



**DEFENSE SECURITY COOPERATION AGENCY**  
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WASHINGTON, D.C. 20301-2800

18 SEP 2019

MEMORANDUM FOR DEPUTY UNDER SECRETARY OF THE AIR FORCE FOR  
INTERNATIONAL AFFAIRS  
DEPUTY ASSISTANT SECRETARY OF THE ARMY FOR  
DEFENSE EXPORTS AND COOPERATION  
DEPUTY ASSISTANT SECRETARY OF THE NAVY FOR  
INTERNATIONAL PROGRAMS  
DIRECTOR, DEFENSE CONTRACT MANAGEMENT AGENCY  
DIRECTOR FOR SECURITY ASSISTANCE, DEFENSE FINANCE  
AND ACCOUNTING SERVICE – INDIANAPOLIS OPERATIONS  
DIRECTOR, DEFENSE INFORMATION SYSTEMS AGENCY  
DIRECTOR, DEFENSE LOGISTICS AGENCY  
DIRECTOR, DEFENSE LOGISTICS INFORMATION SERVICE  
DIRECTOR, DEFENSE REUTILIZATION AND MARKETING  
SERVICE  
DIRECTOR, DEFENSE THREAT REDUCTION AGENCY  
DIRECTOR, MISSILE DEFENSE AGENCY  
DIRECTOR, NATIONAL GEOSPATIAL-INTELLIGENCE  
AGENCY  
DEPUTY DIRECTOR FOR INFORMATION ASSURANCE,  
NATIONAL SECURITY AGENCY

SUBJECT: Case Description Field in an Amendment or Modification Document to a Letter of Offer and Acceptance (LOA), Defense Security Cooperation Agency (DSCA) Policy 19-07, SAMM E Change #422

The Security Assistance Management Manual (SAMM), Table C6.T9, currently mandates that detailed information regarding the changes in an Amendment or Modification to an LOA be included in the case description field (“This Amendment [Modification]. . .”). The intent of this requirement is to ensure that the description includes information needed to summarize the contents of the document and identify the rationale behind the change(s). Strict interpretation of this SAMM policy, however, has led to Implementing Agencies (IAs) including a statement for each individual case line that is included in the change document. This has caused the case description to be tremendously lengthy and makes it difficult to identify the overarching objective and reasons for the change(s). It has also caused re-work and extended document preparation timelines unnecessarily when individual line information has inadvertently been omitted.

To help alleviate these problems, the attached SAMM change updates the guidance for what must be included in the case description field. The new policy retains the intent (summary

information and rationale) while eliminating language that has been interpreted to require line-by-line information.

Effective immediately, the requirement for the case description field entry will mandate only (1) the identification of the major program involved, (2) a summary of the change(s) that are included in the document, (3) the reason(s) for the change(s), (4) identification of previous unaccepted amendments, if any, and (5) indication that this is a restated document (if applicable). An example of an acceptable entry might be: “This Amendment provides updates for the AH-64D Helicopter program, which reduces the quantity of items and extends the Period of Performance for several line items per the customer’s request. Amendment 3 was cancelled without acceptance.”

This memo sets the minimum requirements for the Case Description field and the document will not be rejected if the IAs choose to continue referencing each individual case line.

The case description field should include only information regarding the allowable changes to the LOA, and cannot be used to generate a change or action that is outside the scope of the document or case.

If you have any questions concerning this guidance, my point of contact is Ms. Vu-Tuyet Nguyen, DSCA-CPO, at [vu-tuyet.t.nguyen.civ@mail.mil](mailto:vu-tuyet.t.nguyen.civ@mail.mil) or 703-697-9314.



Alan Gorowitz  
Principal Director  
Strategy, Plans, and Programming

Attachments:  
As stated

cc:  
STATE/PM-RSAT  
AFRICOM  
CENTCOM  
EUCOM  
JFCOM  
NORTHCOM  
INDOPACOM  
SOCOM

SOUTHCOM  
TRANSCOM  
USASAC  
SATFA TRADOC  
NAVICP  
NETSAFA  
AFSAC  
AFSAT  
MDA  
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## SECURITY ASSISTANCE MANAGEMENT MANUAL (SAMM), E-CHANGE 422

Revise C6.T9 as follows:

Current wording:

#	Instruction
1	<p>“Based On.” Each Amendment or Modification includes a reference to the document, meeting, review, etc. that prompted the change.</p>
2	<p>Description. The “This Amendment (or Modification) is for:” includes a concise and clear purpose of the Amendment or Modification, using the following guidelines:</p> <ol style="list-style-type: none"> <li>a. Program. Identify the major program involved (e.g., “Apache Program”).</li> <li>b. Overview. Provide an overview of the Amendment or Modification. Actual changes are shown in detail subsequent to page 1.</li> <li>c. References. Enter references to specific parts of the basic LOA, Amendments, or Modifications; e.g., Basic LOA, Item 001, Attachment 2; Amendment 2, Item 003. Show if the action is an addition, modification, deletion, increase, or decrease. This must show whether value increases (line or total LOA) are due to scope or price changes.</li> <li>d. Previous Unaccepted Amendments. If a previous Amendment offer has expired, note that Amendment (number) was not accepted and state that data prior to the Amendment is being used herein. The unaccepted Amendment number should not be reused.</li> <li>e. LOA Acceptance Date. Include “Basic LOA was accepted [insert date].”</li> </ol>
3	<p>SC/MOS/TA or Notes. This column includes the source code (also referred to as the Source of Supply (SOS) code), the availability (estimated number of months FROM IMPLEMENTATION OF THE BASIC LOA to when items are available), Type of Assistance (TA) code, and training notes.</p>
4	<p>Term(s) of Sale. The Term(s) of Sale must be recorded on the first page of the Amendment or Modification. Cases that include multiple sources of funding must list all sources. The Amendment or Modification includes a dollar breakout for each credit term used.</p>
5	<p>DSCA Congressional Notification Transmittal Number. Include the DSCA transmittal number used in the statutory Congressional notification (e.g., Congressional Notification 92-15) when applicable. When multiple notification numbers apply, they must all be listed.</p>
6	<p>Expiration Date. The Amendment expiration date follows the same rules as for an LOA. <u>See Figure C5.F6.</u> for current country level timeframes.</p>
7	<p>Other Fields. Quantity, notes, codes, and financial fields should be changed to reflect the previous and revised values. The payment schedule should be adjusted accordingly.</p>

Revised wording: (Note: Changes are reflected in section 2 of C6.T9)

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1	<p>“Based On.” Each Amendment or Modification includes a reference to the document, meeting, review, etc. that prompted the change.</p>
2	<p>Description. The “This Amendment (or Modification):” includes a concise and clear purpose of the Amendment or Modification, using the following guidelines:</p> <ul style="list-style-type: none"> <li>a. Program. Identify the major program involved (e.g., “Apache Program”).</li> <li>b. Overview. Provide an overview of the Amendment or Modification. Identify the changes in the document by showing if the action is an addition, modification, deletion, increase, or decrease.</li> <li>c. Reason. Provide an explanation for the changes (e.g. per the purchaser’s request, due to scope, price changes, etc.)</li> <li>d. Previous Unaccepted Amendments. If a previous Amendment offer has expired, note that Amendment (number) was not accepted. The unaccepted Amendment number should not be reused.</li> <li>e. Identification of Restatement. If a previous version of the document was offered to the customer but requires changes before the customer will accept the offer, note that this document is restated (e.g. “This Amendment is a Restated document...”)</li> </ul> <p>Example: “This Amendment provides updates for the AH-64D Helicopter program, which reduces the quantity of items and extends the Period of Performance for several line items per the customer’s request. Amendment 3 was cancelled without acceptance.”</p>
3	<p>SC/MOS/TA or Notes. This column includes the source code (also referred to as the Source of Supply (SOS) code), the availability (estimated number of months FROM IMPLEMENTATION OF THE BASIC LOA to when items are available), Type of Assistance (TA) code, and training notes.</p>
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7	<p>Other Fields. Quantity, notes, codes, and financial fields should be changed to reflect the previous and revised values. The payment schedule should be adjusted accordingly.</p>