

# **National Institutes of Health**

**Conference, Administrative, and Travel Services II Contract**

## **NIHCATS II**

# **eGOS CUSTOMER USER MANUAL**

**Last updated: January 3, 2014**

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# 1 Overview

The NIHCATS II electronic Government Ordering System (eGOS) was developed to streamline the Task Order Procedures outlined in Section 3 of the NIHCATS II Standard Operating Procedures (SOP). eGOS is a Web-based system accessible using any computer connected to the internet and is the starting point for any NIHCATS II task order. *Please note that eGOS is a standalone system developed and customized for NIHCATS II and is not linked with other NIH Acquisition systems such as the NIH Business System (NBS) at this time.*

This user manual is intended to walk Government users through the creation and management of NIHCATS II task orders in eGOS. This user manual provides general guidance, and it is recommended that users consult with their Task Order Contracting Officer for specific details.

Contact the Program Support Team at NIHCATSII@mail.nih.gov for clarification on this user manual or if you have any questions.

# 2 Registration and Access

Users can access the system via the NIHCATS II Website at <http://nihcatsii.olao.od.nih.gov>, or directly at <https://olao-nihcatsii.egos.nih.gov>. NIH users will use their NIH username and password to register and access the system while Government users outside of NIH will use their government email and will need to create a password.

First time users can register with eGOS by clicking on the "First Time User? Register Here" link found on the login page of the system as shown in Figure 1.

## Electronic Government Ordering System (e-GOS)

1.8

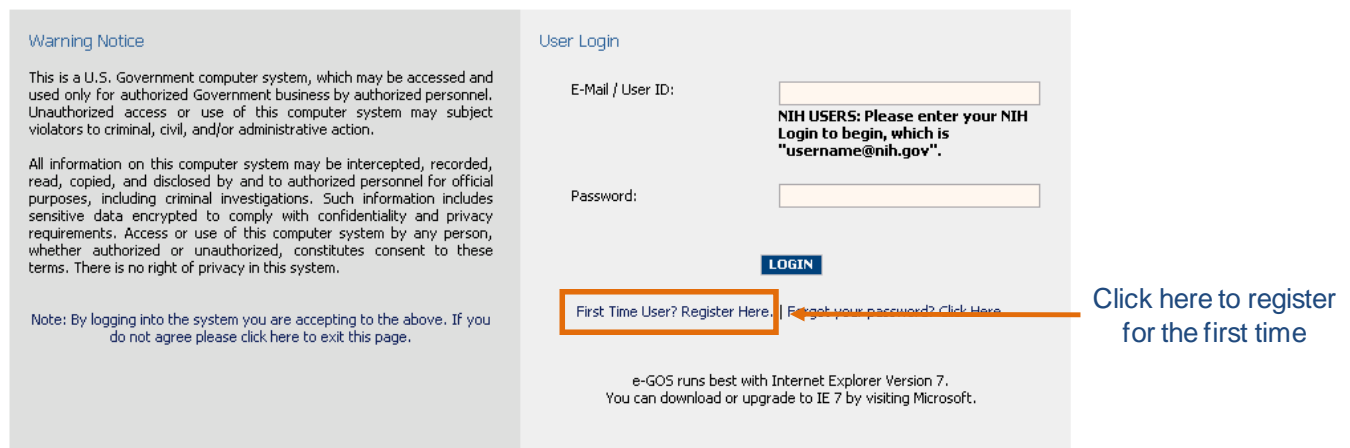
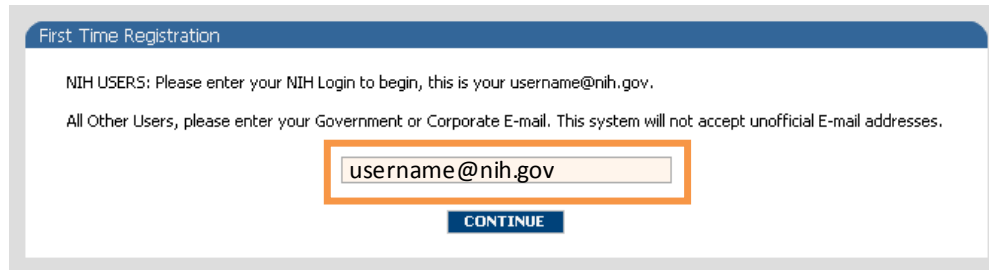


FIGURE 1: EGOS LOGIN SCREEN

The "First Time Registration" screen appears (Figure 2) and users will be asked to enter either their NIH Login or Government e-mail. For eGOS, the NIH Login is the user's NIH username followed by "@nih.gov."

Please note that the NIH Login is not typically the user's email address. The NIH Login must be entered in the proper format in order for eGOS to accurately pull the user's information using Active Directory. Due to the variations among the email addresses used at NIH, the user's email address will generally not work.



First Time Registration

NIH USERS: Please enter your NIH Login to begin, this is your username@nih.gov.

All Other Users, please enter your Government or Corporate E-mail. This system will not accept unofficial E-mail addresses.

username@nih.gov

CONTINUE

FIGURE 2: EGOS REGISTRATION

After clicking "Continue", NIH users will be presented with their information as it appears in the NIH Enterprise Directory (NED) while users outside of NIH will be asked to enter some required fields. Please note that if any of the NIH information is incorrect, users should visit <http://ned.nih.gov> while on the NIH Network and click "Update your information" as shown in Figure 3 or contact their IC representative to update their NED record.



U.S. Department of Health & Human Services | www.hhs.gov

National Institutes of Health  
The Nation's Medical Research Agency

HOME HEALTH GRANTS NEWS RESEARCH INSTITUTES ABOUT NIH

NED | NIH Enterprise Directory

Update your information

Search By: Name Phone E-mail Username NIH ID

Last Name: First Name:

Institute/Center: All Institutes and Centers

Find Clear

Advanced search options

Contact Us | Privacy Notice | Disclaimer | Accessibility | Site Map | Search | FOIA | OIG | FAQ

National Institutes of Health (NIH)  
9000 Rockville Pike  
Bethesda, Maryland 20892

Department of Health and Human Services

USA.gov  
Government Made Easy

FIGURE 3: NIH ENTERPRISE DIRECTORY

Users will then be required to review the Rules of Behavior and Electronic Signature agreements on the following pages. Click "Register" on the subsequent screen to finish the registration process. Near the top of the page, click on the "Continue to eGOS" link to return to the login page.

To access the system, NIH users enter their username@nih.gov that was used during registration and the password that they use for other NIH applications (Figure 4). Users outside of NIH enter their Government e-mail and the password created during registration.

*Please note that the "Forget your password? Click Here" link located on the login page only applies to non-NIH users and contractor personnel. An NIH employee's eGOS password will automatically change as their NIH password is updated.*

Electronic Government Ordering System (e-GOS)  
1.8

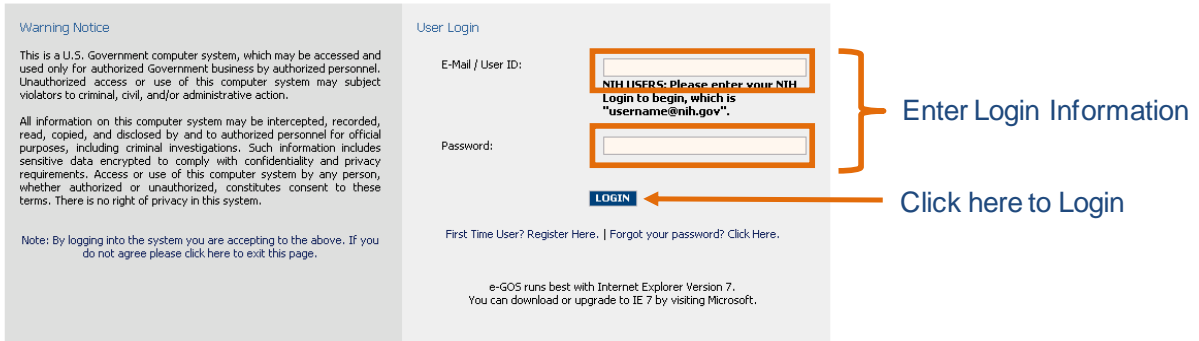


FIGURE 4: LOGGING INTO EGOS

After clicking "LOGIN," users have two options: 1) create a new NIHCATS II task order, or 2) view and manage existing task orders as shown in Figure 5. These topics will be covered later in this user manual.

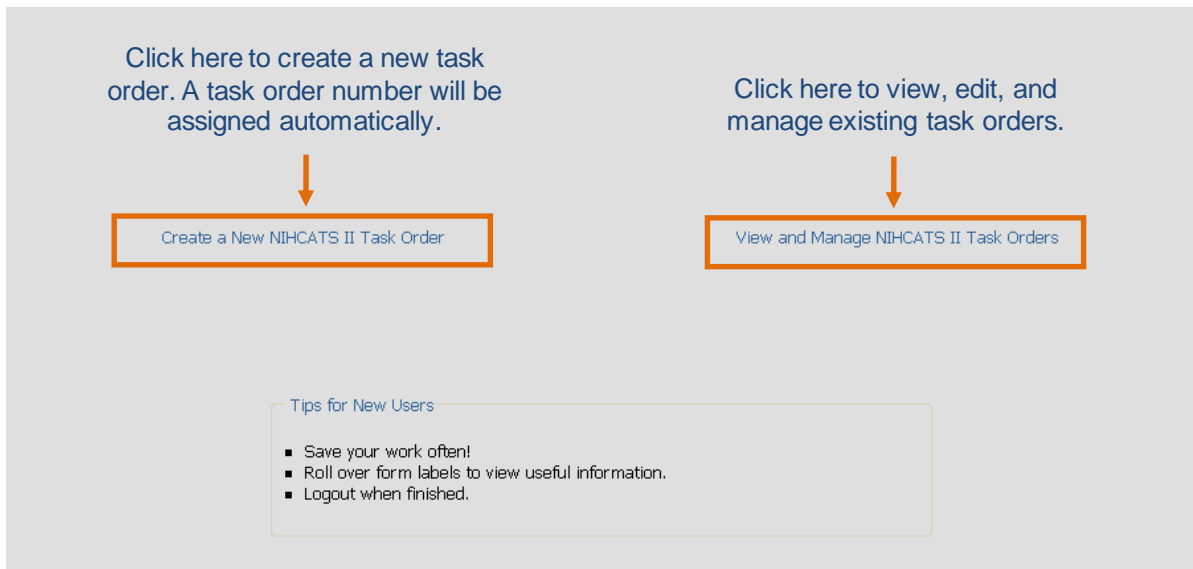


FIGURE 5: LOGGING INTO EGOS

### 3 Navigation

There are common elements to every screen, such as tabs and menus that are utilized while creating and managing task orders. These elements, shown in Figure 6, are described in detail below:

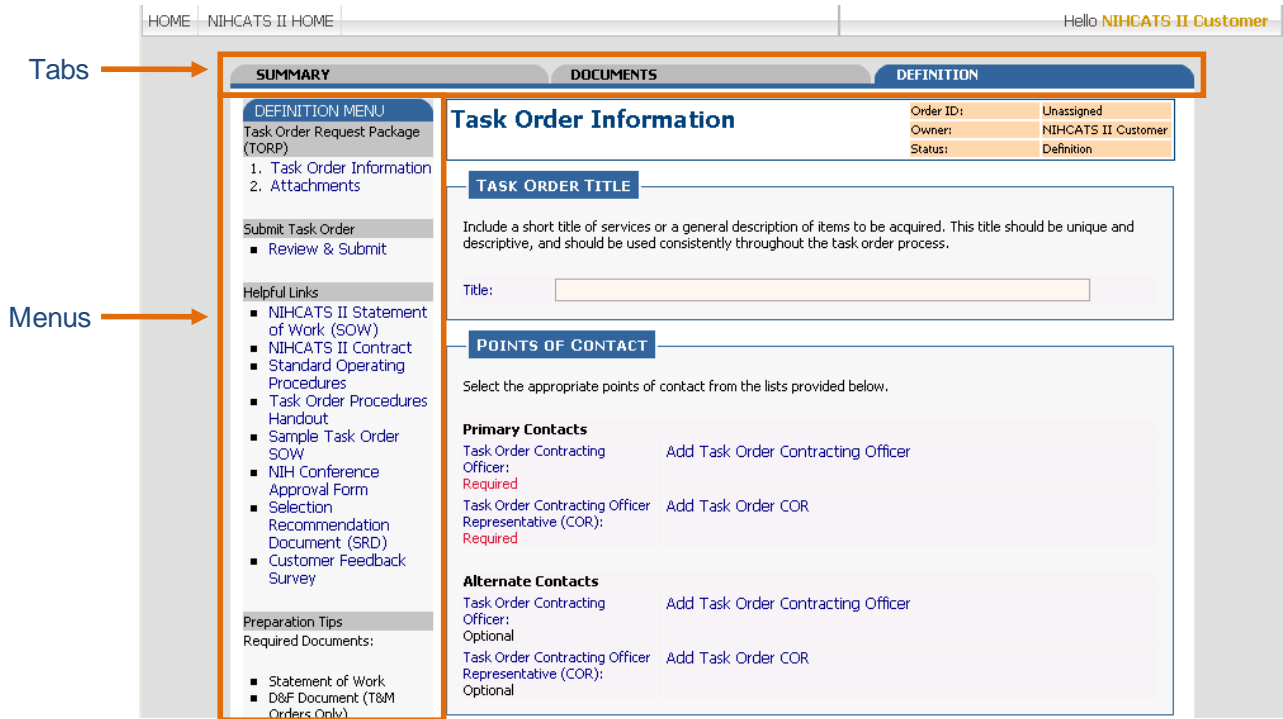


FIGURE 6: MENUS AND TABS

#### 3.1 Tabs

After choosing to create a new task order or to manage an existing one, users can click through tabs located along the top of the page to define their requirement, create an amendment, check on the competition status of the TORP, view documents, and review a summary. Though the *Summary* Tab and the *Documents* Tab are always available, other tabs may change depending on the task order's status.

The **SUMMARY** TAB provides a one-page snapshot of the task order and includes information such as the processing schedule and the points of contact.

The **DOCUMENTS** TAB houses all the documents related to a task order. This includes the TORP form generated by eGOS, SOW attachments, amendments, question and answer documents, contractor proposals, and other pertinent documents.

The **DEFINITION** TAB provides access to the screen for creating and editing the TORP Form.

The **AMENDMENT** TAB appears after a Task Order Request Package (TORP) is released to the contractors and allows users to either create an amendment or to view an existing amendment. The Amendment process is described in Section 5.2 of this user manual.

The **COMPETITION TAB** appears after a TORP is released to the contractors and allows users to see how contractors are responding to the TORP. Contractors are recorded as having submitted a proposal, having submitted a "no response" statement which includes the reason for not responding to the TORP (otherwise known as a no bid), or no submission.

### 3.2 Menus

The vertical menu located along the left side of the page is designed for users to navigate within a tab, to perform activities, and to access helpful links and important information. Menus vary depending on the tab chosen. Actions may be grayed-out if the action is no longer available due to the passing of a deadline or if the user does not have the proper authority.

The **DEFINITION MENU** is located on the *Definition* Tab and contains links to the two sections of a TORP: Task Order Information and Attachments. The "Review and Submit" link from this menu allows users to submit the task order to the NIHCATS II Program Support Team. Additionally, it includes helpful links and preparation tips.

The **ACTIVITY MENU** is located on the *Summary* Tab and contains links to perform actions such as submit a task order to NIHCATS II, view and answer questions, release answers, view response details, submit an awardee recommendation, and cancel a task order.

The **SELECTION MENU** is located on the *Selection* screen and contains links to select an awardee and to review and submit the awardee selection to the contractors.

The **AMENDMENT MENU** is located on the *Amendment* Tab and allows users to create a new amendment or view an existing one.

### 3.3 Task Order Status

eGOS tracks the status of each task order as it moves through the various steps of the process, from definition to fully funded award. The status of any task order can be found in the upper right hand corner of the screen along with the Order ID and the Owner of the task order, as shown in Figure 7.

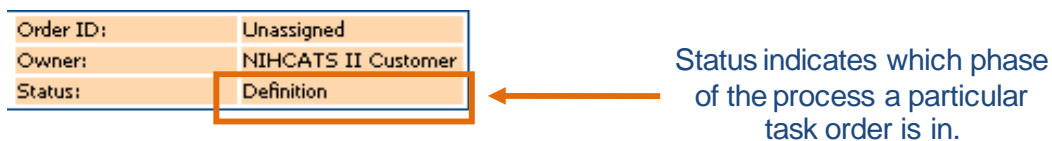


FIGURE 7: TASK ORDER STATUS

The status of a task order may reflect one of the eight phases described below:

**DEFINITION** - The TORP is being developed by the Customer, and the requirement is still being defined.

**SUBMITTED** - The Customer has finished developing the TORP, and it has been submitted to the NIHCATS II Program Support Team for review.

**APPROVED** - The NIHCATS II Program Support Team has approved the TORP for release to the contractors, but the release has not yet occurred.

**RELEASED PENDING QUESTIONS** - The TORP has been released to the contractors and contractors are able to submit questions via the system.

**RELEASED PENDING PROPOSALS** - The TORP has been released to the contractors, the questions deadline has passed, and the contractors are able to submit their proposals via the system until the proposal deadline passes.

**EVALUATION** - The proposal deadline has passed and the Customer is able to evaluate the submitted proposals.

**SELECTION MADE** - The Customer has completed their evaluation and has provided their selection recommendation to the NIHCATS II Program Support Team.

**AWARD APPROVED** - The NIHCATS II Program Support Team has reviewed the selection recommendation and the award has been approved.

## 4 Create a New NIHCATS II Task Order

The following section will aid registered users in creating an NIHCATS II TORP. Refer to Section 3 of the NIHCATS II SOP for more about creating a TORP.

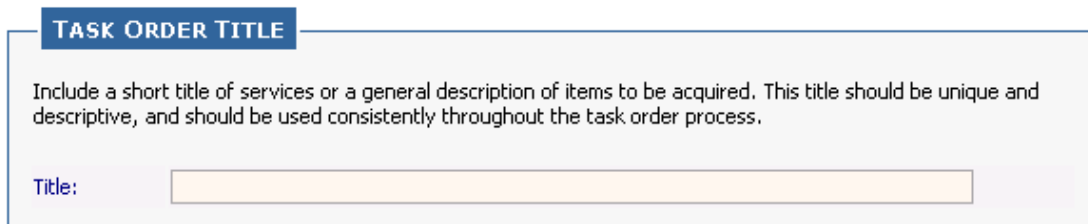
The system will open in the *Definition* Tab where users will define the requirement. For your convenience, TORPs do not need to be completed at one time but can be saved and completed at a later date.

### 4.1 Task Order Information

Users populate information regarding the task order title, points of contact, task areas, task order type, period of performance, evaluation factors, place of performance, security, government furnished equipment/ government furnished information, response instructions, other information, and the order processing schedule. Each section is described in detail below.

#### 4.1.1 Task Order Title

Users should create a meaningful title for the task order. This will be what contractors see when they open the task order in eGOS (Figure 8).



**TASK ORDER TITLE**

Include a short title of services or a general description of items to be acquired. This title should be unique and descriptive, and should be used consistently throughout the task order process.

Title:

FIGURE 8: TASK ORDER TITLE



### 4.1.2 Points of Contact

There are three main user roles in eGOS: Owner (individual creating the task order), Task Order Contracting Officer (CO), and Task Order Contracting Officer's Representative (COR). Users may assign up to four points of contact to the task order; however, the Primary Task Order CO and COR are the only two required. See Section 2 of the NIHCATS II SOP for more information on duties associated with the Primary Task Order CO and COR roles. Each person listed as a point of contact for the task order - along with the owner - will have access to the task order within the eGOS system.

The OWNER is the person who initiates a TORP within eGOS and is referred to as the requestor. Often it is the Task Order COR or CO, but does not need to be. Since the individual's name is automatically assigned to the task order by the system, it cannot be manually assigned or changed.

A TASK ORDER CONTRACTING OFFICER designee will be the CO on the task order. During the pre-award phase, the Task Order CO will support the Task Order COR to define the requirement, approve and submit the TORP, submit the answers to the questions, support evaluation of proposals, release the award recommendation to the NIHCATS II Program Support Team, and create the task order contract in NBS. During the post-award phase, the Task Order CO will be responsible for contracting activities. This person will be an appropriately warranted contracting officer.

A TASK ORDER CONTRACTING OFFICER'S REPRESENTATIVE designee will be the COR on the task order. During the pre-award phase, the Task Order COR will work with the Task Order CO in defining the requirement, often lead the team in evaluating the technical proposals, and draft the Selection Recommendation Document (SRD) recommending an awardee. During the post-award phase, the Task Order COR will be responsible for working with the winning contractor's management staff to clarify what needs to be completed. This person must be FAC-COR certified.

Alternates for the Task Order CO and COR roles may also be identified in addition to the primary selections.

Figure 9 displays where users will designate individuals to serve as the Task Order CO and COR.



Click here to easily assign the CO and COR from a dropdown of registered users.

FIGURE 9: POINTS OF CONTACT

Users are able to either choose "Self" if qualified for a particular role or choose another registered individual from the dropdown as shown in Figure 10. **Please contact the NIHCATS II Program Support Team if the registered user you are looking for does not appear in the dropdown.** The same process is used for the other roles.

Individuals assigned to a task order will receive an email notification from the system informing them they have been assigned to a task order.

Please contact your COAC for help identifying your Task Order Contracting Officer.

Please select your Task Order Contracting Officer (CO) below.  
You may designate yourself by checking the "Self" button.  
Your Task Order Contracting Officer (CO) must register on this site in order for them to appear in the list.

<input checked="" type="radio"/>	Self	Designate yourself as the Task Order Contracting Officer (CO) point of contact.
<input type="radio"/>	Other Registered User	Designate another registered user as the Task Order Contracting Officer (CO) point of contact.

FIGURE 10: DESIGNATING A PERSON TO A ROLE

### 4.1.3 Task Areas

Users will select all task areas that apply to the task order requirement and may scroll over each task area for descriptions (Figure 11). Please refer to the NIHCATS II Statement of Work for further information on the task areas.

TASK AREAS

Identify each NIHCATS II Task Area required to ensure that your tasks are within contract scope. Check all Task Areas that apply:

- 1. Travel Support
- 2. Meeting and Conference Support
- 3. Documentation Support
- 4. Administrative Support
- 5. Website Design, Development, and Maintenance Support/Internet Support

FIGURE 11: TASK AREAS

#### 4.1.4 Task Order Type

There are two task order types that are allowable under NIHCATS II: Firm Fixed Price (FFP) and Time and Materials (T&M).

FFP contracts are strongly encouraged because they provide the maximum incentive for the contractor to control costs and perform effectively while exposing the government to the least risk.

T&M contracts require a Determination and Findings (D&F) document, which will be approved by the NIH Head of Contracting Activity (HCA) if the task order is for longer than three years. T&M type contracts would generally be used if details about the requirement are not known.

**TASK ORDER TYPE**

Select one of the following contract types, as applicable to your task order. Attach Determinations and Findings (D&F) document required for Time & Materials task orders. Task orders type may be designated as either Fixed Price AND/OR Time and Materials. Though Fixed Price type task orders are preferred, Time and Materials are permitted but require a signed Determinations and Findings (D&F) report. If the task order is in excess of 3 years, the D&F must be signed by the NIH Head of Contracting Activity. Time and Materials type task orders should only be used if Fixed Price type task orders are not suitable for the designated task order.

Firm Fixed Price (FFP)  
 Time and Material (T&M)  
 Both FFP and T&M

For additional information please refer to the Federal Acquisition Regulations (FAR) Part 16

FIGURE 12: TASK ORDER TYPE

#### 4.1.5 Period of Performance

The period of performance will be from the date of award to completion defined as when the contractor has performed the work and invoiced for all labor and costs. Users can indicate the start date and end date of the specific event by choosing a specified date from the drop down lists provided (Figure 13).

**PERIOD OF PERFORMANCE**

The period of performance is from date of award to completion.  
Enter the dates of the event(s) below.

Start Date:      Oct ▾ 22 ▾ 2012 ▾

End Date:        Oct ▾ 22 ▾ 2012 ▾

FIGURE 13: PERIOD OF PERFORMANCE

#### 4.1.6 Evaluation Factors

Users will select the factors that will be used to evaluate contractor proposals from the list in this box (Figure 14). They will then be required to provide information on the importance of each factor to be used during proposal evaluation. The customer must use at least one or any combination of the original

evaluation criteria. However, in addition, the customer may create additional evaluation factors at their discretion and include them in the field provided.

**EVALUATION FACTORS**

The Government will award a task order resulting from this solicitation to the responsible Offeror whose offer conforming to the solicitation will be most advantageous to the Government, price and other factors considered. The customer shall use at least one or any combination of the original evaluation criteria as listed below. In addition, the customer may create additional evaluation factors at their discretion and include them in the box below.

- Experience with International Issues
- Corporate Experience
- Past Performance
- Price/Cost Evaluation

A statement must be made regarding the relative importance of each evaluation criterion. This may be accomplished through the use of an adjective description or the assignment of weights, at the discretion of the customer.

The Task Order COR will evaluate the Offerors' technical and business task order proposals.

The Government reserves the right to hold clarifications or discussions with contractors. Discussions, if held, shall involve at a minimum the Task Order COR and contractor management. Others such as the NIHCATS II CO and proposed staff may also participate. Discussions may range from informal meetings that discuss minor discrepancies. Offerors shall be treated equitably and fairly during this evaluation process. After evaluation and clarifications or discussions if any, the Task Order COR and Task Order CO will perform an award analysis of the information contained in the proposals using the stated evaluation criteria.

The Task Order COR and Task Order CO are responsible for ensuring that proprietary information contained in the Offerors' proposals is protected from unauthorized disclosure. It is the Offerors' responsibility to ensure that all proprietary information is appropriately marked.

FIGURE 14: EVALUATION FACTORS

### 4.1.7 Place of Performance

Users will specify if the work location is expected to be at Government owned/leased facilities or if the contractor personnel will work from their own sites. Users should use the text box to include additional details about the location, which may include the name of the office and the address (Figure 15).

Users will select between Domestic (within the US) and Foreign Services. TORPs will be considered foreign if there is any international element associated with the requirement, whether concerning the geography of the event or related activities.

**PLACE OF PERFORMANCE**

This task order requires the contractor to provide services from:

- Contractor-Owned Facilities
- Government-Owned/Leased Facilities

If requesting that the contractor provide services from Government-Owned/Leased Facilities, please describe the place of performance using details as appropriate.

Please indicate if these services are foreign or domestic:  
(TORPs will be considered foreign if there is any international element associated with the requirement, whether concerning the geography of the event or related activities.)

- Domestic (within the U.S.)
- Foreign

FIGURE 15: PLACE OF PERFORMANCE

#### 4.1.8 Security

Users may choose from among three security designations, depending on the level of security needed for the position. It is expected that most positions will require a Level 1 designation. For task orders with multiple required positions, click all that apply, and then provide additional information identifying which positions/activities apply to which level in the fields provided.

eGOS automatically includes standard security language, but if users wish to add specific security details relevant to the task order, they may click on the box for optional text. Likewise, if additional security training shall be taken by the contractor to comply with office policy, users may click on the other box and describe the mandatory courses (Figure 16).

### SECURITY

Check all position sensitivity designations that apply. If more than one of the below designations apply to the task order, the Task Order Contracting Officer (CO), Task Order Contracting Officer's Representative (COR), and Information Systems Security Officer (ISSO) may wish to consider whether there is a need to identify specific Contractor Position Titles with the applicable sensitivity designations. Additional Note: It is expected that the majority of positions under this contract will be Level 1. Levels 2, 3, and 4 are reserved for National Security positions which are generally not applicable to this type of contract.

For additional information and assistance for completion of this item, see Table 2, Position Sensitivity Designations for Individuals Accessing Agency Information.

- Level 6: Public Trust - High Risk (Requires Suitability Determination with a Background Investigation (BI)). Contractor employees assigned to a Level 6 position are subject to a BI.
- Level 5: Public Trust - Moderate Risk (Requires Suitability Determination with National Agency Check and Inquiry Investigation plus a Credit Check (NACIC), a Minimum Background Investigation (MBI), and/or a Limited Background Investigation (LBI)). Contractor employees assigned to a Level 5 position with no previous investigation and approval shall undergo a NACIC, MBI, and/or LBI.
- Level 1: Non Sensitive (Requires Suitability Determination with a National Agency Check and Inquiry Investigation (NACI)). Contractor employees assigned to a Level 1 position are subject to a NACI.

#### HHS IT Security Training Policy

HHS policy requires contractors/subcontractors receive security training commensurate with their responsibilities for performing work under the terms and conditions of their contractual agreements. The contractor shall ensure that each contractor/subcontractor employee has completed the NIH Computer Security Awareness Training course at: <http://irtsectraining.nih.gov/> prior to performing any task order work, and thereafter completing the NIH-specified fiscal year refresher course during the period of performance of the task order.

The contractor shall maintain a listing by name and title of each contractor/ subcontractor employee working under this task order that has completed the required training. Any additional security training completed by contractor/subcontractor staff shall be included on this listing.

- Include optional text.
- Contractor/Subcontractor staff is required to take additional security training.
- Check here if "Confidential Treatment of Sensitive Information" is NOT APPLICABLE to this task order.

#### Rules Of Behavior

The contractor/subcontractor employees shall comply with the National Institutes of Health (NIH) Information Technology General Rules of Behavior.

#### Personnel Security Responsibilities

The contractor shall perform, adhere to, and document the actions and responsibilities identified in the Employee Separation Checklist when a contractor/subcontractor employee terminates work under this contract. All documentation shall be made available to the Task Order COR and/or Task Order CO upon request.

#### Commitment to Protect Non-Public Departmental Information Systems and Data

- Contractor Agreement  
The contractor and its subcontractors performing under this SOW shall not release, publish, or disclose non-public Departmental information to unauthorized personnel, and shall protect such information in accordance with provisions of the following laws and any other pertinent laws and regulations governing the confidentiality of such information:
  - 18 U.S.C. 641 (Criminal Code: Public Money, Property or Records)
  - 18 U.S.C. 1905 (Criminal Code: Disclosure of Confidential Information)
  - Public Law 96-511 (Paperwork Reduction Act)
- Contractor-Employee Non-Disclosure Agreements  
Each contractor/subcontractor employee who may have access to non-public Department information under this task order shall complete the Commitment to Protect Non-Public Information - Contractor Agreement. A copy of each signed and witnessed Non-Disclosure agreement shall be submitted to the Task Order COR prior to performing any work under the contract.

The contractor shall guarantee strict confidentiality of the information/data that it is provided by the Government during the performance of the task order. The Government has determined that the information/data that the contractor will be provided during the performance of the task order is of a sensitive nature. Disclosure of the information/data, in whole or in part, by the contractor can only be made after the contractor receives prior written approval from the Contracting Officer. Whenever the contractor is uncertain with regard to the proper handling of information/data under the contract, the contractor shall obtain a written determination from the Contracting Officer.

FIGURE 16: SECURITY

### 4.1.9 Government Furnished Equipment (GFE)/Government Furnished Information (GFI)

Users may indicate if the Government will provide furnished equipment (e.g., workspace, computer, phone) (Figure 17).

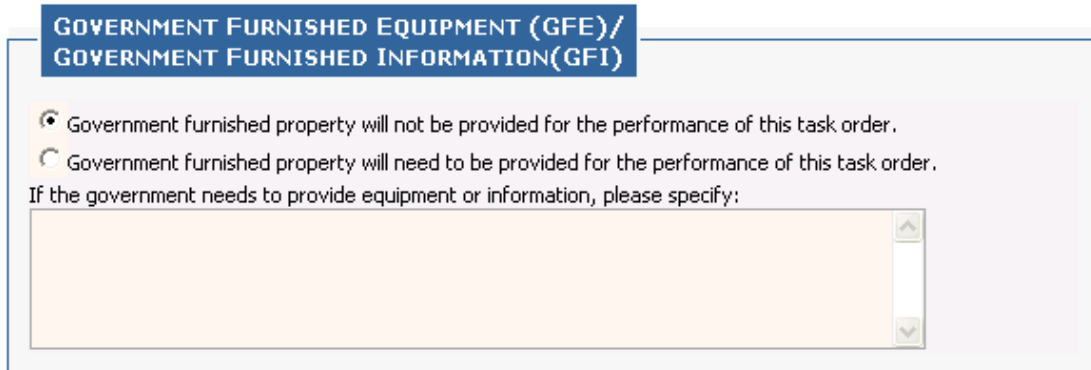


FIGURE 17: GOVERNMENT FURNISHED EQUIPMENT AND INFORMATION

### 4.1.10 Response Instructions

Users are able to create response instructions for contractors such as page limits. The system pre-populates this field with default text that has been developed based on lessons learned from other task orders (Figure 18). However, this text may be altered by users to accommodate their specific requirements.

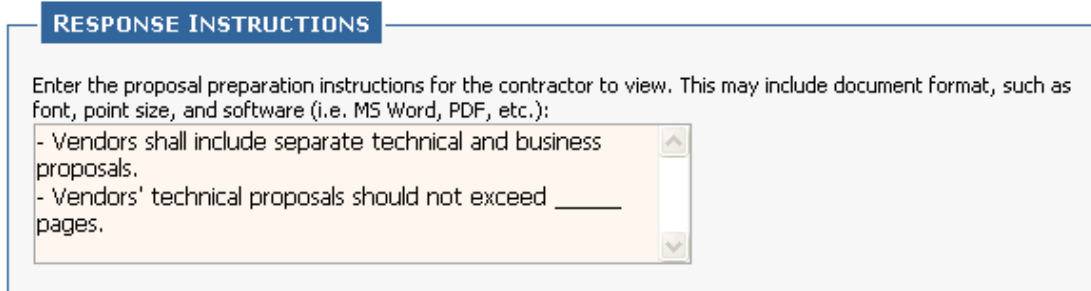


FIGURE 18: RESPONSE INSTRUCTIONS

### 4.1.11 Other Information

This field will allow the user to designate whether the TORP is an exemption to Fair Opportunity, the size of the TORP, and if any approvals are required (Figure 19). For more information on the exemption to Fair Opportunity, please refer to the FAR Subpart 16.5.

The NIHCATS II task orders have been reserved as a Partial Small Business set-aside. Task order proposals for domestic services with an estimated value of \$500,000 and below will receive priority consideration for award to a small business. If the Task Order CO and Task Order COR receive two or more task order proposals for domestic services valued at \$500,000 or less, the Task Order CO and Task Order COR would first review offers submitted from small business concerns. If the Task Order CO and

Task Order COR receive no acceptable offers from small business concerns, the set-aside shall be withdrawn and offers from the large business will then be considered. Furthermore, the Government may solicit task order proposals with an estimated value above \$500,000 from small businesses. The small business reservation does not preclude large business from submitting proposals on any task order, reference (FAR 19.502-3).

OTHER INFORMATION

**Fair Opportunity**

Is this Task Order an Exception to Fair Opportunity?

Yes  No

For additional information please refer to the Federal Acquisition Regulations (FAR) Subpart 16.5

**Order Size and Locale/Partial Small Business Set-Aside**

The NIHCATS II contracts are a Partial Small Business set-aside. Task order proposals for domestic services with an estimated value of \$500,000 and below will receive priority consideration for award to small businesses as stated in B.2.h of the NIHCATS II contracts.

Is this Task Order under \$500,000 and Domestic?

Yes  No

**Approvals**

Does this task order require any conference/meeting forms or waivers based on the services being requested?

Yes  No

FIGURE 19: OTHER INFORMATION

#### 4.1.12 Order Processing Schedule

Users are able to indicate the date and time of key task order milestones such as when the questions and proposals are due (Figure 20).

The **QUESTIONS DEADLINE** is the day that closes the period contractors have to submit questions.

The **PROPOSAL DEADLINE** is the day when contractors are required to upload their technical and business proposals in the system. The length of time contractors have to respond to a TORP should be in line with the complexity of the requirement.

**The dates and times that the system pre-populates into the TORP do not represent the recommended order processing schedule. It is expected that all the dates and perhaps times will be changed to reflect your specific requirement and your team's availability.**

ORDER PROCESSING SCHEDULE

Select the desired Order Processing Schedule subject to NIHCATS II Program Support Team approval.

Questions Deadline:	Mar ▼	27 ▼	2013 ▼	10:00 AM ▼	ET
Proposal Deadline:	Apr ▼	10 ▼	2013 ▼	10:00 AM ▼	ET

SAVE
NEXT
GENERATE PDF



FIGURE 20: ORDER PROCESSING SCHEDULE

After all sections have been completed users will click "Generate PDF" and a PDF version of the requirements will be placed on the *Documents* Tab. **Please note that the system will not display the PDF after created making it appear that the system is not responsive but in fact, the system automatically attaches it to the TORP.** A quick check of the *Documents* Tab will confirm that a PDF named "TorpForm - XXXX.pdf" was generated. If users make alterations to the requirements, a new PDF should be generated to replace the existing one. Please remember to click "Save" before generating the PDF in order to capture all the changes.

Click "Next" to move to the attachments screen where you will be able to attach the required documents and any other relevant material.

## 4.2 Attachments

Users are able to attach additional documents to the TORP such as a statement of work outlining the specific tasks to be performed, an Independent Government Cost Estimate (IGCE), a Determinations & Findings (D&F) for T&M contracts, a funding document, and any approval/waiver forms is applicable.

**When naming your attachments, please only use alphanumeric characters.** Special characters (such as "#") are not supported and will not allow users to download the document.

In addition to the required documents, the system will automatically attach the PDF generated earlier as discussed in the previous section.

Please note that depending on the document type chosen, attachments will be recorded as either "Visible to Contractors" or "Hidden to Contractors" (Figure 21).

Attachments

Order ID:	Unassigned
Owner:	
Status:	Definition

ATTACH FILES

Visibility of attached documents is displayed in the "List of Attachments" below.

\* Document Type:  \* The D&F Document is required for all Time & Materials Task Orders.  
\* Only the SOW and SOW Attachment documents are visible to Contractors.

\* Title:

Description:

\* File to Attach:

Please use alphanumeric characters only (special characters such as "#" are not supported).

ATTACH

LIST OF ATTACHMENTS

Files VISIBLE to Contractors

No.	Type	Title	Description	Filename	Remove
There are currently no attachments.					

Files HIDDEN from Contractors

No.	Type	Title	Description	Filename	Remove
There are currently no attachments.					

FIGURE 21: ATTACHMENTS SCREEN

### 4.3 Review and Submit

After users populate the TORP information and attach the required documents, it is recommended that they contact the Task Order CO either by phone or via email to notify them that the TORP is ready for their review and approval. *Only the Task Order CO is able to submit the TORP to the NIHCATS II Program Support Team for final review prior to release to the contractors.*

The Task Order CO will click on "Review and Submit" at the bottom of the attachments screen and then click on the "Submit to NIHCATS II" button at the bottom of the *Summary* Tab (Figure 22) or the link in the

*Activity* Menu along the left side of the screen. This action routes the TORP to the NIHCATS II Program Support Team for review and release to the contractors.

The TORP may be routed back to the customer by the NIHCATS II Program Support Team if revisions are requested. Releasing the TORP to the contractors will be the responsibility of the NIHCATS II Program Support Team. The system will send out an email notification to the individuals assigned to the task order to inform them that the task order has been released.

Task Order Summary				
Order ID:	1022			
Owner:				
Status:	Definition			
Title: 1022: Test				
<b>Points of Contact</b>				
Task Order Contracting Officer:	None Entered.			
Contracting Officer Representative (COR):	None Entered.			
<b>Task Order Specifications</b>				
Task Order Type:				
Period of Performance:	From: Wednesday, October 31, 2012 12:00 AM To: Wednesday, October 31, 2012 12:00 AM			
Security:				
GFE/GFI:	Government furnished property will not be provided for the performance of this task order.			
Proposal Instructions:	- Vendors shall include separate technical and business proposals. - Vendors' technical proposals should not exceed ____ pages.			
Evaluation Criteria:				
Additional Criteria Info:				
Fair Opportunity?	Yes			
<b>Order Processing Schedule</b>				
Actual Release Date:				
Questions Deadline:	Wednesday, November 14, 2012 10:00 AM ET			
Proposals Deadline:	Wednesday, November 28, 2012 10:00 AM ET			
<b>List of Attachments</b>				
No.	Type	Title	Description	Filename
There are currently no attachments.				
<b>SUBMIT TO NIHCATS II</b>				
To view files, you need the				
- Adobe Acrobat Reader for PDF files;				
- Microsoft Word Viewer for DOC files; and/or				
- Microsoft Excel Viewer for XLS files.				

FIGURE 22: TASK ORDER SUBMISSION

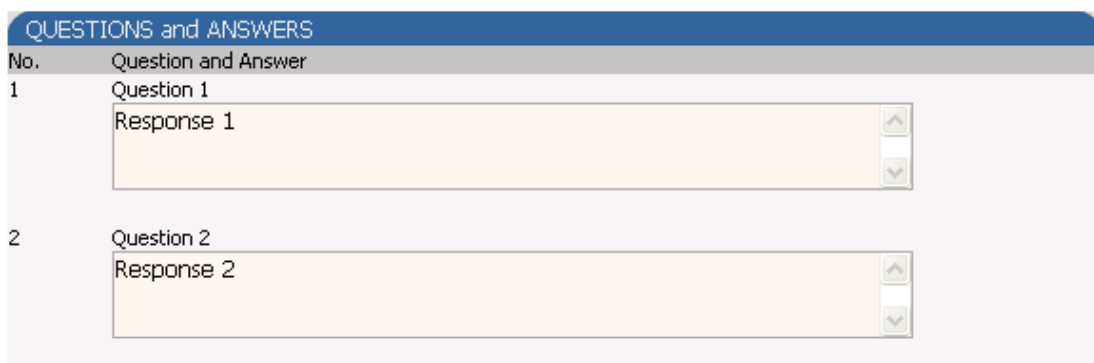
## 5 View and Manage NIHCATS II Task Orders

After an NIHCATS II task order is initiated in the system, users may return at any time to view and manage the task order. Users would click on "View and Manage NIHCATS II Task Order" if they needed to return to a TORP to complete the definition process. If a TORP has been released, users would return to the task order to perform activities such as answer questions, create an amendment, review proposals, and make an award selection. The following sections will describe these activities.

## 5.1 Respond to Questions

Contractors will have an opportunity to submit questions during the period of time between the release date and the questions deadline as defined by the order processing schedule. Individuals assigned to a task order will receive an email notification indicating that the question period has ended. However, those assigned to the task order may enter the system at any point before the deadline passes to see the questions submitted.

To view or respond to the submitted questions, users may enter the system and click on "View and Answer Questions" located on the left side of the *Summary* Tab screen under the *Activity* Menu. Users are able to type answers in the provided fields at any time but must remember to click "Save" to save their responses. Only the Task Order Contracting Officer can release the answers to the NIHCATS II CO by selecting the "Notify NIHCATS II" button. This will prompt a system generated, pre-populated email addressed to the NIHCATS II CO notifying them that the answers are ready to be reviewed and released to the contractors. Please send this pre-populated email when it opens. Once the NIHCATS II CO releases the answers to the contractors, the Task Order Owner, Contracting Officer, and COR will receive a notification. **It is best to wait until after the question deadline has passed before releasing your answers to the NIHCATS II CO.**



QUESTIONS and ANSWERS	
No.	Question and Answer
1	Question 1 Response 1
2	Question 2 Response 2



FIGURE 23: QUESTIONS AND ANSWERS

## 5.2 Create an Amendment

If users need to make a change to a TORP after it has been released to contractors, they have the ability to create an amendment on the *Amendment* Tab. During the time after the TORP is released and before the proposals are due, users may click on the *Amendment* Tab if they wish to make a change to the original TORP. Changes could include altering points of contact, order processing schedule, and content.

The amendment is created in the system by the Task Order CO, approved by the NIHCATS II Program Support Team, and released to the contractors. An email notification will be sent automatically to all individuals assigned to the task order and to the contractors informing them that an amendment was released.

Click on "New Amendment" in the menu along the left hand side to begin (Figure 24). The Task Order CO will be required to upload a document indicating the details of the amendment. It is recommended that a memo be completed and attached detailing the change. A *Pre-Award Amendment Template* can be found on the [NIHCATS II Website under Resources](#). Contractors will be able to see the document(s) attached and the description of the document(s) in eGOS. Users may use the open field after uploading the document to briefly describe the change. The text entered in the open field will appear in the email notification received by the contractors and those assigned to the task order.

The Task Order CO will submit the amendment to the NIHCATS II Program Support Team that will review the change to verify that that it is within scope. If approved, the amendment will be released to the contractors. The email notification will direct contractors to the system where the attached amendment may be viewed in the *Documents* Tab.

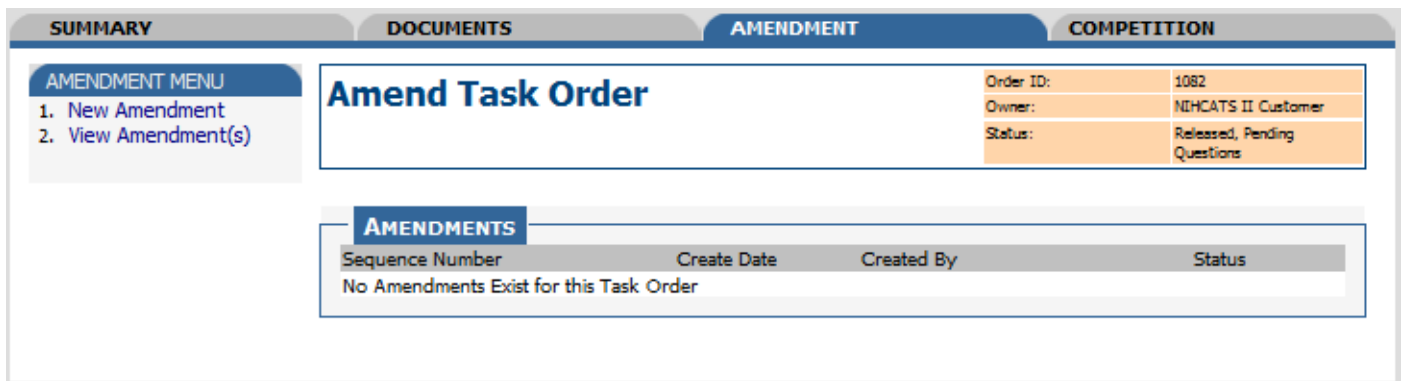


FIGURE 24: AMENDMENT SCREEN

### 5.3 Cancel Task Order

Should you need to cancel a task order the Task Order CO will need to process the cancellation. Only the Task Order CO will have access to this option in eGOS. The Task Order CO will need to access the Activity Menu located on the *Summary* Tab and select "Cancel Task Order." If cancelling after the task order has been submitted to NICHATS II Program Support Team, include a reason for cancellation. Once the reason is submitted, the following page will serve as confirmation that the task order has been cancelled.

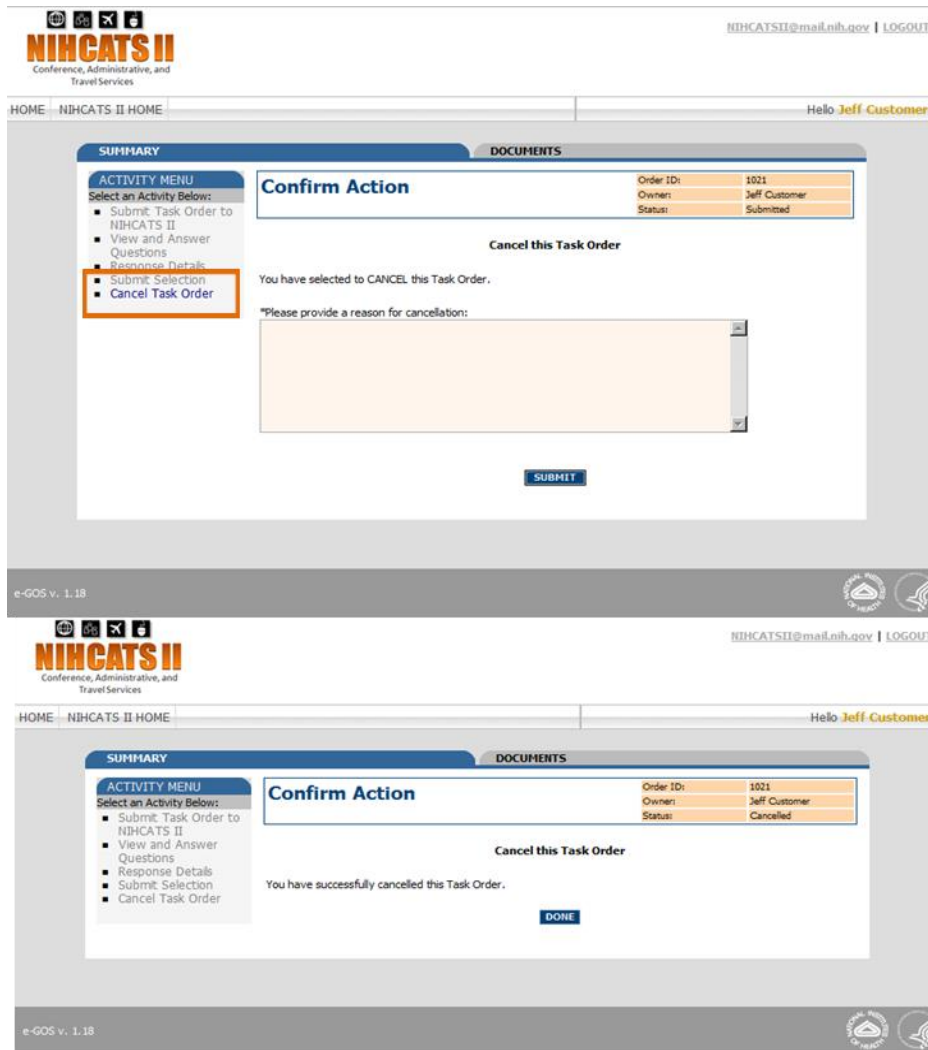


FIGURE 26: CANCELLATION SCREENS

## 5.4 Evaluate Proposals

The evaluation period begins once the proposal deadline passes. Individuals assigned to the task order will receive a notification indicating that the proposal deadline has passed, triggering them to enter the system. Though the proposals are accessible once the contractors submit them, **it is recommended that users enter the system and view the submitted proposals after the deadline has passed since the contractors have the ability to replace an existing proposal up until the proposal deadline.**

Click on the *Documents* Tab to view the proposals submitted by the contractors. Each participating contractor shall include a technical proposal and business proposal in their submission.



Order ID:	1024
Owner:	NIHCATS II Customer
Status:	Evaluation

**Task Order Documents**

- Task Order Request Package (TORP)
  - SOW and Other Attachments
    - SOW Admin#7900.docx [11/01/2012 12:47:42 ET]
  - Amendments
    - Amendments Pending Release (not visible to Contractors)
    - TORP Attachments (not visible to Contractors)
      - approved memo for Admin7900.pdf [11/01/2012 12:48:27 ET]
      - IGCE for Admin 7900.doc [11/01/2012 12:56:06 ET]
- Question and Answers
- Selection Recommendation Document (SRD)
  - Proposals**
  - Evaluations
  - Rationale
- Post-Award Administration
  - Funding Documents
    - customer
  - Status Reports

To view files, you need the

- Adobe Acrobat Reader for PDF files;
- Microsoft Word Viewer for DOC files; and/or
- Microsoft Excel Viewer for XLS files.

FIGURE 25: VIEWING PROPOSALS

## 5.5 Complete Awardee Selection

After the proposals have been evaluated, users must make a selection recommendation using the *Selection* screen shown in Figure 26. Users will indicate the recommended awardee using the dropdown menu, provide a justification for their choice, and then record the price/cost. A SRD must be used to justify the choice. A SRD template can be found on the NIHCATS II Website (<http://NIHCATSII.olao.od.nih.gov>) and must be signed by the Task Order CO before uploading to the system.

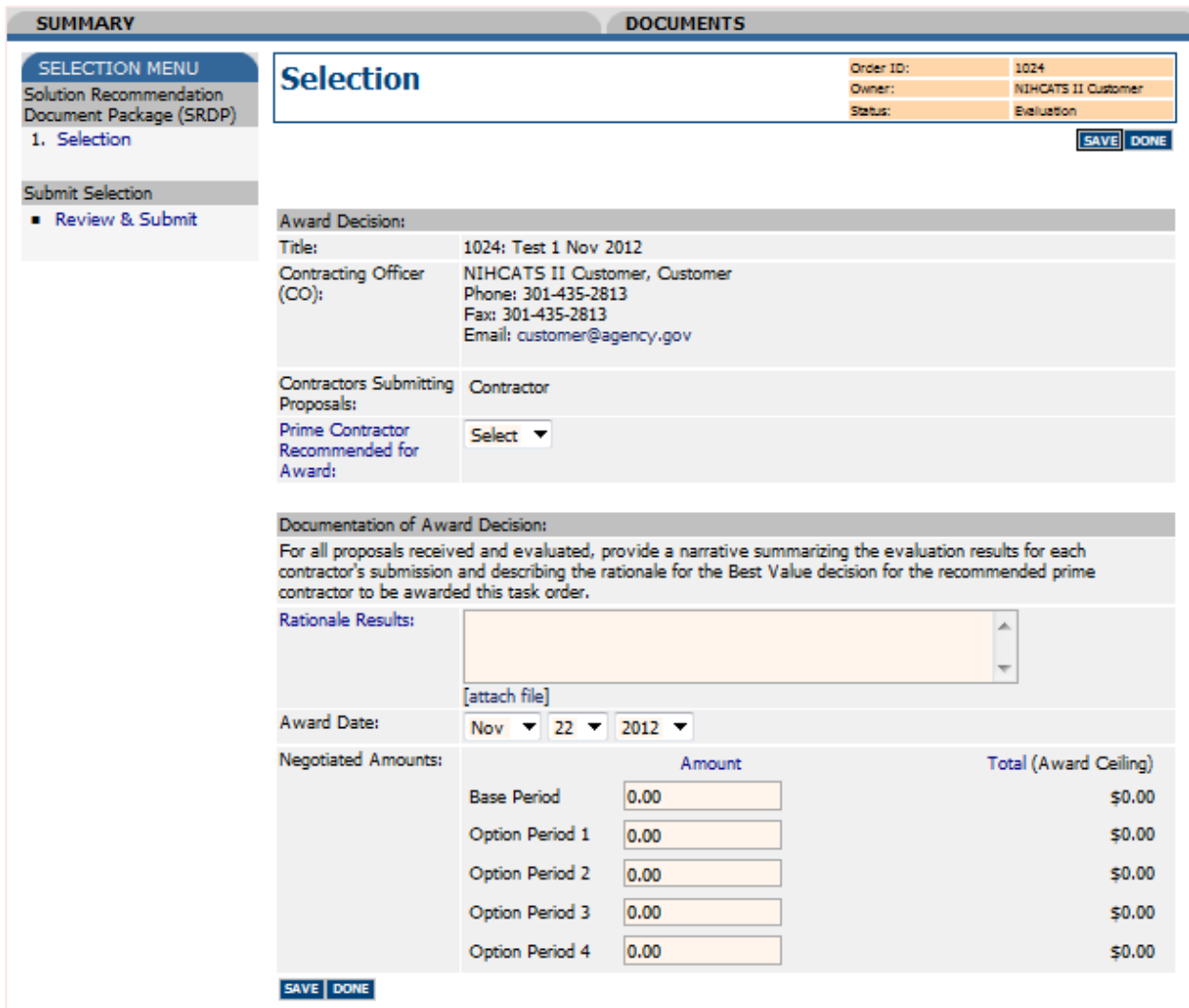
The Task Order COR will be able to recommend the awardee from the dropdown and enter the justification. Once the awardee has been selected and the completed and signed SRD attached, the Task Order CO will release the selection to the NIHCATS II Program Support Team for review. *Only the Task Order CO will be able to submit the recommendation and release it to the NIHCATS II Program Support Team.*

When the Task Order CO submits the recommendation, the Program Support Team will receive an email notifying them that a recommendation has been made. At this point, the NIHCATS II CO will return the

selection either concurring with the recommendation or communicating any concerns to the Task Order CO.

Once the recommendation has passed the review, the Task Order CO will be notified and will need to begin processing the award. The Task Order CO will upload the signed award document, OF347 or comparable award document, and the DCIS report to the *Selection* screen using the attachment link below the justification text box. Lastly, the Task Order CO will resubmit the selection - with the SRD, award document, and DCIS report attached - to the NIHCATS II Program Support Team.

The awardee will receive the notification that they have been awarded the task order once the final approval has been given by the NIHCATS II CO. The NIHCATS II CO will send the awardee an award letter along with the award document provided by the Task Order CO. In addition, the NIHCATS II CO will approve the selection in eGOS which will trigger the release of an award notice to all the contractors informing them of the award.



SELECTION MENU	
Solution Recommendation Document Package (SRDP)	
1. Selection	
Submit Selection	
Review & Submit	

**Selection**

Order ID: 1024  
Owner: NIHCATS II Customer  
Status: Evaluation

**Award Decision:**

Title: 1024: Test 1 Nov 2012

Contracting Officer (CO): NIHCATS II Customer, Customer  
Phone: 301-435-2813  
Fax: 301-435-2813  
Email: customer@agency.gov

Contractors Submitting Proposals: Contractor

Prime Contractor Recommended for Award: Select

**Documentation of Award Decision:**

For all proposals received and evaluated, provide a narrative summarizing the evaluation results for each contractor's submission and describing the rationale for the Best Value decision for the recommended prime contractor to be awarded this task order.

Rationale Results: [attach file]

Award Date: Nov 22, 2012

Negotiated Amounts:	Amount	Total (Award Ceiling)
Base Period	0.00	\$0.00
Option Period 1	0.00	\$0.00
Option Period 2	0.00	\$0.00
Option Period 3	0.00	\$0.00
Option Period 4	0.00	\$0.00

FIGURE 27: SELECTION SCREEN



## 6 Closing Remarks

If help is needed as you begin to use eGOS, or if you have questions regarding the process detailed in the eGOS manual, please contact the NIHCATS II Program Support team via [NIHCATSII@mail.nih.gov](mailto:NIHCATSII@mail.nih.gov).