable.

Case Information:

- Case DoDAAC *
- Caste Type
- Service / Agency *
- Administrative Agency *
- Remarks

Case Information is entered by the PLCO/Support PLCO.

Note: * - Required

Plant Clearance Officer - Plant Clearance Case

Contract Information ▼

Contract Number Type	Contract Type	Contract Number	Contract Order Number	Prime CAGE
Cooperative Agreement	BOA/BPA	20082011	20082011	2AAE1

Case Information

Case DoDAAC *

Case Type

Service / Agency *

Administrative Agency *

Remarks

Schedules

Case Type:

- Other
- Section 2 Contract
- Termination

Case Information

Case DoDAAC *

S0512A

Service / Agency *

Remarks

Case Type

Select Case Type

Other
Section 2 Contract
Termination

Service / Agency allows the user to select from a prepopulated list.

Plant Clearance Officer - Plant Clearance Case

Contract Information

Contract Number	Type	Contract Type	Contract Number
		DOD EDUCATION ACTIVITY	20082011
		DOI	
		DOJ	
		DOT	
		DPAP	
		Defense Advanced Research Projects Agency	
		Defense Commissary Agency	
		Defense Contract Audit Agency	
		Defense Contract Management Agency	
		Defense Finance & Accounting Service	
		Defense Health Agency	
		Defense Information System Agency	
		Defense Intelligence Agency	
		Defense Legal Services Agency	
		Defense Logistics Agency	
		Defense Media Activity	
		Defense Micro Electronics Activity	
		Defense POW-MIA Accounting Agency	
		Defense Security Cooperation Agency	
		Defense Security Service	
		Defense Technical Information Center	
		Defense Technology Security Administration	
		Defense Threat Reduction Agency	
		Department of State	
		Department of Veteran Affairs	
		DoD Education Activity	
		DoD Human Recourses Activity	
		DoD Inspector General	
		DoD Test Resource Management Center	
		EPA	

Agency *

Agency

Schedules

The Schedules section lists the Inventory Schedule being used to establish a Case.

Click the Open button under the Action(s) column to open the Inventory Schedule and review the document and apply Screener Rules to the line items.

Schedules

Show 10 entries

Previous 1 Next

Schedule Reference Number	Line Item Count	Total Acquisition Cost	Action(s)
2AAE1-064812020082011	2	200	Open

Showing 1 to 1 of 1 entries

Previous 1 Next

* = Required Fields, † = Conditional.

After clicking the Open link, the Inventory Schedule will display the Header tab. The documents information may be reviewed but cannot be changed here if changes are required refer to the PLCO/Support PLCO Unaccept Inventory Schedule training. The Screener Rules tab contains the list of line items and the Screener Rules may be updated here. Screener Rules may be added to accepted Inventory Schedules before the Establish Case process by opening the accepted Inventory Schedule and updating the Screener Rules tab and saving, refer to the Apply Screener Rules training for PLCO and Support PLCO users. If no Screener Rules have been applied at this time, they are required before completing the Establish Case process.

Case – Inventory Schedule

Plant Clearance Officer - View Plant Clearance Inventory Schedule

Header Line Item Screener Rules Documentation History

Contract Information

Contract Number Type	Contract Type	Contract Number	Contract Order Number	Prime CAGE
Cooperative Agreement	BOA/BPA	20082011	20082011	2AAE1

Inventory Schedule

Total Acquisition Value
200.00

Header Information

Schedule Reference Number	Alternative Schedule Reference Number	Program Title	Scrap List	Termination	Termination Docket Number
2AAE1-064812020082011	54765476	pt	Yes	Yes	897689769876987

Final Schedule	Property Type	Is the property allocable to a FMS contract/FMS portion of a contract?
Yes	GFP	No

Download Excel Return to Case

Continue to the Screen Rules tab to review the line items and Screener Rules.

Case – Apply Screener Rules

On the Screen Rules tab all line items on the Inventory Schedule will be listed. If Screener Rules were previously applied to the line items, they will appear in the Screener Rules column of the table. If there are already Screener Rules, they may be changed at this time by the PLCO/Support PLCO.

Plant Clearance Officer - View Plant Clearance Inventory Schedule

Header Line Item **Screener Rules** Documentation History

Contract Information >

Inventory Schedule >

Screener Rules

This screen allows you to apply screener rules to line items in the inventory schedule.
 To apply a rule to selected line items, mark the checkbox for each line item, select the rule from the Screener Rule drop-down list, and then click Apply to Selected.
 To apply a rule to all blank line items simultaneously, select the rule from the Screener Rule drop-down list, and then click Apply to Blank.
 To apply a rule to ALL line items simultaneously, select the rule from the drop-down list, and then click Apply to All. Note that any line items with a screener rule already applied will be overwritten with the newly selected screener rule.
 Press the Apply Screener Rules button at the bottom to save the Screener Rules applied.

Select

Show 10 entries 1

Select	Line ID	Line No.	Item Name	Item Desc.	Demil Code	Demil Integrity Code	Condition Code	Screener Rules
<input type="checkbox"/>	263896	1	Test Item Name	test			G	

Showing 1 to 1 of 1 entries 1

Select a Screener Rules option from the dropdown:

- 001 – Standard Screening (DoD for 20 days, followed by GSA for 26 days)
- 002 – Special Screening (DoD for 20 days)
- 006 – GSA-Only Screening (GSA for 26 days)
- 999 – No Screening

Screener Rules

This screen allows you to apply screener rules to line items in the inventory schedule.
 To apply a rule to selected line items, mark the checkbox for each line item, select the rule from the Screener Rule drop-down list, and then click Apply to Selected.
 To apply a rule to all blank line items simultaneously, select the rule from the Screener Rule drop-down list, and then click Apply to Blank.
 To apply a rule to ALL line items simultaneously, select the rule from the drop-down list, and then click Apply to All.
 Press the Apply Screener Rules button at the bottom to save the Screener Rules applied.

Select the Screening Rule to be applied to the line items.

Select

- 001 - Standard Screening (DoD for 20 days, followed by GSA for 26 days)
- 002 - Special Screening (DoD for 20 days)
- 006 - GSA-Only Screening (GSA for 26 days)
- 999 - No Screening

After selecting a Screening Rule click one of the three buttons:

- Apply to Selected – Apply rules to selected line items, mark the checkbox for each line item.
- Apply to Blank – Apply rules to all blank line items simultaneously (any unchecked line items).
- Apply to All – Apply rules to ALL line items simultaneously.

Plant Clearance Officer - View Plant Clearance Inventory Schedule

Screener Rules set for selected line items.

Header | Line Item | Screener Rules | Documentation | History

Contract Information >

Inventory Schedule >

Screener Rules

This screen allows you to apply screener rules to line items in the inventory schedule.

To apply a rule to selected line items, mark the checkbox for each line item, select the rule from the Screener Rule drop-down list, and then click Apply to Selected.

To apply a rule to all blank line items simultaneously, select the rule from the Screener Rule drop-down list, and then click Apply to Blank.

To apply a rule to ALL line items simultaneously, select the rule from the drop-down list, and then click Apply to All. Note that any line items with a screener rule already applied will be overwritten with the newly selected screener rule.

Press the **Apply Screener Rules** button at the bottom to save the Screener Rules applied.

001 - Standard Screening (DoD for 20 days, followed by GSA for 26 c ▾) Apply to Selected Apply to Blank Apply to All Clear All Applied Rules

Show 10 entries Previous 1 Next

Select	Line ID	Line No.	Item Name	Item Desc.	Demil Code	Demil Integrity Code	Condition Code	Screener Rules
<input type="checkbox"/>	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input checked="" type="checkbox"/>	263896	1	Test Item Name	test			G	001 - Standard Screening

Showing 1 to 1 of 1 entries Previous 1 Next

Apply Screener Rules Download Excel Return to Case

After reviewing/updating Screener Rules click the Apply Screener Rules button at the bottom of the page to save the Screener Rules applied. An info message will be displayed "Screener Rules have been applied to line items."

After applying Screener Rules to the line items click the Return to Case button at the bottom of the screen on any tab.

Plant Clearance Officer - View Plant Clearance Inventory Schedule

Screeener Rules have been applied to line items.

Header Line Item **Screeener Rules** Documentation History

Contract Information

Inventory Schedule

Screeener Rules

This screen allows you to apply screener rules to line items in the inventory schedule.

To apply a rule to selected line items, mark the checkbox for each line item, select the rule from the

To apply a rule to all blank line items simultaneously, select the rule from the Screener Rule drop-

To apply a rule to ALL line items simultaneously, select the rule from the drop-down list, and then

Press the Apply Screener Rules button at the bottom to save the Screener Rules applied.

001 - Standard Screening (DoD for 20 days, followed by GSA for 26 d

Apply to Selected

Show 10 entries

Select	Line ID	Line No.	Item Name	Item Desc
	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>
<input checked="" type="checkbox"/>	263896	1	Test Item Name	test

Apply Screener Rules

Case – Establish Case

The Case can be established after all line items have Screener Rules applied to them. On the Case Header page click the Establish Case button to confirm Case Establishment.

Remarks

Good to go with Case Establishment

Schedules

Show 10 entries

Schedule Reference Number	Line Item Count	Total
2AAE1-064812020082011	2	200

Showing 1 to 1 of 1 entries

Establish Case

After clicking the Establish Case button, a Confirm Establishment of Case window will pop-up.

Confirm Establishment of Case

Are you sure you want to establish this plant clearance case?

Click the OK button to continue with the Case Establishment.

A Success Screen will be displayed with Contract Information and Case Number and info messages for the emails being sent. The Case will appear in the PLCO/Support PLCO's Case Workflow folder in view only.

The line items from the established Cases will be viewable to the appropriate parties based on the Screener Rules applied. PLCOs, Support PLCOs, and DoD Screeners may now create Transfer Requests from these line items on the established Cases.

Plant Clearance Officer - Plant Clearance Case

The Plant Clearance Case was successfully established.

Contract Number	Contract Order Number	Prime CAGE	Case Number
20082011	20082011	2AAE1	S0512A-010720

INFO: Email sent to Contractor Property Manager: TomHoward@Bethesda.com.
INFO: Email sent to Contractor Property Manager Organizational Email: RickA@roll.com.

Case – Establish Case Success