MAS Office Hours Q&A: Transactional Data Reporting (TDR)

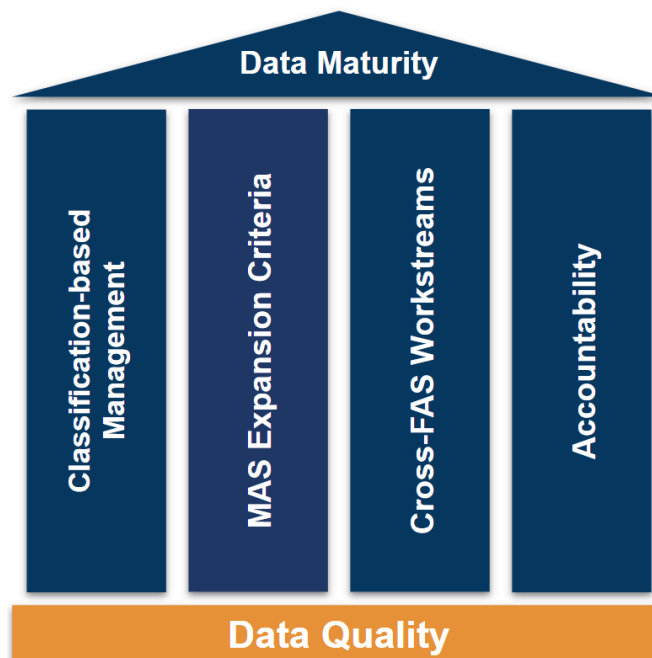February 2024 | Multiple Award Schedule (MAS) Program Office

About this Document

The purpose of the content herein is to document questions and answers from the February 15th Office Hours session on Transactional Data Reporting (TDR)

FAS TDR Maturation Strategy Overview

In Quarter 3 of FY23, GSA's Federal Acquisition Service (FAS) initiated execution of a four-pillared strategy to mature TDR data, improve its usage, and achieve business goals. TDR data quality provides the foundation for achieving and measuring progress in all four pillars as shown in Figure 1.

Figure 1. Four-pillar FAS TDR maturation strategy built upon foundational data quality
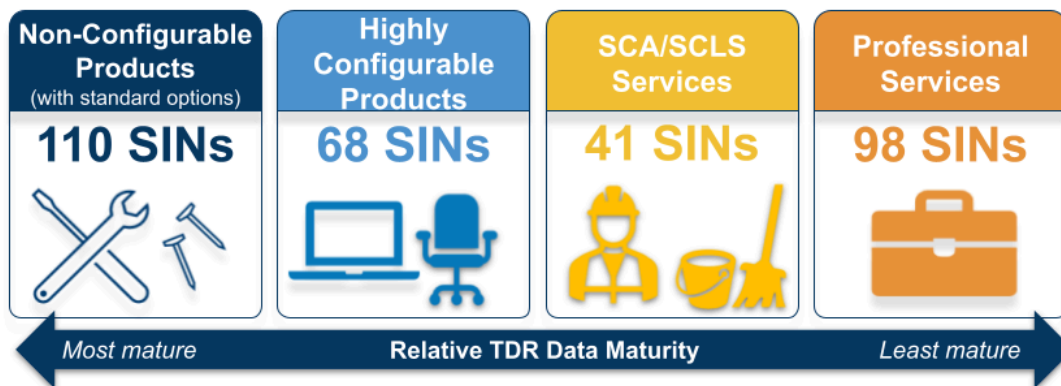

The maturation strategy pillars are described below:

1. **Classification-based management** • FAS classified all MAS SINs into four categories as shown in Figure 2 based on preponderance of work and named portfolio experts to

lead cross-FAS integrated product teams (IPTs) over each classification. IPT members are responsible for resolving problems and making decisions to improve data quality and usage within their respective areas.

2. **MAS TDR Expansion Criteria •** Chief among the decisions classification IPTs will make is the go/no-go decision to move new SINs into the TDR pilot. FAS has implemented rigorous criteria, and IPTs are responsible for evaluating whether SINs meet them prior to TDR expansion. The metrics in this document will be used to support expansion readiness evaluations.

3. **Cross-FAS workstreams •** In addition to the cross-FAS IPTs, cross-functional leads are in place to coordinate system, communication, process, and policy development to support continued maturation of TDR data quality and usage over time.

4. **Accountability •** All FAS executives are meeting monthly with the Deputy Commissioner to drive progress in TDR maturation, and an FY24 executive performance metric specifically focused on TDR is in place. FAS is briefing OMB on TDR quarterly to garner OFPP's buy-in and ensure alignment with government-wide priorities. FAS has several efforts underway to strengthen contractor assessment and accountability.

Figure 2. Four SIN classifications of like offerings designed to support preparation and vetting of SINs prior to being added to the TDR pilot

FY24 TDR Strategic Goals

The FY24 strategic goals listed below serve as the basis for alignment of program metrics and prioritization of TDR efforts:

1. Mature TDR **data quality** capabilities in specific MAS offering areas:
   a. Sustain progress in improving data quality for non-configurable products.
   b. Improve the capture of TDR data for configurable products.
   c. Develop matching methodology and business rules for services TDR data.
2. Increase TDR **data usage**.
3. Expand TDR **data collection requirements** to address data gaps.
4. Implement TDR **data validations** in SRP.

5. **Expand** TDR to new MAS SINs.
6. Make SRP **system changes**.
7. Implement **performance measures and accountability** to promote TDR data quality and usage.

Feb-15 Q&A

Topic	Question	Answer
Administrative	Will CLP's be issued for this training?	No CLPs will be issued for the February 15th TDR MAS Office Hours session because the event was primarily designed for industry--not the acquisition workforce.
Administrative	Is there a place we can send feedback based on the proposed new TDR fields?	Thank you, yes. Please email TDRteam@gsa.gov.
Demand Data	Considering 74% were not aware of the demand data, can we get a link to where it's located?	To access demand data on the Vendor Support Center, navigate to vsc.gsa.gov. Click on the "Managing my GSA Contract" dropdown menu. Then select "MAS (Multiple Award Schedule)" to expand the selections. Click "Market Research" (direct URL: https://vsc.gsa.gov/vsc/app-content-viewer/section/150). Once you are on the Market Research page, scroll down to the "Demand Data" heading. Demand data files are posted at the bottom of the page every other month.
Demand Data	Could we get a list of those 5,000 items?	GSA's Office of Global Supply and Services (GSS) posts the top-selling 5,000 items every other month on the Vendor Support Center. To access demand data on the Vendor Support Center, navigate to vsc.gsa.gov. Click on the "Managing my GSA Contract" dropdown menu. Then select "MAS (Multiple Award Schedule)" to expand the selections. Click "Market Research" (direct URL: https://vsc.gsa.gov/vsc/app-content-viewer/section/150). Once you are on the Market Research page, scroll down to the "Demand Data" heading. Demand data files are posted at the bottom of the page every other month.

Topic	Question	Answer
Expansion/TDR Pilot Scope	What is the expansion criteria that each MAS SIN must meet prior to being added to the TDR pilot?	In November 2023, FAS issued specific criteria that each SIN must meet prior to being added to the TDR pilot. SINs are not considered eligible until they meet all of the following criteria: ☐ *SINs classified into groupings of offerings* ☐ *Propose categorization methodology* ☐ *Maintain and monitor categorization annually* ☐ *Data collection requirements established* ☐ *Unique item identifier established* ☐ *Finalized and aligned Price Proposal/Catalog and TDR reporting data elements* ☐ *Data validation methodology documented* ☐ *Data quality approach defined* ☐ *Baselined current-state data quality* ☐ *Defined matching methodology* ☐ *Defined structured goals for data quality* ☐ *Data use plan in place* ☐ *Demand data published for industry* ☐ *Transactional data available for AWF use, to include a data maturation plan and system integration documentation* ☐ *Non-Price/Category Management use cases identified with a timeline for implementation* ☐ *Training or guidance materials have been developed/updated (e.g., acquisition workforce, industry)* ☐ *Data oversight methodology determined* ☐ *Personnel assigned to follow-up with contractors on data quality issues*
Expansion/TDR Pilot Scope	Is TDR now available for all SINs?	No, the list of TDR-eligible SINs can be found in the MAS Available Offerings attachment within the MAS Solicitation.
Expansion/TDR Pilot Scope	Will the rollout schedule for additional SINs be addressed today?	The rollout schedule for adding SINs to the TDR Pilot was not covered in the presentation because GSA's focus at this time is on preparing Non-Configurable Products SINs to meet the expansion criteria. We will not add any SINs until they demonstrate full satisfaction of the criteria.
Expansion/TDR Pilot Scope	Are there any timeline updates for the expansion of TDR?	We hope to expand to additional Non-Configurable Products SINs before Fiscal FY24 year-end close. However, we are not operating on a fixed timeline. Instead, our focus is on preparing new SINs to meet expansion criteria. We will not add SINs until they demonstrate full satisfaction of the criteria.

Topic	Question	Answer
Expansion/TDR Pilot Scope	For which SINs is TDR available?	The list of TDR-eligible SINs can be found in the MAS Available Offerings attachment within the [MAS Solicitation. See Column J]().
Expansion/TDR Pilot Scope	Is TDR available for any services SINs?	Yes. The list of TDR-eligible SINs can be found in the MAS Available Offerings attachment within the [MAS Solicitation. See Column J]().
FAS Catalog Platform/Validations	What is the Authoritative Catalog Repository? Is this the FAS Catalog Platform	The Authoritative Catalog Repository (ACR) is the back-end database for the FAS Catalog Platform (FCP).
FAS Catalog Platform/Validations	MFR Part numbers need to match advantage items, otherwise the report won't match so the corrections should really start in advantage	Today, Manufacturer Part Number field entries reported in SRP are matched with the GSA Advantage! catalog after submission for product transactions only. In the future, SRP will validate select fields in the Authoritative Catalog Repository (ACR) in real time--first for product SINs and ultimately for all SINs included in the TDR Pilot. Contract-holders struggling with reporting Manufacturer Part Numbers posted in GSA Advantage! should update their Advantage postings as needed and vet their SRP reports accordingly before submission.
FAS Catalog Platform/Validations	Where do we learn more about the FAS Catalog Platform Pilot?	Please check out the Catalog Management Interact page here: https://buy.gsa.gov/interact/community/178/activity-feed.
FAS Catalog Platform/Validations	What will happen if a contractor only has a pricelist (T&Cs) on GSA Advantage, but not a catalog file. Will they receive an MPN error message or other flag/sales report rejection? Later addition - For example - the eCommerce SIN. They may not have a catalog file with an MPN, but the SRP system requires an MPN for that SIN so a lot of eCOM SIN contract holders	Currently, transactions reported on product SINs (Commodity Code *C*) are matched against GSA Advantage! after they are reported. To respond to the example posed--the eCommerce SIN, 54151ECOM has the Commodity Code *C* indicating that the preponderance of work is considered product-centric. Because Manufacturer Part Numbers (MPNs) are required for product SINs, you are correct that non-matched 54151ECOM MPNs will continue to show up on your mismatch list for offerings not listed on Advantage. In the future, SRP will validate select fields in the Authoritative Catalog Repository (ACR) in real time--first for product SINs and ultimately for all SINs included in the TDR Pilot. The ACR will replace price lists and capture catalog files for highly configurable products and services not listed on Advantage. Once that happens, we can improve the way line item data is validated and prevent transactions from erroneously being treated as mismatches.

Topic	Question	Answer
	show up on our TDR mismatch list	
Maturation Strategy/Classifications	What is meant by "configurable" products?	Here is the FY24 definition of the classification Greg mentioned: ***Classification 2: Highly Configurable products*** • *SINs in this classification predominantly offer products that are built to order. Due to the level of customization and variability that impact the final price, these products are not sold through GSA Advantage!. Examples of highly configurable products include customizable copying and printing equipment and supplies, automotive vehicles and accessories, furniture and storage, and configurable IT equipment.*
Maturation Strategy/Classifications	Can we see categorization into buckets (non-configurable, configurable, etc).	FAS will share specific SIN classifications in a future communiqué. Here are the classification definitions for the time being: ***Classification 1: Non-configurable products (with standard options)*** • *SINs in this classification predominantly offer stand-alone COTS products priced per unit but may include basic options in a limited capacity. These products are typically published on GSA Advantage!. Examples of non-configurable products (with standard options) include off-the-shelf tools, chemical and cleaning products, standard maintenance repair and operations hardware, scientific supplies and equipment, and packaging materials. Examples of standard options include color selections and other options offered at no additional cost.* ***Classification 2: Highly Configurable product****s* • *SINs in this classification predominantly offer products that are built to order. Due to the level of customization and variability that impact the final price, these products are not sold through GSA Advantage!. Examples of highly configurable products include customizable copying and printing equipment and supplies, automotive vehicles and accessories, furniture and storage, and configurable IT equipment.* ***Classification 3: Service Contract Act/Service Contract Labor Standards (SCA/SCLS) Services*** • *SINs in this classification predominantly offer services governed by standard Department of Labor wage determinations which specify minimum hourly rates and fringe benefits. Examples of SCA/SCLS services include emergency response, ground transportation, packaging and trucking, records management, laboratory support, document*

Topic	Question	Answer
		destruction, automotive repair and maintenance, and guard services. ***Classification 4: Professional Services*** • *SINs in this classification predominantly offer custom, consultative services not subject to predetermined wage rates. Examples of professional services include photography, videography, Cloud advising, financial management, human resources, legal services, engineering, graphic design, software maintenance, cybersecurity, technical consulting, research, and environmental services.*
Maturation Strategy/Engagement	When speaking about the engagement strategy for services-focused improvements, are you referring to labor categories that fall under SIN 54151S? Can you speak more about how you intend to evaluate pricing for these labor categories?	The Services Pricing IPT that manages aforementioned classifications #3 and #4 is working steadily on formulating new pricing evaluation processes. Services efforts are operating on a longer timeline than products based on complexity and current-state data maturity. We communicate more about services in the future. In the meantime, please feel free to email TDRteam@GSA.gov with any suggestions.
Maturation Strategy/FFP	How is the TDR data validation against GSA MAS catalog can be achieved for Fixed Price Task Orders. Vendors are required to report invoicing data and for FP task orders there is no break down to specific items on the invoice.	As discussed at the February 15th event, FAS grouped SINs into classifications to establish governance sufficient for troubleshooting technical questions and implementing improvements in specific offering areas. FFP reporting is one of many issues that classification integrated product teams (IPTs) are working through in FY24.
New Fields/Reporting Requirements	How does a vendor navigate to this additional requirements if their system is not equipped to pull this additional TDR data?	The new fields will be rolled out as optional on an initial basis to allow contract holders to equip their systems and processes. After FAS analyzes the new field data and obtains Senior Procurement Executive approval--the fields may be made mandatory for select SINs at a later time. FAS will allow an acclimation period of no fewer than six months before making the fields mandatory.

Topic	Question	Answer
New Fields/Reporting Requirements	Additional TDR fields are to be rolled out in June 2024 as optional?	Yes, the fields will initially be optional when rolled out in Quarter 3.
New Fields/Reporting Requirements	One of the field changes is order date and ship date but what if we report based on receipt of order and the ship date has not passed yet?	This is a question that FAS has not previously considered. The new fields are initially being rolled out on an optional basis so that we can solve problems and questions like this before making the fields mandatory. While we prefer that contractors not report until after they have an approved invoice, the TDR clause allows for reporting upon invoice issuance (See GSAR 552.238-80 ALTERNATE I for more information.). Based on the information available at this time, we recommend waiting until after the ship date to report transactions to us--unless that date occurs more than 30 days after the transaction month closes. We will ensure that the SRP template provides clear guidance on this front. Thank you for this question.
New Fields/Reporting Requirements	Can we get a copy of the template of all field needed in excel format?	A revised SRP template will be shared with industry well in advance of the field changes.
New Fields/Reporting Requirements	Are you expecting industry to manually enter in the Agency code, as this is not something our accounting system is currently set up to capture? Or are you expecting us to completely change our accounting system to track this Treasury Agency code?	FAS expects contract holders to use their discretion in determining how to handle the new fields (i.e., via manual entry or system change). Once updated in advance of the rollout, the SRP template will include a list of acceptable federal customer field options. Again, the new fields will be rolled out as optional on an initial basis to allow contract-holders to equip their systems and processes for the changes. After FAS analyzes the new field data and obtains Senior Procurement Executive approval--the fields may be made mandatory for select SINs at a later time. FAS will allow an acclimation period of no fewer than six months before making any of the new fields mandatory.
New Fields/Reporting Requirements	How can you report ship field if you're providing a service vs. product	The Ship Date field is only applicable for products. Thank you very much for asking for this clarification.

Topic	Question	Answer
New Fields/Reporting Requirements	Is Shipped to Zip supposed to be the End User or the actual Shipped to address? This would be non-valuable if the product goes to a partner before the End User.	We do not understand what you mean by *End User*. For products only--we are seeking the ZIP code that is used to determine pricing. Our goal for the field is to enable analysis of locality-based cost drivers and demand. We are not requesting a specific address at this time, only ZIP code. Here is our draft language for the SRP template: *Enter the date the product was shipped to the customer. This field is not applicable for services. (YYYY-MM-DD)* Please email follow-up questions and suggestions for improvements to TDRteam@gsa.gov.
New Fields/Reporting Requirements	Are you going to ding manufacturer's for supply chain shortages when there are significant gaps between order date and ship date?	It is not our intent to "ding" anyone for order date/ship date field entries. Rather, our goal is to analyze cycle times to formulate evidenced-based inferences about the MAS program's performance and trends (e.g., efficiency, demand, seasonality, etc.).
Reporting requirements	How should respondents address multiple SINs in their responses?	MAS Special Item Number (SIN) is a preexisting TDR field required for all transactions. FAS analyzes vendor-reported transactions primarily by SIN and sets TDR field requirements in SRP based on each SIN's commodity code. Commodity Codes are one-letter codes that indicate whether a SIN is a product (code *C*), service (code *S*), or both (code *B*) based on preponderance of work. Commodity codes can be viewed in eLibrary here: https://www.gsaelibrary.gsa.gov/docs/MAS_Available_Offerings_Attachment_Refresh.xlsx#:~:text=Commodity%20Codes%20are%20one%2Dletter,product%2C%20service%2C%20or%20both.&text=PSC%2C%20Product%20Service%20Code%2C%20is,s)%20associated%20with%20the%20SIN. (If this link does not work for you, Google "GSA SIN commodity code" to find the SIN Listing spreadsheet.) Here is an example of how the SRP field requirements work based on commodity code for three media-related SINs: Because SIN 51130/Media Products/Books and Pamphlets has the commodity code *C*, the Manufacturer Name and Manufacturer Part Number fields are required. Whereas these fields are optional for closely related SINs with commodity code *B* (e.g., 511120/Media Services/Periodicals, Subscriptions, Online Book Selling and Lending Library Services) and commodity code *S* (e.g., 561410/Media Services/Editorial, Publishing, and Library

Topic	Question	Answer
		Media Services). After the February 15th MAS Office Hours concluded, FAS followed up with the contract holder who asked this question to ensure it was fully addressed. The contract holder indicated that he/she/they had contracts on multiple SINs and were unsure which SIN to select for reporting. For products ordered via GSA Advantage!, contract holders must use the SIN aligned to their products as posted. For services, highly configurable products, and hybrid offerings not posted on GSA Advantage!, we advise selecting the SIN primarily based on preponderance of work and secondarily customer preference (if applicable).
TDR value proposition	How could company find out if this is something they would want to do.. what is the implementation process. and what are the benefits of TDR vs. CSP?	FAS implemented TDR as a less burdensome alternative to legacy pricing disclosure requirements. Traditionally, a contractor would submit Commercial Sales Practices in an offer for a GSA Schedule contract. However, with Transactional Data Reporting (TDR), there is no agreed upon Basis of Award customer, therefore the Price Reductions Clause is removed and, rather, an offer is evaluated in accordance with GSAR 538.270-2 Evaluation of offers with access to transactional data. Please see the following URL for more information: https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/help-with-mas-contracts-to-sell-to-government/consider-transactional-data-reporting.
TDR value proposition	Can you track most favorite customer through TDR? Of there will not bee need for it with you do TDR?	No, Most Favored Customer and Basis of Award information is not required for vendors who opt in to the TDR Pilot. Please see the following URL for more information: https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/help-with-mas-contracts-to-sell-to-government/consider-transactional-data-reporting"