Initiating Final Proposal Revision

Training Document

Homepage

Solicitation

Solicitation Home Page

Closed Notices User Dashboard

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Roles

Solicitation Roles with the capability to initiate a final proposal revision:

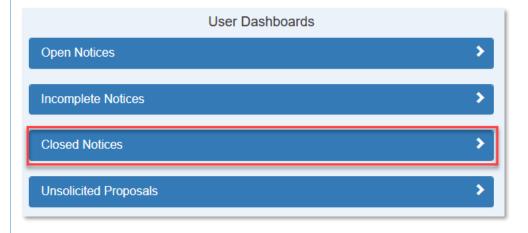
• Solicitation Manager

Log in to PIEE as a Solicitation Manager user to access the Solicitation Application. The Closed Notices User Dashboard is located on the Solicitation Module Homepage. Select the arrow icon to expand the Closed Notices User Dashboard.



Show # entries drop-down menu.

User **Navigation**

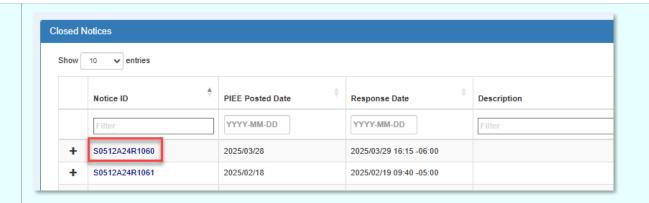


Final **Proposal**

Revision

Select the **Notice ID** of the notice that needs a final proposal revision. The notice's information page displays.

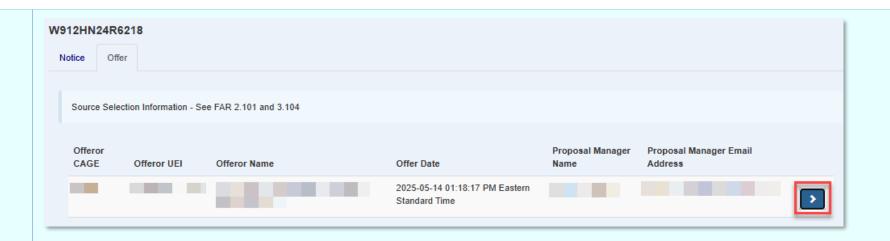
Notices are filtered by entering data in the corresponding header. Control the number of entries displayed on the table by selecting an option on the



The information of the notice is read-only. Click the Offer tab. The Offer page displays.

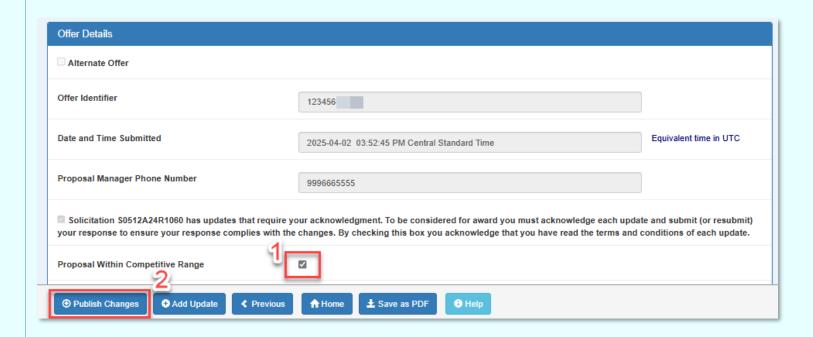


Click the **arrow** to display the offer information.



Indicate the offer is within the competitive range by selecting the **Proposal Within Competitive Range** checkbox. Selecting the checkbox enables the vendor to edit the offer and submit a revised version reflecting the discussions.

Mark all applicable offers and click the **Publish Changes** button to confirm changes.



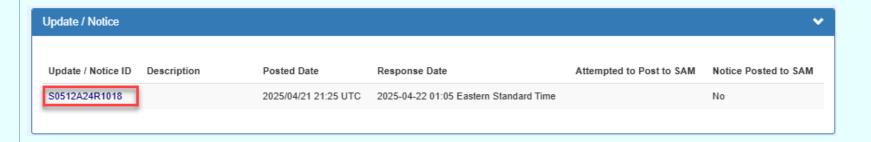
Successfully saving selections displays a message at the top of the screen stating: "The Notice and Offers have been updated."

The Notice and Offers have been updated.

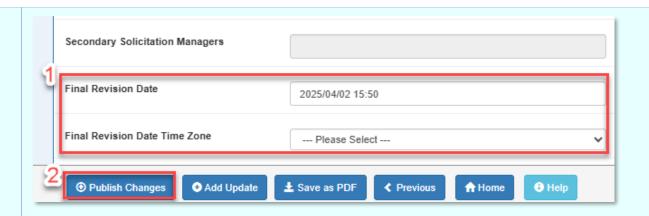
The **Final Revision Date** and **Final Revision Date Time Zone** fields are located on the base notice. Click the **Notice** tab. For notices without updates, the base notice displays.



For notices with updates, locate the base notice in the **Update / Notice** history section at the bottom of the update. Click the appropriate **Update / Notice ID** link. The base notice displays.



Enter the **Final Revision Date** and **Final Revision Date Time Zone** to set a time for offers to be updated by the vendors. Click the **Publish Changes** button to confirm changes.



Successfully publishing the Final Revision Date displays a message at the top of the screen stating: "The Notice and Offers have been updated."

The Notice and Offers have been updated.

Closed Notices User Dashboard Headers:

- Notice ID (hyperlink)
- PIEE Posted Date
- Response Date
- Description
- Restricted
- Notice Type
- PSC
- NAICS
- Set Aside
- Number of Offers

Closed Notices User Dashboard Filter Fields:

- Show # entries (options: 10 / 20 / 40 / 60 / 80 / 100)
- Notice ID
- PIEE Posted Date (format: YYYY-MM-DD)
- Response Date (format: YYYY-MM-DD HH:MM Time Zone)
- Description
- Restricted (options: Y/N)
- Notice Type
- PSC (must be numeric characters)

- NAICS (must be numeric characters)
- Set Aside
- Number of Offers

Offer Headers:

- Offeror CAGE
- Offeror UEI
- Offeror Name
- Offer Date (format: YYYY-MM-DD HH:MM:SS Time Zone)
- Proposal Manager Name
- Proposal Manager Email Address

Offer Details Fields:

- Alternate Offer (read-only)
- Offer Identifier (read-only)
- Date and Time Submitted (format: YYYY-MM-DD HH:MM:SS Time Zone; read-only)
- Proposal Manager Phone Number (read-only)
- Update Acknowledgment (checkbox, if applicable; read-only)
- Proposal within Competitive Range (checkbox)

Solicitation / Combined Synopsis/Solicitation Notice Fields:

- Notice ID (read-only)
- Solicitation Type (read-only)
- Response Date (read-only)
- Response Date Time Zone (read-only)
- Set Aside Code (read-only)
- Primary Solicitation Manager (field pre-populates Primary Solicitation Manager's name)
- Secondary Solicitation Managers (field pre-populates Secondary Solicitation Managers' names, if previously entered) (field is blank, if Secondary Solicitation Manager is not selected)
- Final Revision Date (format YYYY/MM/DD HH:MM; cannot be a past date)
- Final Revision Date Time Zone (searchable drop-down)
- Description * (read-only)

Offer Details Buttons:

- Offer Tab (leads to the Offer screen)
- Arrow Button (to view offer details)
- Add (to add an offer)

Buttons:

- Proposal within Competitive Range (checkbox)
- Publish Changes (to publish changes made to offer)

- Add Update (to update notice)
- Previous (leads back to previous page)
- Home (leads to Solicitation home page)
- Save as PDF (to download opened notice to local machine)
- Help (to display help information)

NOTE: Any offer not marked as within competitive range is not editable, thus preventing the vendor from submitting a revised offer.

To download attachments included with the offer, click the **document's hyperlink** in the **File** column or the **Download All Attachments** button at the bottom of the page.

Attachments Headers:

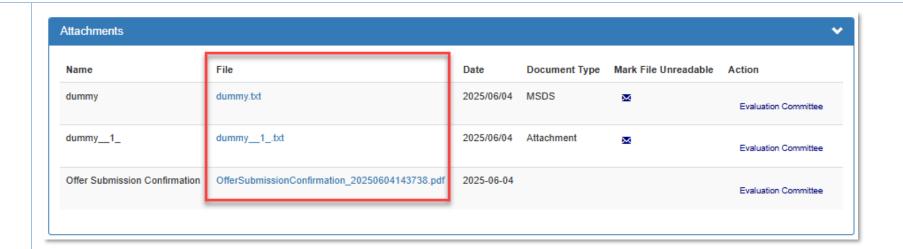
- Name
- File (hyperlink)
- Date (format: YYYY-MM-DD)
- Document Type (options: Attachment / MSDS)
- Mark File Unreadable
- Action
 - Evaluation Committee

Action Buttons:

• Evaluation Committee (hyperlink; navigates to User with Access screen)

Buttons:

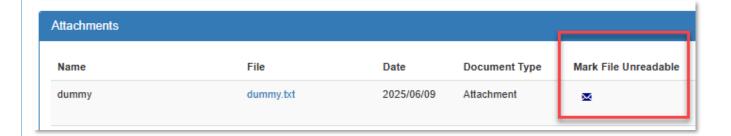
- File (hyperlink; downloads listed attachment)
- Mark File Unreadable Icon (navigates to Send Email to Vendor POC for Unreadable File pop-up)
- Download All Attachments (downloads all notice's attachments to which the user has been given access)



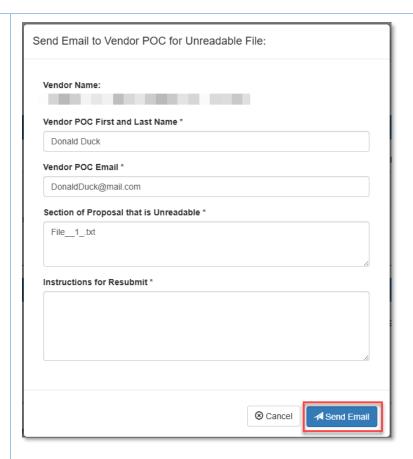


Send Email to Vendor POC for Unreadable File Pop-Up:

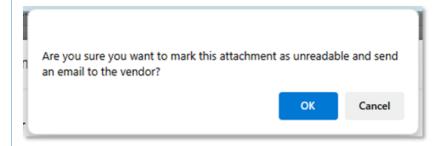
Select the **Mark File Unreadable** icon to indicate that all or a portion of a file is unreadable and requires resubmission by the Offeror. A pop-up displays.



The Vendor's information is pre-populated into the fields. Details and instructions are editable in the mandatory fields. Click **Send Email.**



A pop-up displays asking: "Are you sure you want to mark this attachment as unreadable and send an email to the vendor?" Click **OK** to send the Vendor an email notification for resubmission.



The document displays a status of **Email Sent** in the **Mark File Unreadable** column.



Send Email to Vendor POC for Unreadable File Pop-up Fields:

- Vendor Name (auto-populated from Offeror's CAGE code; not editable)
- Vendor POC First and Last Name * (pre-populated)
- Vendor POC Email * (pre-populated)
- Section of Proposal that is Unreadable * (pre-populated)
- Instructions for Resubmit *

Send Email to Vendor POC for Unreadable File Pop-up Buttons:

- Send Email (displays confirmation message)
- Cancel (to disregard changes and close pop-up)

Confirmation Pop-Up Buttons:

- OK (sends email notification to Vendor)
- Cancel (to disregard changes and close pop-up)

An email notification is sent when an offer is submitted against a solicitation. After the response date passes, late offers submitted against a solicitation are viewable.

Click the Late Offer tab. Click the arrow adjacent to the late offer to view the Late Offer Details.

Late Offer Headers:

Late Offers

- Offeror Cage
- Offeror UEI
- Offeror Name
- Offer Date (format: YYYY/MM/DD HH:MM:SS Time Zone)
- Proposal Manager Name
- Proposal Manager Email Address

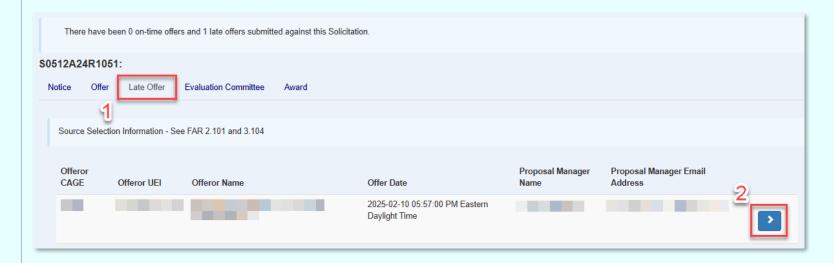
Late Offer Details Fields:

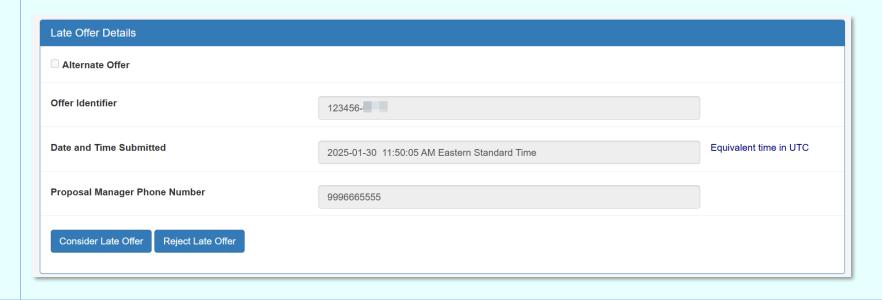
- Alternate Offer (not available for selection; Proposal Managers only)
- Offer Identifier (read-only)

- Date and Time Submitted (read-only)
- Proposal Manager Phone Number (read-only)

Buttons:

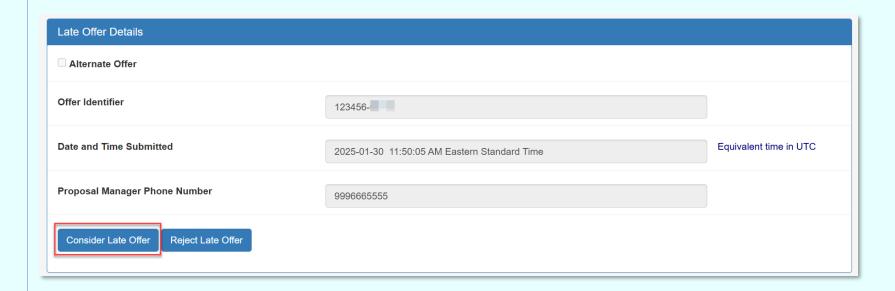
- Late Offer tab (leads to late offer details)
- Arrow Button (to view offer details)
- Consider Late Offer (to accept late offer)
- Reject Late Offer (decline late offer)





Consider Late Offer Pop-Up:

Select Consider Late Offer to consider the offer.



A pop-up displays asking: "Are you sure you want to accept this late offer for consideration?" Select a **Late Reason** in the drop-down menu. Click **Yes** to accept the late offer.



Successfully accepting the late offer displays a confirmation message and the **Late Reason** selected stating: "It was determined that the late offer could be considered for award and is now accessible from the Offer tab."

It was determined that the late offer could be considered for award and is now accessible from the Offer tab. Reason: Only Offer Received.

Upon consideration of the late offer, the offer and its attachments are now available on the Offer tab.

Consider Late Offer Pop-up Field:

- Late Reason (drop-down)
 - o Only Offer Received
 - o Evidence shows receipt at Government installation and was under Government control prior to response due date

Late Offer Details Buttons:

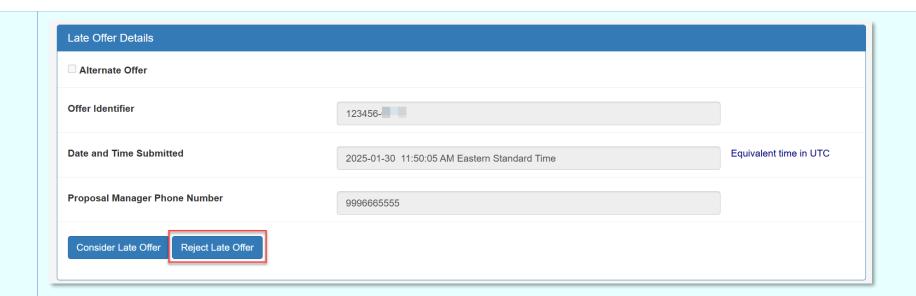
- Consider Late Offer (to accept late offer)
- Reject Late Offer (decline late offer)

Consider Late Offer Buttons:

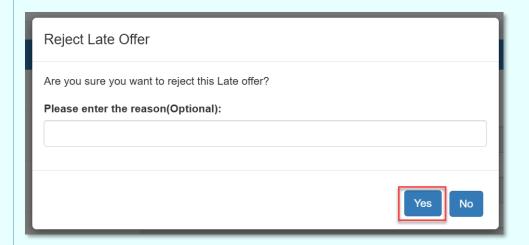
- Yes (to accept late offer)
- No (to disregard changes and close pop-up)

Reject Late Offer Pop-Up:

Select Reject Late Offer to reject the offer.



A pop-up displays asking: "Are you sure you want to reject this Late offer?" An optional field is available to state the reason for rejection. Click **Yes** to reject the late offer.



Successfully rejecting the late offer displays a confirmation message with the **Reason** stating: "It was determined the late offer will not be considered for award." The reason entered in the optional field is displayed.

It was determined the late offer will not be considered for award. Reason:

To download attachments included with the offer that displays after rejecting the late offer, refer to the <u>Attachments</u> section of this training document.

If a Late Offer is rejected before a related Award notice is posted, the attachments on the Late offer are not visible until the Award notice is posted. For more information on **creating a related Award Notice**, refer to the <u>Create Related Notice</u> training; located on the **WBT > Solicitation > Create**New Notices/Posting Updates > Create Related Notice.

Reject Late Offer Pop-Up Field:

• Reason (optional)

Late Offer Details Buttons:

- Consider Late Offer (to accept late offer)
- Reject Late Offer (decline late offer)
- Validate Offer Signature (to verify signature)
- Download All Attachments (to bulk download attachments)

Reject Late Offer Pop-Up Buttons:

- Yes (to reject late offer)
- No (to disregard changes and close pop-up)