



DEFENSE LOGISTICS AGENCY
HEADQUARTERS
8725 JOHN J. KINGMAN ROAD
FORT BELVOIR, VIRGINIA 22060-6221

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MEMORANDUM FOR DISTRIBUTION

SUBJECT: DoD Discrepancy/Deficiency Reporting Process Review Committee (PRC) 21-01 Meeting, May 12, 2021

This memorandum forwards the minutes of the DoD Discrepancy/Deficiency Reporting PRC 21-01 Meeting for your information and action as appropriate.

Purpose: Defense Enterprise Business & Data Standards (DEBaDS) hosted the subject virtual meeting via Defense Collaboration Services (DCS) for remote participants. Meeting documentation: A list of the meeting agenda, briefing materials, and the Action Item Tracker are available on the Discrepancy/Deficiency Resource webpage:
<https://www.dla.mil/HQ/InformationOperations/DLMS/Archives/sdr/>

Brief Summary of Discussion: Mr. Ben Breen, DoD Discrepancy/Deficiency Administrator, facilitated discussions during the SDR PRC 21-01 meeting. The Action Item Tracker contains the resulting action items. Action items are due within 30 days from the DoD Discrepancy/Deficiency Reporting PRC 21-01 meeting minutes publication unless otherwise noted.

Meeting Topics:

a. Agenda Item 1 - Welcome, Administrative, & Introductions. Mr. Ben Breen provided opening remarks with an emphasis on the DEBaDS mission. Mr. Breen introduced Mr. Tad DeLaney, Director, DEBaDS, who welcomed participants. The DEBaDS mission is to develop, publish, and maintain interoperable information technology standards for the business systems of the DoD Supply Chain to facilitate auditability and support reform initiatives of the Department. Mr. DeLaney announced that the office was in transition and expressed appreciation for the members' patience.

b. Agenda Item 2 - WebSDR Metrics and SDR Standard Response Timeframes. Mr. Breen briefed attendees on the recently Approved Standards Change (ADC) 1359 which documents the revised response time standards for all supply discrepancy report (SDR) document type codes.

In addition to the revised time standards, Mr. Breen proposed some enhancements to the metrics within DAAS WebSDR application. The proposal included new status codes that will help aggregate SDRs by status and therefore, provide more accurate reports via the

application. The status codes available today are not well defined and do not capture the different stages in the process. In addition, Mr. Breen explained some of the benefits of this change. First, the proposed status category realignment employed by WebSDR automation will not only assign a clearly defined internal code number but will also allow users to search the status of each SDR record by user defined SDR status codes using the existing reports application functionality. For example, the current category for an open record is only found by choosing the option for Open/Awaiting Disposition, whereas the proposed status and code for open will state Open/Awaiting Disposition – Status Code 1, is interpreted to mean that no disposition/status reply codes have processed, or a reply was used to indicate forwarding or interim response. (Reference DEBaDS brief slide number 6). Secondly, customers will have better visibility and the ability to query select records by enhanced, more exact, status codes eliminating the ambiguous status categories in use today.

Mr. Breen discussed adding SDRs with Action Codes 1H/3B (Info only/trend analysis) into the closed status based on the fact there is no need for a response. Mr. Breen also questioned whether SDRs with Action Code 1B (material being retained) should be included into this category. Mr. Troy Brown, DLA, inquired about the differences between Status Code 1 and Status Code TBD regarding follow ups. Mr. Breen clarified that Status Code TBD would apply after the 55 days and the submission of the SDR follow-up. Lastly, this change would encompass the ability to calculate SDR timeframes based on the original creation date. The intent is to create visibility of timeframes in coordination with the proposed status codes. (Reference DEBaDS brief slide numbers 7, 8 and 9).

Mr. Nate Wurst, ODASD(Logistics) inquired about the SDR Metrics and asked if those calculations would be automated in WebSDR. Mr. Breen replied that the application will calculate the metrics and provide the results in the form of reports. The intent is to have an exportable report output that captures the creation dates, and the systemic response time for each record. One example, based on the response time, the system would show the date DLA Distribution processed the completion notice and if it was within the standard timeframe. The application will continue to support Microsoft Excel files or other alternative form of output. Mr. Wurst also noted that users would be able to see overall SDR performance over time if other than the standard timeframes. Mr. Breen agreed and noted the desire is to see the extrapolation of submissions against the timeframes, providing visibility of performance trends as a Department against the life cycle events.

Mr. Breen also discussed the specifics regarding unprocessed or rejected records that failed for reasons other than missing data or information. In these cases, no record is established in WebSDR prior to the rejection and a control number is not assigned. In response to additional feedback, Mr. Breen clarified that these failures are captured in WebSDR metrics behind the scenes and reports are available for review from the DAAS WebSDR team.

Additionally, Mr. Breen summarized the WebSDR automated capability to process storage quality control reports (SQCR) using the DoD WebSDR platform at DAAS. The SQCR will

be included as SDR Document Type 5 (SQCR) and will be processed through WebSDR. These SQCR reports will have the same level of granularity as the SDR records.

Conclusion: The SDR community leaders will provide input to confirm the final approach. DLA provide input and feedback during the discussion. Once all components provide feedback, DEBaDS will draft a Proposed Standards Change (PDC) to document the proposed status codes.

Action item 1: Provide coordinated feedback as to moving the SDR Action Code 1B (Materiel being retained) to an information only SDR status category. All Components.

Action item 2. Provide coordinated feedback regarding status categories (per briefing slides) for SDR/SQCR in WebSDR metrics. All Components.

c. Agenda Item 3 - Constructed Document Number Update. Mr. Steve Nace, DLA Headquarters (HQ) briefed attendees regarding the ongoing issue pertaining to the use of constructed document numbers and specifically requesting credit. Mr. Nace began by explaining the problem statement: “Referencing constructed document numbers to provide credit results in the inability of purchaser or seller to trace credit back to an actual purchase order, resulting in auditability issues for both parties.” Mr. Nace provided a review of the current supply lifecycle flow. He also stated that the use of the constructed document number for the receipt of materiel creates problems across the supply life cycle, which may result in unmatched payments/funds where credit is first approved and then processed back to the customer via an SDR/PQDR response. Post credit issues include improper account assignment once the credit has been issued back the owning component, or results in an unmatched transaction which cannot be processed (Reference slides 11 through 16).

Mr. John Beale, USAF, inquired about the process where receivers research and determine that the original document number is missing and how they overcome the deficiency at the time of receipt. Mr. Beale recommended that the original document number be documented by the receiving activity on the stock screening report details supporting the user with the PQDR submission once identified or requesting that the original document number is outstanding. Steve Nace noted the concerns and reiterated that the flow briefed in today’s meeting is DLA specific and that other Component’s processes vary and may process more PQDRs than DLA. Mr. Nace acknowledged the lack of and the need for a document number validation process. He noted that going forward, the DoD should develop a document number validation process to address the financial and audit concerns mentioned when using a constructed document number.

Mr. Breen reiterated the need for the constructed document number for submission of SDR/PQDRs, but under the specific condition that users are aware that no credit would be provided. The original document number is required to properly issue credit to the owning customer. Army recommended that when an original document number is identified after the discrepancy/deficiency has been closed, that it can be reopened and processed until correct owner has received their credit due. The community agreed that proposed solutions include a process for reopening closed discrepancies is needed. Mr. Christopher Parker, Navy Product Data Reporting and Evaluation Program (PDREP-AIS) team, also commented about the handling of

closed SDRs and SQCRs and wanted confirmation that the original records are to be cancelled and resubmitted once the original document number was identified.

Conclusion: The proposed way ahead to eliminate the issues associated with the use of constructed document numbers will begin with a DLA drafted proposed standards change. This change will begin by disestablishing the issue of credit when a constructed document number is used on an SDR/PQDR in place of the original document number. The change will continue the use of constructed document number when the original cannot be located. The continued use of constructed document number provides a methodology to capture future trend analysis and will require services/components to inform SDR/PQDR submitters of the inability to issue credit for constructed document numbers. DLA and DEBaDs will formally coordinate the proposed change with the DoD Components to include the DoD financial communities before approval. The target completion date for this change is September 2021. (Reference slide 15).

Action item 3: Discuss and identify the proper manner to handle PQDR/SDRs if the original document number is identified after the SDR/PQDR has been closed. Determine if the original record is cancelled and a new report submitted with the original document number for SDR and PQDR. All Components.

d. Agenda Item 4 - DLA Warehouse Management System (WMS) Update to Transmit Storage Quality Control Reports (SQCRs). Mr. Greg Pigg, DLA Distribution briefed the status of the DLA WMS systemic transmission of SQCRs (Reference slides 17, 18 and 19).

The current state of the DLA WMS planning and implementation schedule includes the planning/development phase for initial launch (post testing) at DDCT (Corpus Christi, TX) tentatively scheduled for September 30, 2021.

The future state of the WMS planning and implementation schedule also includes processing care of supplies in storage (COSIS) development with the projected completion date of July 1, 2021. The projected go-live at DDCT only is September 30, 2021, if the Services are ready by this time. Once DDCT is live, all other sites will still operate on the existing DSS/separate transaction platform. As the remaining DLA sites transition to WMS, they will transmit the new SDR transaction for SQCRs. Cutover plans for current open records are still in discussion.

Mr. Breen provided additional comments regarding the current SQCR backlog/workload and how it will be addressed once WMS is operating at full capacity. Ms. Erin Fowles, DLA WMS Program Manager, conveyed that the current DLA DSS activity addressing routing identifier code (RIC) will not be used for WMS addressing. The main concern with the open workload of SDR/SQCRs will be addressed by eliminating RIC SL3. Ms. Tanya Green, DLA Inventory Management stated that this topic will be discussed offline in a separate meeting.

Action item 4. Set up a follow-on meeting with DLA HQ/DAAS WebSDR to discuss how to handle open SDR/SQCRs once a DLA Distribution site transitions to WMS. DEBaDS, DAAS, and DLA WMS team.

e. Agenda Item 5 - Wrap Up. Mr. Breen thanked all attendees for their participation and continued support. Components provide responses to the open action items within 30 days of

publication or as otherwise noted. Open action items are attached to the DoD Discrepancy/Deficiency Reporting PRC 21-01 Meeting Minutes for reference. Follow-on meeting date to be determined.

The Enterprise Business Standards Office points of contact are Mr. Ben Breen, email EBSO.SDR@dla.mil

THOMAS A. DELANEY
Director, Enterprise Business Standards Office

DISTRIBUTION:
ODASD(Logistics)
OASD(A, DPC)
OUSD(C)
DLMS Supply PRC
Attendees