

*Office of Logistics and Acquisition Operations*

# *NIHCATS III eGOS User Manual*



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## 1 Overview

The NIHCATS III electronic Government Ordering System (eGOS) was developed to facilitate the Task Order Procedures outlined in Section 3 of the NIHCATS III 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 III task order. *Please note that eGOS is a standalone system developed and customized for NIHCATS III and is not linked with other NIH Acquisition systems such as the NIH Business System (NBS).*

This user manual is intended to walk Government users through the creation and management of NIHCATS III 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 Support Team at [NIHCATSIII@mail.nih.gov](mailto:NIHCATSIII@mail.nih.gov) for clarification on this user manual or if you have any questions.

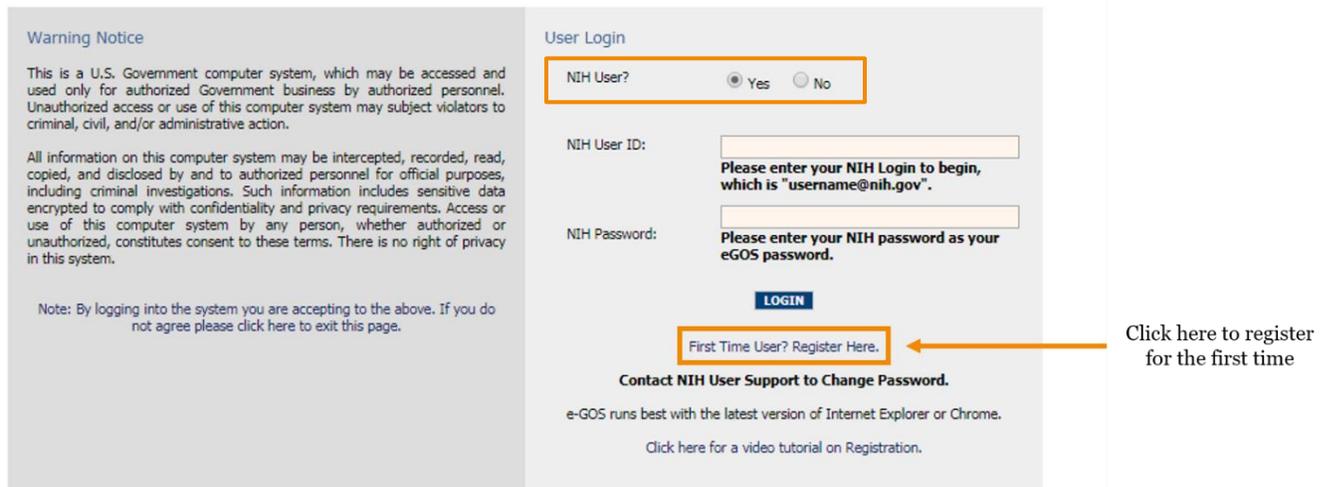
## 2 Registration and Access

Users can access the system via the NIHCATS III eGOS site at <https://nihcatsiii.egos.nih.gov> or by clicking on the orange square button on the front page of the NIHCATS III website at <http://nihcats.olao.od.nih.gov>. NIH users will use their NIH username and NIH password to access the system. When you select “Yes” to the “NIH User?” question you will see the login prompts specific to NIH Users. Government users who select “No” to the “NIH User?” question 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 Figures 1a and 1b. Non-NIH users are able to select “Forgot your Password” if needed (Figure 1b). Since their eGOS password is the same as their NIH password, NIH users will need to contact NIH IT to reset their NIH password or visit <https://iforgotmypassword.nih.gov/>.

### Electronic Government Ordering System (e-GOS)

1.20



**Warning Notice**

This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

Note: By logging into the system you are accepting to the above. If you do not agree please click here to exit this page.

**User Login**

NIH User?  Yes  No

NIH User ID:   
Please enter your NIH Login to begin, which is "username@nih.gov".

NIH Password:   
Please enter your NIH password as your eGOS password.

**LOGIN**

[First Time User? Register Here.](#) ← Click here to register for the first time

Contact NIH User Support to Change Password.

e-GOS runs best with the latest version of Internet Explorer or Chrome.

[Click here for a video tutorial on Registration.](#)

FIGURE 1a: eGOS LOGIN SCREEN for NIH CUSTOMERS

**Electronic Government Ordering System (e-GOS)**

1.20

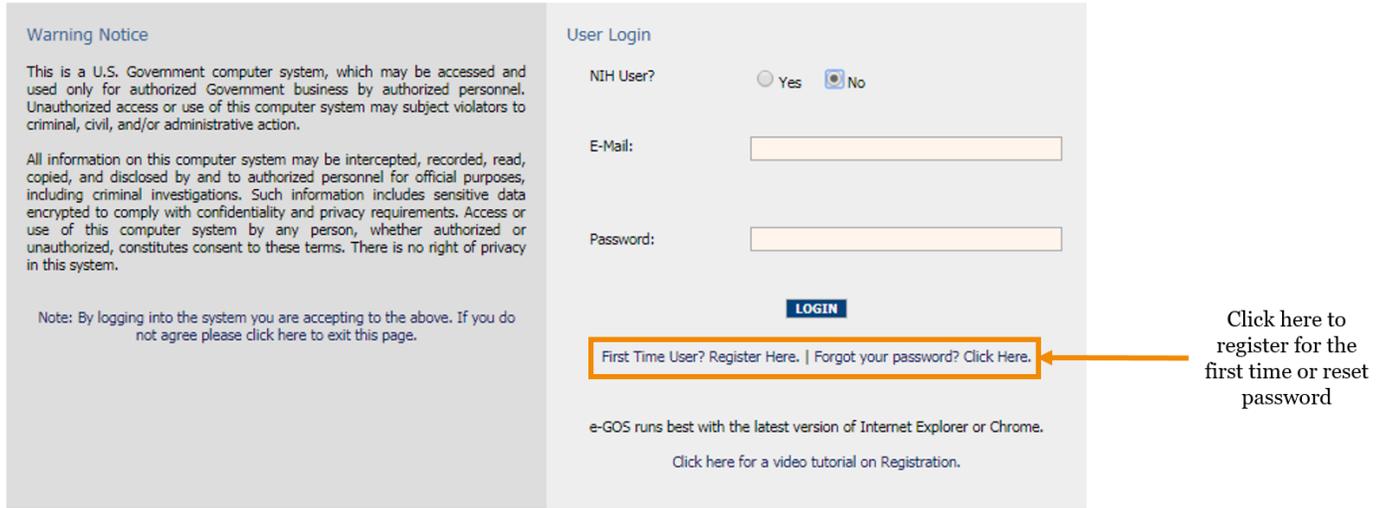


FIGURE 1b: eGOS LOGIN SCREEN for NON-NIH CUSTOMERS

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** 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 not work.

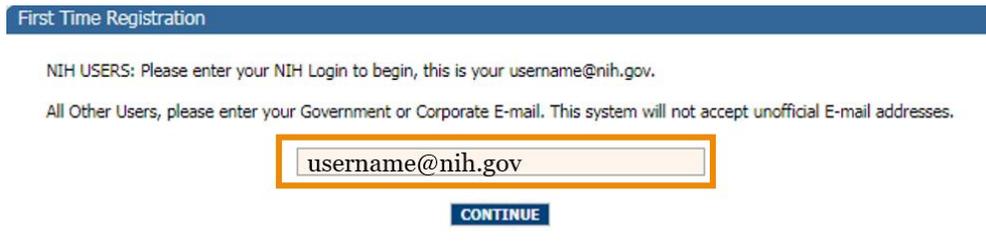


FIGURE 2: eGOS REGISTRATION

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.

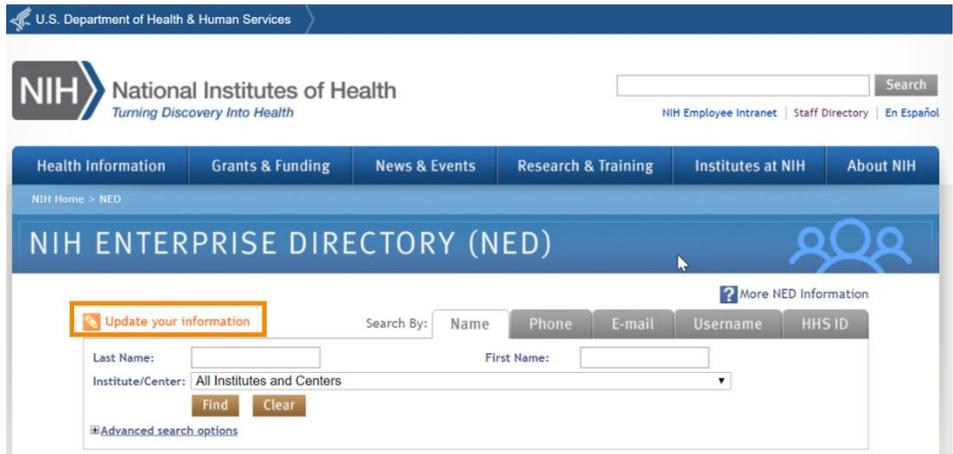


FIGURE 3: NIH ENTERPRISE DIRECTORY

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 will only appear when "No" is selected for the "NIH User?" question. An NIH employee's eGOS password will automatically change as their NIH password is updated.*

Electronic Government Ordering System (e-GOS)

1.20

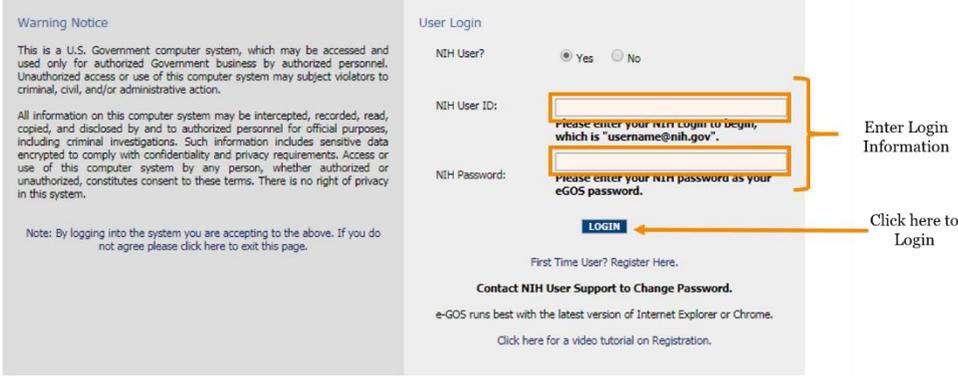


FIGURE 4: LOGGING INTO eGOS

After clicking "LOGIN," users have two options: 1) create a new NIHCATS III 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.

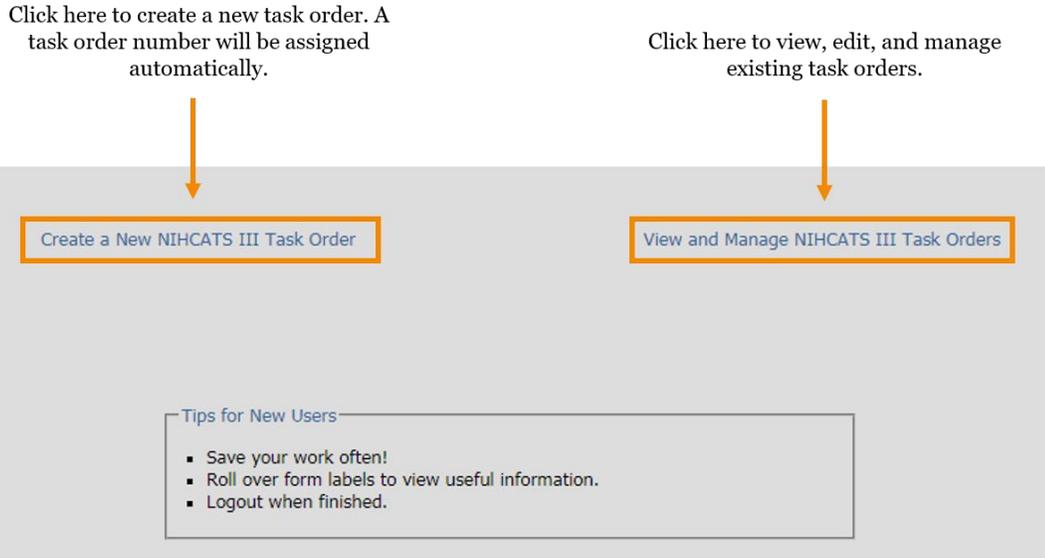


FIGURE 5: LOGGING INTO eGOS

### 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:

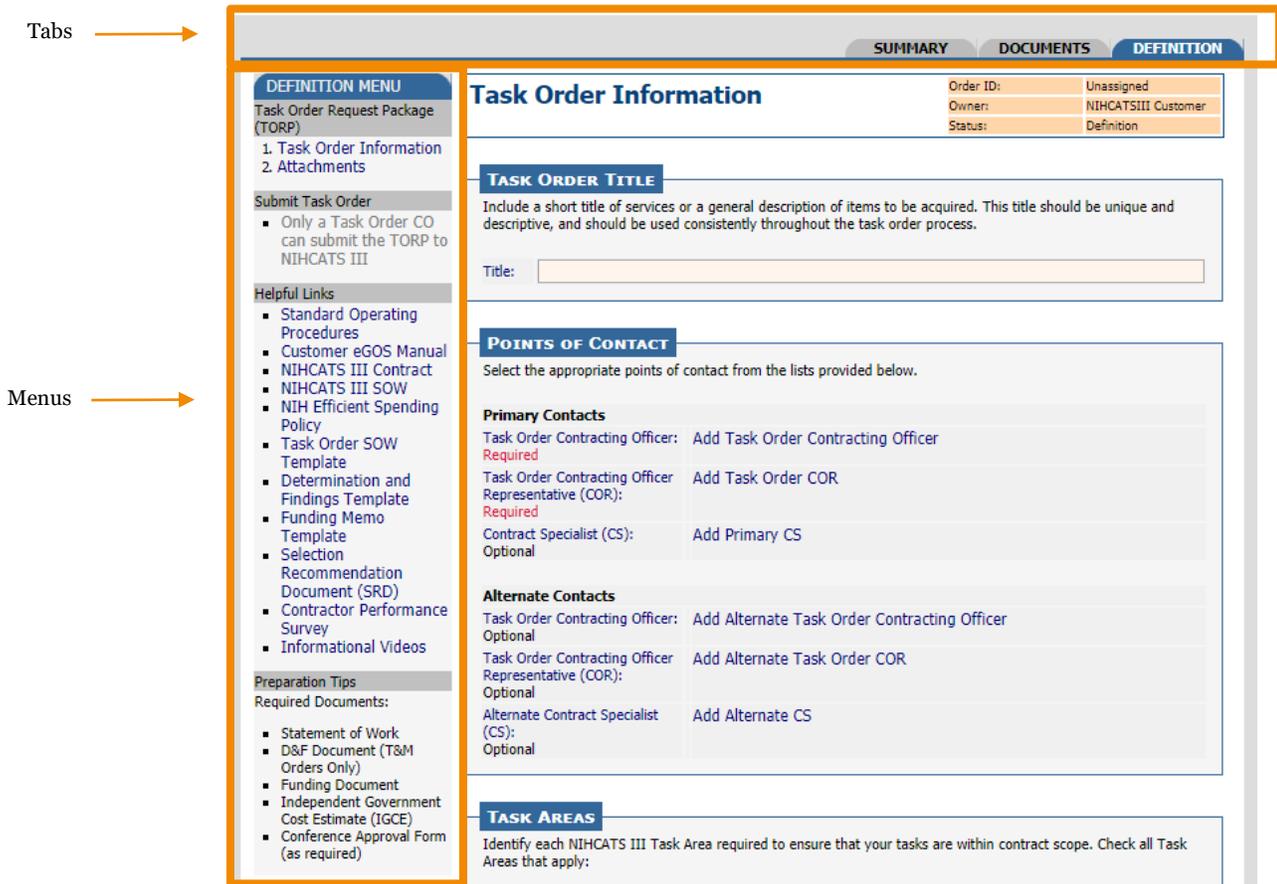


FIGURE 6: MENUS AND TABS

### 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, 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 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.

The SELECTION TAB appears when a TORP is in evaluation and allows users to identify the awardee from among the offerors that submitted a proposal and provide a rationale for the selection. The Selection Recommendation Document (SRD), and eventually the contract award, are uploaded on this tab.

### 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 (available only to the Task Order CO) allows users to submit the task order to the NIHCATS III Support Team. In addition, there are helpful links and preparation tips. Other users are able to click on the "Notify CO" button to send a pre-populated email message to the Task Order CO letting them know the TORP is ready for review.

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

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

The SELECTION MENU is located on the *Selection* Tab and contains links to select an awardee and to review and submit the awardee selection to the NIHCATS III Support Team for release to the contractors.

### 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 award approved. 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.

Order ID:	1142
Owner:	NIHCATSIII Customer
Status:	Definition

← Status indicates which phase of the process a particular task order is in.

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 III Support Team for review.

**APPROVED** - The NIHCATS III 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 III Support Team.

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

## 4 Create a New NIHCATS III Task Order

The following section will aid registered users in creating an NIHCATS III TORP. Refer to Section 3 of the NIHCATS III SOP for more information about the task order process.

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).

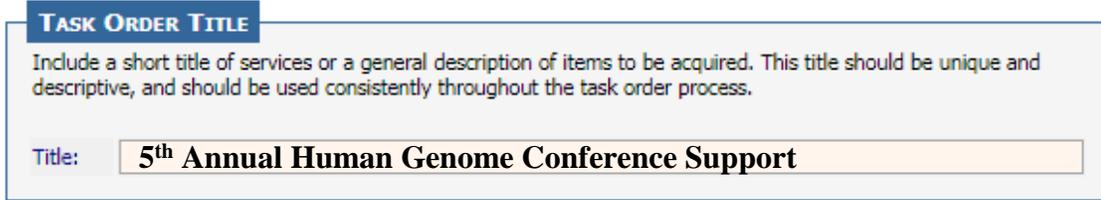


FIGURE 8: TASK ORDER TITLE

#### 4.1.2 Points of Contact

The main user roles in eGOS are: Owner (individual creating the task order), Task Order Contracting Officer (CO), Task Order Contract Specialist (CS), and Task Order Contracting Officer's Representative (COR). Users are required to assign the Primary Task Order CO and COR; however, they have the option to assign a Contract Specialist and alternates for all three roles. See Section 2 of the NIHCATS III 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 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 III 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 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.

A TASK ORDER CONTRACT SPECIALIST is will be the CS and be responsible for supporting the CO.

Alternates for the Task Order CO, COR, and CS 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, COR, and CS.

**POINTS OF CONTACT**

Select the appropriate points of contact from the lists provided below.

<b>Primary Contacts</b>	
Task Order Contracting Officer: <i>Required</i>	Add Task Order Contracting Officer
Task Order Contracting Officer Representative (COR): <i>Required</i>	Add Task Order COR
Contract Specialist (CS): <i>Optional</i>	Add Primary CS
<b>Alternate Contacts</b>	
Task Order Contracting Officer: <i>Optional</i>	Add Alternate Task Order Contracting Officer
Task Order Contracting Officer Representative (COR): <i>Optional</i>	Add Alternate Task Order COR
Alternate Contract Specialist (CS): <i>Optional</i>	Add Alternate CS

Click here to easily assign the CO, COR, and/or CS 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. This includes the ability to designate an OLAO Assisting CO if you are using OLAO as your contracting office. **Please contact the NIHCATS III Support Team if the registered user you are looking for does not appear in the dropdown.**

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 acquisition office 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.
<input type="radio"/> OLAO Assisting CO	Designate an OLAO Assisting CO as the Task Order Contracting Officer (CO) point of contact.

**SAVE** **CANCEL**

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 III Statement of Work for further information on the task areas.

**TASK AREAS**

Identify each NIHCATS III 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 Usage Assessment

If you are part of an agency outside of NIH, you will need to select the box in the Usage Assessment section. Please read the text that appears explaining the assessments for using NIHCATS III. If you are part of an NIH IC, you can skip this question, (Figure 12).

**USAGE ASSESSMENT**

Check here if this requirement is for an agency outside of NIH

FIGURE 12: Usage Assessments

#### 4.1.5 Task Order Type

There are three task order types that are allowable under NIHCATS III: Firm Fixed Price (FFP), Time and Materials (T&M), and a hybrid of FFP and T&M. Hybrid type task orders are often used when a statement of work has a combination of well-defined requirements along with a portion that is less defined or variable, for example travel support. It is always recommended to contact the Task Order CO to help make this determination.

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 and Hybrid contracts require a Determination and Findings (D&F) document. If the task order is in excess of 3 years, the D&F must be signed by the NIH Head of Contracting Activity. T&M and Hybrid type contracts would generally be used if details about the requirement are not known (e.g., the number of travelers, location of travelers).

**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 13: TASK ORDER TYPE

**4.1.6 Period of Performance**

Enter the estimated period of performance in the space provided. 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 specify the base period and any option periods in terms of years/months if the exact dates are not known (Figure 14). For example, the period of performance may be expressed as follows: “The period of performance consists of a base year plus three 6 month option periods.”

**PERIOD OF PERFORMANCE**

Enter the estimated period of performance in the space below. Please identify the base period and any option periods.

FIGURE 14: PERIOD OF PERFORMANCE

**4.1.7 Evaluation Factors**

Users will not enter the Evaluation Criteria on the TORP Form. This information will need to be included in the SOW and detail to the contractors how the technical and business task order proposals will be evaluated (Figure 15).

**EVALUATION FACTORS**

See SOW or other specific attachment for Evaluation Criteria.

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 III 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 15: EVALUATION FACTORS

### 4.1.8 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 16).

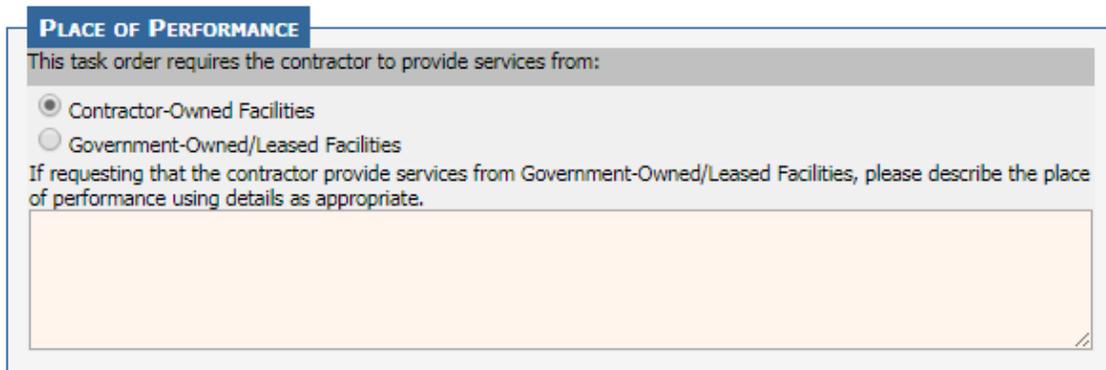


FIGURE 16: PLACE OF PERFORMANCE

### 4.1.9 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 17).

**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 Task Order 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 Task Order Contracting Officer.

FIGURE 17: SECURITY

**4.1.10 Government Furnished Equipment (GFE)/Government Furnished Information (GFI)**

Users may indicate if the Government will furnish equipment (e.g., workspace, computer, phone) (Figure 18). The default for this is that Government furnished property will not be provided for the performance of this task order.

GOVERNMENT FURNISHED EQUIPMENT (GFE)/  
 GOVERNMENT FURNISHED INFORMATION (GFI)

Government furnished property will not be provided for the performance of this task order.  
 Government furnished property will need to be provided for the performance of this task order.

If the government needs to provide equipment or information, please specify:

FIGURE 18: GOVERNMENT FURNISHED EQUIPMENT AND INFORMATION

#### 4.1.11 Response Instructions

Users should include response instructions such as page limits in the SOW or other attachments so that contractors can provide responses in a consistent format (Figure 19).

RESPONSE INSTRUCTIONS

See SOW or other specific attachment for Response Instructions.

FIGURE 19: RESPONSE INSTRUCTIONS

#### 4.1.12 Other Information

This field will allow the user to designate whether the TORP is an exemption to Fair Opportunity, and if any approvals are required (Figure 20). For more information on the exemption to Fair Opportunity, please refer to the FAR Subpart 16.5.

Users will also be able to designate whether the task order requires any conference/meeting approval forms or waivers based on the services being requested.

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

**Approvals**

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

Yes     No

FIGURE 20: OTHER INFORMATION

#### 4.1.13 Task 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 21).

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.**

We recommend that you set the questions deadline approximately one week after release of the TORP with the proposal deadline approximately two weeks after the question deadline. The two weeks between the questions and proposal deadlines will allow customers time to respond to questions submitted and provide contractor adequate time to adjust their proposals based on the responses to the questions.

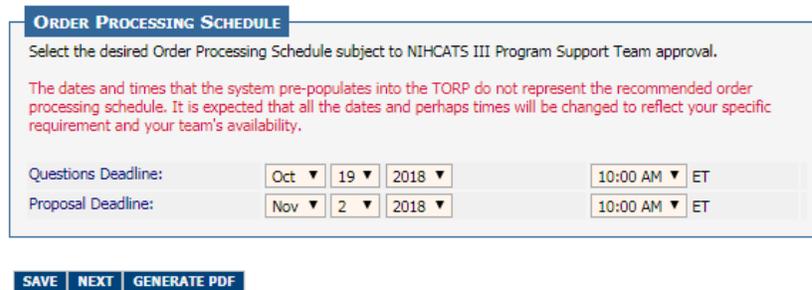


FIGURE 21: ORDER PROCESSING SCHEDULE

After all sections have been completed and the “Save” button clicked, 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 it is created. This will make it appear that the system is not responsive but the system will automatically attach 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 must 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 the additional required documents to the TORP such as a Statement of Work (SOW) outlining the specific tasks to be performed, an Independent Government Cost Estimate (IGCE), a Determinations & Findings (D&F) for T&M and Hybrid contracts, a funding document/memo, 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 22).

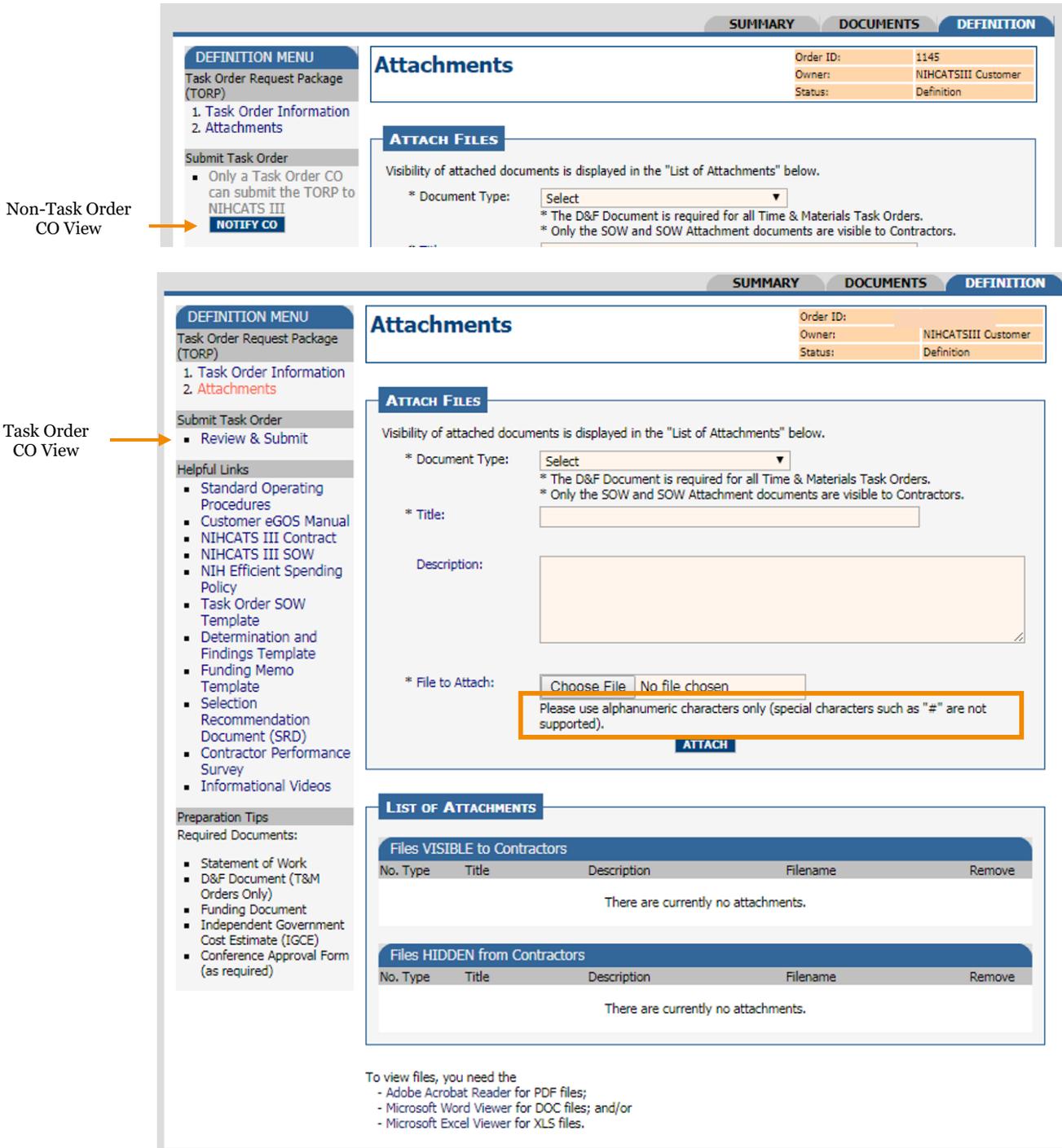


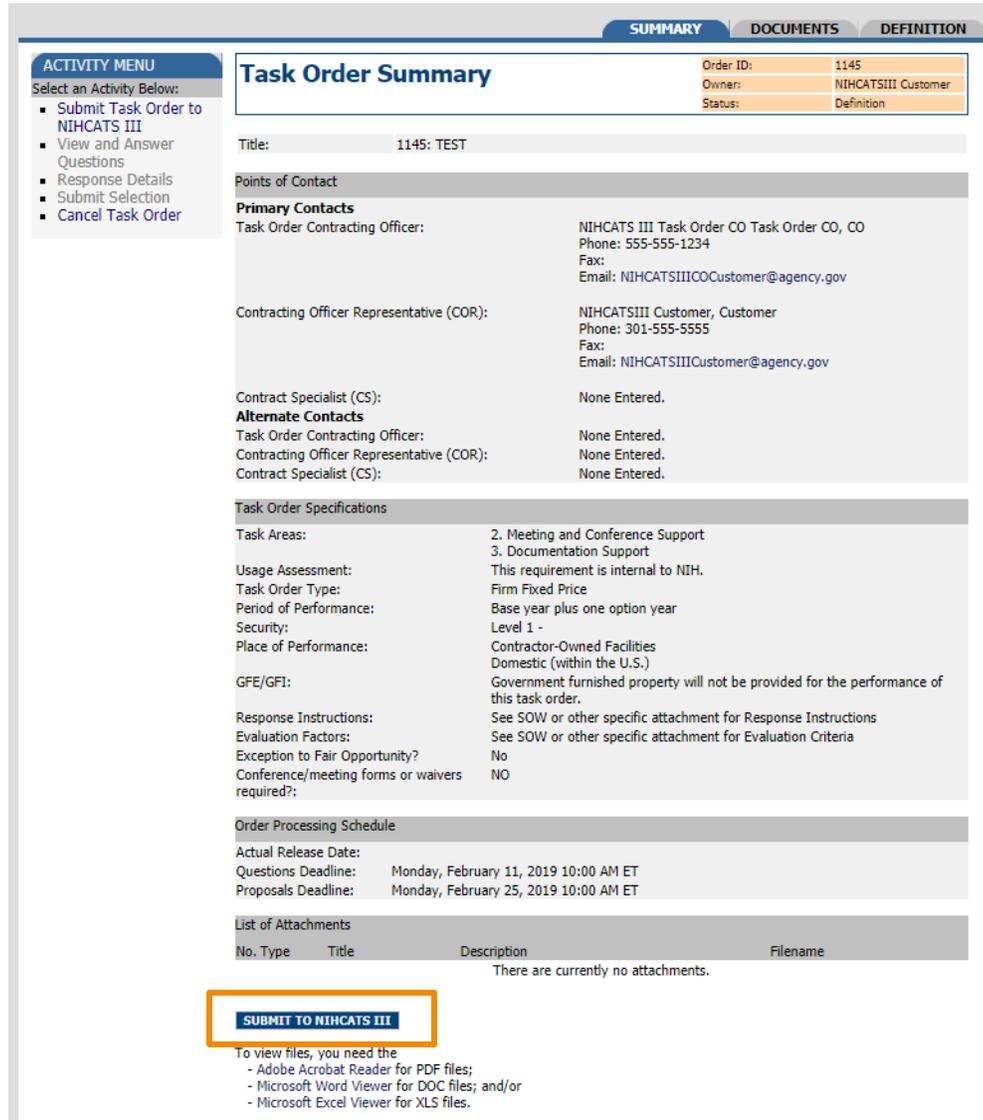
FIGURE 22: ATTACHMENTS SCREEN

### 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. You may also click on the “Notify CO” button provided that will generate a pre-populated email addressed to the Task Order CO. *Only the Task Order CO is able to submit the TORP to the NIHCATS III Support Team for final review prior to release to the contractors.*

The Task Order CO will click on "Review and Submit" link under the *Activity* Menu along the left side of the attachments screen and then click on the "Submit to NIHCATS III" button at the bottom of the *Summary* Tab (Figure 23) or the link in the *Activity* Menu along the left side of the screen. This action routes the TORP to the NIHCATS III Support Team for review and release to the contractors.

The TORP may be routed back to the customer by the NIHCATS III Support Team if revisions are requested. Releasing the TORP to the contractors will be the responsibility of the NIHCATS III 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:	1145
Owner:	NIHCATSIII Customer
Status:	Definition

Title: 1145: TEST

**Points of Contact**

**Primary Contacts**

Task Order Contracting Officer: NIHCATS III Task Order CO Task Order CO, CO  
Phone: 555-555-1234  
Fax:  
Email: NIHCATSIIICustomer@agency.gov

Contracting Officer Representative (COR): NIHCATSIII Customer, Customer  
Phone: 301-555-5555  
Fax:  
Email: NIHCATSIIICustomer@agency.gov

Contract Specialist (CS): None Entered.

**Alternate Contacts**

Task Order Contracting Officer: None Entered.  
Contracting Officer Representative (COR): None Entered.  
Contract Specialist (CS): None Entered.

**Task Order Specifications**

Task Areas: 2. Meeting and Conference Support  
3. Documentation Support

Usage Assessment: This requirement is internal to NIH.

Task Order Type: Firm Fixed Price

Period of Performance: Base year plus one option year

Security: Level 1 - Contractor-Owned Facilities Domestic (within the U.S.)

Place of Performance: Government furnished property will not be provided for the performance of this task order.

GFE/GFI: See SOW or other specific attachment for Response Instructions

Response Instructions: See SOW or other specific attachment for Evaluation Criteria

Evaluation Factors: No

Exception to Fair Opportunity? NO

Conference/meeting forms or waivers required?: NO

**Order Processing Schedule**

Actual Release Date: Monday, February 11, 2019 10:00 AM ET

Questions Deadline: Monday, February 11, 2019 10:00 AM ET

Proposals Deadline: Monday, February 25, 2019 10:00 AM ET

**List of Attachments**

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

**SUBMIT TO NIHCATS III**

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 23: TASK ORDER SUBMISSION

## 5 View and Manage NIHCATS III Task Orders

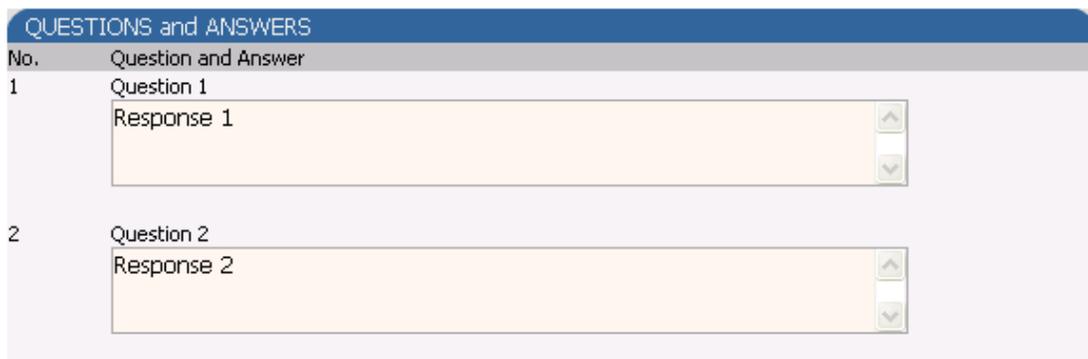
After an NIHCATS III task order is initiated in the system, users may return at any time to view and manage the task order. Users would click on "View and Manage NIHCATS III Task Order" if they needed to return to a TORP to complete the definition process. If a TORP has been released, users would return 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 III Support Team by selecting the "Notify NIHCATS III" button. This will prompt a system generated, pre-populated email addressed to the NIHCATS III Support Team 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 III Support Team releases the answers to the contractors, the Task Order Owner, Contracting Officer, COR, and CS will receive a notification. **It is best to wait until after the question deadline has passed before notifying the NIHCATS III Support Team.**



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



FIGURE 24: QUESTIONS AND ANSWERS

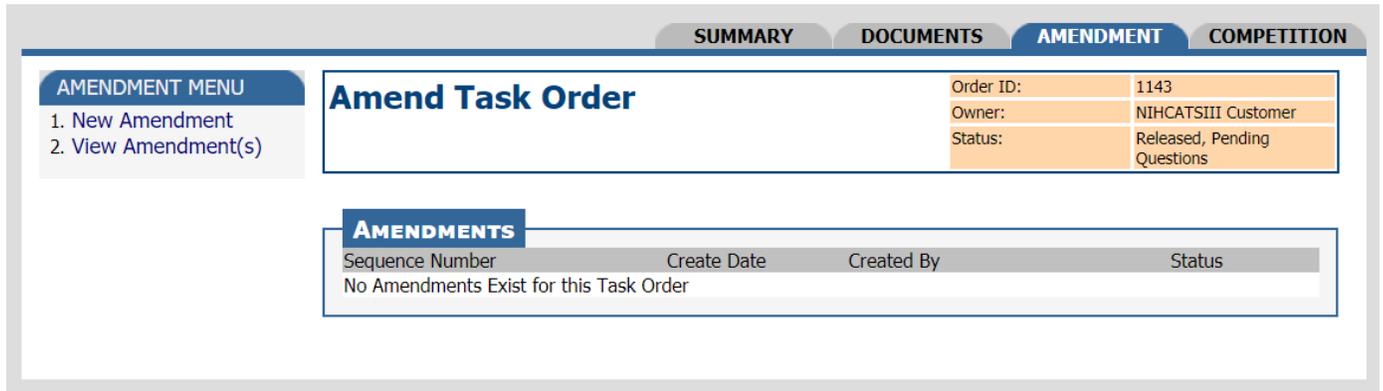
## 5.2 Create an Amendment

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 III 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 25). 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. *An Amendment Template* can be found on the NIHCATS III 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 III 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.



The screenshot shows the 'AMENDMENT' tab selected in a navigation bar. On the left is an 'AMENDMENT MENU' with options: 1. New Amendment, 2. View Amendment(s). The main area is titled 'Amend Task Order' and contains a table with the following data:

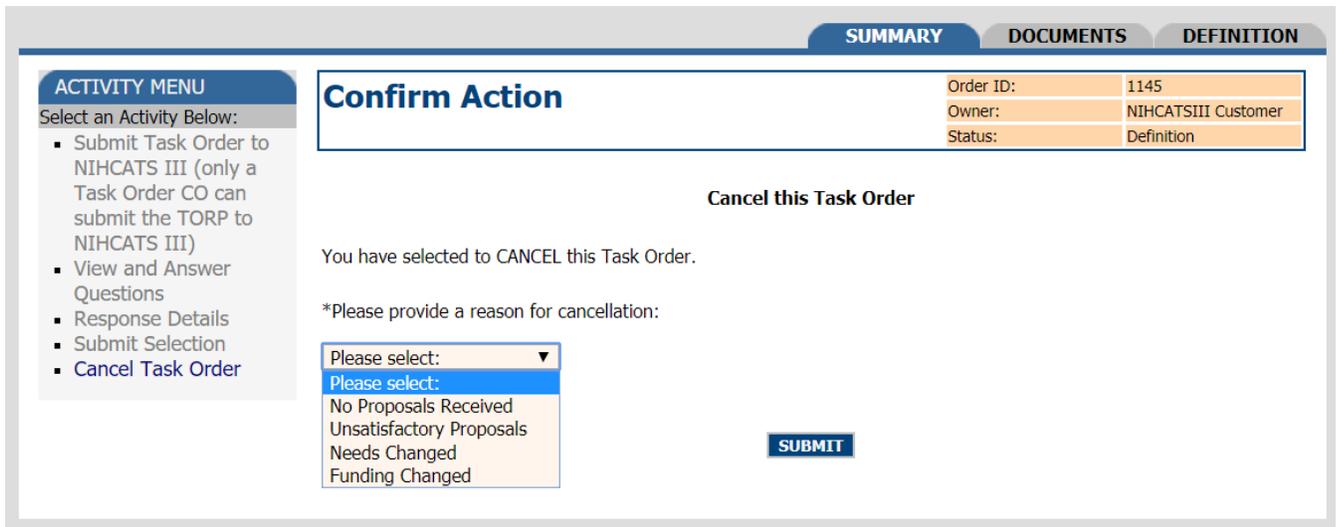
Order ID:	1143
Owner:	NIHCATSIII Customer
Status:	Released, Pending Questions

Below this is an 'AMENDMENTS' section with a table header: Sequence Number, Create Date, Created By, Status. The content of the table is: No Amendments Exist for this Task Order.

FIGURE 25: 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 III 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.



The screenshot shows the 'SUMMARY' tab selected. On the left is an 'ACTIVITY MENU' with the following options: Submit Task Order to NIHCATS III (only a Task Order CO can submit the TORP to NIHCATS III), View and Answer Questions, Response Details, Submit Selection, Cancel Task Order. The main area is titled 'Confirm Action' and contains a table with the following data:

Order ID:	1145
Owner:	NIHCATSIII Customer
Status:	Definition

Below the table is the heading 'Cancel this Task Order' and the text: 'You have selected to CANCEL this Task Order.' Below that is a prompt: '\*Please provide a reason for cancellation:' followed by a dropdown menu with the following options: Please select: (selected), No Proposals Received, Unsatisfactory Proposals, Needs Changed, Funding Changed. A 'SUBMIT' button is located to the right of the dropdown.

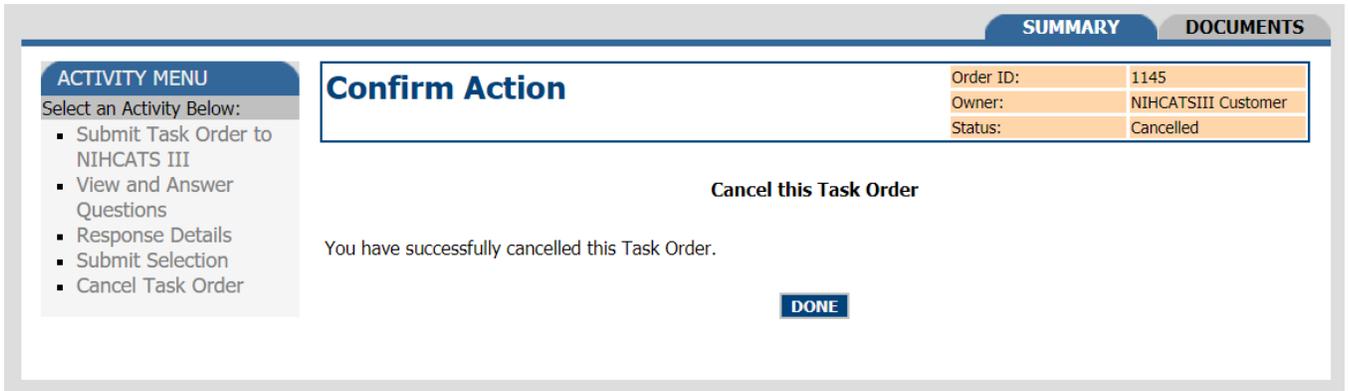


FIGURE 26: CANCELLATION SCREENS

## 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.

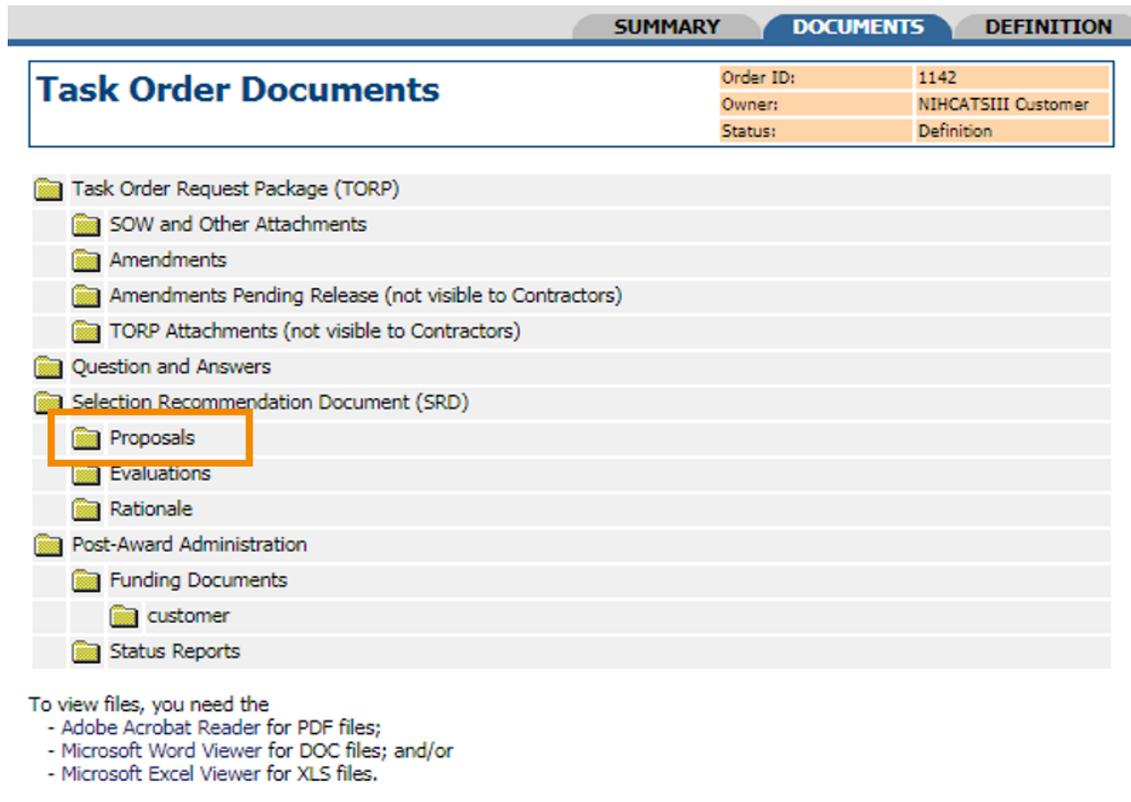


FIGURE 27: VIEWING PROPOSALS

## 5.5 Complete Awardee Selection

After the proposals have been evaluated, users must make a selection recommendation using the *Selection* screen shown in Figure 28. Users will indicate the recommended awardee using the dropdown menu, provide a justification for their choice, and then record the price/cost. A Selection Recommendation Document (SRD) must be used to justify the choice. A SRD template can be found on the NIHCATS III Website (<http://nihcats.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 III Support Team for review. *Only the Task Order CO will be able to submit the recommendation to the NIHCATS III Support Team.*

When the Task Order CO submits the recommendation, the Support Team will receive an email notifying them that a recommendation has been made. At this point, the NIHCATS III Support Team 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 (e.g. 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 III 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 III Support Team. The NIHCATS III Support Team will send the awardee an award letter along with the award document provided by the Task Order CO. In addition, the NIHCATS III Support Team will approve the selection in eGOS which will trigger the release of an award notice to all the contractors informing them of the award.

SUMMARY | DOCUMENTS | **SELECTION**

**SELECTION MENU**

Solution Recommendation Document Package (SRDP)

1. Selection

---

Submit Selection

- Review & Submit

**Selection**

Order ID:	1141
Owner:	NIHCATSIII Customer
Status:	Evaluation

SAVE | DONE

**Award Decision:**

Title:	1141: TEST DEFINITION
Contracting Officer (CO):	NIHCATSIII Customer, Customer Phone: 301-555-5555 Fax: Email: NIHCATSIIICustomer@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: Feb ▼ 3 ▼ 2019 ▼

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

SAVE | DONE

FIGURE 28: 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 III Support team via [NIHCATSIII@mail.nih.gov](mailto:NIHCATSIII@mail.nih.gov).