Reviewing A Late Proposal – Solicitation Manager

Training Document

Homepage

Solicitation

Solicitation Homepage

User Dashboards

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Roles User Navigation

The role required to Review a Late Proposal (Offer) submitted by a Proposal Manager in the Solicitation module:

Solicitation Manager

This guide provides an overview of how a Solicitation Manager user reviews a Late Proposal (Offer) in the Solicitation module for Solicitations with a **Response Date** in the past.

Log in to PIEE as a Solicitation Manager user to access the Solicitation application.

There are two ways to locate a **Closed** notice:

- Notice Search Criteria
- Closed Notices User Dashboard



Closed Notices User Dashboard This section details the process of locating a Closed notice through the Closed Notices User Dashboard.

The Closed Notices dashboard displays all notices with past response dates where the user is listed as a Primary or Secondary Solicitation Manager. Click the **arrow** to expand the Closed Notices dashboard.



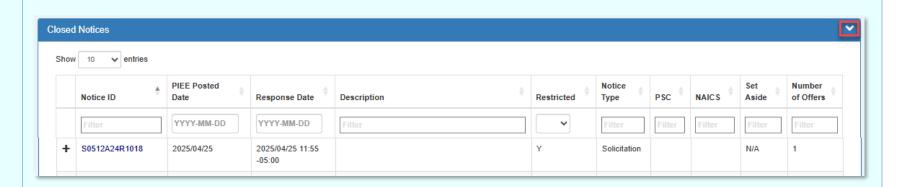
Notices can be filtered by entering data or using the drop-down menu of the corresponding header. Control the number of entries displayed on the table by selecting an option on the **Show # entries** drop-down menu.

Closed Notices Headers:

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

Closed Notices Filter Fields:

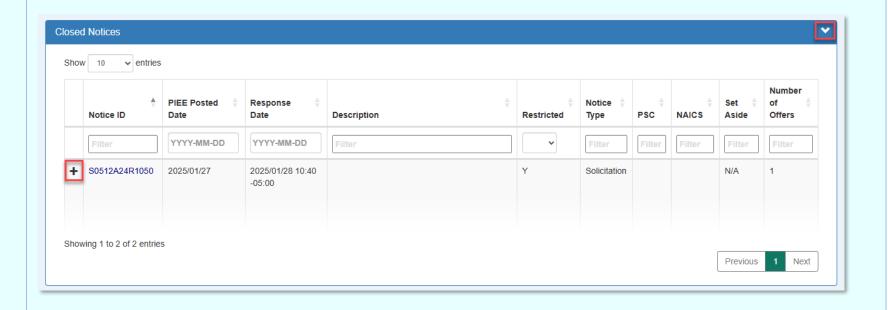
- Show # entries (options: 10 / 20 / 40 / 60 / 80 / 100)
- Notice ID
- PIEE Posted Date (format: YYYY-MM-DD)
- Response Date (format: YYYY-MM-DD HH:MM Time Zone)
- Description
- Restricted (options: Y/N)
- Notice Type
- PSC (must be numeric characters)
- NAICS (must be numeric characters)
- Set Aside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

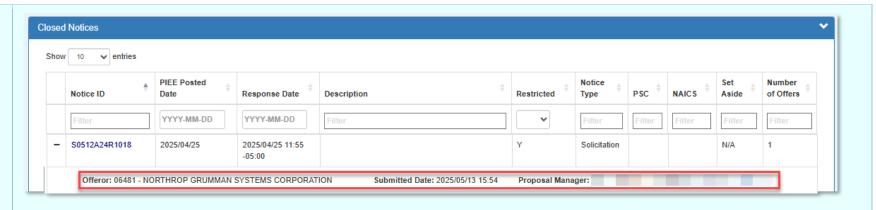


Click the **Notice ID** hyperlink in the Notice ID column to view the existing notice.

Offeror Information

Click the (+) icon beside the Notice ID hyperlink to expand and display the Offeror information. If an offer has been made against an existing notice, the Offeror's CAGE Code, Submission Date, and Proposal Manager are shown.





This section details the process of locating a Closed notice through the **Notice Search Criteria**.

To locate the closed notice, click **Search** in the navigation bar. The Notice Search Criteria displays.



Enter known data of the existing notice in the **Notice Search Criteria** fields.

Notice Search Criteria

Notice Search Criteria Fields:

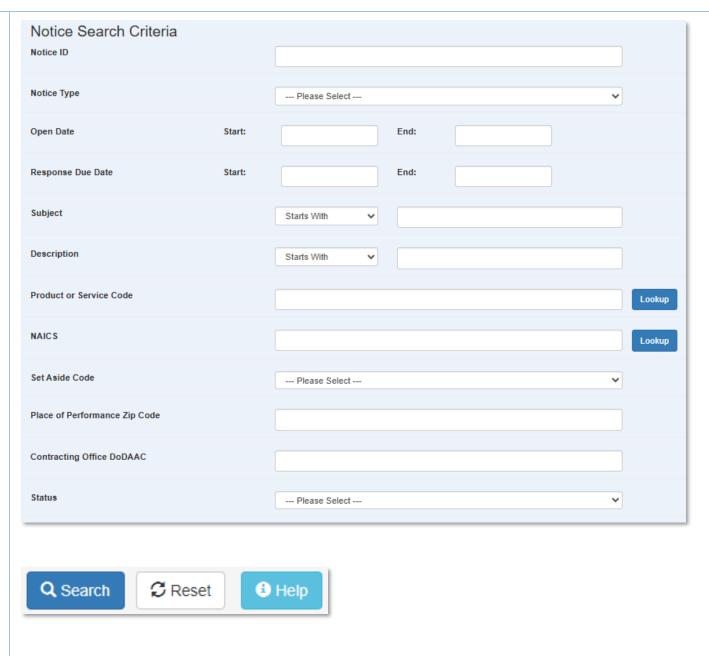
- Notice ID (up to 127 alphanumeric characters including special characters)
- Notice Type (options: Special Notice / Solicitation / Combined Synopsis/Solicitation / Presolicitation / Sources Sought / Consolidate/(Substantially) Bundle / Justification and Approval / Award Notice)
- Open Date (subfields: Start / End: format YYYY/MM/DD)
- Response Due Date (subfields: Start / End; format YYYY/MM/DD)
- Subject (parameters: Starts With / Equal To / Contains / Ends With)
- Description (parameters: Starts With / Equal To / Contains / Ends With)
- Product or Service Code (must be valid codes in database)
- NAICS (must be valid codes in database)
- Set Aside Code (searchable drop-down)
 - Total Small Business Set-Aside
 - Partial Small Business Set-Aside
 - o 8(a) Set-Aside
 - Historically Underutilized Business (HUBZone) Set-Aside
 - o Service-Disabled Veteran-Owned Small Business (SDVOSB) Set-Aside
 - Women-Owned Small Business (WOSB) Program Set-Aside
 - Economically Disadvantaged WOSB (EDWOSB) Program Set-Aside
 - o 8(a) Sole Source

- Historically Underutilized Business (HUBZone) Sole Source
- Service-Disabled Veteran-Owned Small Business (SDVOSB) Sole Source
- Women-Owned Small Business (WOSB) Program Sole Source
- Economically Disadvantaged WOSB (EDWOSB) Program Sole Source
- Local Area Set-Aside
- Competitive 8(a)
- Economically Disadvantaged Woman Owned Small Business
- Emerging Small Business
- o HUBZone
- o Partial HBCU / MI
- Partial Small Business
- o Service-Disabled Veteran-Owned Small Business
- o Total HBCU / MI
- Total Small Business
- Veteran-Owned Small Business
- Woman Owned Small Business
- Place of Performance Zip Code (must be 5 numeric characters)
- Contracting Office DoDAAC (must be 6 alphanumeric characters; excluding special characters)
- Status (options: Open / Closed / Incomplete / No Response Due Date)

Click the **Search** button to view search results.

Buttons:

- Lookup (button displays beside the 'Product or Service Code' and 'NAICS' fields; leads to Lookup search pop-ups)
- Search (leads to search criteria results screen)
- Reset (clears fields in search form)
- Help (displays help information)



NOTE: If a search is generated without any criterion, all notices created in the database to which the user has access (regardless of status) are returned in the search results.

NOTE: 'Product or Service Code' and 'NAICS' codes are populated in field once selected from Lookup pop-up.

Product or Service Code Lookup Pop-Up:

To search for the Product or Service Code, click the **Lookup** button. A pop-up displays.

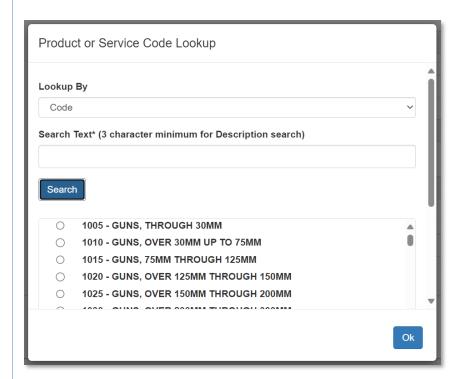
Enter required fields and click the **Search** button. The results for **Product or Service Code** appear at the bottom of the pop-up. Select a code and click **OK**.

Product or Service Code Lookup Pop-Up Fields:

- Lookup By (option: Code / Description)
- Search Text * (user must enter at least 3 characters to search by "Description"; field can remain blank if searching by "Code")

Pop-Up Buttons:

- Search
- Ok (closes the pop-up if fields are blank; if the Product or Service Code is selected, closes pop-up, and populates name in designated field)



NOTE: Select the entry best describing the overall acquisition for notices with multiple goods or services.

NAICS Lookup Pop-Up:

To search for the NAICS, click the **Lookup** button. A pop-up displays.

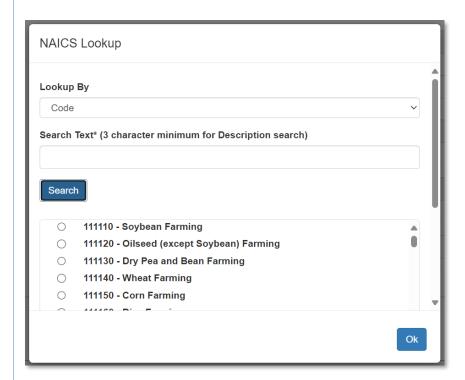
Enter required fields and click the **Search** button. The results for **NAICS** appear at the bottom of the pop-up. Select a code and click **Ok**.

NAICS Lookup Pop-Up Fields:

- Lookup By (options: Code / Description)
- Search Text * (user must enter at least 3 characters to search by "Description"; field can remain blank if searching by "Code")

Pop-Up Buttons:

- Search
- Ok (closes the pop-up if fields are blank; if the NAICS is selected, closes pop-up and populates name in designated field)



NOTE: Select the entry best describing the overall acquisition for notices with multiple goods or services.

Search Results appear on a new screen. Select the Notice ID hyperlink to view the existing notice.



Search Result Headers:

- Notice ID (hyperlink)
- Response Date
- Notice Type
- Subject
- Description
- Restricted
- Status
- Attempted to Post to SAM
- Notice Posted to SAM
- Last Successful SAM Posting
- PIEE Posted Date
- PSC
- NAICS
- Contracting Office Name
- Set Aside
- Number of Updates

Search Result Fields:

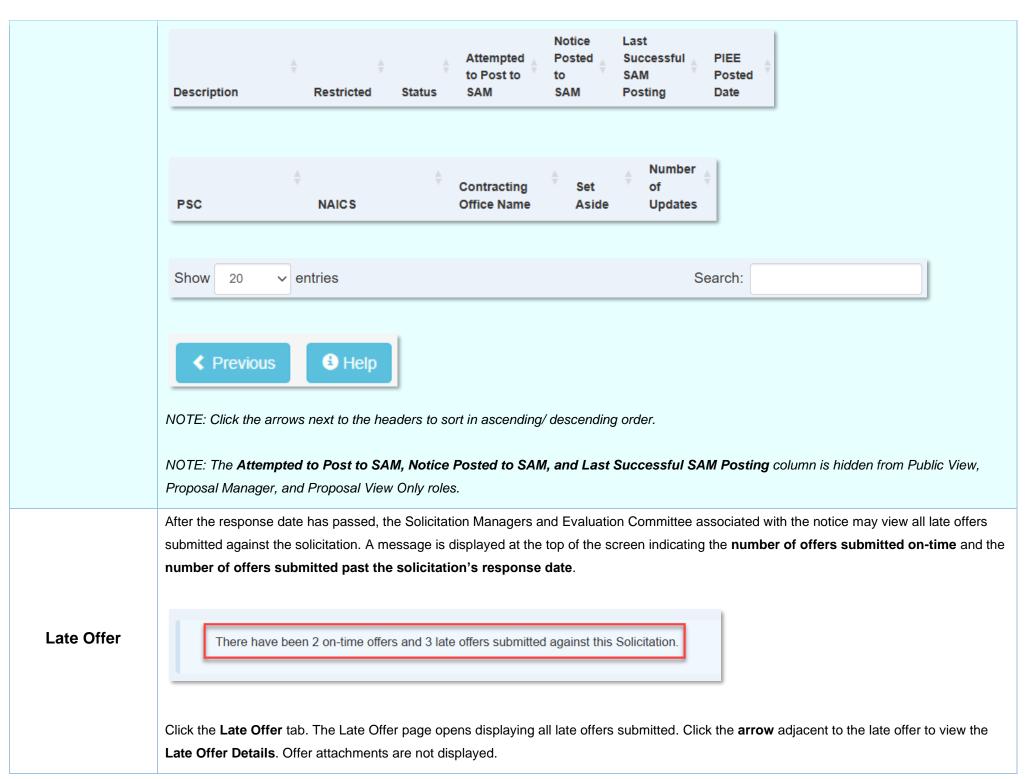
- Show # Entries (options: 20 / 40 / 60 / 80 / 100; controls number of entries appearing on each page)
- Search (can filter results by keywords entered by the user)

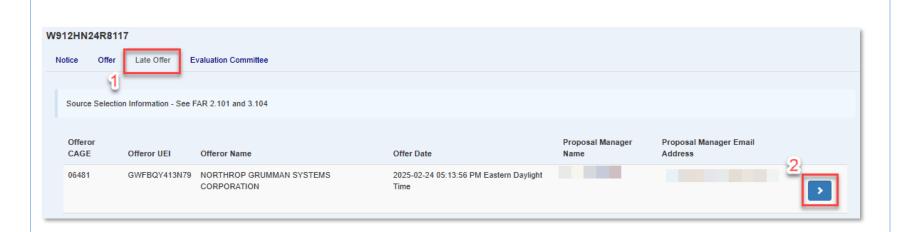
Buttons:

- Previous (to navigate back to Create Notice screen)
- Help (displays help information)



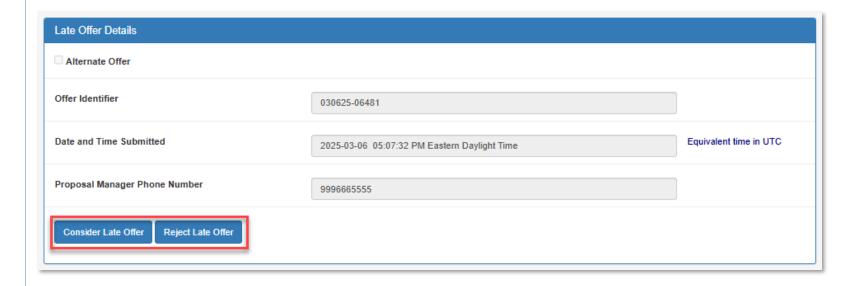
Search Results





To consider the Late Offer for award, click the **Consider Late Offer** button. Refer to the **Consider Late Offer** section of this training for more information.

To reject the Late Offer and exclude it from award consideration, click the **Reject Late Offer** button. Refer to the **Reject Late Offer** section of this training for more information.



Late 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

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)

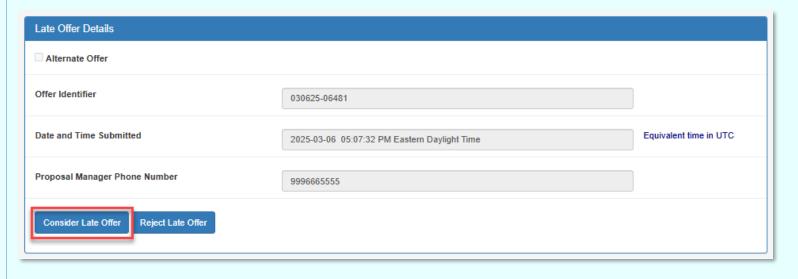
Buttons:

- 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)

Select the Consider Late Offer button to consider the offer for award. A pop-up displays.

Consider Late

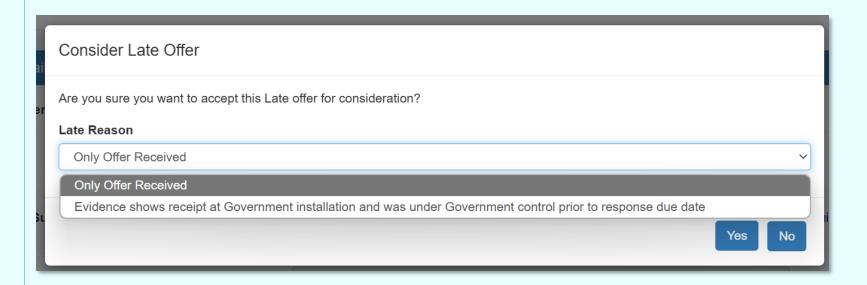
Offer



A pop-up displays asking: "Are you sure you want to accept this late offer for consideration?" Select one of the following two **Late Reasons** in the drop-down menu:

- Only Offer Received
- Evidence shows receipt at Government installation and was under Government control prior to response due date

Click Yes to accept late offer.



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

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 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

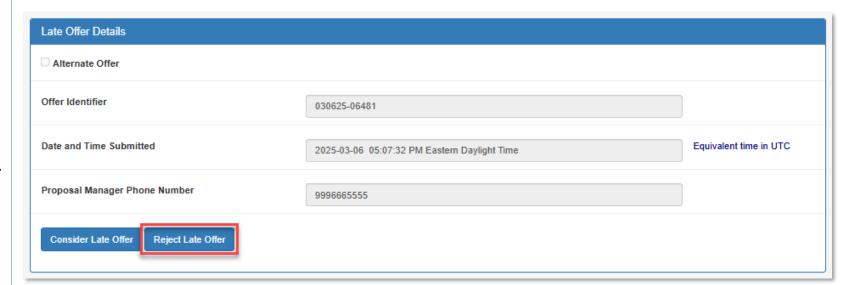
Late Offer Details Buttons:

- 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)

Select Reject Late Offer to reject the offer.



Reject Late Offer

A pop-up displays asking: "Are you sure you want to reject this Late offer?" An editable 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 stating: "It was determined the late offer will not be considered for award." and the reason entered in the optional field.

It was determined the late offer will not be considered for award. Reason: Received significantly after the submission deadline.

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

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**.

Previously rejected offers can be reconsidered by selecting the **Consider Late Offer** button.

Reject Late Offer Pop-Up Field:

Reason (field is editable)

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)

