ClevelandFES

BUDGETING RESOURCE PAGE

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Welcome to the FES Center Budget Resource Page!
This is your one stop shop to all of your budgeting needs.

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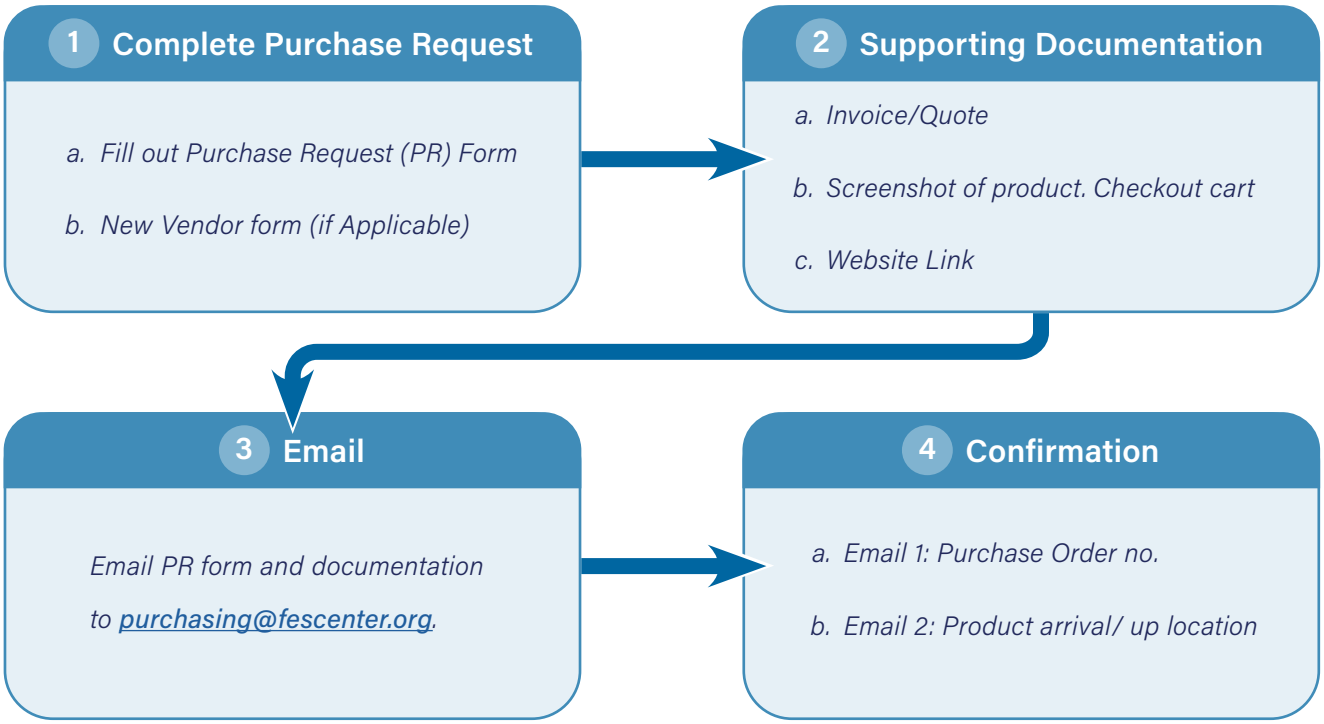
    g. Onboarding Documents

Note that some hyperlinks are accessible only utilizing the VA Network. Please refer to the respective Documents Sections to find links to hardcopy versions of the forms.

I General Purchasing

The Purchasing Process



You can submit a purchase request to FES Purchasing (**purchasing@fescenter.org**) using the Purchase Request Form. The form must be completed in its entirety for our records. Any requisition form that is not filled out entirely may take longer to be processed. It is always helpful if you can include quotes, links, screenshots or even share your cart!

Access Purchase Request Form Here

How to Complete a Purchase Request Form

For all credit card purchase orders the amounts are as follows:

I. **Supplies, "chemicals and equipment:** up to $10,000 total (this includes shipping, tariffs, dry ice, etc.)

II. **Services:** $2,500 total including any fees

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Vendorization

To do business with VA, vendors must be **registered with the official website** of the **U.S. Government System for Award Management (SAM)** AND with the **internal VA system**, AND they **must accept a credit card**. If you need to check and see if a vendor is in the system please email **purchasing@fescenter.org** the name of the company.

- If the vendor is not registered with the VA system, use the **New Vendor Form** and provide the form back to **purchasing@fescenter.org**. Request the vendor to register through the **FSC** and complete the payment account setup, and allow for 3-5 days for Logistics to enter them. They will need to create an **ID.me** account first, then register and complete the electronic 10091 form.

  Access New Vendor Form Here

- Vendors will receive payment electronically through FSC **Veterans Affairs | Tungsten Network.**

Helpful resource: Doing business with the VA

FSC Contact Information: 1-877-353-9791, vafsccshr@mail.va.gov

Timeline

Please be aware that **a standard order can take 1-2 weeks to process**. If the order is high priority (under 2 weeks) or special (ASAP) please mark it on the form **and** mention that in the email.

THE LAST DAY TO SUBMIT A PURCHASE ORDER REQUEST IS AUGUST 15TH.

Order Splitting

The VA **does not allow split purchasing** although you may order from the same company multiple times. When an order comes in from the same company but for two different items at the same time this is order splitting that cannot be processed. The individual needs to either find another company to order from or work with the company to get everything **under $15,000**. If you order again from the same company it needs to be **2 months apart**.

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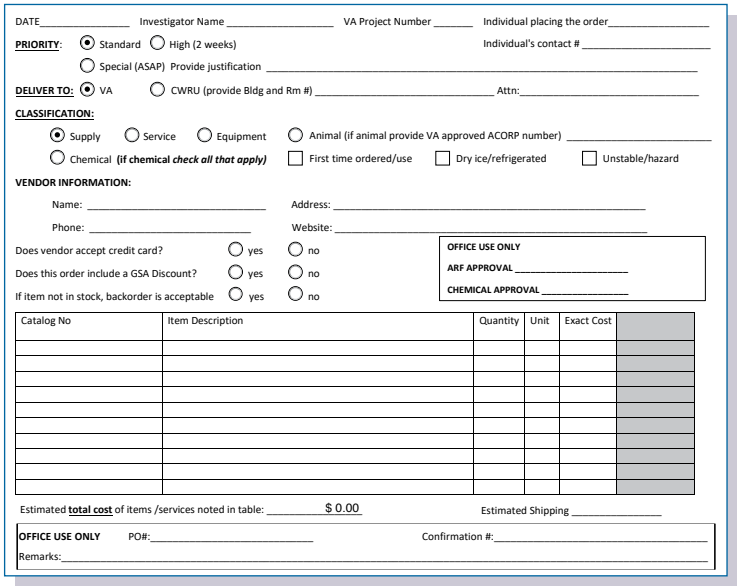
II Government Card Purchase Request

a. Purchase Request (PR) Form

Submit a purchase request to FES Purchasing (**purchasing@fescenter.org**) using the **Purchase Request Form**. The form must be completed in its entirety for our records. **Any requisition form that is not filled out entirely, may take longer to be processed.**

Make sure to send any quotes, invoices, receipts, or any other relevant documents directly to **purchasing@fescenter.org** as soon as they are available.



DATE_____ Investigator Name _____ VA Project Number _____ Individual placing the order_____

PRIORITY: ◉ Standard ○ High (2 weeks) Individual's contact # _____

○ Special (ASAP) Provide justification _____

DELIVER TO: ◉ VA ○ CWRU (provide Bldg and Rm #) _____ Attn:_____

CLASSIFICATION:

◉ Supply ○ Service ○ Equipment ○ Animal (if animal provide VA approved ACORP number) _____

○ Chemical **(if chemical *check all that apply*)** ☐ First time ordered/use ☐ Dry ice/refrigerated ☐ Unstable/hazard

VENDOR INFORMATION:

Name: _____ Address: _____

Phone: _____ Website: _____

Does vendor accept credit card? ○ yes ○ no

Does this order include a GSA Discount? ○ yes ○ no

If item not in stock, backorder is acceptable ○ yes ○ no

OFFICE USE ONLY
ARF APPROVAL _____
CHEMICAL APPROVAL _____

Catalog No	Item Description	Quantity	Unit	Exact Cost	

Estimated **total cost** of items /services noted in table: _____$ 0.00 Estimated Shipping _____

OFFICE USE ONLY PO#:_____ Confirmation #:_____

Remarks:_____

Purchase Workflow

I. Purchase Request Form

   a. Collect supporting documentation: invoice/quote, website link, screenshot of the product or your checkout/cart

   b. Fill out the form.

II. If applicable, fill out the New Vendor Form and request to fill out the forms at **https://www.cep.fsc.va.gov/**.

III. Email your purchase request to **purchasing@fescenter.org**.

IV. Get confirmation emails containing:

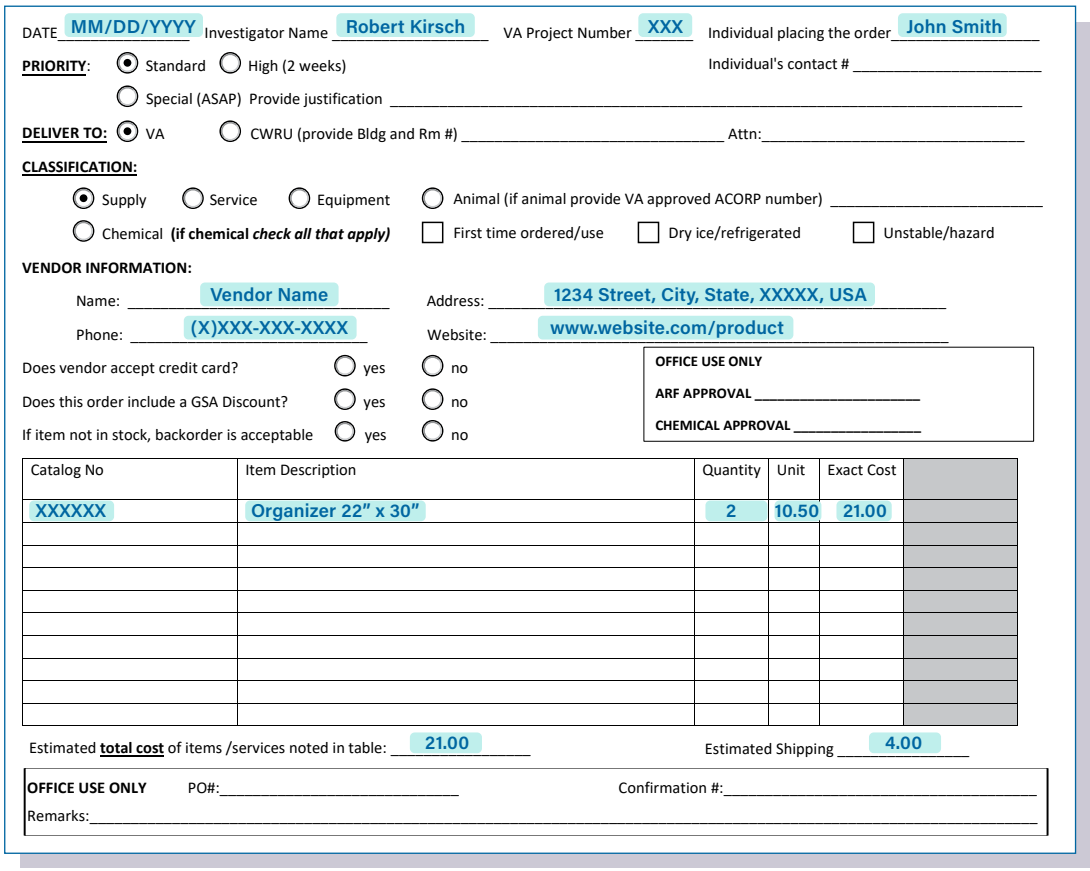
   a. Purchase order number (PO#).

   b. Product arrival notice and pick up location.

cont.

How to complete a Purchase Request Form

See this PDF for a detailed look at how to fill out the purchase request forms.



DATE MM/DD/YYYY Investigator Name Robert Kirsch VA Project Number XXX Individual placing the order John Smith

PRIORITY: (•) Standard ( ) High (2 weeks) Individual's contact # _____

( ) Special (ASAP) Provide justification _____

DELIVER TO: (•) VA ( ) CWRU (provide Bldg and Rm #) _____ Attn:_____

CLASSIFICATION:

(•) Supply ( ) Service ( ) Equipment ( ) Animal (if animal provide VA approved ACORP number) _____

( ) Chemical **(if chemical *check all that apply*)** [ ] First time ordered/use [ ] Dry ice/refrigerated [ ] Unstable/hazard

VENDOR INFORMATION:

Name: Vendor Name Address: 1234 Street, City, State, XXXXX, USA

Phone: (X)XXX-XXX-XXXX Website: www.website.com/product

Does vendor accept credit card? ( ) yes ( ) no

Does this order include a GSA Discount? ( ) yes ( ) no

If item not in stock, backorder is acceptable ( ) yes ( ) no

OFFICE USE ONLY

ARF APPROVAL _____

CHEMICAL APPROVAL _____

Catalog No	Item Description	Quantity	Unit	Exact Cost	
XXXXXX	Organizer 22" x 30"	2	10.50	21.00	

Estimated **total cost** of items /services noted in table: 21.00 Estimated Shipping 4.00

OFFICE USE ONLY PO#:_____ Confirmation #:_____

Remarks:_____

[Access Purchase Request Form Here]

[How to Complete a Purchase Request Form]

Special Notes for PR-Forms

- **Justification: Every purchase request requires justification.** Please provide justification on the form.
- **No Tax:** Do not include tax in the table. We work with vendors to remove tax charges.
- Attach any links or login details required for accessing specific quotes. Inform us of any specifications to ensure correct product selection.
- **Forward Emails:** If you receive any receipts, quotes, or invoices, forward them to purchasing@fescenter.org for our records and include your Purchase Order number (PO#) in the subject line. **When sending an email, please CC the PI's email.**

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b. Recommended Government Vendors

The VA asks that we prioritize using government vendors when possible. Below are two options that offer a wide variety of products. We ask that you please check these out before searching through other vendors. You may use standard purchase request forms.

AbilityOne | GSA Advantage

Please Note

- Per guidance Amazon should be a **"last resort"** vendor meaning an alternate vendor should be looked for prior to defaulting to Amazon. Use best judgment. If an order is significantly cheaper on Amazon, we should still be okay to process but you will need to send me a justification with your Purchase Request.
- If you know we likely haven't used a vendor before please contact **purchasing@fescenter.org** with the vendor name prior to sending through a purchase order to ensure the vendor is set-up within the VA system.

c. Purchasing Documents

Purchase Request Form | Example Purchase Request (PR)

New Vendor Form

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III Stores Located at LSCVA Medical Center

Both of these stores are internal for the LSCVA, so items will arrive extremely quickly. The money does not come out of your budget!

Your order must include: Quantity, Item Number, Item Name, and Delivery Location.

Please note that the items from the Dimestore and SPD can only be delivered within LSCVA-MC and may not be available in every color or size.

Dimestore

Consider using this store for any **office supply needs**.

- Located in the Basement, Warehouse
- To order, email **Christina.Raymond2@va.gov**
- VA Link: **Dime-Store.aspx**
- **Dimestore Catalog**

Supply and Distribution (SPD)

Consider using this store for any **medical supply needs**.

- Located on the first Floor, Module G
- To order, use **SPD Leaf Page** or come In-person
- VA Link: **Supply Distribution and TSS.aspx**
- **SPD Catalog**

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IV Contracts

Contract requests must be submitted as a **procurement package**, along with the **quote from the vendor**. It's crucial to take the time to fill out the package and be as detailed as possible to avoid any miscommunication or returned packages from contracting.

Contracts are required for **services over $2,500** and **equipment over $15,000**.

a. Procurement Documents

i. New Requirements

CORs should always check out **Acquisition Knowledge Portal** (AKP) for the newest templates. Go to the 2nd column, titled, "**VHA Procurement**" to view documents.

Service Request	Equipment Request
Service Procurements Attachment 4 OR Biomed Procurements Attachment 15 (HTM Biomedical Engineering Service)	Equipment & Supply Procurements Attachment 3
Security Checklist VA Handbook 6500.6, App. A. DO NOT SIGN. Admin will obtain the signatures.	
IGCE	
eCMS Line Item	
Market Research Report Attachment 1 IF ≤ $250,000 Market Research Report Attachment 2 IF > $250,000	
General description of salient physical, functional, or performance characteristics that are essential to your requirement.	
Statement of Work (SOW)	
Quote	
When there is only 1 source that can fulfill your request: Single Source Justification (SSJ) IF ≤ $250,000 Single Source Justification FAR 13.5 (SSJ) IF > $250,000 When there is more than 1 source that can fulfill your request but a specific name brand is required for compatibility: LSJ Attachment 1 IF ≤ $250,000 LSJ Attachment 2 IF > $250,000	
SBAR approval	

cont.

For anything that looks like IT, FITARA reviews are quick if network access is not applicable, but the review is still required. Reach out with any questions to purchasing@fescenter.org.

ii. Option Period Requirements

I. Attachment F Annual Contractor Performance Eval Report

II. Memo to COR or Program Manager for Option Renewal

III. Sometimes CS/COs request Attachments B & D:

   a. Attachment B Quarterly Contractor Performance Eval Report

   b. Attachment D - COR Invoice Report

IV. Updated SBAR approval.

V. Updated IGCE.

Please be mindful that contractors **reserve the right to solicit any government contracts regardless of if a sole source is requested**. Please refrain from communicating to any vendor that we will do business with them because it is left to contracting.

Purchasing@fescenter.org will review and enter data into the contracting system. After getting approval, the documentation will be submitted to the Acquisition Package for contracting. There will be an email confirmation that the contract has been submitted. Once a contractor is assigned it will take anywhere from 30 - 90 days for a decision. After review, contracts can be awarded with the original vendor, a different vendor, or be denied. If awarded, the equipment will be delivered and services will be rendered. We recommend inspecting the equipment/services promptly.

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b. Cut-Off Dates

Cut-Off Date	Request Type	Request Amount
February 1st	Open Market	>$7M
March 1st	Open Market	$500K–$7M
April 1st	Orders Against Existing Contracts (GSA/FSS, etc.)	>$7M
May 1st	Orders Against Existing Contracts (GSA/FSS, etc.)	$500K–$7M
June 15th	Orders Against Existing Contracts (GSA/FSS, etc.) Open Market	$250K–$500K
June 30th	Open Market	$25K–$250K
July 1st	Orders Against Existing Contracts (GSA/FSS, etc.)	<$250K
July 15th	Orders Against Existing Contracts (GSA/FSS, etc.)	Any Dollar Value
August 1st	Open Market	<$25K — SUPPLIES
90 Days Prior to the Contract End Date	Option Renewals	N/A

All procurement packages are due 2 weeks before the purchasing Cut-Off Dates to ensure completion and submission.

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c. Modification of Contract

Complete the **VHAPG Part 843 Contract Modification** and ensure you provide a justification.

i. De-Obligation

When a contract is awarded, the funds are allocated specifically for that contract and can only be used for its purposes. When the contract's performance period has ended and there are no remaining funds, it is time to release those funds.

ii. Increase

For whatever reason, additional funds need to be added to an existing contract. What it is checked for - Amount, Decrease or Increase was marked, (**two signatures**, if there's an **Increase & the SBAR Approval** was uploaded - for increase)

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d. Contracting Documents

Document Name	FES Server	VA Website
Contract Examples	https://fescenter.org/wp-content/uploads/2026/07/ContractingExamples_Table.pdf	N/A
FITARA	N/A	https://dvagov.sharepoint.com/sites/vhaproguide/SitePages/Part-839.101-70.aspx
SBAR	https://fescenter.org/wp-content/uploads/2026/06/SBAR-template-2.docx	N/A
Supply/Equipment Procurements Att. 3	https://fescenter.org/wp-content/uploads/2026/07/CRG_Detailed_Customer_Procedures_Attachment_3_Equipment_and_Supply.docx	https://dvagov.sharepoint.com/:w:/r/sites/vhaprocrg/_layouts/15/Doc.aspx?sourcedoc=%7B31AE1AEA-79FC-4354-9D01-FB0847945350%7D&file=CRG_Detailed_Customer_Procedures_Attachment_3_Equipment_and_Supply.

cont.

Service Procurements Att. 4	https://fescenter.org/wp-content/uploads/2026/07/CRG_Detailed_Customer_Procedures_Attachment_4_Service_Procurements.docx	https://dvagov.sharepoint.com/:w:/r/sites/vhaprocrg/_layouts/15/Doc.aspx?sourcedoc=%7b05025EEA-480F-4B41-AA0C-307D3D7FD15E%7d&file=CRG_Detailed_Customer_Procedures_Attachment_4_Service_Procurements.docx&wdLOR=c9027F2CE-3BD8-445A-A259-6738DD0B9FB0&action=default&mobileredirect=true
Biomedical Procurements Att. 15	https://fescenter.org/wp-content/uploads/2026/07/CRG_Detailed_Customer_Procedures_Attachment_15_Biomed_Procurements.docx	https://dvagov.sharepoint.com/:w:/r/sites/vhaprocrg/crg/CRG_Detailed_Customer_Procedures_Attachment_15_Biomed_Procurements.docx
Security Checklist 6500.6	https://fescenter.org/wp-content/uploads/2026/07/VA-Handbook-6500.6-App.-A-Template.pdf	https://dvagov.sharepoint.com/sites/vhanco10/CORToolbox/How%20to%20Guides/VA%20Handbook%206500.6,%20App.%20A%20Template.pdf
IGCE	https://fescenter.org/wp-content/uploads/2026/07/CRG_IGCE_Service_Template.xlsx	https://dvagov.sharepoint.com/sites/vhaprocrg/crg/CRG_IGCE_Service_Template.xlsx
COR Nomination Memo	https://fescenter.org/wp-content/uploads/2026/07/Attachment-1-COR-Nomination-Memo_P01.docx	https://dvagov.sharepoint.com/sites/vhaproguide/ProGuide/Attachment%201%20-%20COR%20Nomination%20Memo_P01.docx
Market Research MTP-SAT Att. 1	https://fescenter.org/wp-content/uploads/2026/07/Atch-1-VHA-Streamlined-MR-Report-Template.docx	https://dvagov.sharepoint.com/sites/vhaproguide/ProGuide/Atch%201%20VHA%20Streamlined%20MR%20Report%20Template.docx
Market Research SAT-7.5M Att. 2	https://fescenter.org/wp-content/uploads/2026/07/Atch-2-VHA-Market-Research-Report-Template.docx	https://dvagov.sharepoint.com/sites/vhaproguide/ProGuide/Atch%202%20VHA%20Market%20Research%20Report%20Template.docx
SOW	https://fescenter.org/wp-content/uploads/2026/07/SOW-Template.docx	N/A
Exception to Fair Opportunity Att. 1	https://fescenter.org/wp-content/uploads/2026/07/Attachment-1-Exception-to-Fair-Opportunity.doc	https://dvagov.sharepoint.com/:w:/r/sites/vhanco10/Customer%20Toolbox/Shared%20Documents/Attachment%201%20Exception%20to%20Fair%20Opportunity.

cont.

FAR 6 JA IAW VAAR Att. 1 (Justification for other than full and open competition 2024)	https://fescenter.org/wp-content/uploads/2026/07/PG_Part819.7008-7009_Atch1_FAR6_JA_IAW_VAAR_819.7008-7009.docx	https://dvagov.sharepoint.com/sites/vhaproguide/ProGuide/PG_Part819.7008-7009_Atch1_FAR6_JA_IAW_VAAR_819.7008-7009.docx
eCMS Line Item	https://fescenter.org/wp-content/uploads/2026/07/Services-eCMS-Line-Item-Template-FY23-Added-Column.xlsx	https://dvagov.sharepoint.com/:x:/r/sites/VHAProcurement/LineItemDocuments/Services%20eCMS%20Line%20Item%20Template%20FY23%20-%20Added%20Column.
SSJ MPT-SAT Att. 1	https://fescenter.org/wp-content/uploads/2026/07/Attachment-1-Single-Source-Justification-MPT-to-SAT.doc	https://dvagov.sharepoint.com/:w:/r/sites/vhaproguide/ProGuide/Attachment%201%20Single%20Source%20Justification%20MPT%20to%20SAT.doc
SSJ SAT-7.5M Att. 1	https://fescenter.org/wp-content/uploads/2026/07/Attachment-1-FAR-13.5-Sole-Source-Justification-SAT-7.5M.docx	https://dvagov.sharepoint.com/:w:/r/sites/vhaproguide/ProGuide/Attachment%201%20FAR%2013.5%20Sole%20Source%20Justification%20-%20SAT-$7.5M.docx
LSJ MPT-SAT Att. 1	https://fescenter.org/wp-content/uploads/2026/07/PG_Part808.405-6_Atch1_Limiting_Sources_Justification_MPT-SAT.docx	https://dvagov.sharepoint.com/sites/vhaproguide/ProGuide/PG_Part808.405-6_Atch1_Limiting_Sources_Justification_MPT-SAT.docx
LSJ SAT-7.5M Att. 2	https://fescenter.org/wp-content/uploads/2026/07/PG_Part808.405-6_Atch2_Limiting_Sources_Justification_OVER_SAT.docx	https://dvagov.sharepoint.com/sites/vhaproguide/ProGuide/PG_Part808.405-6_Atch2_Limiting_Sources_Justification_OVER_SAT.docx
Option Period Requirements		
Att. F Annual Contractor Performance Evaluation	https://fescenter.org/wp-content/uploads/2026/07/Attachment-F-Annual-Contractor-Performance-Eval-Report.docx	https://dvagov.sharepoint.com/sites/vhaprocrg/crg/Attachment%20F%20-%20Annual%20Contractor%20Performance%20Eval%20Report.docx
Memo to COR	https://fescenter.org/wp-content/uploads/2026/07/Att-2-Sample-Memo-to-COR-or-Program-Manager-for-Option-Renewal.doc	https://dvagov.sharepoint.com/sites/vhaproguide/ProGuide/Att%202%20Sample%20Memo%20to%20COR%20or%20Program%20Manager%20for%20Option%20Renewal.doc
Att. B Quarterly Contractor Performance Evaluation	https://fescenter.org/wp-content/uploads/2026/07/Attachment-B-Quarterly-Contractor-Performance-Eval-Report-PDF.pdf	https://dvagov.sharepoint.com/sites/vhaprocrg/crg/Attachment%20B%20-%20Quarterly%20Contractor%20Performance%20Eval%20Report%20PDF.pdf

cont.

Att. D - COR Invoice Report	https://fescenter.org/wp-content/uploads/2026/07/Attachment-D-COR-Invoice-Report.xlsx	https://dvagov.sharepoint.com/sites/vhaprocrg/crg/Attachment%20D%20-%20COR%20Invoice%20Report.xlsx
Modification of Contract		
Contract Increase Example	https://fescenter.org/wp-content/uploads/2026/07/Example-Contract-Increase-Modification.pdf	N/A
VHAPG 842 Att. 2	https://fescenter.org/wp-content/uploads/2026/07/VHAPG_843_-Attachment_2.docx	https://dvagov.sharepoint.com/:w:/r/sites/vhaproguide/ProGuide/VHAPG_843_-Attachment_2.

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V Employment & Onboarding

a. Memorandum of Understanding (MOU)

If you have a VA employee working on your project and part of their efforts are funded through a non-VA grant, you must have an MOU for that person.

> ***Example**: If Mechanical Engineer Ruben Jack is working at 80% on your project, you should pay for 80% of his time.*

If you feel this may apply to you or your personnel please reach out to us at **purchasing@fescenter.org**.

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b. Intergovernmental Personnel Act (IPA)

IPAs are temporary assignments for skilled personnel. The agreement is between the Federal Government and local governments, colleges and universities, federally funded research and development centers, and other organizations. If you need an IPA, please note that the process takes several months. **The onboarding timeline is 2-4 months.**

Please verify that the organization from which the appointee is coming is on the approved list.

List of Approved Intergovernmental Personnel Act Organizations

New IPA

Please submit the following documents in one email to **joseph.jasany@va.gov** and **drecksiedler@fescenter.org**.

- **OF-306** (Be advised: both boxes 17a and 17b need to be signed by the individual the IPA is for)
- **OF-69 draft IPA agreement** (the FINAL signed IPA can be uploaded later) . The Research Department will be responsible for getting the Director's signature once the IPA appointee has been cleared by HR.
- **Current Résumé/CV** for applicant: Please ensure that **signature, date, current**

cont.

home postal mailing address, telephone and email address are included on the résumé as HR will use this information to send the WOC onboarding materials to them. Please ensure you list **ONE email address that you access frequently** as this email will be used for your login to complete all USAStaffing requirements, preferably a personal email address.

- **Request for Personal Identity Verification (PIV card)**.
- **Offer/Employment Letter** (IPA only): must include "[Affiliation/School/Facility name] Human Resources Department confirms that [Name of IPA] appointee has been employed since [Month, Day, Year] in a non-temporary position for at least 90 days with [Affiliation/School/Facility name]."
- **New Employee Information** sheet signed by the Research PI.
- Completed **WOC/IPA PI checklist.**
- **Scope of Practice** for Research Duties & Responsibilities: Research PI signatures on page 4
- **VA-WOC/IPA Appointee Intellectual Property Agreement**.
- **New Employee Information** sheet.
- For **male applicants** over 18 years of age, **VA Form 5578** is required.

Access all the examples of the necessary IPA documents here.

IPA Renewal

120 days before end date: **purchasing@fescenter.org** will email PI to inquire if the IPA will continue, if yes then we will begin the necessary paperwork:

- Completed **OF-69** Agreement.
- Current **Résumé/CV** for applicant: Please ensure that **signature, date, current home postal mailing address, telephone and email address** are included on the résumé as HR will use this information to send the WOC onboarding materials to them.
- A document stating the employees **start date** with the institution and clearly states **they are on a non-temporary appointment**. This can be a document from the

cont.

HR department or a letter stating the above two requirements with a **department signature** at the bottom.

Please Note

- Students (including graduate students) are not considered permanent employees and are not eligible for IPA regardless of tenure.
- Non-citizens may be eligible for IPA provided they meet employment requirements, have a valid visa status allowing employment, and pass the background check. Refer to "**Employment Eligibility Verification**" **form I-9**.
- IPA agreements are written in two-year increments.
- The PI must have VA funds available.
- Indirect costs are not allowed on an IPA agreement.
- IPA agreements can be cancelled at any time.
- The final start date will be determined by HR once the employee is cleared.

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c. Without Compensation (WOC)

A WOC (Without Compensation) appointment at the VA, as defined in 38 USC § 7405(a)(1), allows individuals to work with Veterans and access VA facilities/data without being a salaried employee. It grants official status for roles like researchers, students, and health professions trainees (HPTs) to access VA systems and conduct authorized duties.

Although WOC appointees do not receive payment from the VA, they are still considered federal employees. Therefore, all prospective WOC employees must be U.S. citizens* eligible to work and must pass a background check. **The onboarding process can take 3–6 weeks.**

Eligibility Guide

Use the **eligibility guide to determine if a non-citizen WOC is appropriate. For further information contact your local HR office.*

The information needed to initiate a WOC appointment must be submitted to HRMACS at least 90-120 days prior to the anticipated start date.

cont.

Please send the following information to Christina Raymond at **Christina.Raymond2@va.gov** and CC' Deadra Recksiedler at **drecksiedler@fescenter.org**.

- **New Employee Information sheet** signed by the Research PI.
- Current **Résumé/CV** for applicant: Please ensure that **signature, date, current home postal mailing address, telephone and email address** are included on the résumé as HR will use this information to send the WOC onboarding materials to them. Please ensure you list **ONE email address that you access frequently** as this email will be used for your login to complete all USAStaffing requirements, preferably a personal email address.
- **Scope of Practice** for Research Duties & Responsibilities: Research PI signatures on page 4
- **Transcripts** showing degree(s) awarded and or any licenses or certifications.
- Reference Check: **2 references** are required
- **Completed WOC/IPA PI checklist**, MUST BE COMPLETED/SIGNED BY RESEARCH PI. Please ensure all fields are completed. HRMACS will not accept generic job titles such as Research Assistant, Research Assistant, Researcher, etc. One of the job titles/series on the attached "Research WOC and IPA Statement of Duties Series" must be selected.
- **VA-WOC/IPA Appointee Intellectual Property Agreement**

d. Volunteers

Volunteers under age 18 will not be permitted VA Network or CPRS access.

Complete all required forms (Minors must obtain their parent/guardian signature on the Volunteer application) and email them to **vernell.whippel@va.gov** in the Communications & External Affairs office to process your volunteer.

Once Volunteer Service has processed and approved your volunteer, please email **Christina.Raymond2@va.gov** and **drecksiedler@fescenter.org** a completed New Employee Sheet (check that they are a Volunteer on the form).

Volunteers will receive an email with the required Research Credentialing and Training needed.

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e. Contract Student Appointment

Please submit one email with the following documents at least 75 days before the anticipated start date to **Christina.Raymond2@va.gov** and **drecksiedler@fescenter.org**.

- **New Employee Information sheet** signed by the Research PI.
- Complete **WMC Contractor Request Form**. COR will complete the top half of the form. The contract employee will complete the Contractor Personal Identifiable Information section. Please **ensure the blue fields on the form remain intact** on the form uploaded to Personnel Security systems or it will be returned by PerSec. To do this, please complete the form and select "Save As", DO NOT select "Microsoft print to PDF".
- Contractor to complete **OF-306**. To avoid common mistakes:
  - Use the current version of the OF-306; all other versions are not allowed.
  - Utilize the fillable pdf version for legibility.
  - Spell out the middle name or indicate "No Middle Name" / "Initial Only".
  - Provide City and State (for the US) or City and Country (for outside of the US).
  - Provide complete answers to questions #9 thru #15 in block #16. Please refer to the last sentence in each question for specific requirements.
  - Sign Line #17a (DO NOT SIGN Line 17B). Only Wet/Physically and USAccess PIV Digital Signatures are acceptable.
  - No scratch marks or corrections on form.
- Complete **Self-Certification of Continuous Service Form**.
  - Only Wet/Physically and USAccess PIV Digital Signatures are acceptable
  - No scratch marks or corrections on form.
- **If contractor is not a US Citizen, they must include a copy of:**
  - Copy of their **DS2019** or **I-20 Form**, or **I797A** or **I797B Notice of Action/ Approval Notice**, **Permanent Resident Card I-551**, or whatever document

cont.

allows you to work in the United States. Please include **ALL PAGES** of the documentation.

- Copy of **current/unexpired Passport** (not needed if already uploaded the Permanent Resident Card).

Once all the complete forms listed above are submitted, the **additional required documents** will be sent directly to the contract employee.

A contract employee is **not allowed to participate as a study team member on a human studies research project**. However, they **can engage in bench and/or animal work** as long as all necessary training and approvals are in place.

f. TMS Training Requirements

- VHA Mandatory Training for Health Professionals (TMS#3185966)
- VA Privacy and Information Security Awareness and Rules of Behavior (TMS#10176)
- Privacy and HIPAA Training (TMS#10203)
- VA Technology Transfer Program (TMS#131008977)
- Government Ethics (TMS#3812493)

g. Onboarding Documents

Document Name	FES Server	VA Website
New Employee Info Sheet	https://fescenter.org/wp-content/uploads/2026/06/New-Employee-Information-Form-Template.doc	N/A
MOU Quarterly	https://fescenter.org/wp-content/uploads/2026/07/MOU-Quarterly.pdf	N/A
MOU Annually	https://fescenter.org/wp-content/uploads/2026/07/MOU-Annually.pdf	N/A
WOC/IPA Intellectual Property Agreement	https://fescenter.org/wp-content/uploads/2026/07/Appointee_IP_Agreement_Form.pdf	N/A
WOC/IPA Checklist	https://fescenter.org/wp-content/uploads/2026/07/IPA-WOC_PI_Checklist.pdf	N/A

cont.

OF-69	https://fescenter.org/wp-content/uploads/2026/06/OF-69-IPA-Form-Template.pdf	https://www.opm.gov/forms/pdf_fill/of69.pdf
OF-69 Example	https://fescenter.org/wp-content/uploads/2026/06/OF-69-IPA-Form-Example.docx	N/A
OF-306	https://fescenter.org/wp-content/uploads/2026/06/OF-306-Declaration-for-Fed-Employment-Template.pdf	https://www.opm.gov/media/itafqgu2/declaration-for-federal-employment-optional-form-august-2023.pdf
VA Selective service registration 5578 (For male applicants)	https://fescenter.org/wp-content/uploads/2026/07/VA5578.pdf	https://www.va.gov/files/2021-09/Selective_Service_Registration.pdf
PIV Application	https://fescenter.org/wp-content/uploads/2026/07/PIV-Application-Form-Template.docx	N/A
Reference Form	https://fescenter.org/wp-content/uploads/2026/07/05-RP-032F-Referemce-Check-Form.pdf	https://dvagov.sharepoint.com/sites/vhahremployee/SOP_JobAide/Forms/All%20documents.
Eligibility Guide	N/A	https://www.research.va.gov/resources/policies/human_resources/WOC-Eligibility-Guide-for-non-US-citizens.pdf
Self-Certification of Continuous Service Form	https://fescenter.org/wp-content/uploads/2026/07/Self-Certification_of_Continuous_Service_Form.pdf	N/A
WMC Contractor Request Form	https://fescenter.org/wp-content/uploads/2026/07/WMC_Contractor_Request_Form.pdf	https://dvagov.sharepoint.com/sites/vhahremployee/SecurityDocs/Forms/AllItems.
Scope of Practice	https://fescenter.org/wp-content/uploads/2026/07/Scope-of-Practice-Form-Template.docx	N/A

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