



OLAO SIMPLIFIED ACQUISITIONS

Job Aid

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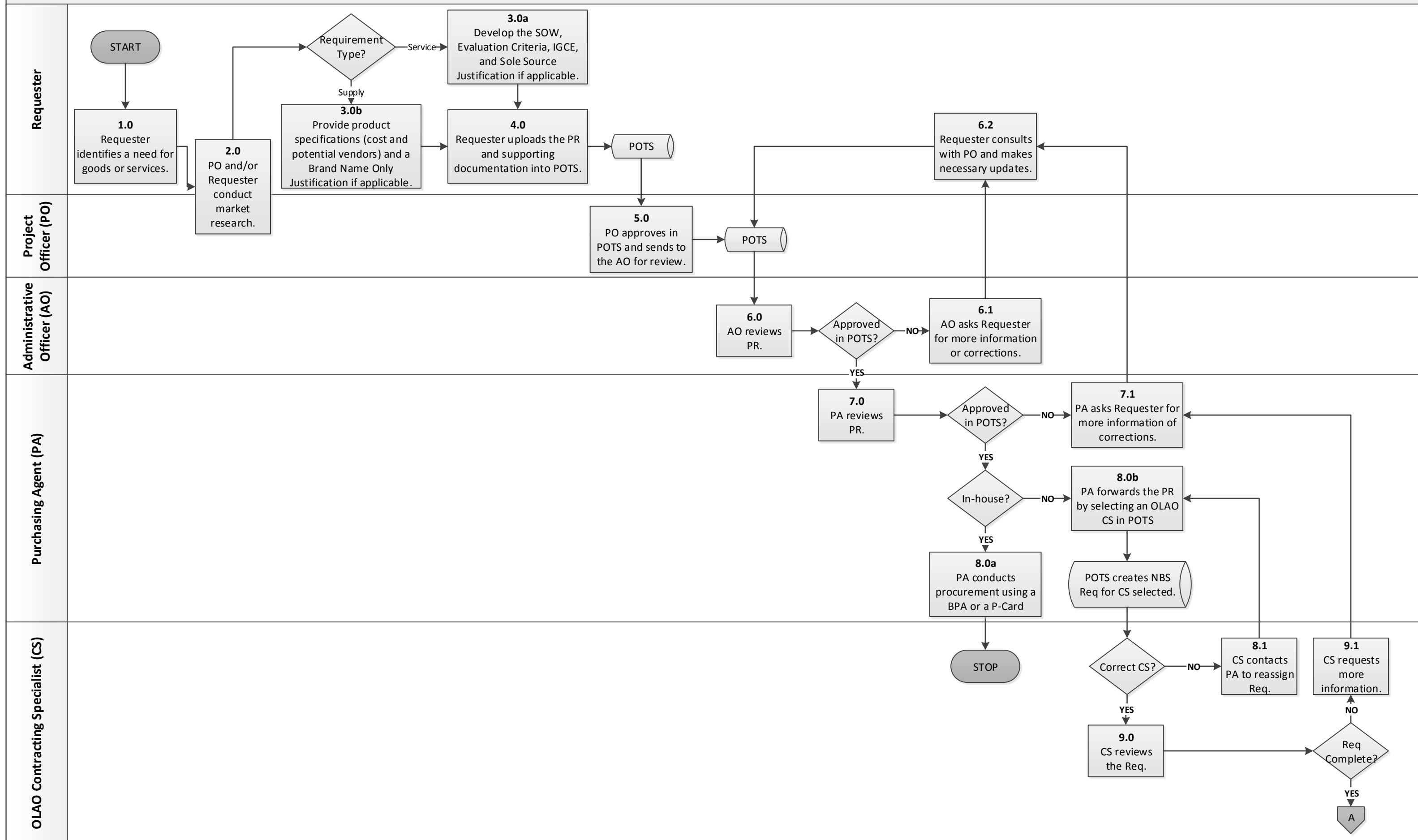
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Page one of all Simplified Acquisitions Process Maps

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → 3.0a Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
- IGCE
- J&A (Justification & Approval)
- LSJ (Limited Source Justification)

SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO →**
- 6.1** AO asks Requester for more information or corrections.
 - 6.2** Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → **7.1** PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

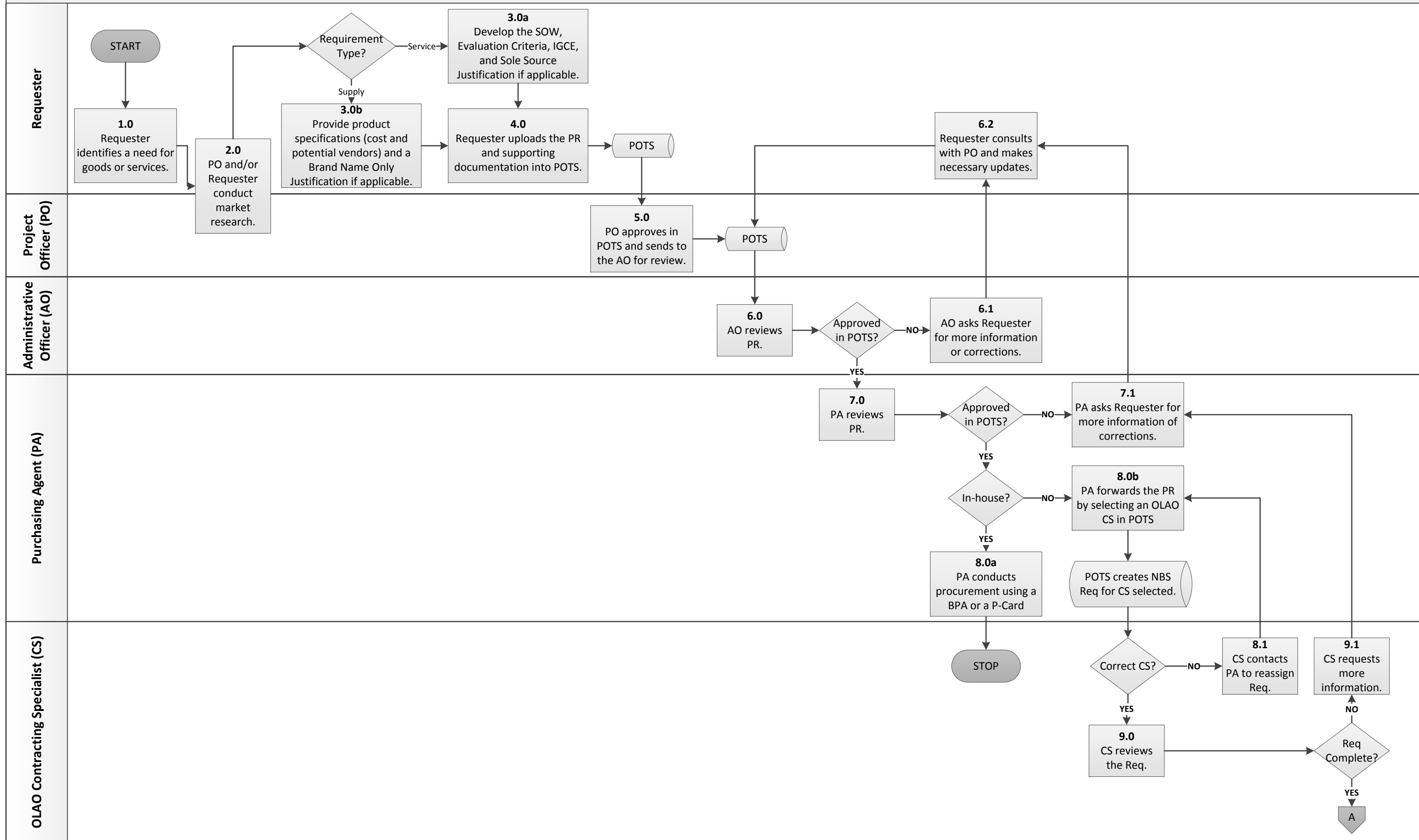
NO → 8.1 CS contacts PA to reassign Req.

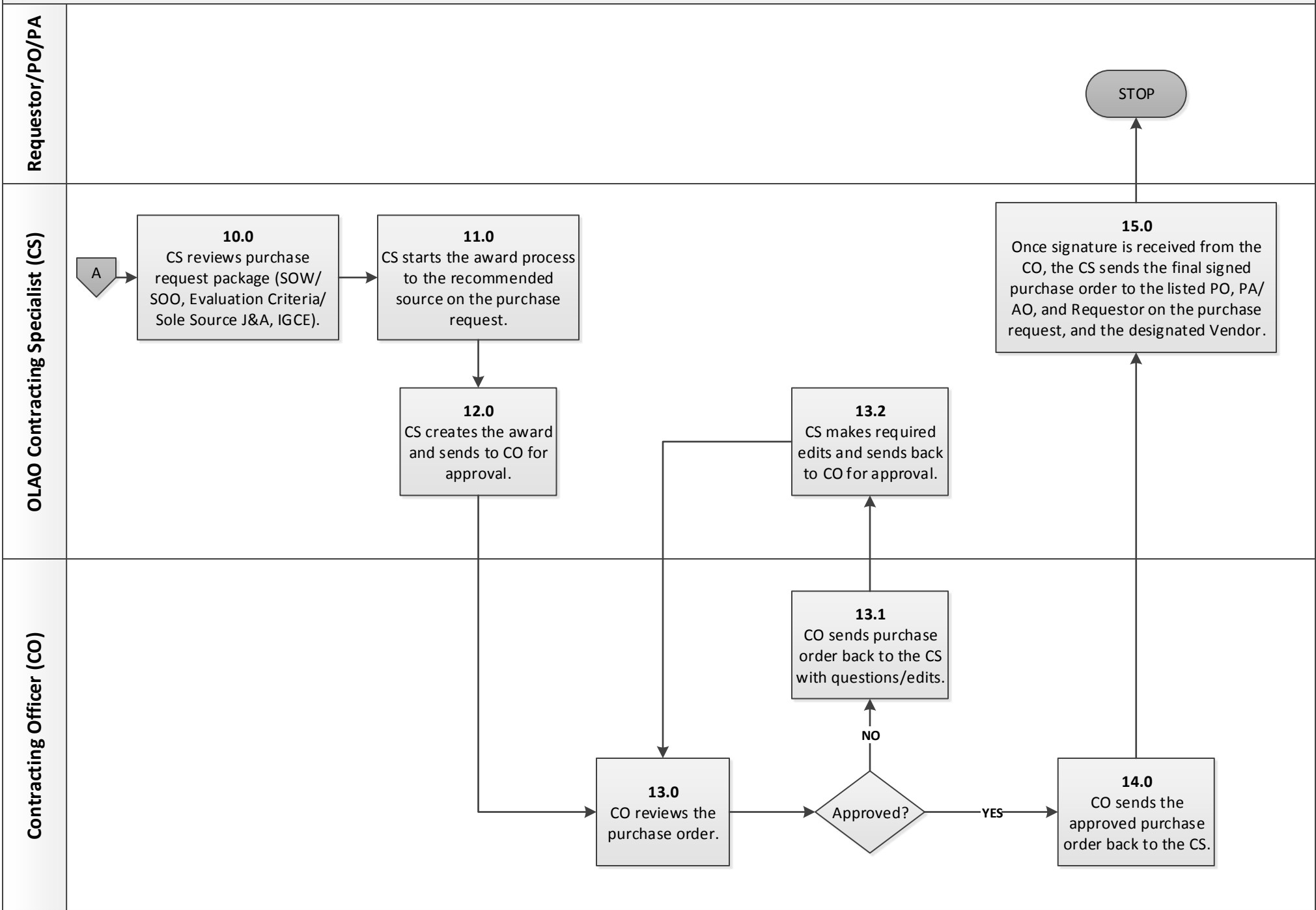
YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A





Process Map for Service Acquisitions Under \$3,500

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
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- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → **3.0a** Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
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- J&A (Justification & Approval)
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- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO** → **6.1** AO asks Requester for more information or corrections.
6.2 Requester consults with PO and makes necessary updates.
- YES** → **7.0** PA reviews PR.

APPROVED IN POTS?

- NO** → **7.1** PA asks Requester for more information of corrections.
- YES** → **Can it be completed in-house?**

IN HOUSE?

- YES** → **8.0a** PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (SOW/SOO, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 CS starts the award process to the recommended source on the purchase request.

12.0 CS creates the award and sends to CO for approval.

13.0 CO reviews the purchase order.

APPROVED?

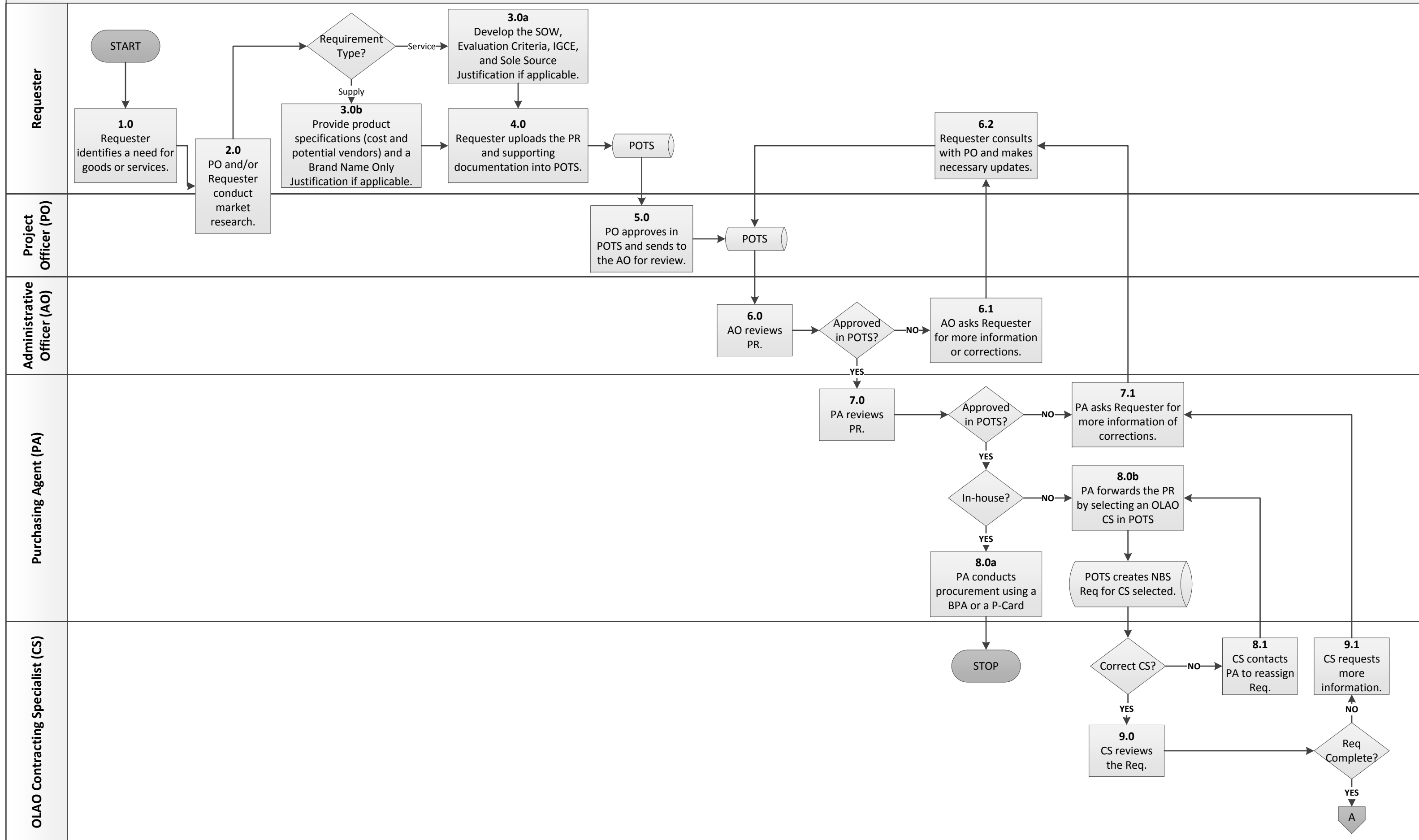
NO → 13.1 CO sends purchase order back to the CS with questions/edits.

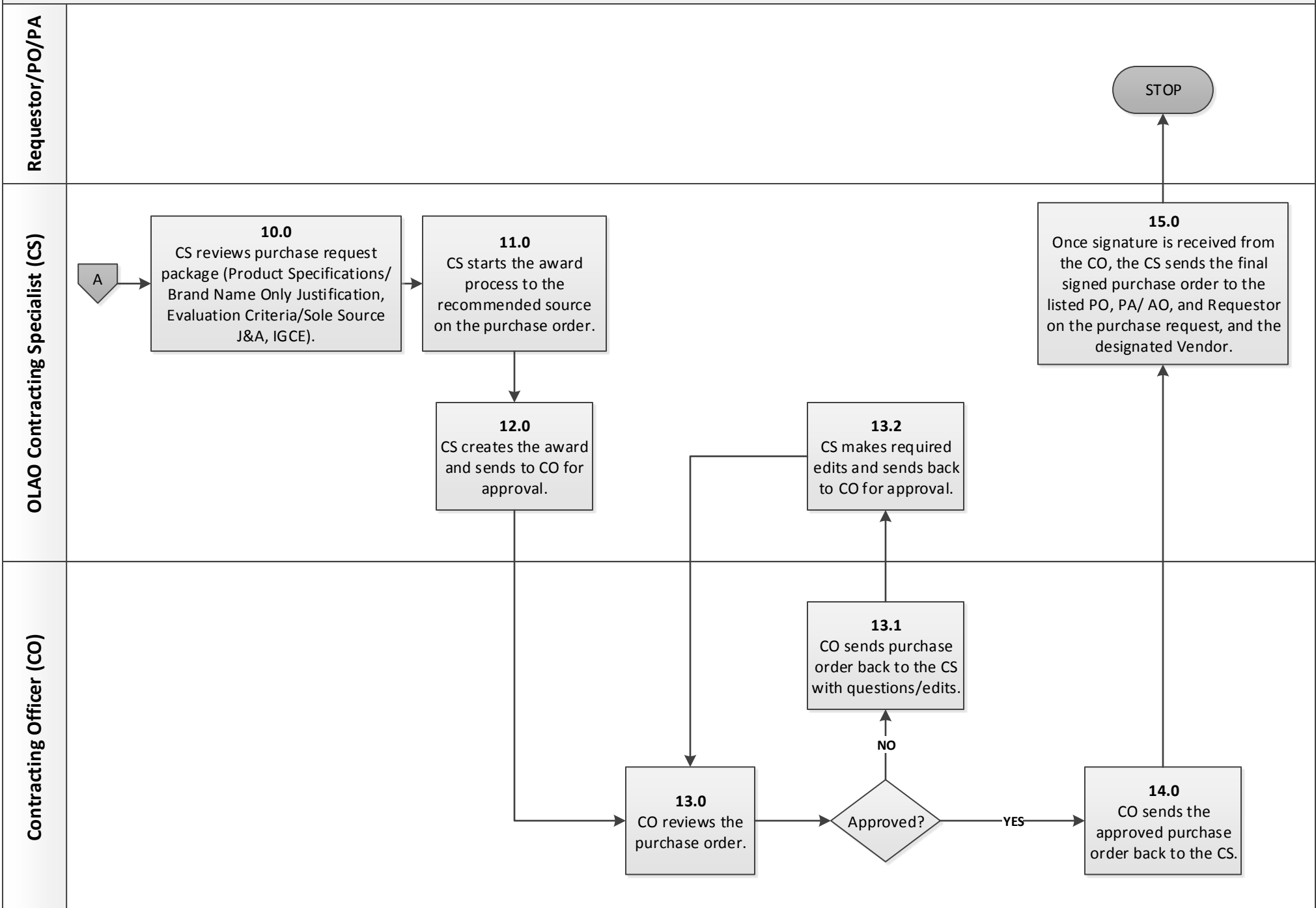
13.2 CS makes required edits and sends back to CO for approval.

YES → 14.0 CO sends the approved purchase order back to the CS.

15.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Supply Acquisitions Under \$3,500

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO →** **6.1** AO asks Requester for more information or corrections.
 6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

- NO →** **7.1** PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → **8.1** CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (Product Specifications/Brand Name Only Justification, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 CS starts the award process to the recommended source on the purchase order.

12.0 CS creates the award and sends to CO for approval.

13.0 CO reviews the purchase order.

APPROVED?

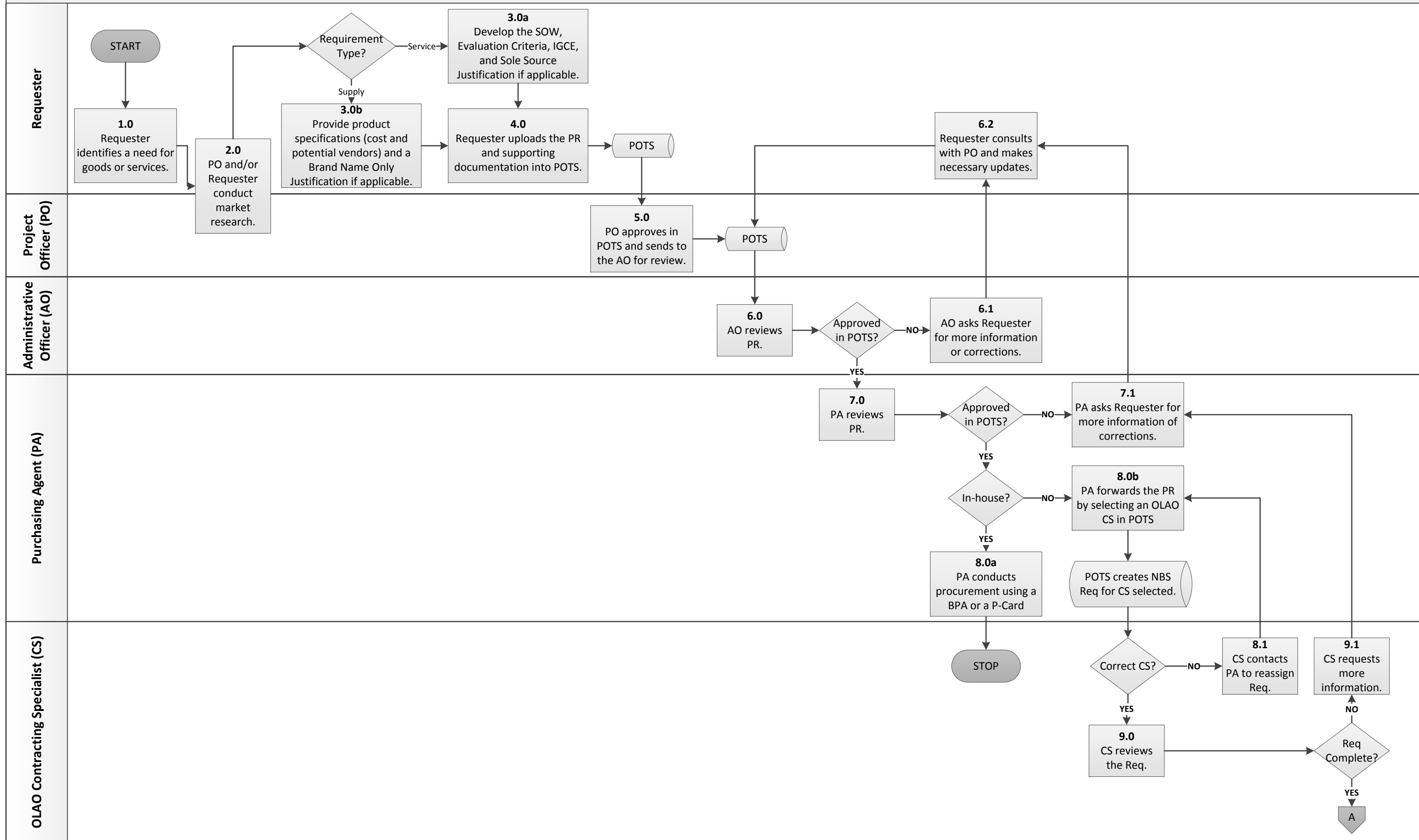
NO → 13.1 CO sends purchase order back to the CS with questions/edits.

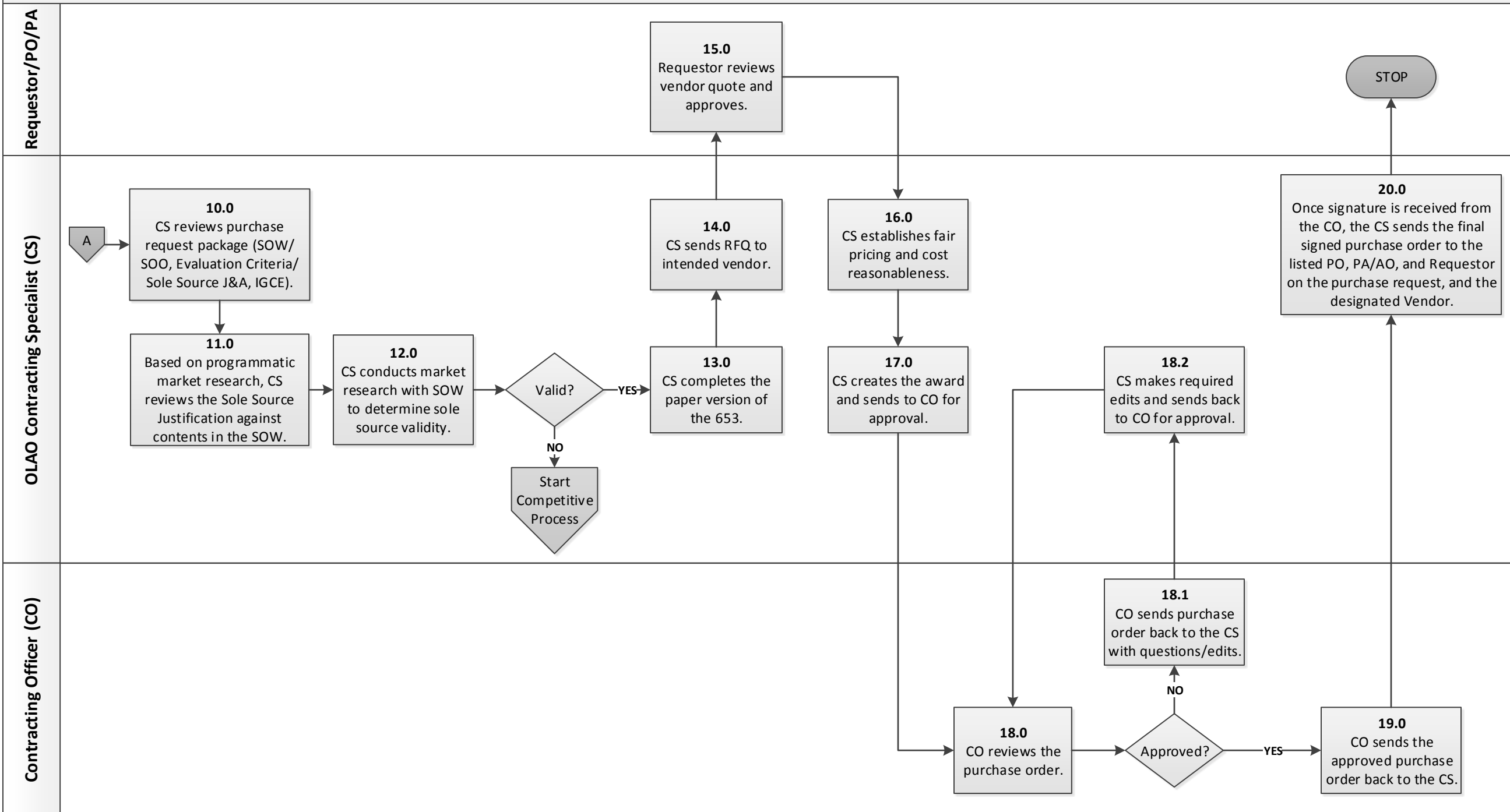
13.2 CS makes required edits and sends back to CO for approval.

YES → 14.0 CO sends the approved purchase order back to the CS.

15.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/ AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Sole Source Service Acquisitions Over \$3,500 - \$15,000

Programmatic market research presently consists of program's responses from vendors who have provided quotes. However market research could consist of a written summary of how the program surveyed the commercial market to determine that there is no other vendor that would meet their needs.

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

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- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → 3.0a Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
- IGCE
- J&A (Justification & Approval)
- LSJ (Limited Source Justification)

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

NO → 6.1 AO asks Requester for more information or corrections.

6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → 7.1 PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (SOW/SOO, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 Based on programmatic market research, CS reviews the Sole Source Justification against contents in the SOW.

12.0 CS conducts market research with SOW to determine sole source validity.

VALID?

NO → Start Competitive Process.

YES → 13.0 CS completes the paper version of the 653.

14.0 CS sends RFQ to intended vendor.

15.0 Requestor reviews vendor quote and approves.

16.0 CS establishes fair pricing and cost reasonableness.

17.0 CS creates the award and sends to CO for approval.

18.0 CO reviews the purchase order.

APPROVED?

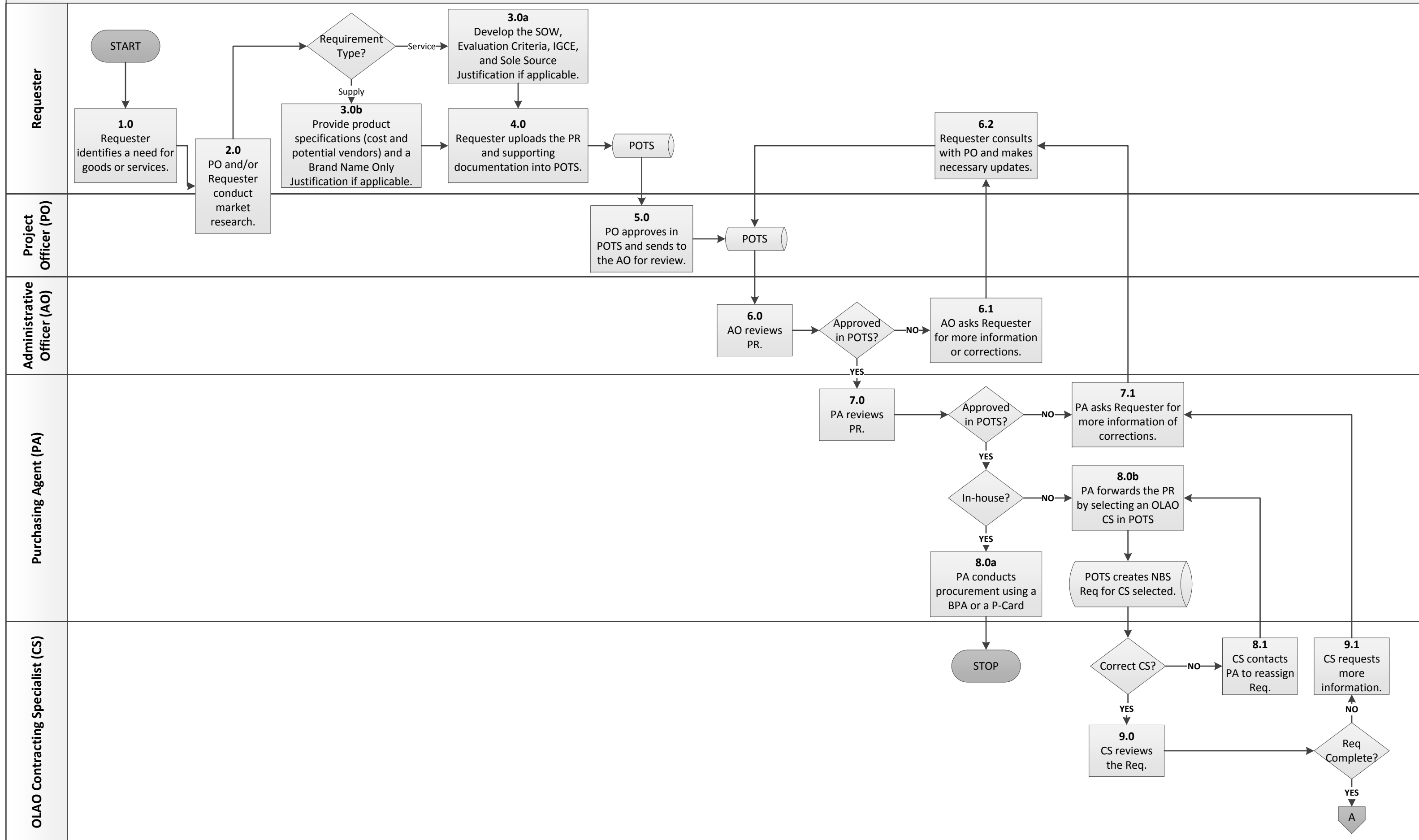
NO → 18.1 CO sends purchase order back to the CS with questions/edits.

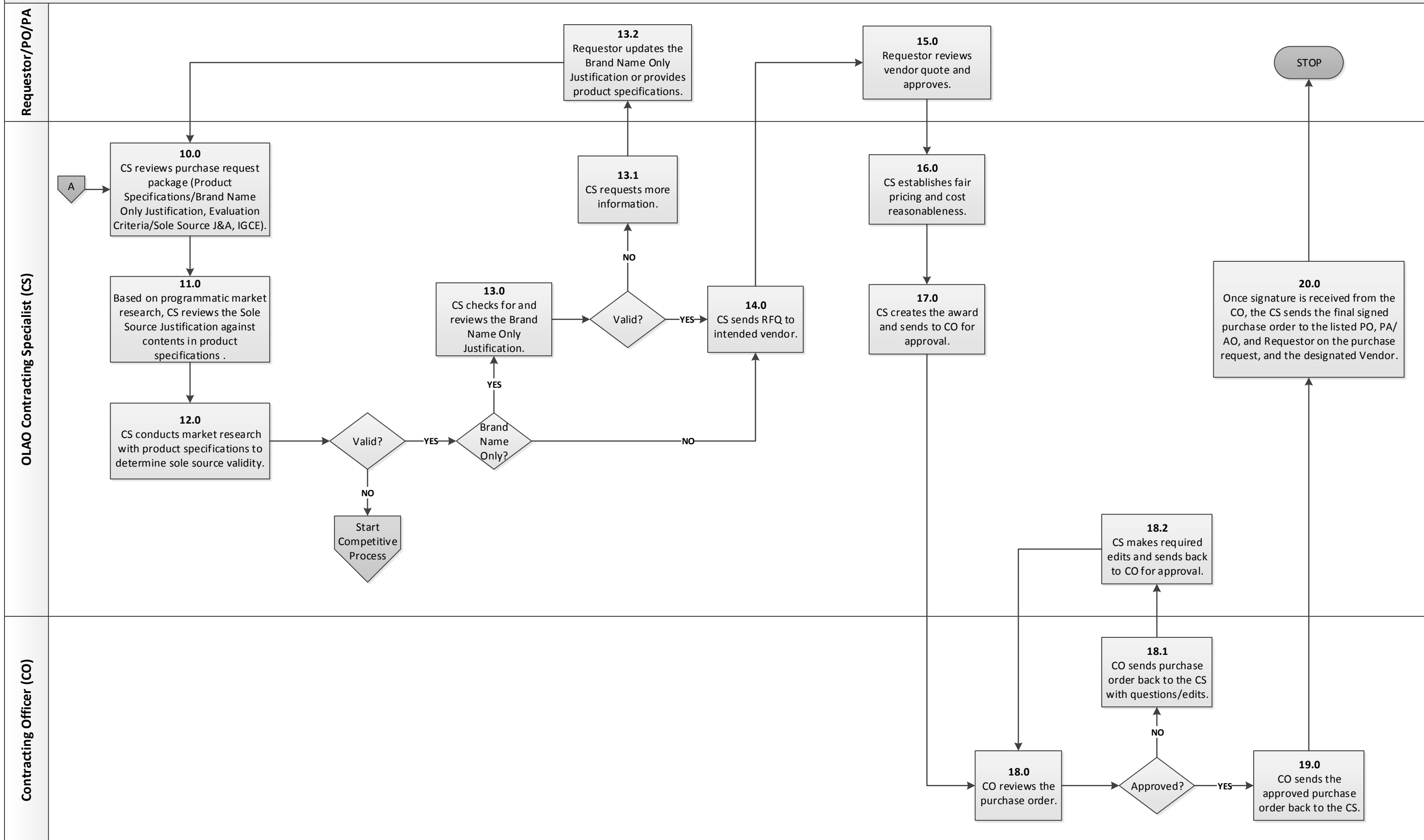
18.2 CS makes required edits and sends back to CO for approval.

YES → 19.0 CO sends the approved purchase order back to the CS.

20.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Sole Source Supply Acquisitions Over \$3,500 - \$15,000

Programmatic market research presently consists of program's responses from vendors who have provided quotes. However market research could consist of a written summary of how the program surveyed the commercial market to determine that there is no other vendor that would meet their needs.

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

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- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

NO → 6.1 AO asks Requester for more information or corrections.

6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → 7.1 PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (Product Specifications/Brand Name Only Justification, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 Based on programmatic market research, CS reviews the Sole Source Justification against contents in the Product Specifications.

12.0 CS conducts market research with the Product Specifications to determine sole source validity.

VALID?

NO → Start Competitive Process

YES → Is it Brand Name Only?

BRAND NAME ONLY?

NO → 14.0 CS sends RFQ to intended vendor.

YES → 13.0 CS checks for and reviews the Brand Name Only Justification.

VALID?

NO → 13.1 CS requests more information.

13.2 Requestor updates the Brand Name Only Justification or provides product specifications.

YES → 14.0 CS sends RFQ to intended vendor.

15.0 Requestor reviews vendor quote and approves.

16.0 CS establishes fair pricing and cost reasonableness.

17.0 CS creates the award and sends to CO for approval.

18.0 CO reviews the purchase order.

APPROVED?

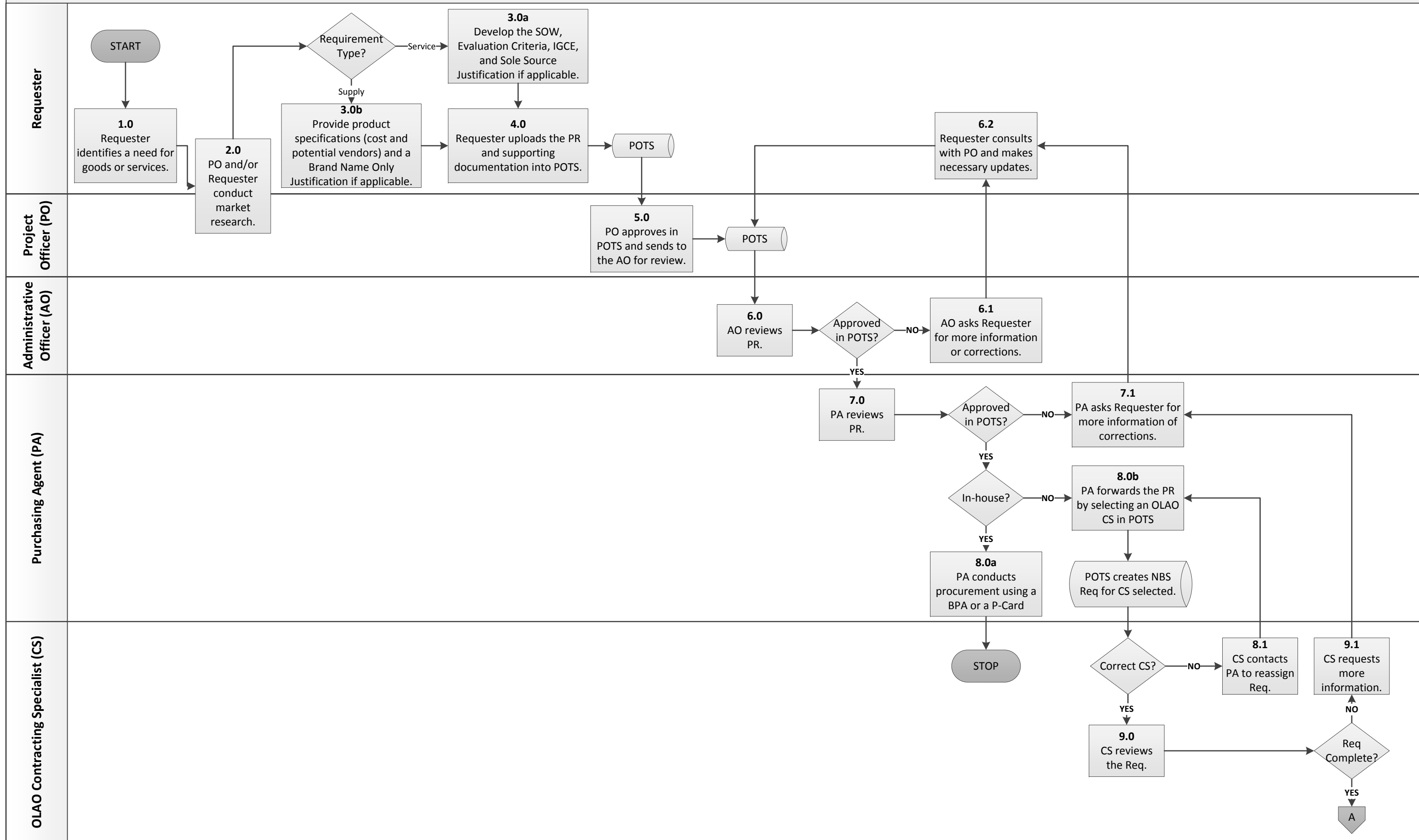
NO → 18.1 CO sends purchase order back to the CS with questions/edits.

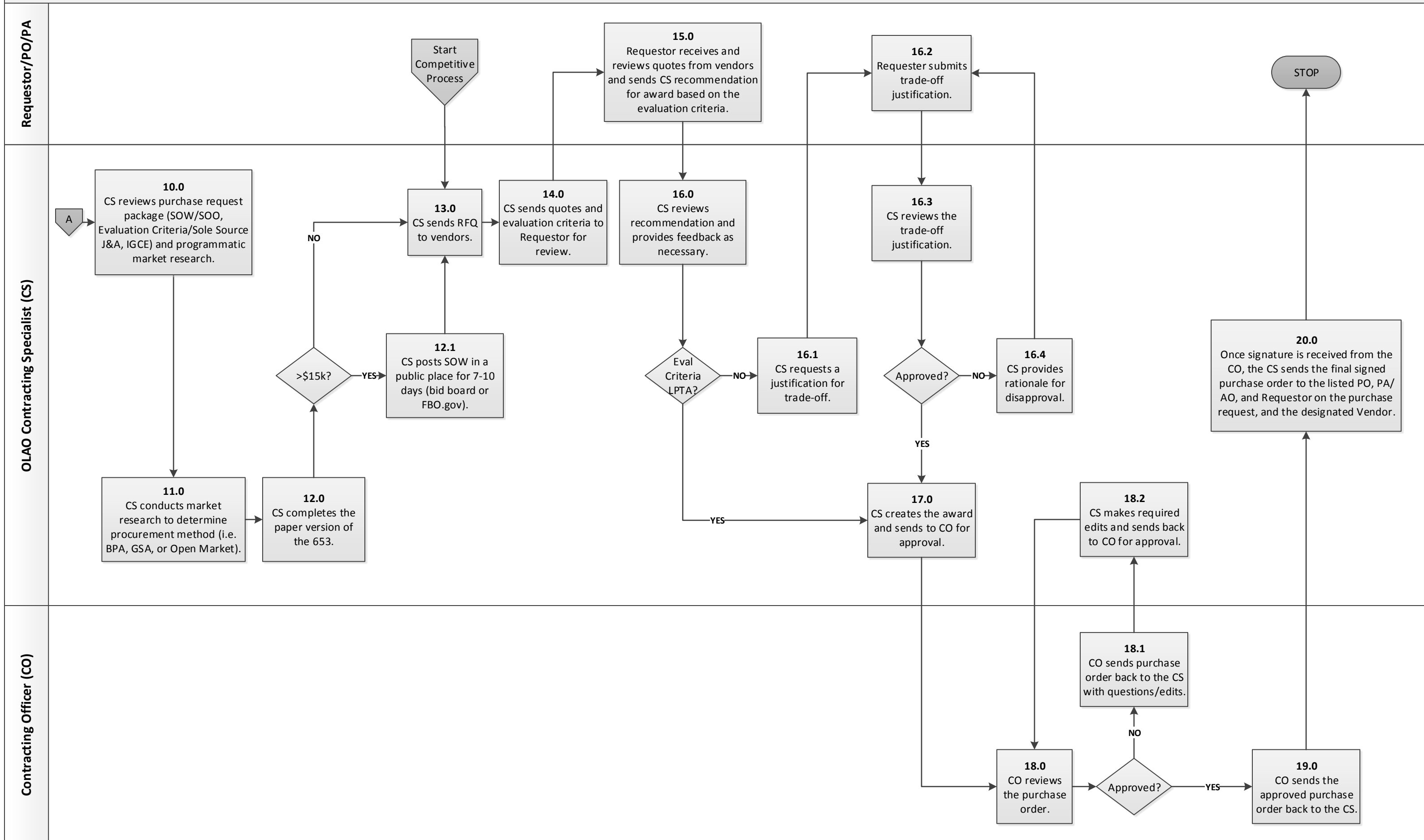
18.2 CS makes required edits and sends back to CO for approval.

YES → 19.0 CO sends the approved purchase order back to the CS.

20.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Competitive Service Acquisitions Over \$3,500 - \$25,000

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

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- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
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- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → 3.0a Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
- IGCE
- J&A (Justification & Approval)
- LSJ (Limited Source Justification)

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO** → 6.1 AO asks Requester for more information or corrections.
6.2 Requester consults with PO and makes necessary updates.
- YES** → 7.0 PA reviews PR.

APPROVED IN POTS?

- NO** → 7.1 PA asks Requester for more information of corrections.
- YES** → **Can it be completed in-house?**

IN HOUSE?

- YES** → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (SOW/SOO, Evaluation Criteria/Sole Source J&A, IGCE) and programmatic market research.

11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

12.0 CS completes the paper version of the 653.

>\$15k?

YES → 12.1 CS posts SOW in a public place for 7-10 days (bid board or FBO.gov).

NO → 13.0 CS sends RFQ to vendors. **(Competitive Process Begins)**

14.0 CS sends quotes and evaluation criteria to Requestor for review.

15.0 Requestor receives and reviews quotes from vendors and sends CS recommendation for award based on the evaluation criteria.

16.0 CS reviews recommendation and provides feedback as necessary.

EVALUATION CRITERIA = LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA)?

YES → 17.0 CS creates the award and sends to CO for approval.

NO → 16.1 CS requests a justification for trade-off.

16.2 Requester submits trade-off justification.

16.3 CS reviews the trade-off justification.

APPROVED?

NO → 16.4 CS provides rationale for disapproval.

YES → 17.0 CS creates the award and sends to CO for approval.

18.0 CO reviews the purchase order.

APPROVED?

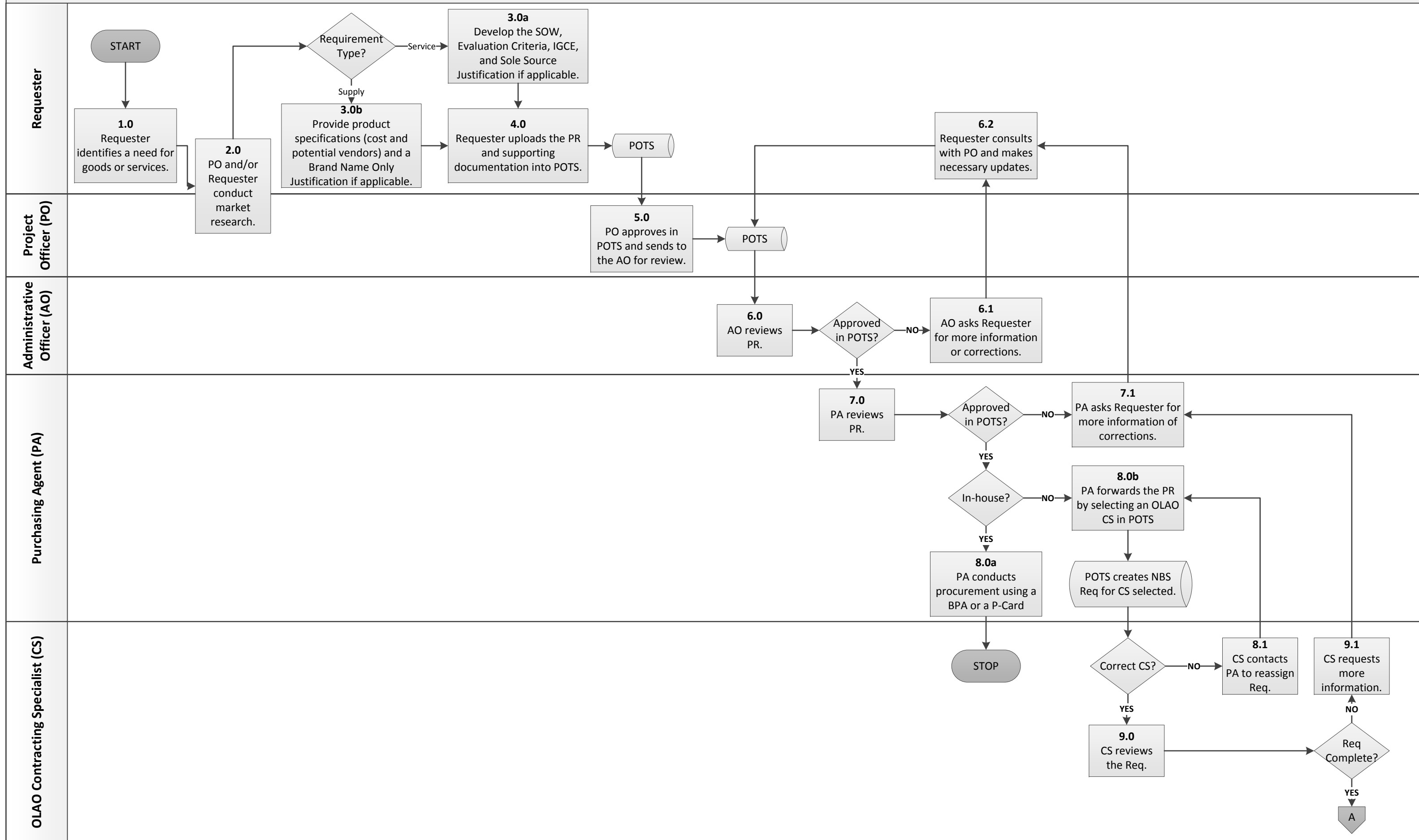
NO → 18.1 CO sends purchase order back to the CS with questions/edits.

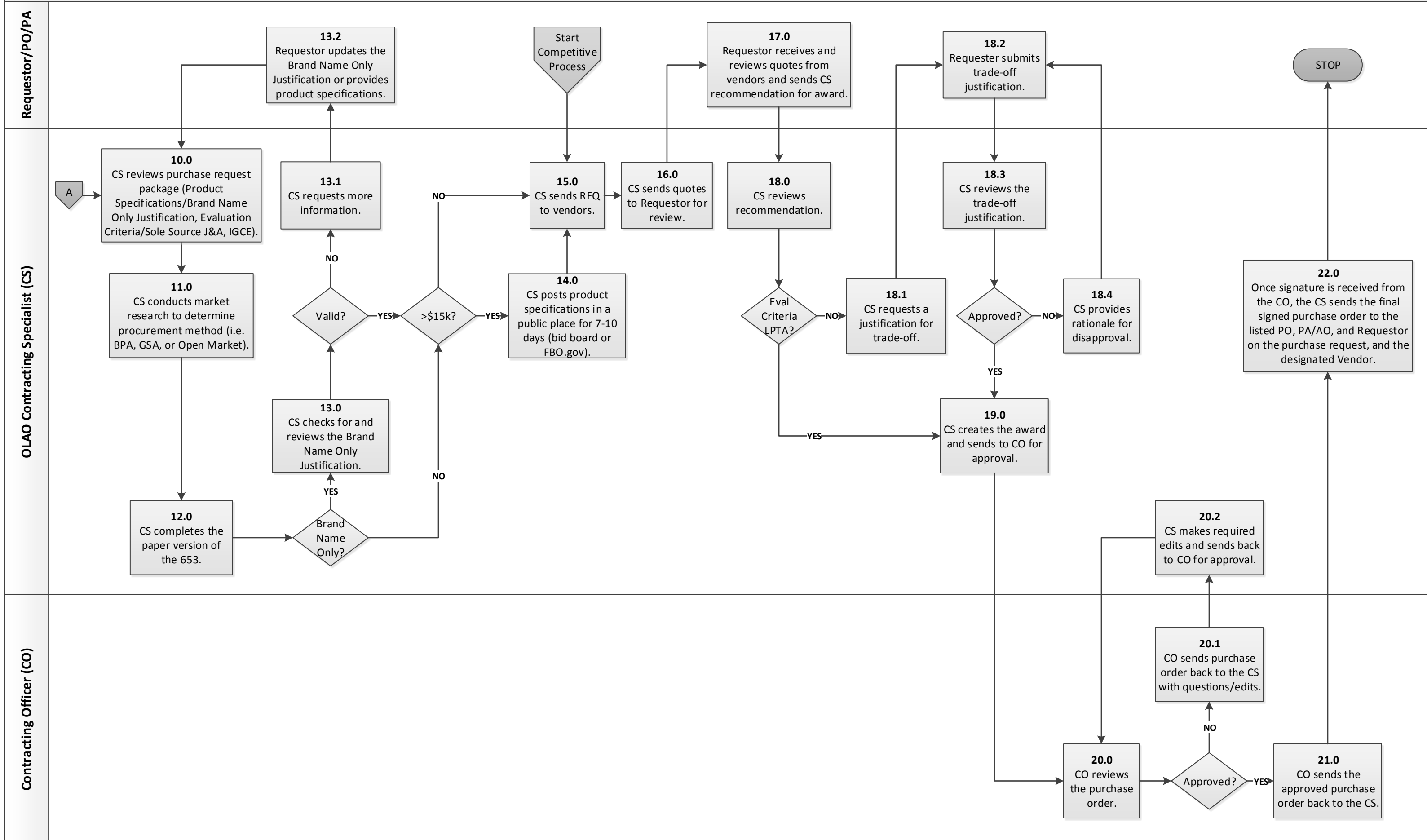
18.2 CS makes required edits and sends back to CO for approval.

YES → 19.0 CO sends the approved purchase order back to the CS.

20.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Competitive Supply Acquisitions Over \$3,500 - \$25,000

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

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SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

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- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO →** **6.1** AO asks Requester for more information or corrections.
 6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

- NO →** **7.1** PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → **8.1** CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (Product Specifications/Brand Name Only Justification, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

12.0 CS completes the paper version of the 653.

BRAND NAME ONLY?

NO → Greater than \$15k?

YES → 13.0 CS checks for and reviews the Brand Name Only Justification.

VALID?

NO → 13.1 CS requests more information.

13.2 Requestor updates the Brand Name Only Justification or provides product specifications.

YES → Greater than \$15k?

>\$15k?

YES → 14.0 CS posts product specifications in a public place for 7-10 days (bid board or FBO.gov).

15.0 CS sends RFQ to vendors. **(Competitive Process Begins)**

NO → 15.0 CS sends RFQ to vendors. **(Competitive Process Begins)**

16.0 CS sends quotes to Requestor for review.

17.0 Requestor receives and reviews quotes from vendors and sends CS recommendation for award.

18.0 CS reviews recommendation.

EVALUATION CRITERIA LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA)?

YES → 19.0 CS creates the award and sends to CO for approval.

NO → 18.1 CS requests a justification for trade-off.

18.2 Requester submits trade-off justification.

18.3 CS reviews the trade-off justification.

APPROVED?

NO → 18.4 CS provides rationale for disapproval.

YES → 19.0 CS creates the award and sends to CO for approval.

20.0 CO reviews the purchase order.

APPROVED?

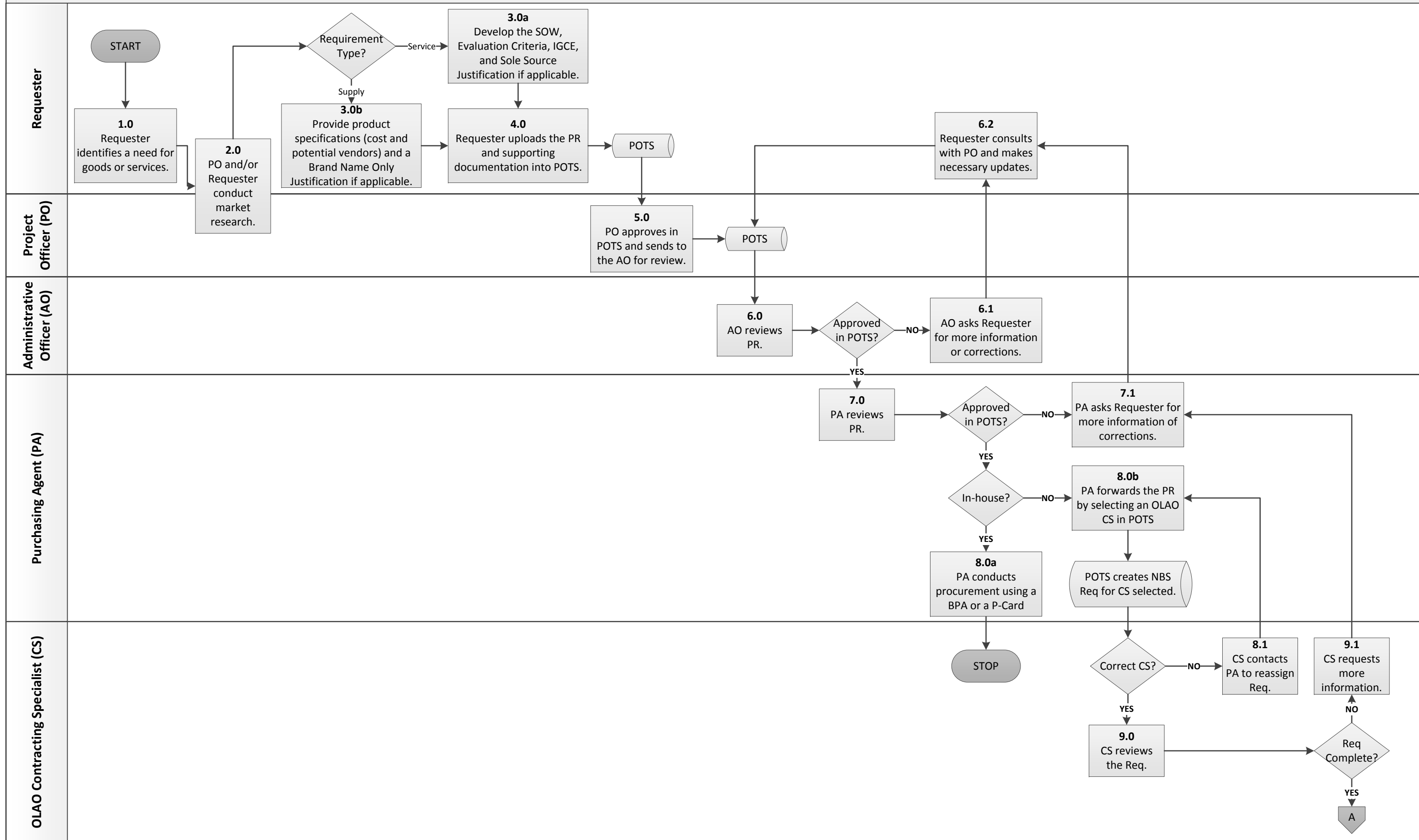
NO → 20.1 CO sends purchase order back to the CS with questions/edits.

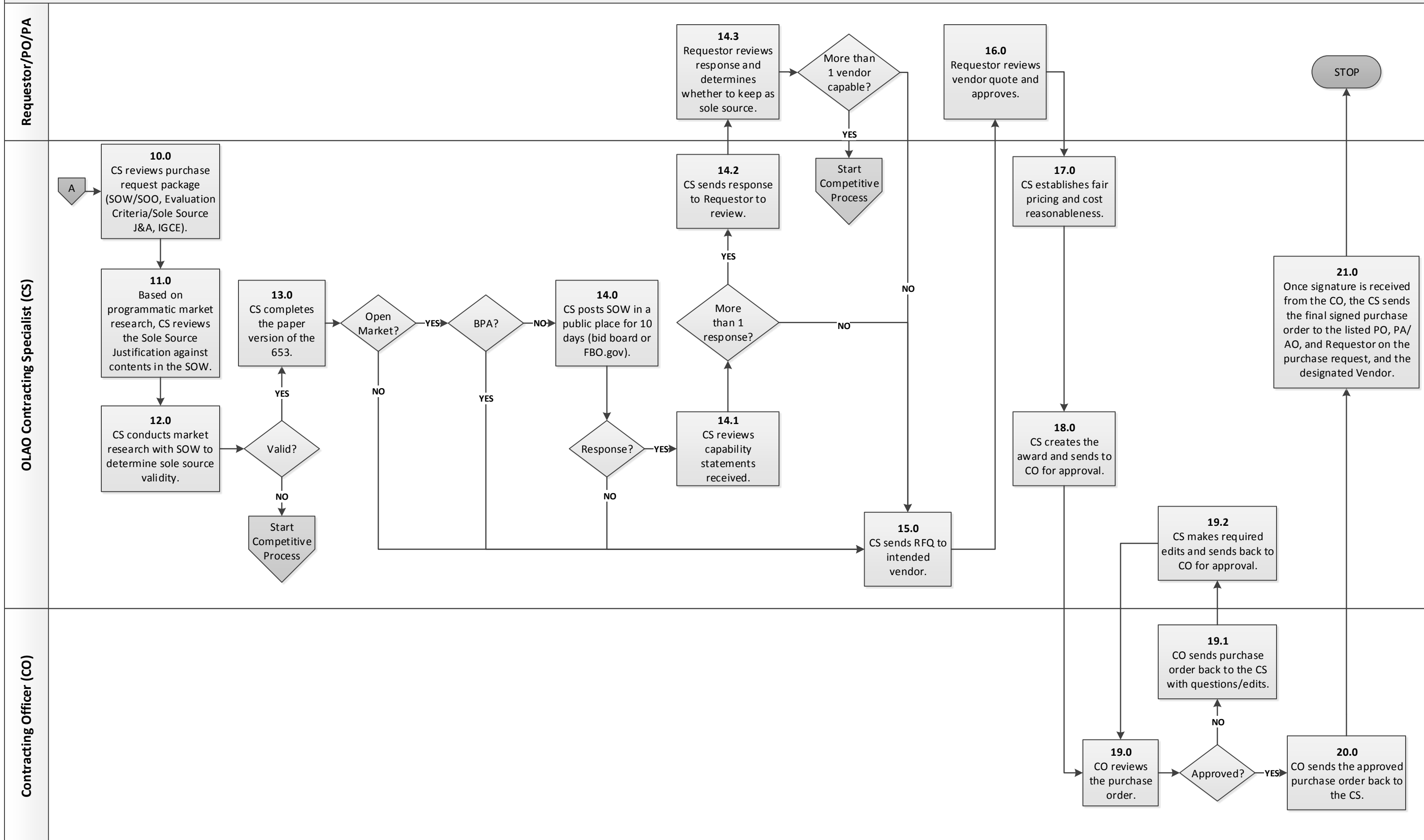
20.2 CS makes required edits and sends back to CO for approval.

YES → 21.0 CO sends the approved purchase order back to the CS.

22.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/ AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Sole Source Service Acquisitions Over \$15,000 - \$25,000

Programmatic market research presently consists of program's responses from vendors who have provided quotes. However market research could consist of a written summary of how the program surveyed the commercial market to determine that there is no other vendor that would meet their needs.

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → 3.0a Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
- IGCE
- J&A (Justification & Approval)
- LSJ (Limited Source Justification)

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

NO → 6.1 AO asks Requester for more information or corrections.

6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → 7.1 PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (SOW/SOO, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 Based on programmatic market research, CS reviews the Sole Source Justification against contents in the SOW.

12.0 CS conducts market research with SOW to determine sole source validity.

VALID?

NO → Start Competitive Process.

YES → 13.0 CS completes the paper version of the 653.

OPEN MARKET?

NO → 15.0 CS sends RFQ to intended vendor.

YES → BPA?

BPA?

YES → 15.0 CS sends RFQ to intended vendor.

NO → 14.0 CS posts SOW in a public place for 10 days (bid board or FBO.gov).

RESPONSE?

NO → 15.0 CS sends RFQ to intended vendor.

YES → 14.1 CS reviews capability statements received.

MORE THAN 1 RESPONSE?

NO → 15.0 CS sends RFQ to intended vendor.

YES → 14.2 CS sends response to Requestor to review.

14.3 Requestor reviews response and determines whether to keep as sole source.

MORE THAN 1 VENDOR CAPABLE?

YES → Start Competitive Process.

NO → 15.0 CS sends RFQ to intended vendor.

16.0 Requestor reviews vendor quote and approves.

17.0 CS establishes fair pricing and cost reasonableness.

18.0 CS creates the award and sends to CO for approval.

19.0 CO reviews the purchase order.

APPROVED?

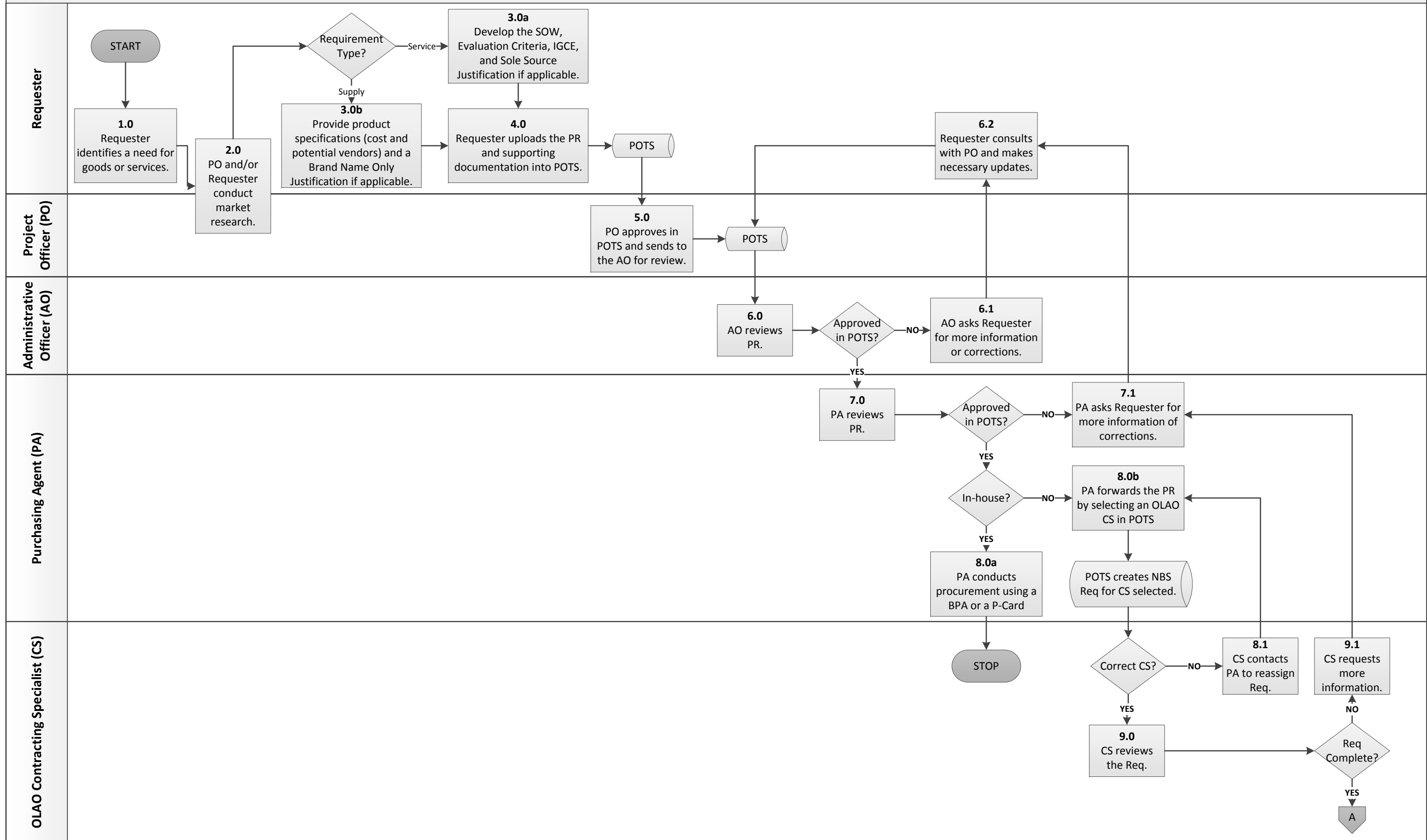
NO → 19.1 CO sends purchase order back to the CS with questions/edits.

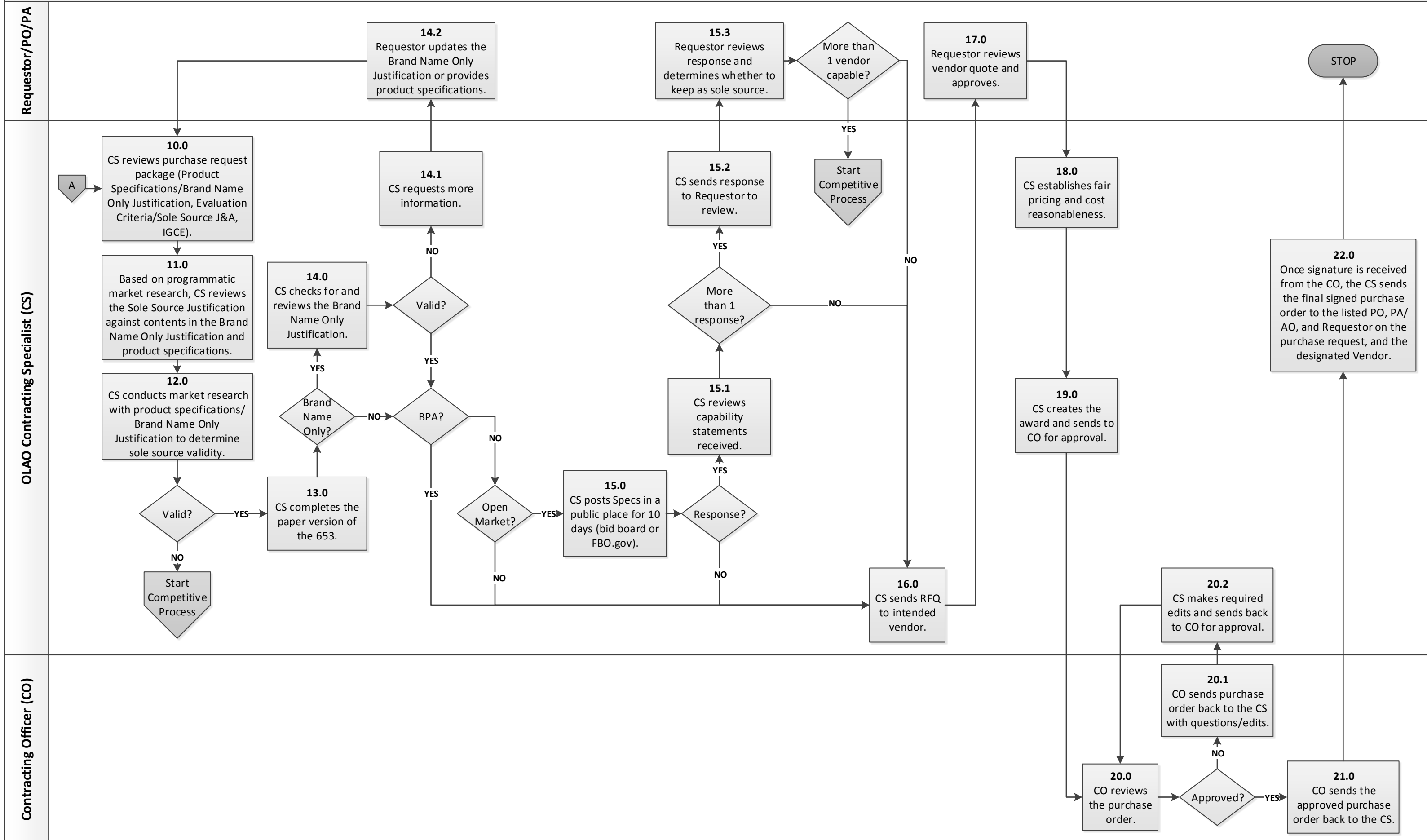
19.2 CS makes required edits and sends back to CO for approval.

YES → 20.0 CO sends the approved purchase order back to the CS.

21.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Sole Source Supply Acquisitions Over \$15,000 - \$25,000

Programmatic market research presently consists of program's responses from vendors who have provided quotes. However market research could consist of a written summary of how the program surveyed the commercial market to determine that there is no other vendor that would meet their needs.

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

NO → 6.1 AO asks Requester for more information or corrections.

6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → 7.1 PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (Product Specifications/Brand Name Only Justification, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 Based on programmatic market research, CS reviews the Sole Source Justification against contents in the Brand Name Only Justification and product specifications.

12.0 CS conducts market research with product specifications/Brand Name Only Justification, to determine sole source validity.

VALID?

NO → Start Competitive Process

YES → 13.0 CS completes the paper version of the 653.

BRAND NAME ONLY?

NO → BPA?

YES → 14.0 CS checks for and reviews the Brand Name Only Justification.

VALID?

YES → BPA?

NO → 14.1 CS requests more information.

14.2 Requestor updates the Brand Name Only Justification or provides product specifications.

BPA?

YES → 16.0 CS sends RFQ to intended vendor.

NO → Open Market?

OPEN MARKET?

NO → 16.0 CS sends RFQ to intended vendor.

YES → 15.0 CS posts Specs in a public place for 10 days (bid board or FBO.gov).

RESPONSE?

NO → 16.0 CS sends RFQ to intended vendor.

YES → 15.1 CS reviews capability statements received.

MORE THAN 1 RESPONSE?

NO → 16.0 CS sends RFQ to intended vendor.

YES → 15.2 CS sends response to Requestor to review.

15.3 Requestor reviews response and determines whether to keep as sole source.

MORE THAN 1 VENDOR CAPABLE?

YES → Start Competitive Process.

NO → 16.0 CS sends RFQ to intended vendor.

17.0 Requestor reviews vendor quote and approves.

18.0 CS establishes fair pricing and cost reasonableness.

19.0 CS creates the award and sends to CO for approval.

20.0 CO reviews the purchase order.

APPROVED?

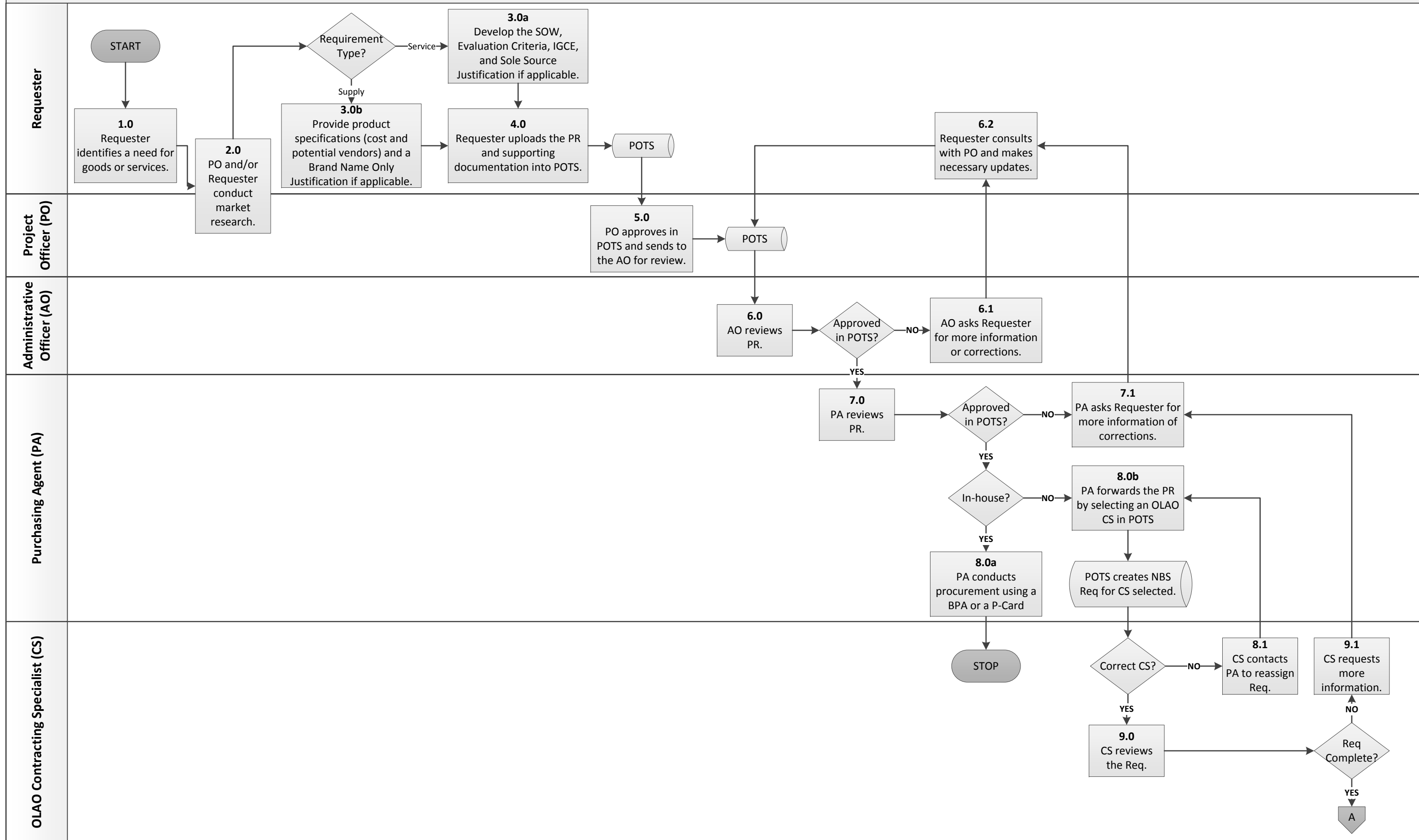
NO → 20.1 CO sends purchase order back to the CS with questions/edits.

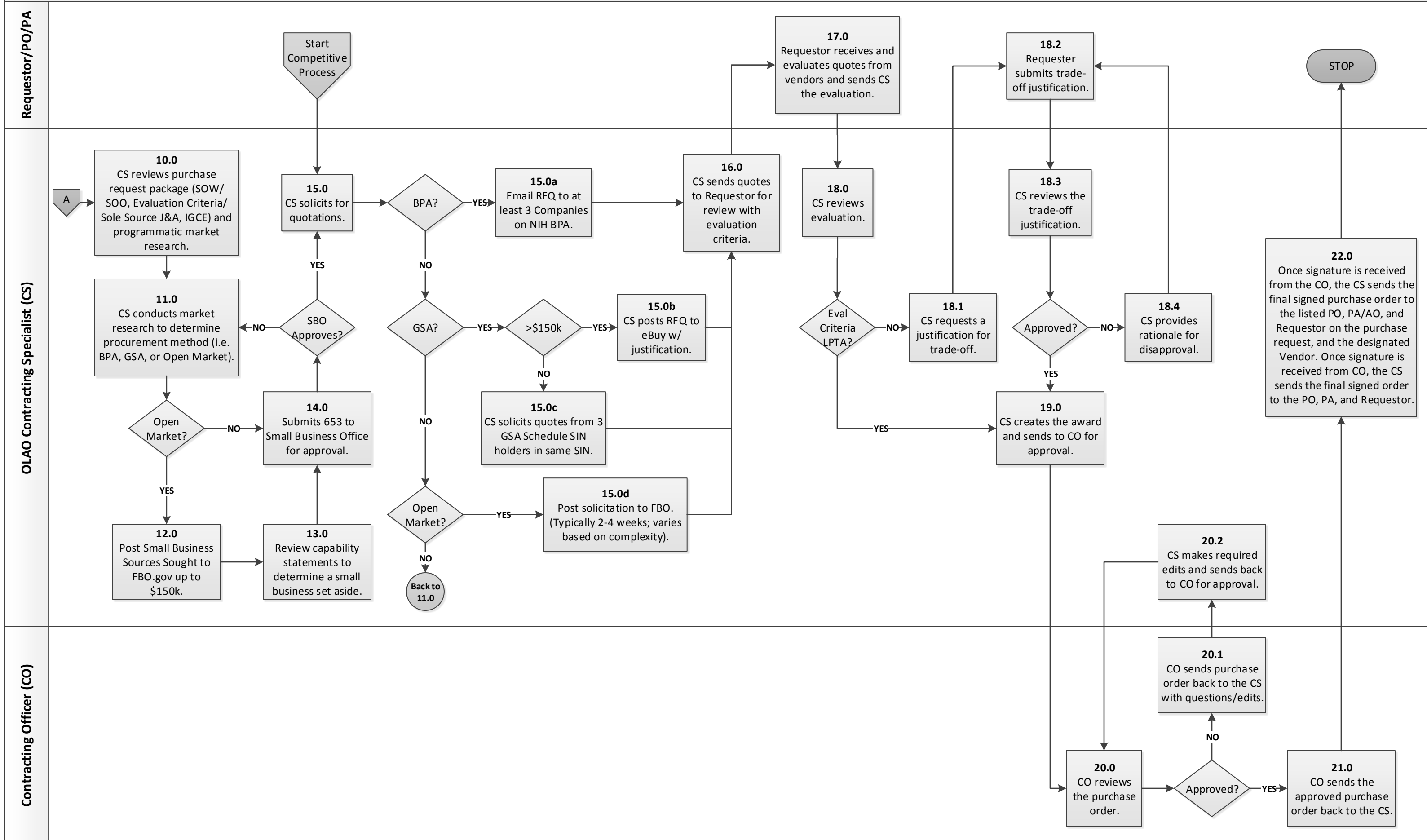
20.2 CS makes required edits and sends back to CO for approval.

YES → 21.0 CO sends the approved purchase order back to the CS.

22.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Competitive Service Acquisitions Over \$25,000

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → 3.0a Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
- IGCE
- J&A (Justification & Approval)
- LSJ (Limited Source Justification)

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO** → **6.1** AO asks Requester for more information or corrections.
 6.2 Requester consults with PO and makes necessary updates.
- YES** → **7.0** PA reviews PR.

APPROVED IN POTS?

- NO** → **7.1** PA asks Requester for more information of corrections.
- YES** → **Can it be completed in-house?**

IN HOUSE?

- YES** → **8.0a** PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (SOW/SOO, Evaluation Criteria/Sole Source J&A, IGCE) and programmatic market research.

11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

OPEN MARKET?

YES → 12.0 Post Small Business Sources Sought to FBO.gov up to \$150k.

13.0 Review capability statements to determine a small business set aside.

14.0 Submits 653 to Small Business Office for approval.

NO → 14.0 Submits 653 to Small Business Office for approval.

SMALL BUSINESS OFFICE (SBO) APPROVES?

NO → Go back to step 11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

YES → 15.0 CS solicits for quotations. **(Competitive Process Begins)**

BPA?

YES → 15.0a Email RFQ to at least 3 Companies on NIH BPA.

NO → GSA?

GSA?

NO → Open Market?

YES → Greater than \$150k?

>\$150k?

YES → 15.0b CS posts RFQ to eBuy w/ justification.

NO → 15.0c CS solicits quotes from 3 GSA Schedule SIN holders in same SIN.

OPEN MARKET?

NO → Go back to step 11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

YES → 15.0d Post solicitation to FBO. (Typically 2-4 weeks; varies based on complexity).

16.0 CS sends quotes to Requestor for review with evaluation criteria.

17.0 Requestor receives and evaluates quotes from vendors and sends CS the evaluation.

18.0 CS reviews evaluation.

EVALUATION CRITERIA = LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA)?

YES → 19.0 CS creates the award and sends to CO for approval.

NO → 18.1 CS requests a justification for trade-off.

18.2 Requester submits trade-off justification.

18.3 CS reviews the trade-off justification.

APPROVED?

NO → 18.4 CS provides rationale for disapproval.

YES → 19.0 CS creates the award and sends to CO for approval.

20.0 CO reviews the purchase order.

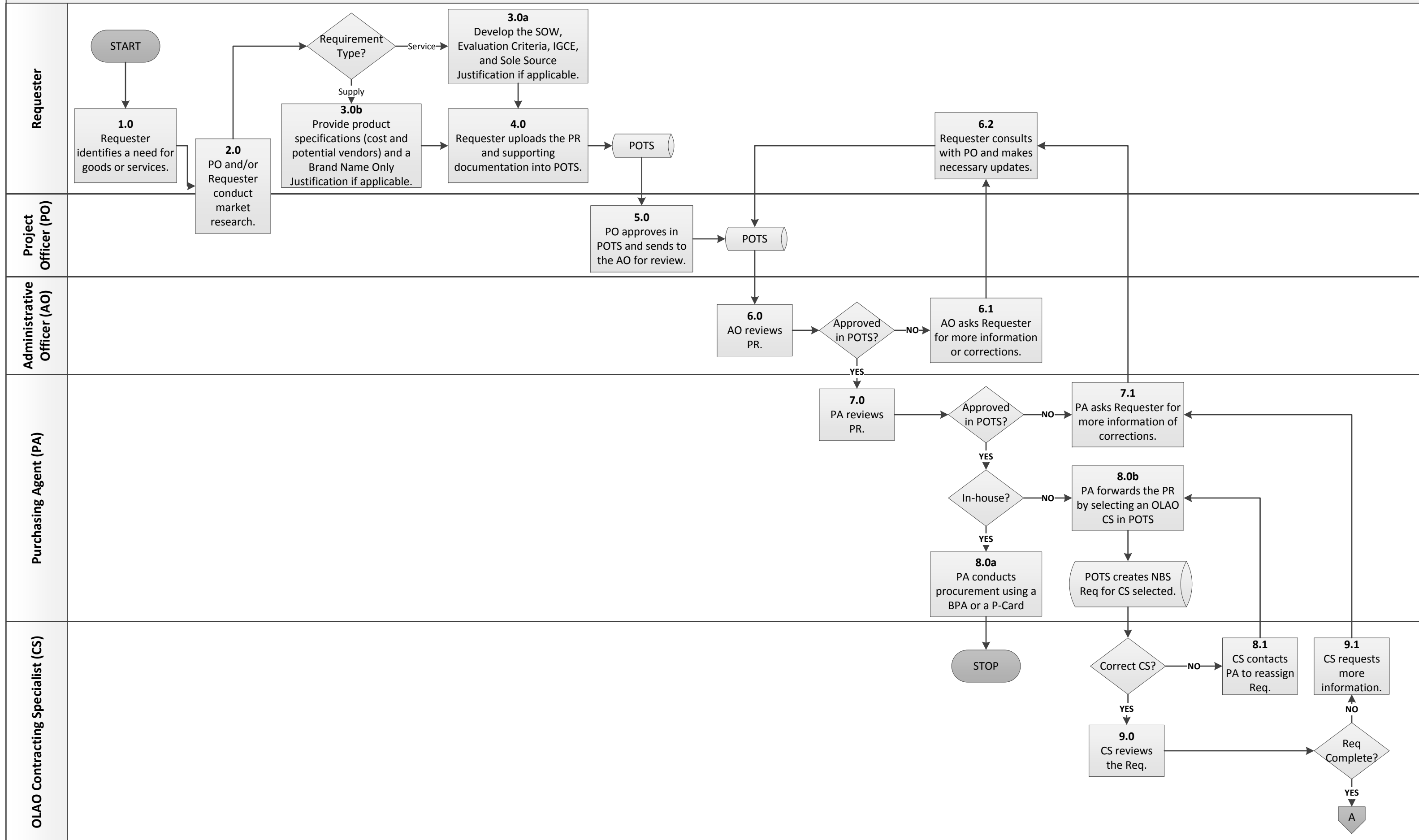
NO → 20.1 CO sends purchase order back to the CS with questions/edits.

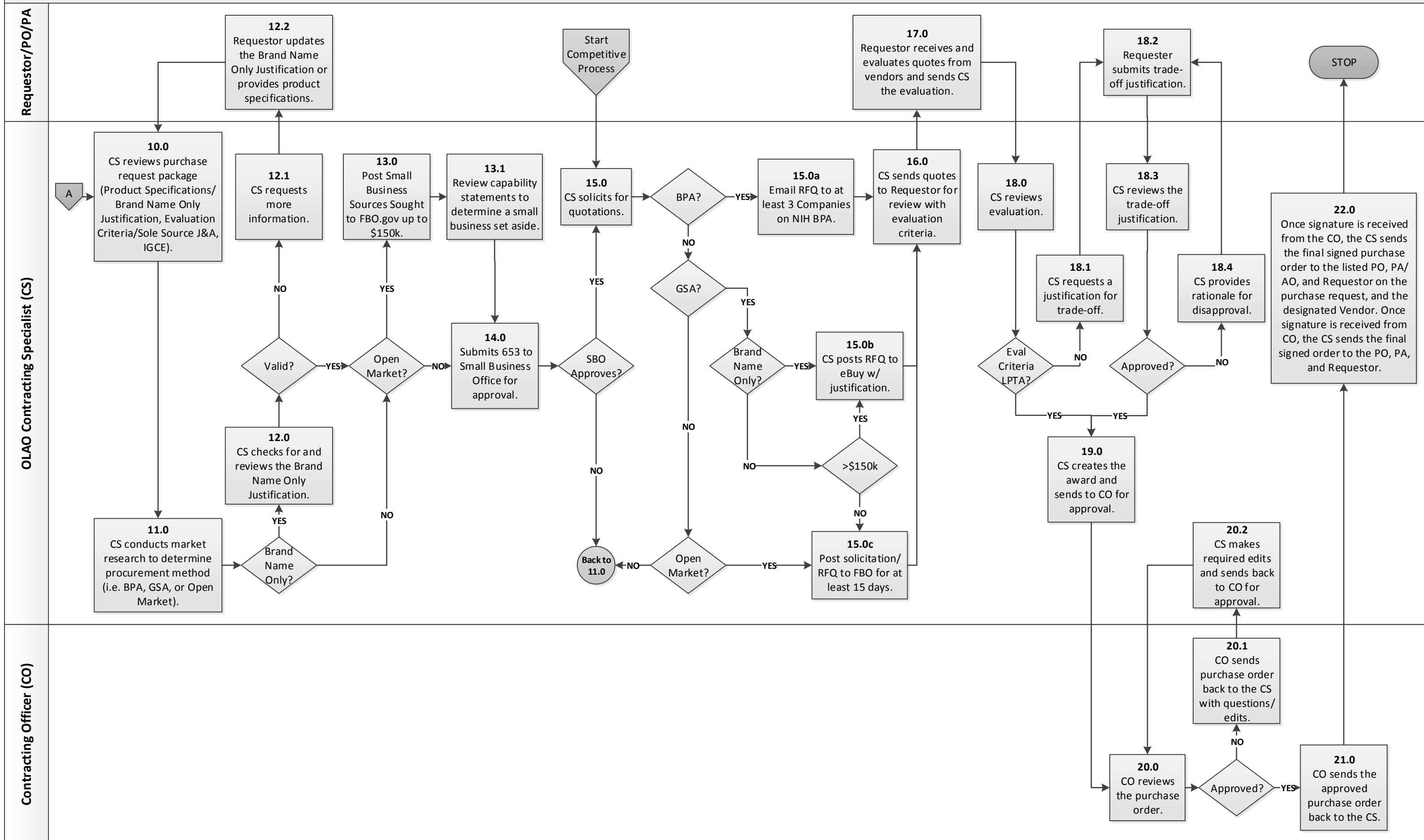
20.2 CS makes required edits and sends back to CO for approval.

YES → 21.0 CO sends the approved purchase order back to the CS.

22.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Competitive Supply Acquisitions Over \$25,000

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO →**
- 6.1** AO asks Requester for more information or corrections.
 - 6.2** Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

- NO →**
- 7.1** PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO →

- 8.1** CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (Product Specifications/Brand Name Only Justification, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

BRAND NAME ONLY?

NO → Open Market?

YES → 12.0 CS checks for and reviews the Brand Name Only Justification.

VALID?

YES → Open Market?

NO → 12.1 CS requests more information.

12.2 Requestor updates the Brand Name Only Justification or provides product specifications.

OPEN MARKET?

YES → 13.0 Post Small Business Sources Sought to FBO.gov up to \$150k.

13.1 Review capability statements to determine a small business set aside.

14.0 Submits 653 to Small Business Office for approval.

NO → 14.0 Submits 653 to Small Business Office for approval.

SMALL BUSINESS OFFICE (SBO) APPROVES?

NO → Go back to step 11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

YES → 15.0 CS solicits for quotations. (Competitive Process Begins)

BPA?

YES → 15.0a Email RFQ to at least 3 Companies on NIH BPA.

NO → GSA?

GSA?

NO → Open Market?

YES → Brand Name Only?

BRAND NAME ONLY?

YES → 15.0b CS posts RFQ to eBuy w/ justification.

NO → Greater than \$150k?

>\$150k?

YES → 15.0b CS posts RFQ to eBuy w/ justification.

NO → 15.0c Post solicitation/RFQ to FBO for at least 15 days.

OPEN MARKET?

NO → Go back to step 11.0 CS conducts market research to determine procurement method (i.e. BPA, GSA, or Open Market).

YES → 15.0c Post solicitation/RFQ to FBO for at least 15 days.

16.0 CS sends quotes to Requestor for review with evaluation criteria.

17.0 Requestor receives and evaluates quotes from vendors and sends CS the evaluation.

18.0 CS reviews evaluation.

EVALUATION CRITERIA LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA)?

YES → 19.0 CS creates the award and sends to CO for approval.

NO → 18.1 CS requests a justification for trade-off.

18.2 Requester submits trade-off justification.

18.3 CS reviews the trade-off justification.

APPROVED?

NO → 18.4 CS provides rationale for disapproval.

YES → 19.0 CS creates the award and sends to CO for approval.

20.0 CO reviews the purchase order.

APPROVED?

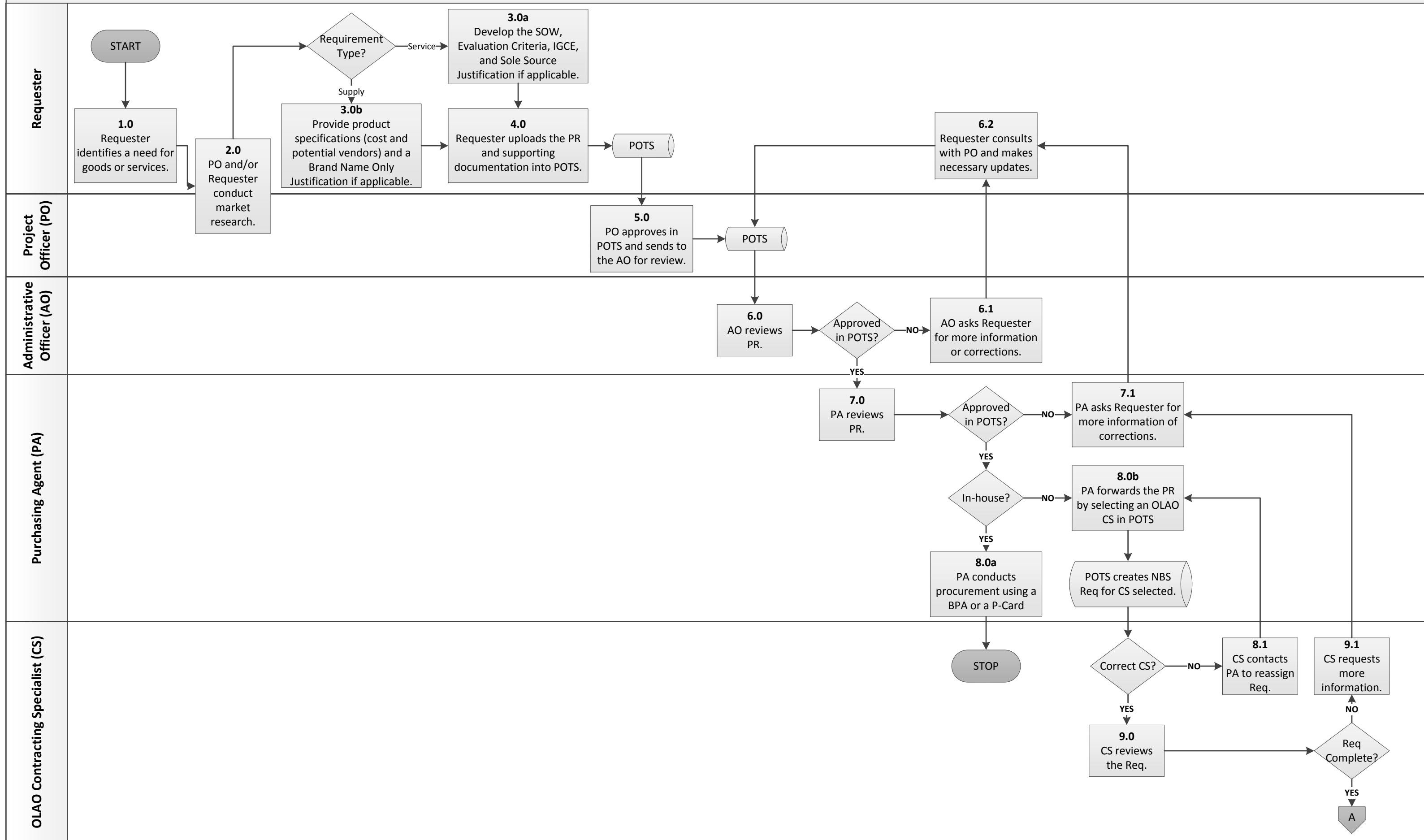
NO → 20.1 CO sends purchase order back to the CS with questions/edits.

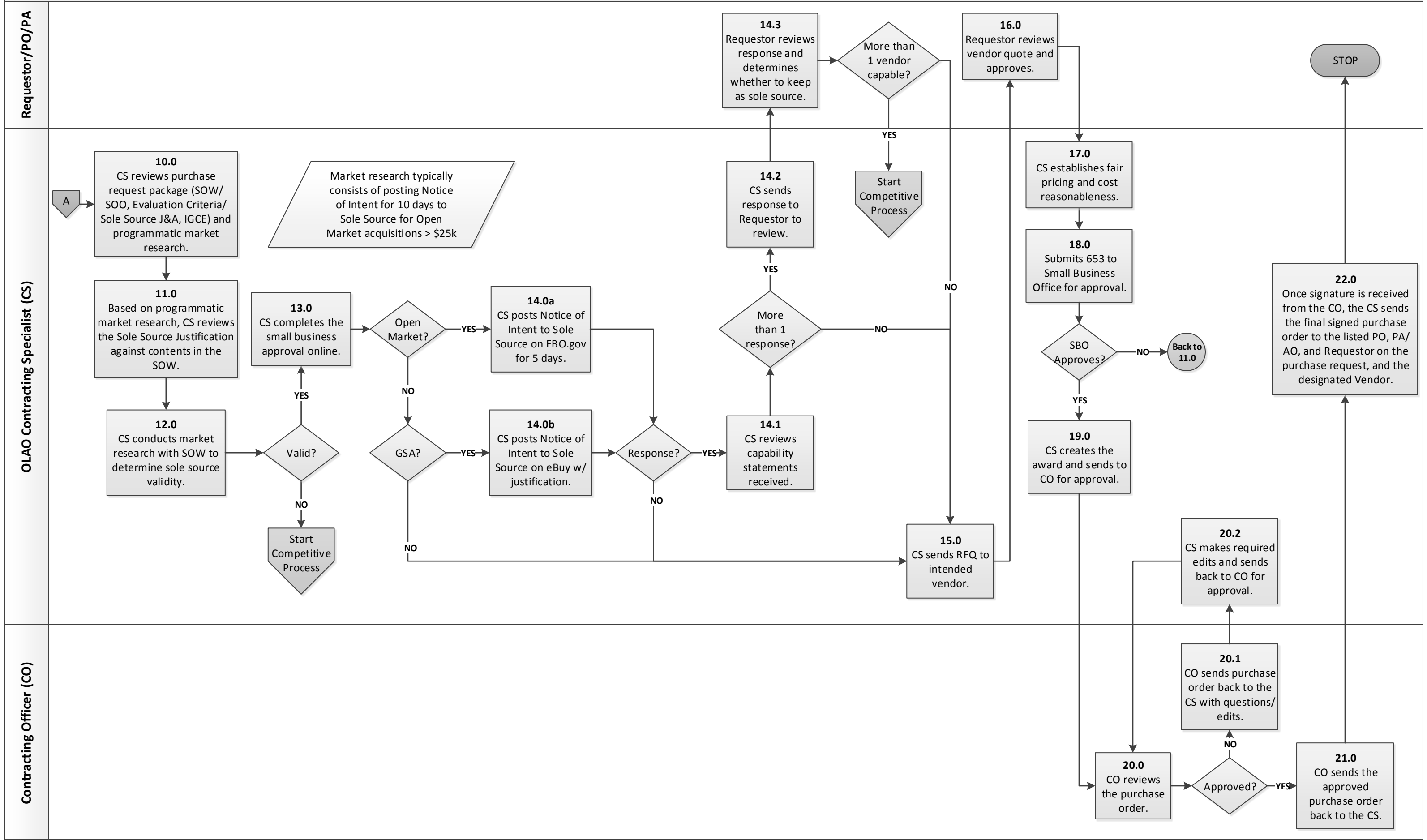
20.2 CS makes required edits and sends back to CO for approval.

YES → 21.0 CO sends the approved purchase order back to the CS.

22.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/ AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Sole Source Service Acquisitions Over \$25,000

Programmatic market research presently consists of program's responses from vendors who have provided quotes. However market research could consist of a written summary of how the program surveyed the commercial market to determine that there is no other vendor that would meet their needs.

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → 3.0a Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
- IGCE
- J&A (Justification & Approval)
- LSJ (Limited Source Justification)

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

NO → 6.1 AO asks Requester for more information or corrections.

6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → 7.1 PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (SOW/SOO, Evaluation Criteria/Sole Source J&A, IGCE) and programmatic market research. (Market research typically consists of posting Notice of Intent for 10 days to Sole Source for Open Market acquisitions > \$25k)

11.0 Based on programmatic market research, CS reviews the Sole Source Justification against contents in the SOW.

12.0 CS conducts market research with SOW to determine sole source validity.

VALID?

NO → Start Competitive Process.

YES → 13.0 CS completes the small business approval online.

OPEN MARKET?

YES → 14.0a CS posts Notice of Intent to Sole Source on FBO.gov for 5 days.
Move to Response.

NO → GSA?

GSA?

NO → 15.0 CS sends RFQ to intended vendor.

YES → 14.0b CS posts Notice of Intent to Sole Source on eBuy w/ justification.
Move to Response.

RESPONSE?

NO → 15.0 CS sends RFQ to intended vendor.

YES → 14.1 CS reviews capability statements received.

MORE THAN 1 RESPONSE?

NO → 15.0 CS sends RFQ to intended vendor.

YES → 14.2 CS sends response to Requestor to review.

14.3 Requestor reviews response and determines whether to keep as sole source.

MORE THAN 1 VENDOR CAPABLE?

YES → Start Competitive Process.

NO → 15.0 CS sends RFQ to intended vendor.

16.0 Requestor reviews vendor quote and approves.

17.0 CS establishes fair pricing and cost reasonableness.

18.0 Submits 653 to Small Business Office for approval.

SMALL BUSINESS OFFICE (SBO) APPROVES?

NO → Go back to step 11.0 Based on programmatic market research, CS reviews the Sole Source Justification against contents in the SOW.

YES → 19.0 CS creates the award and sends to CO for approval.

20.0 CO reviews the purchase order.

APPROVED?

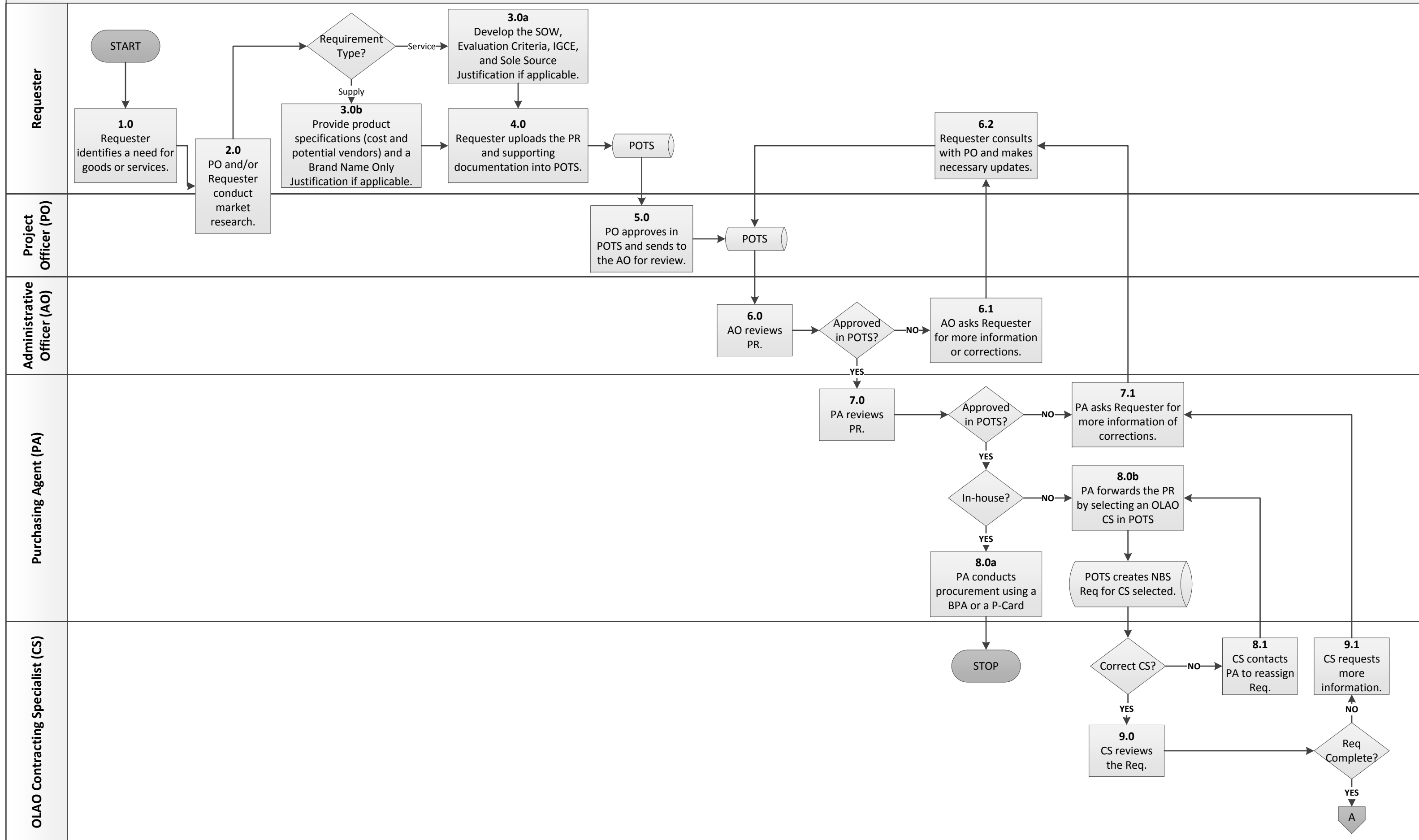
NO → 20.1 CO sends purchase order back to the CS with questions/edits.

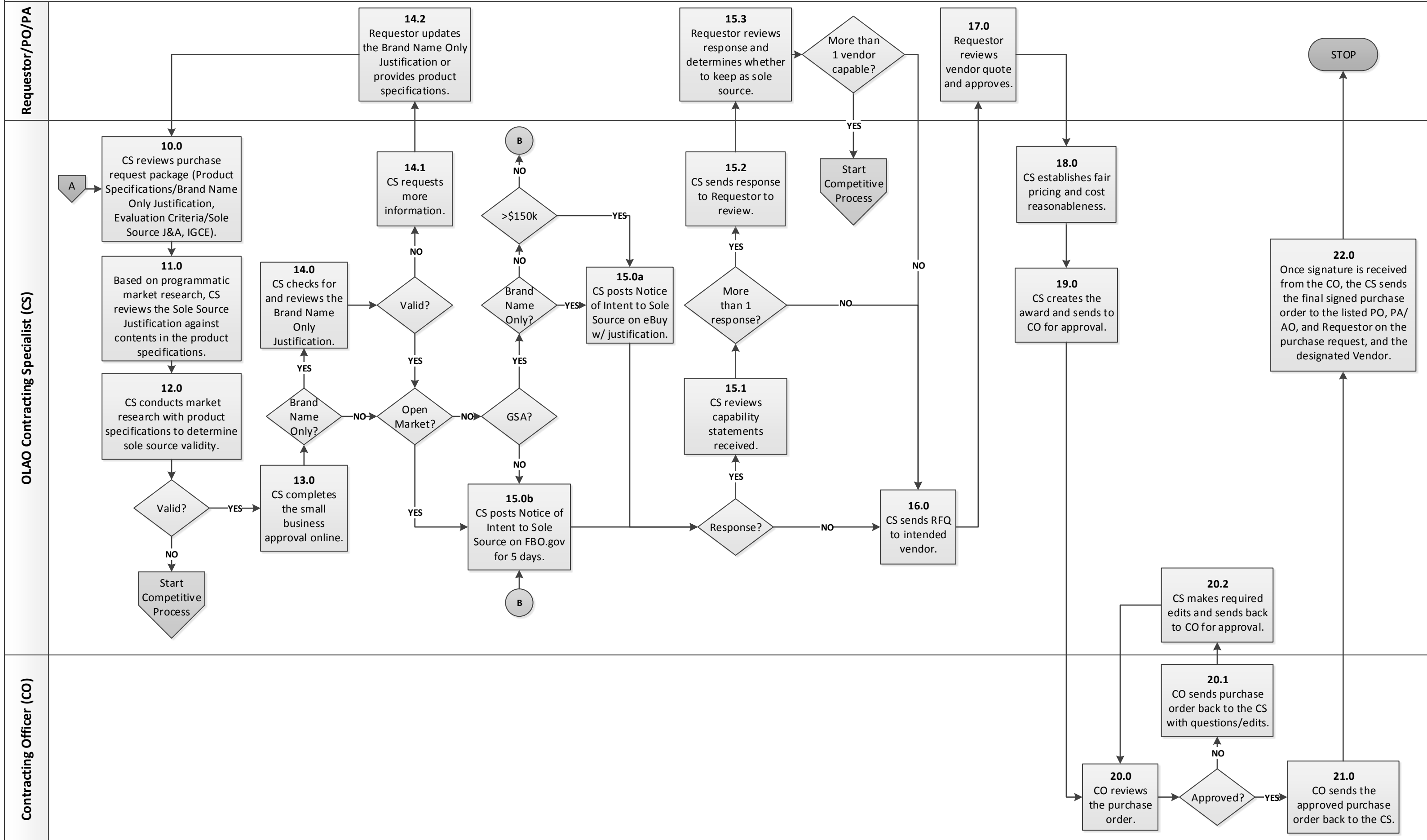
20.2 CS makes required edits and sends back to CO for approval.

YES → 21.0 CO sends the approved purchase order back to the CS.

22.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for Sole Source Supply Acquisitions Over \$25,000

Programmatic market research presently consists of program's responses from vendors who have provided quotes. However market research could consist of a written summary of how the program surveyed the commercial market to determine that there is no other vendor that would meet their needs.

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

NO → 6.1 AO asks Requester for more information or corrections.

6.2 Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → 7.1 PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (Product Specifications/Brand Name Only Justification, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 Based on programmatic market research, CS reviews the Sole Source Justification against contents in the Brand Name Only Justification and Product Specifications.

12.0 CS conducts market research with Product Specifications/Brand Name Only Justification, to determine sole source validity.

VALID?

NO → Start Competitive Process.

YES → 13.0 CS completes the small business approval online.

BRAND NAME ONLY?

NO → Open Market?

YES → 14.0 CS checks for and reviews the Brand Name Only Justification.

VALID?

YES → Open Market?

NO → 12.1 CS requests more information.

12.2 Requestor updates the Brand Name Only Justification or provides product specifications.

OPEN MARKET?

YES → 15.0b CS posts Notice of Intent to Sole Source on FBO.gov for 5 days.
Move to Response.

NO → GSA?

GSA?

NO → 15.0b CS posts Notice of Intent to Sole Source on FBO.gov for 5 days.
Move to Response.

YES → Brand Name Only?

BRAND NAME ONLY?

YES → 15.0a CS posts Notice of Intent to Sole Source on eBuy w/ justification.
Move to Response.

NO → Greater than \$150k?

>\$150k?

YES → 15.0a CS posts Notice of Intent to Sole Source on eBuy w/ justification.
Move to Response.

NO → 15.0b CS posts Notice of Intent to Sole Source on FBO.gov for 5 days.
Move to Response.

RESPONSE?

NO → 16.0 CS sends RFQ to intended vendor.

YES → 15.1 CS reviews capability statements received.

MORE THAN 1 RESPONSE?

NO → 16.0 CS sends RFQ to intended vendor.

YES → 15.2 CS sends response to Requestor to review.

15.3 Requestor reviews response and determines whether to keep as sole source.

MORE THAN 1 VENDOR CAPABLE?

YES → Start Competitive Process.

NO → 16.0 CS sends RFQ to intended vendor.

17.0 Requestor reviews vendor quote and approves.

18.0 CS establishes fair pricing and cost reasonableness.

19.0 CS creates the award and sends to CO for approval.

20.0 CO reviews the purchase order.

APPROVED?

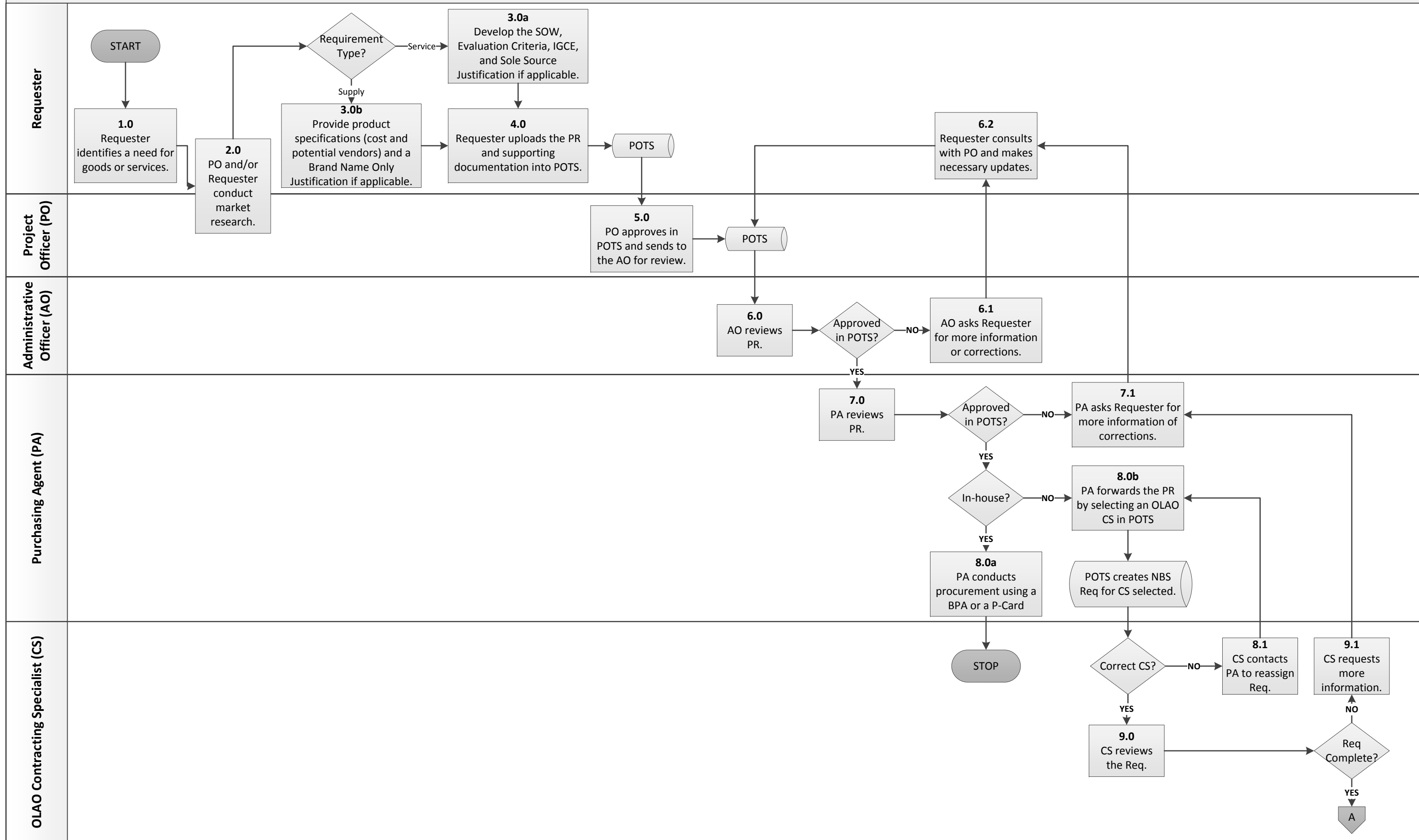
NO → 20.1 CO sends purchase order back to the CS with questions/edits.

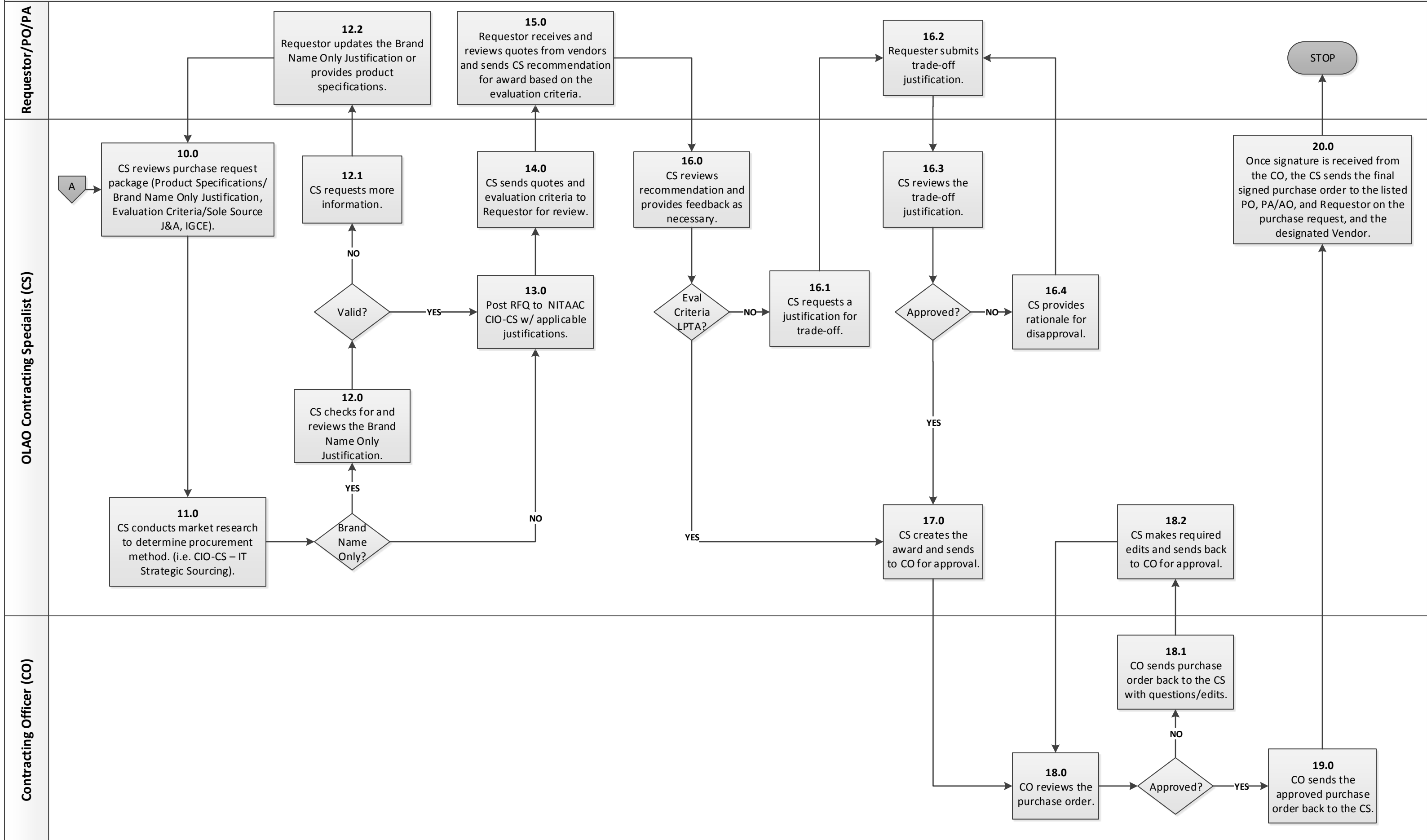
20.2 CS makes required edits and sends back to CO for approval.

YES → 21.0 CO sends the approved purchase order back to the CS.

22.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/AO, and Requestor on the purchase request, and the designated Vendor.

STOP





Process Map for CIO-CS Service & Supply Acquisitions Over \$3,500 - \$150,000+

1.0 Requester identifies a need for goods or services.

2.0 PO and/or Requester conduct market research.

- OLAO OA Acquisition Examples and Templates - <https://olao.od.nih.gov/office-acquisitions/COR-examples-and-templates>
- NIH Supply Center Catalog - <https://nihscatalog.od.nih.gov/>
- UNICOR - http://www.unicor.gov/Shopping/viewCat_m.asp?iStore=UNI
- NIH BPA Program – <http://oamp.od.nih.gov/dsaps/bpa-program>
- NITAAC - <https://nitaac.nih.gov/nitaac/>
- GSA Advantage and GSA e-Library - <https://www.gsaadvantage.gov/advantage/main/home.do> , <http://www.gsaelibrary.gsa.gov/ElibMain/home.do>

SERVICES → 3.0a Develop the SOW, Evaluation Criteria, IGCE, and Sole Source Justification if applicable.

- SOW
- Evaluation Criteria
- IGCE
- J&A (Justification & Approval)
- LSJ (Limited Source Justification)

SUPPLY → 3.0b Provide product specifications (cost and potential vendors) and a Brand Name Only Justification, if applicable.

- Brand Name Only Justification

4.0 Requester uploads the PR and supporting documentation into POTS.

- PR (Purchase Request/1861 Form)
- POTS - <https://pots.ors.od.nih.gov/Support/Help.aspx?role=SUP>, <http://tutorialdev.ninds.nih.gov/document.aspx?role=UGU>

5.0 PO approves in POTS and sends to the AO for review.

6.0 AO reviews PR.

APPROVED IN POTS?

- NO →**
- 6.1** AO asks Requester for more information or corrections.
 - 6.2** Requester consults with PO and makes necessary updates.

YES → 7.0 PA reviews PR.

APPROVED IN POTS?

NO → **7.1** PA asks Requester for more information of corrections.

YES → Can it be completed in-house?

IN HOUSE?

YES → 8.0a PA conducts procurement using a BPA or a P-Card. **STOP**

NO → 8.0b PA forwards the PR by selecting an OLAO CS in POTS.

CORRECT CS?

NO → 8.1 CS contacts PA to reassign Req.

YES → 9.0 CS reviews the Req.

REQ COMPLETE?

NO → 9.1 CS requests more information.

YES → Move to A

A → 10.0 CS reviews purchase request package (Product Specifications/Brand Name Only Justification, Evaluation Criteria/Sole Source J&A, IGCE).

11.0 CS conducts market research to determine procurement method. (i.e. CIO-CS – IT Strategic Sourcing).

BRAND NAME ONLY?

NO → 13.0 Post RFQ to NITAAC CIO-CS w/ applicable justifications.

YES → 12.0 CS checks for and reviews the Brand Name Only Justification.

VALID?

NO → 12.1 CS requests more information.

12.2 Requestor updates the Brand Name Only Justification or provides product specifications.

YES → 13.0 Post RFQ to NITAAC CIO-CS w/ applicable justifications.

14.0 CS sends quotes and evaluation criteria to Requestor for review.

15.0 Requestor receives and reviews quotes from vendors and sends CS recommendation for award based on the evaluation criteria.

16.0 CS reviews recommendation and provides feedback as necessary.

EVALUATION CRITERIA LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA)?

YES → 17.0 CS creates the award and sends to CO for approval.

NO → 16.1 CS requests a justification for trade-off.

16.2 Requester submits trade-off justification.

16.3 CS reviews the trade-off justification.

APPROVED?

NO → 16.4 CS provides rationale for disapproval.

YES → 17.0 CS creates the award and sends to CO for approval.

18.0 CO reviews the purchase order.

APPROVED?

NO → 18.1 CO sends purchase order back to the CS with questions/edits.

18.2 CS makes required edits and sends back to CO for approval.

YES → 19.0 CO sends the approved purchase order back to the CS.

20.0 Once signature is received from the CO, the CS sends the final signed purchase order to the listed PO, PA/ AO, and Requestor on the purchase request, and the designated Vendor.

STOP