Small Business Outreach Subcontracting Opportunities

User Guide

NIH NCI OA

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The Small Business Outreach Subcontracting Opportunities User Guide provides Prime and Sub-Contractors general instructions for registering, posting and signing up for alerts.

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1 Overview

Subcontracting allows small and disadvantaged businesses to substantially impact the federal procurement preference programs. Due to legislative mandates, federal prime contractors award billions of subcontracting dollars annually. Any federal contractor receiving a contract for more than the simplified acquisition threshold must agree in the contract that small businesses (including veteran-owned, service-disabled veteran-owned, HUBZone, disadvantaged, and women-owned businesses), will have the maximum practicable opportunity to participate in the contract consistent with its efficient performance. Furthermore, large prime contractors receiving a federal contract exceeding $650,000 ($1.5 million in the case of construction), and that offer subcontracting opportunities, must establish subcontracting plans with goals that provide opportunities to these small businesses.

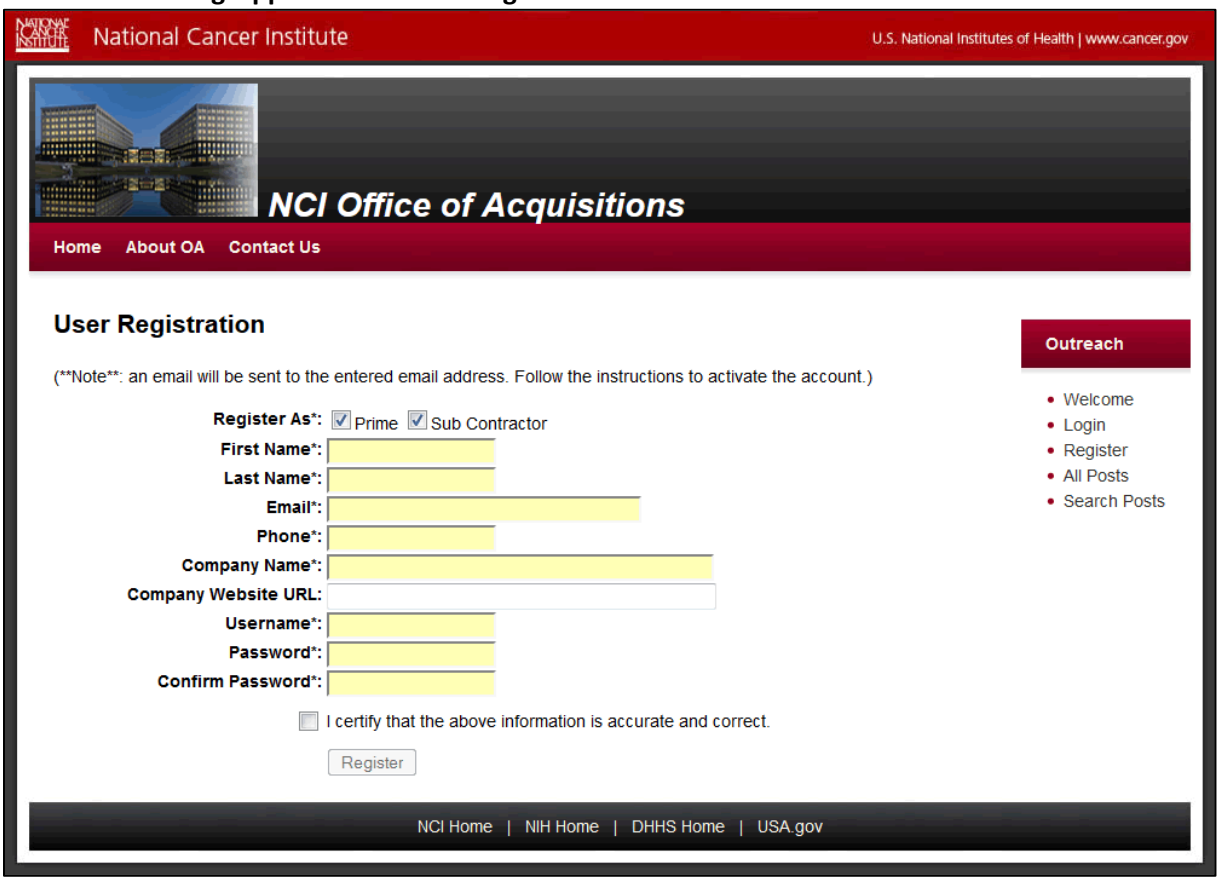
Small Business Outreach Subcontracting Opportunities provides an avenue for Prime contractors to post opportunities and allow sub-contractors to register for alerts for opportunities that may be of interest to them.

2 Registration

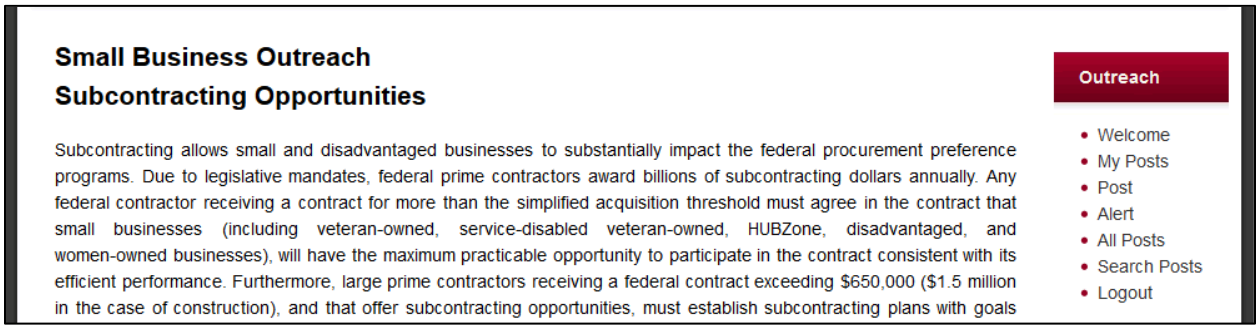
Registration is required prior to posting an opportunity or registering for alerts. If you are a prime contractor, you will need to register in order to post small business subcontracting opportunities. If you are a sub-contractor, you will need to register in order to sign up for alerts which will notify you of opportunities of interest to you.

1. To register with the NCI OA Small Business Outreach, click Register from the navigation on the right side of the Small Business Outreach screen.
2. The User Registration screen displays.
3. You can **Register As** a Prime, a Sub Contractor or as both a Prime and a Sub Contractor. Click in the appropriate check boxes to select. You will see a checkmark when a box is selected. Click again to clear the check box.
4. Enter your information in the remaining fields. Fields with a yellow background and marked with an asterisk are required fields and you must input the information.
5. Enter your First Name, Last Name, Email address, Phone Number, Company Name.
6. You can enter your company website URL – but this information is not required.
7. Enter a username. Enter a password and confirm the password. Make note of the username and password you enter. This is the username and password you will use to login to the Small Business Outreach Subcontracting Opportunities.
8. Once all of your information is entered and verified, select the "*I certify that the above information is accurate and correct*" checkbox to declare you have verified your data is accurate and correct.
9. After selecting the checkbox, the Register button is activated. Click on Register to proceed with the registration process.

SBO Subcontracting Opportunities User Registration Screen



10. A User Registration message displays indicating your registration was successful and your account has been created, but your account has not yet been activated. After registering, an email is sent to the email account you entered on the registration form. To activate your Small Business Opportunities account, open the email and select the link within the email.
11. You will receive a confirmation message stating your account is now active. Select Login, which is located either within the sentence text or from the navigation panel on the right side of the screen. Input your username and password that you created on the registration form. Select Login to proceed to the Small Business Opportunities.
12. Upon successful login, you will see options available to you per your login privileges.
13. If you are a Prime Contractor, you will see the My Posts and Posts menu options.

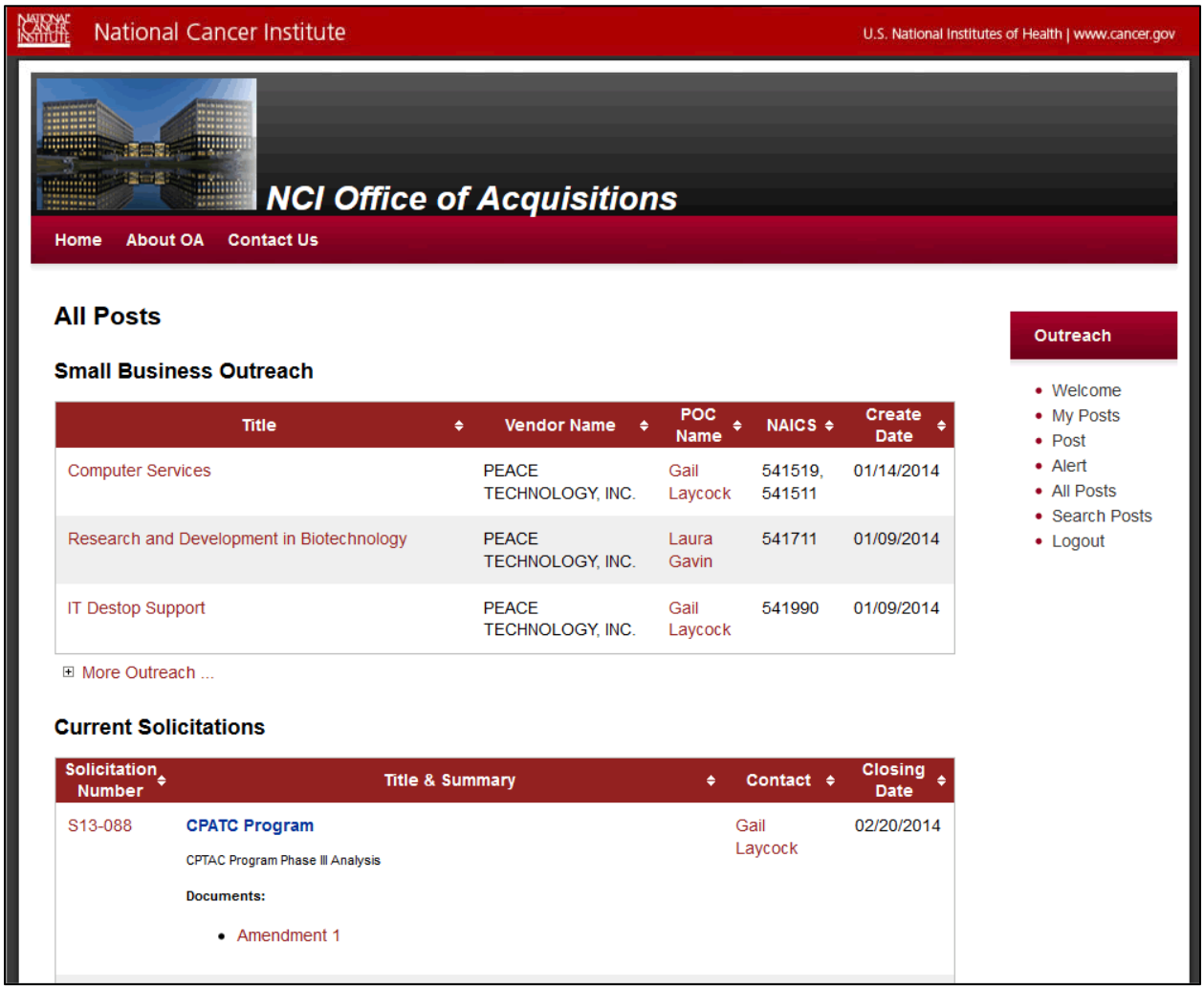


14. If you are a sub-contractor, you will see the Alert menu option.
15. Select Logout when you are ready to leave the site.

3 View All Posts

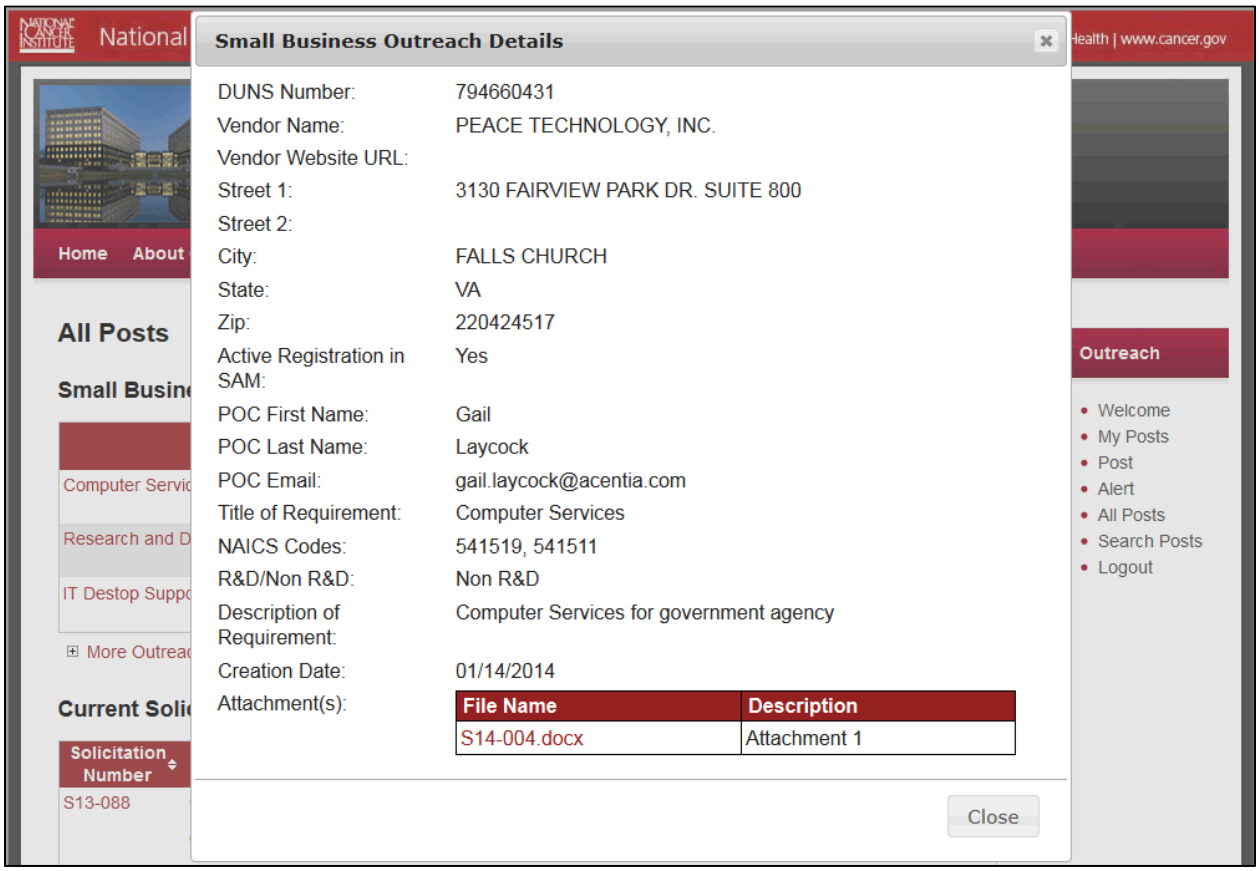
All posted opportunities can be viewed through the All Posts menu option.

1. To **View All Posts** select All Posts from the navigation on the Outreach screen. The All Posts Small Business Outreach screen displays. All Posts are listed and grouped by posting type. You will see all of the Small Business Outreach requirements listed at the top of the screen. Then you will see all of the Solicitations grouped together, and finally you will see the Awards listed. Scroll through the page to view all the postings.



2. If more than three postings are listed, then you will see the expand/collapse feature. Click to view all the listings. Click a second time to collapse the listings. The list will collapse to three postings.

3. You can view the SBO details by selecting the SBO Title. The Small Business Outreach Details screen displays. Review and select Close to close this view and return to the All Posts listing.



4. You can view the Solicitation by selecting the solicitation number. The file download message appears. Select Open or Save to view the document. Or select Cancel to close this screen.

5. If solicitation attachments are available, you can view the documents by selecting the link. The file download message appears. Select Open or Save to view the document. Or select Cancel to close this screen.

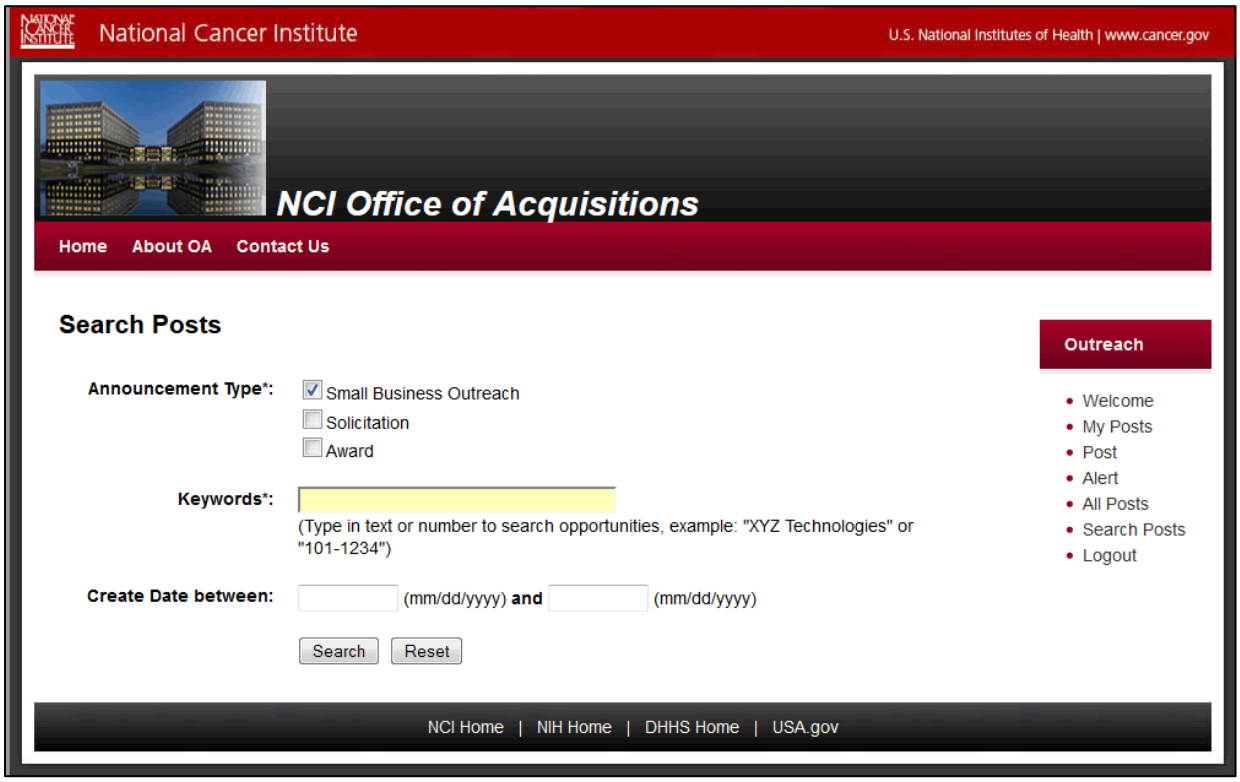
6. You can view the Award information by selecting the Award Solicitation Number. The file download message appears. Select Open or Save to view the document. Or select Cancel to close this screen.

7. For additional information regarding the Small Business Outreach posting, click the POC's name to send an email to the point of contact.

4 Search Posts

You can perform a search on all posted opportunities through Search Posts.

1. To begin a search, select **Search Posts** from the navigation on the right side of the screen. The Search Posts screen displays.



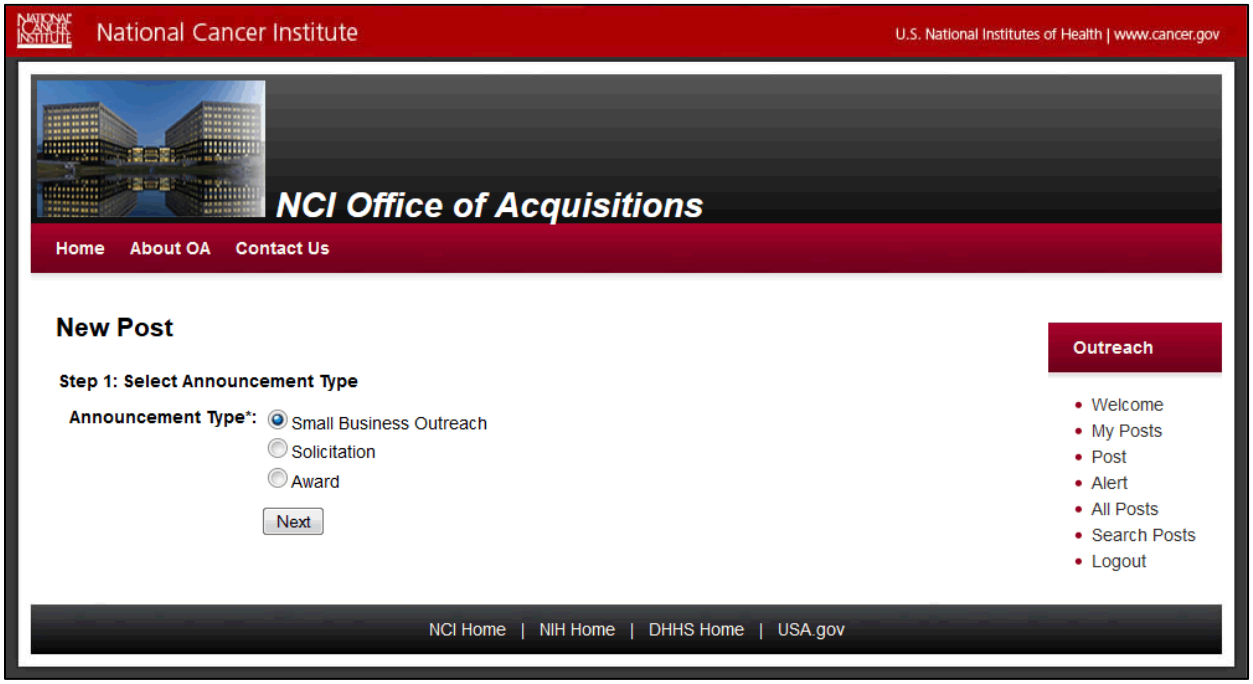
2. Select the announcement type in which you would like to search. You can choose from Small Business Outreach, Solicitation, Award, or any combination of these postings. Click in the appropriate check boxes to select. You will see a checkmark when a box is selected. Click again to clear the check box.
3. Input keywords within the Keywords field. You can input text or numerical keywords. For this example, we are entering text.
4. Select search to view matching records.
5. You can modify your search criteria, by entering a date range for the Create Date of a posted opportunity. Select Search to view the new list of matching records.
6. To perform a new search, select Reset to clear the search fields and enter new search criteria. For this example, we'll enter a NAICS code. After new search criteria are entered, select Search to display the new list.

5 Prime Contractors

As a registered Prime Contractor, you can post Small Business Outreach requirements, Solicitations, and Awards. If you are not yet registered as a prime-contractor, then you will need to register.

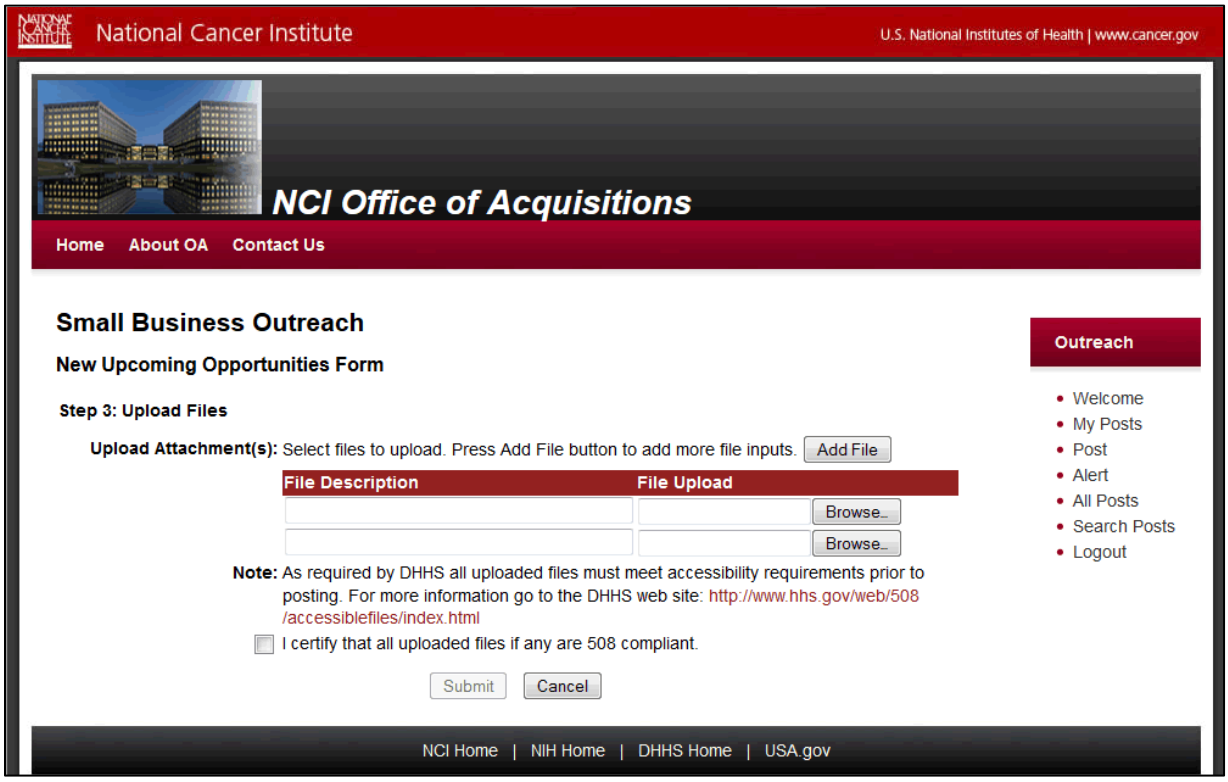
5.1 Post a Small Business Outreach

Once registered and logged in, select Post from the navigation on the right side of the Outreach screen. The New Post screen displays.



1. Step 1 – Select an Announcement Type. You can choose from Small Business Outreach, Solicitation, or Award. Only one choice can be made at a time. In this example, we are going to post a **Small Business Outreach**. Select the radio button next to Small Business Outreach.
2. Select Next to continue. The New and Upcoming Opportunities Form displays. Fields with a yellow background and marked with an asterisk are required fields and information must be entered.
3. Enter your DUNS number. You can enter the numerical DUNS number.
4. As you type, the system performs a search for possible matches. Click to select a listing.
5. After entering the DUNS, the Vendor Name, Street address, City, State, and zip code associated with the DUNS are prepopulated into the data fields.
6. The Vendor Website URL defaults to the vendor website entered when the logged-in user registered with the Small Business Outreach. If a URL was not entered, then this field will be blank, but you can modify it if needed.
7. If the vendor is actively registered within the System for Award Management, select the Active Registration in SAM checkbox.

8. The Point of Contact Name and email address defaults to the logged-in user information. This information can be modified.
9. Enter a title for the requirement.
10. Enter NAICS codes that pertain to the requirement. You can enter up to ten NAICS codes. To enter the NAICS codes, type in the numerical NAICS code. As you type, the system performs a search for possible matches. You can click to select a NAICS code and it is displayed on screen.
11. Select whether the requirement is Research and Development or Non Research and Development.
12. Enter a description of the requirement within the Description of Requirement field.
13. Once all required fields have data and the data has been verified, select Next to proceed with posting the requirement. Step 3 Upload Files screen displays.



14. To upload files, select Browse to navigate to your workstation files to locate the document in which to attach to the Small Business Outreach. After selecting the needed file, the file is listed within the file upload field. Enter a File Description.
15. If posting additional files, select Add Files to display additional file fields. You can post up to 10 files.
16. Note the files must adhere to the HHS Guidelines for 508 compliancy. Click the checkbox to certify that all uploaded files, if any, are 508 compliant. After selecting the checkbox, the Submit button becomes active.
17. Select Submit to post the solicitation and any associated documents. A confirmation message displays confirming the announcement has been successfully posted.

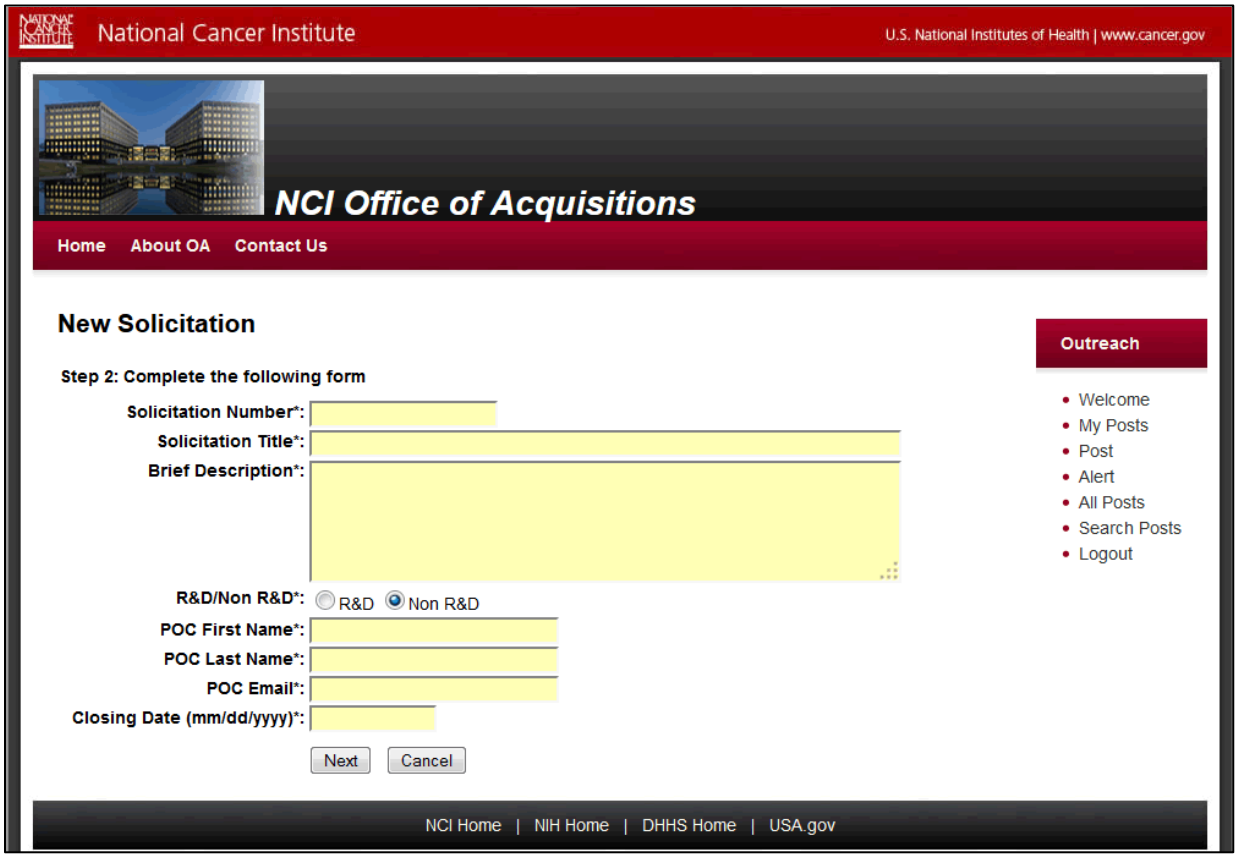
18. Select My Posts or All Posts to view your posting.

5.2 Post a Solicitation

As a registered Prime Contractor, you can post Small Business Outreach requirements, Solicitations, and Awards. If you are not yet registered as a prime-contractor, then you will need to register.

Once registered and logged in as a prime contractor, select Post from the navigation on the right side of the Outreach screen. The New Post screen displays.

1. Step 1 – Select an Announcement Type. You can choose from Small Business Outreach, Solicitation, or Award. Only one choice can be made at a time. For this example, we are going to post a **Solicitation**. Select the radio button next to Solicitation.
2. Select Next to continue. The New Solicitation form displays. Fields with a yellow background and marked with an asterisk are required fields and information must be entered.



3. Enter the Solicitation Number
4. Enter a title for the solicitation.
5. Enter a description for the solicitation.
6. Select whether the solicitation is Research and Development or Non Research and Development.

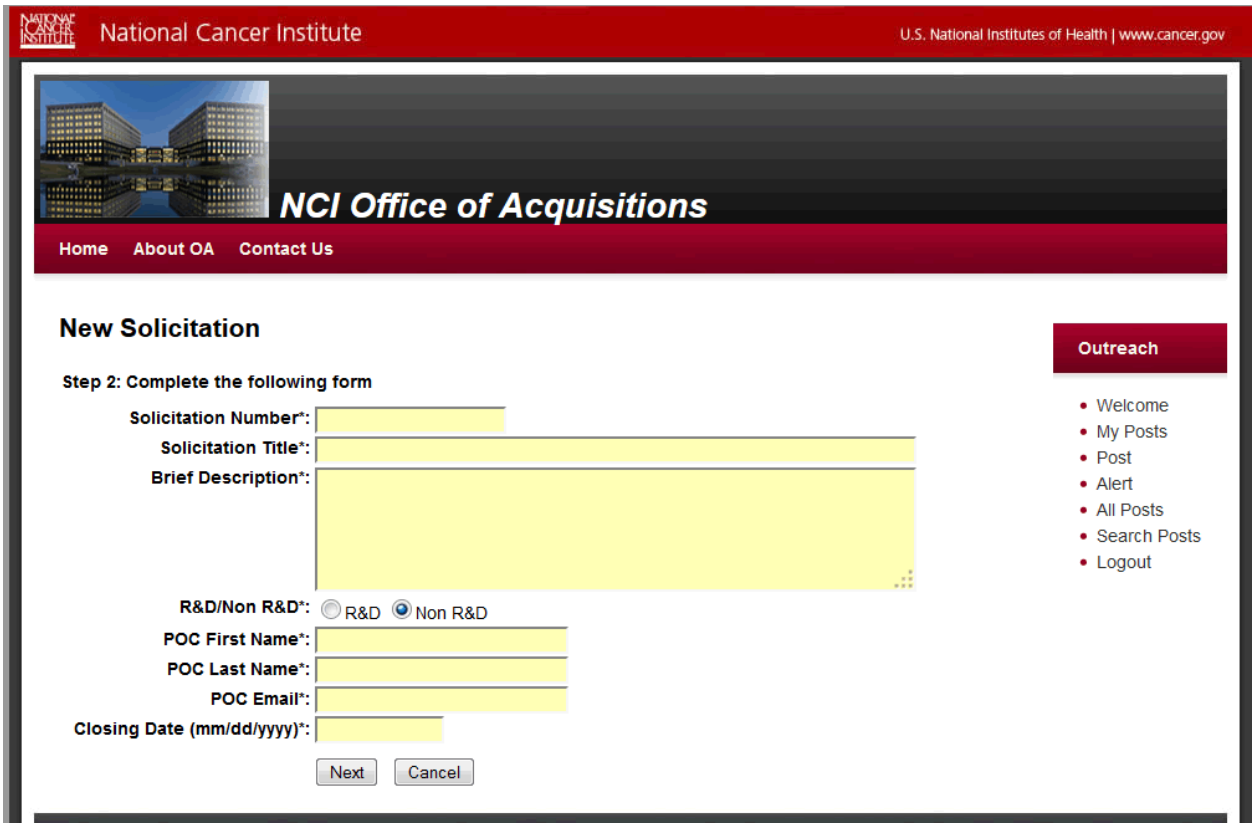
7. The Point of Contact Name and email address defaults to the logged-in user information. This information can be modified as necessary.
8. Enter the solicitation's Closing Date. You can type in the date in mm/dd/yyyy format, or you can select a date from the calendar.
9. Once all required fields have data and the data has been verified, select Next to proceed with posting the solicitation. Step 3 Upload Files screen displays.
10. Select the Solicitation Document by selecting Browse. Navigate to the document on your workstation to select. After selecting the needed file, the file is listed within the Solicitation Document field.
11. If there are any Supporting Documents, select Browse to navigate to your workstation files to locate the document to attach to the solicitation. After selecting the needed file, the file is listed within the files uploaded field. Enter a File Description.
12. If posting additional supporting files, select Add Files to display additional file fields. You can post up to 10 files.
13. Note the files must adhere to the HHS Guidelines for 508 compliancy. Click the checkbox to certify that all uploaded files, if any, are 508 compliant.
14. After selecting the checkbox, the Submit button becomes active.
15. Select Submit to post the solicitation and any associated documents. A confirmation message displays confirming the announcement has been successfully posted.
16. Select My Posts or All Posts to view your posting.

5.3 Post an Award

Once registered and logged in as a prime contractor, select Post from the navigation on the right side of the Outreach screen. The New Post screen displays.

1. Step 1 – Select an Announcement Type. Select the radio button next to Award.
2. Select Next to continue. The New Award form displays. Fields with a yellow background and marked with an asterisk are required fields and information must be entered.
3. Enter the Award Solicitation Number
4. Enter the Solicitation Title
5. Select whether the award is Research and Development or Non Research and Development.
6. Enter the Award Date. You can type in the date in mm/dd/yyyy format, or you can select a date from the calendar.
7. Once all required fields have data and the data has been verified, select Next to proceed with posting the Award. Step 3 Upload Files screen displays.
8. Select the Award Notice Document by selecting Browse. Navigate to the document on your workstation to select. After selecting the needed file, it displays within the Award Notice Document field.

Post a New Solicitation Screen



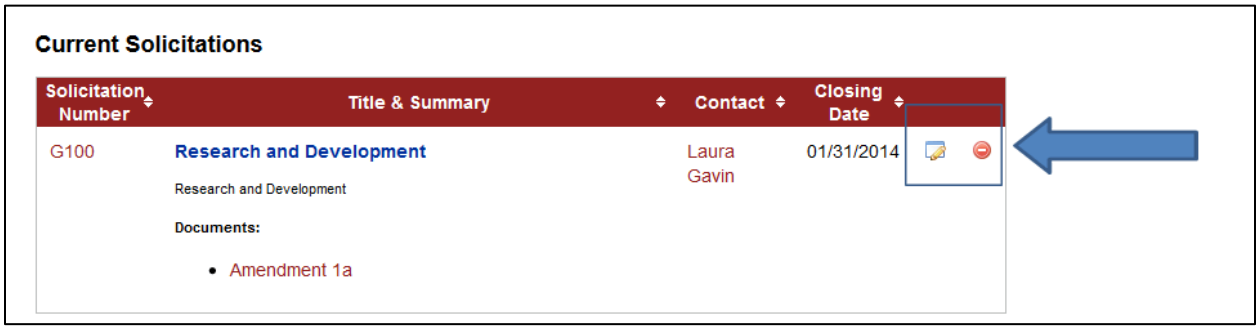
9. Note the files must adhere to the HHS Guidelines for 508 compliancy. Click the checkbox to certify that all uploaded files, if any, are 508 compliant.
10. After selecting the checkbox, the Submit button becomes active.
11. Select Submit to post the solicitation and any associated documents. A confirmation message displays confirming the announcement has been successfully posted.
12. Select My Posts or All Posts to view your posting.

5.4 Amend a Solicitation

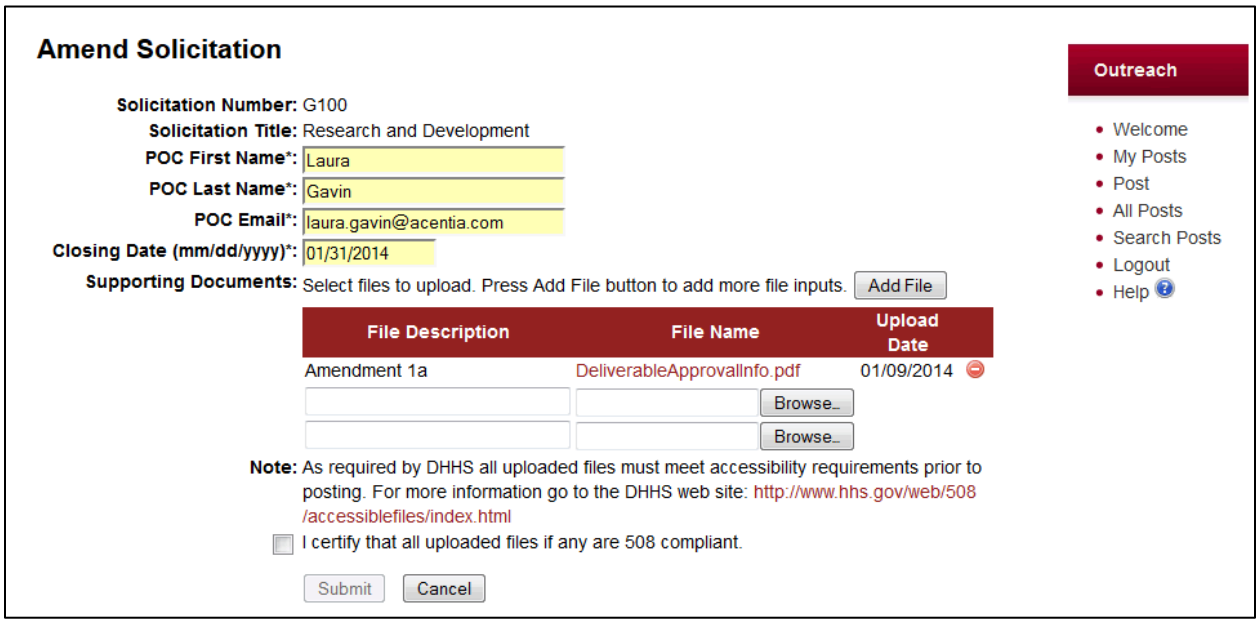
As a registered Prime Contractor, you can post Small Business Outreach Opportunities, Solicitations, and Awards. If you are not yet registered as a prime-contractor, then you will need to register.

Once a solicitation is posted, you can amend the solicitation. After logging into the Small Business Outreach, select My Posts to view a listing of your postings.

1. Select the Amend this Solicitation icon.



2. The Amend Solicitation screen displays.

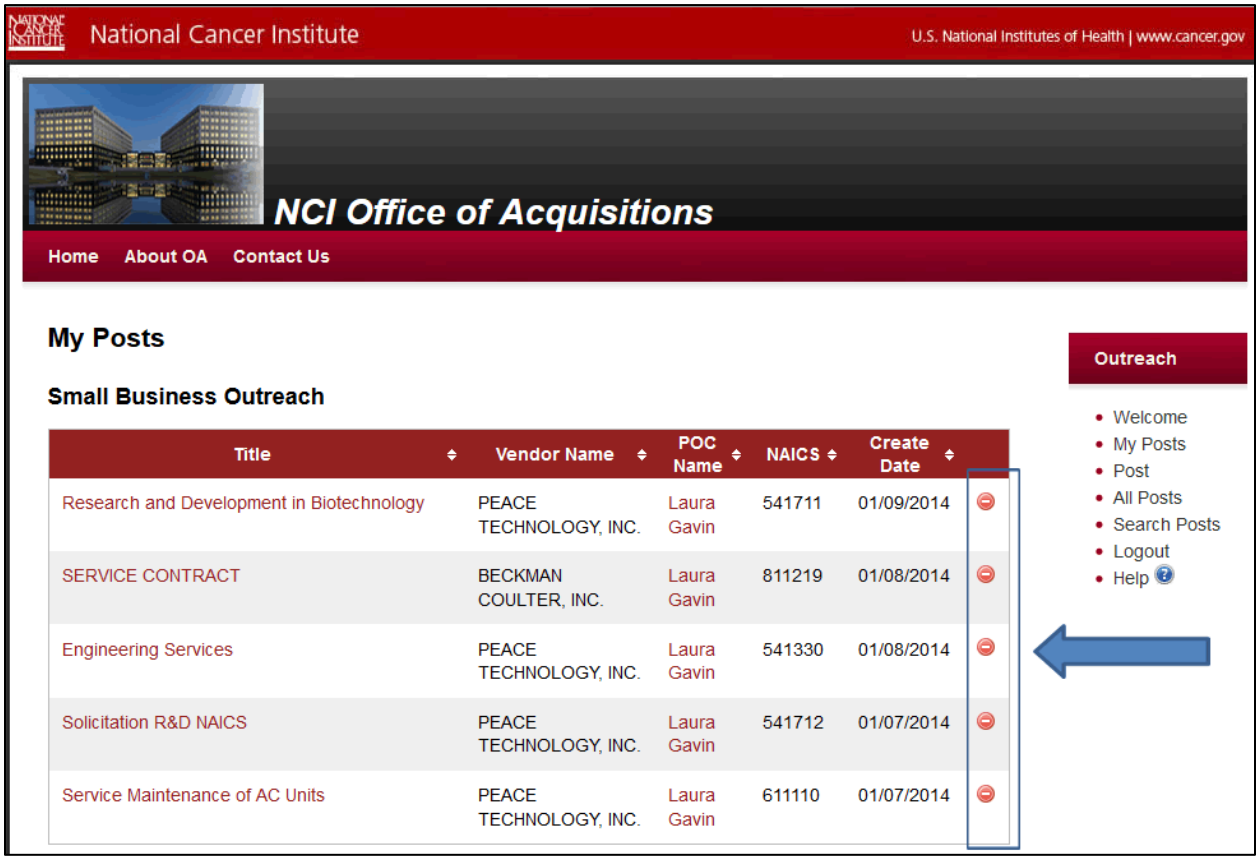


3. The Solicitation Number and Solicitation Title display as read only – these cannot be modified.
4. The point of contact name and email default to the logged-in user's information, but this information is open for edit and can be modified as necessary.
5. The Closing Date is open for edit, and you can make modifications to this information as needed. You can type the date or select from the calendar.

6. You can add additional supporting documents by selecting Browse. Navigate to your workstation files to locate the document to attach to the solicitation. After selecting the needed file, the file is listed within the file name field. Enter a File Description.
7. If you wish to remove a supporting document, select the Delete icon. A confirmation message appears. Select OK to continue with removing the document.
8. If posting additional supporting files, select Add Files to display additional file fields. You can post up to 10 files.
9. Note the files must adhere to the HHS Guidelines for 508 compliancy. Click the checkbox to certify that all uploaded files, if any, are 508 compliant.
10. After selecting the checkbox, the Submit button becomes active.
11. Select Submit to post the solicitation and any associated documents. A confirmation message displays confirming the announcement has been successfully posted.
12. Select My Posts or All Posts to view your posting.

5.5 My Posts (Delete)

From the My Posts screen, a Prime contractor can remove an opportunity that they posted. Next to each of your postings is a red delete icon.

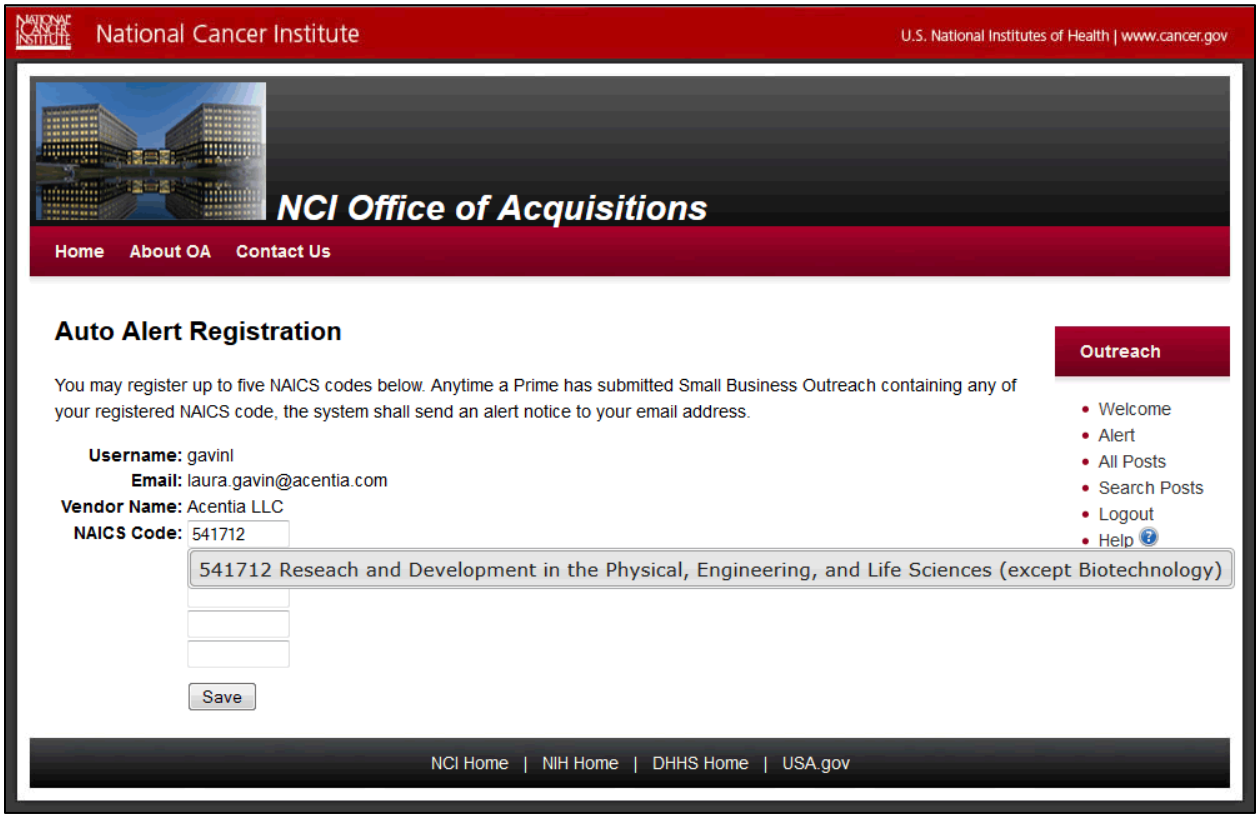


Select the Delete icon. A confirmation message appears. Select OK to continue with removing the document. Note that the deletion of an opportunity is permanent and the information cannot be recovered. To replace the deleted information, you will need to repost the opportunity.

6 Sub-Contractors

As a registered Sub Contractor, you can sign up for Auto-Alert email notifications for new opportunities that are of interest to you. If you are not yet registered as a sub-contractor, then you will need to register.

1. Once registered and logged in as a sub-contractor, select Alert from the navigation. The Auto Alert Registration screen displays.



2. The username, email and vendor name of the logged-in user displays. The alert emails are sent to the displayed user's email address.
3. You may register up to five NAICS codes. To register the NAICS codes, type in the numerical NAICS.
4. As you type the text, the system performs a search for possible matches. Click to select a listing.
5. Select Save to retain the NAICS codes. The Auto Alert Registration screen displays confirming your registration was successful.
6. Anytime a Prime contractor submits a Small Business Outreach Opportunity containing any of your registered NAICS codes, an alert notice is sent to your email. If you would like further

details, the email contains a link to the Small Business Opportunities page. Once on Small Business Opportunity page, you can view All Posts or perform a search on the opportunity to review details and contact information.

7. The registered NAICS codes are saved to the Alert Registration. Each time you login to SBO and select Alert, your registered NAICS codes are listed. You can modify and remove NAICS codes as needed.
8. To change a NAICS code, click in the next available space to enter a new NAICS code, or you can replace an existing NAICS code with a new number.
9. To remove a NAICS code, select the code, and clear the data field.
10. Select Save after any changes on this page. After saving, your alerts will reflect the changes you have made.