



U.S. General Services Administration

GSA Schedules Ordering Guide Quick Reference

Version 1.0



This guide sets forth the procedures for issuing orders against GSA Schedule contracts through the U.S. General Services Administration (GSA) Multiple Award Schedules (MAS) Program.

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Introduction

This quick-reference guide will help you throughout the acquisition process by explaining how to properly place an order against a GSA Schedule contract and addressing contracting issues and concepts unique to GSA Schedules. It does not address basic contracting concepts unless necessary for complete understanding.

Throughout this guide, the terms “Schedule,” “GSA Schedule,” and “GSA MAS” are used interchangeably. Each term refers to a GSA Schedule contract awarded under the GSA Multiple Award Schedules (MAS) Program. The Federal Acquisition Regulation (FAR) refers to GSA Schedule contracts as “Federal Supply Schedules (FSS).”

The term “order” refers to a delivery or task order placed against a GSA Schedule contract.

Who Will Benefit from this Guide?

This guide is designed for all federal contracting personnel considering or planning to use GSA Schedule contracts to meet their acquisition requirements. This guide will aid contracting professionals in their use of GSA Schedule contracts to deliver solutions to meet mission needs and streamline the procurement process.

When properly administered, the GSA Schedules program offers federal contracting professionals a streamlined process that will reduce their procurement administrative lead time (PALT) through the use of streamlined procedures found in FAR Subpart 8.4.

Information to assist contracting professionals with using GSA Schedule contracts is available online at www.gsa.gov/schedules

Roles and Responsibilities

GSA is responsible for the award, administration, and management of GSA Schedule contracts. The ordering activity is responsible for the award, administration, management, and closeout of task and delivery orders placed under the GSA Schedule contract. In addition, the ordering activity must comply with the Schedule contract terms and conditions, the FAR, and authorized agency supplement, statutes, and policies. For example, the Department of Defense (DOD) requires a Best Procurement Approach Determination when using non-DOD contracts.

GSA's responsibilities:

- ❖ Administer the GSA Schedule contract, including annual subcontracting goal reporting, contract modifications to implement new FAR guidance, and contract administration procedures IAW the terms and conditions of the contract
- ❖ Update the GSA Schedule contract terms and conditions, so they remain relevant and FAR compliant
- ❖ Provide advice and guidance to ordering activities regarding GSA Schedule matters, as requested by the ordering activity
- ❖ Negotiate fair and reasonable prices when awarding GSA Schedule contracts

Ordering activity's responsibilities:

- ❖ Define order requirements
- ❖ Prepare a Statement of Work (SOW) or Performance Work Statement (PWS) for task and delivery order Requests for Quotation (RFQs)
- ❖ Properly manage funds IAW rules and regulations
- ❖ Ensure IT capital planning, when appropriate
- ❖ Evaluate quotes
- ❖ Perform performance monitoring and appraisal via a certified Contracting Officer's Representative (COR)

Definitions

Ordering Contracting Officer (OCO): the agency-warranted Contracting Officer (CO) placing the order.

GSA Schedule Contracting Officer: the GSA-warranted CO who awarded and/or administers the GSA Schedule contract.

Schedule Number: the unique identification number assigned to each Schedule category. (For example, GSA MAS 71 offers agencies a variety of furniture options.)

GSA Special Item Number (SIN): the unique identification number assigned to a specific product or service category under the Schedule. (For example, IT Schedule 70 offers a variety of SIN categories such as 132-51, "Information Technology Professional Services," and 132-32, "Term Software License.")

Most Favored Customer Pricing: the best price (i.e., similar or better discounts that the vendor has given to commercial customers).

Contractor Price List: the most favored customer pricing terms, which have been negotiated by GSA at the Schedule contract level.

Contractor Team Arrangement (CTA): two or more GSA Schedule contractors working together to provide a total solution to the ordering activity. www.gsa.gov/contractorteamarrangements

Scope Determination

The ordering activity should determine whether the products and/or services required are within the scope of the GSA Schedule contract. The process for making a scope determination differs for products and services.

Products

For products, if the ordering activity has a bona-fide need for the product and it is available on the GSA contract, it is within scope. There is no requirement for the ordering activity to receive a GSA scope determination.

Services

For services, this typically means the ordering activity will use the steps below to verify its requirement can be adequately met through a GSA Schedule contract:

Step 1: Check the Schedule and category description using GSA eLibrary at www.gsaelibrary.gsa.gov

Step 2: Review the GSA Schedule SOW, which is available in the GSA standing solicitation for the Schedule being contemplated. The solicitation may be accessed through www.gsa.gov/schedulesolicitations

Step 3: If the OCO is still unsure of the scope fit, he or she may request a scope review from the GSA CO.

For most procurements, the ordering activity's CO can make a scope determination by following steps 1 and 2 above. However, if additional information is needed, the OCO may contact GSA for further assistance at gsaschedules@gsa.gov

Services Not Allowed on Schedule Task Orders

Schedule task orders shall not include any of the following:

- ❖ Inherently governmental functions – see the prohibition at FAR Subpart 7.503(a)
- ❖ Personal services as defined in FAR Subpart 37.104(a)
- ❖ Architect-Engineering (A&E) services subject to the Brooks Act and FAR Part 36 acquisition procedures
- ❖ Construction – except: minor repair and alterations can be provided as ancillary under the GSA MAS 03FAC, Facilities Management.

Accessing Schedule Contracts Terms and Conditions

The best and easiest way to review Schedule terms and conditions is to access the current solicitation for the respective Schedule through FedBizOpps. Go to www.gsa.gov/schedulesolicitations and click the link for the appropriate Schedule, which will link to GSA eLibrary. On eLibrary, click the box linking to FedBizOpps.



Click this box on GSA eLibrary.

At the FedBizOpps page, click on the document at the right-hand column entitled “2 – Solicitation.”

Which Ordering Procedures Apply when Using Schedule Contracts?

GSA Schedule contracts are indefinite-delivery/indefinite-quantity (IDIQ) contracts. Applicable ordering procedures are prescribed at FAR Subpart 8.4.

FAR Part 15 does not apply to Schedules orders.

- Exceptions:**
- ❖ DOD: See Defense Procurement and Acquisition Policy (DPAP) class deviation, dated March 13, 2014, Subject: Class Deviation – Determination of Fair and Reasonable Pricing When Using Federal Supply Schedule Contracts.
<http://www.acq.osd.mil/dpap/policy/policyvault/USA001004-14-DPAP.pdf>
 - ❖ NASA: NASA Class Deviation, PIC 14-01, dated March 13, 2014, requiring Fair and Reasonable price determination IAW FAR 15.404-1.
<http://www.hq.nasa.gov/office/procurement/regs/PIC%2014-01.pdf>

The following FAR Parts apply to Schedule orders:

- FAR Part 7, Acquisition Planning
- FAR Part 10, Market Research
- FAR Subpart 33.1, Protests
- FAR Subpart 17.5, Interagency Acquisitions (for orders exceeding \$500,000)
- FAR Subpart 37.6, Performance Based Acquisition

The following FAR Parts **DO NOT** apply to Schedule orders:

- FAR Part 5, Publicizing Contract Actions
- FAR Part 6, Competition Requirements
- FAR Part 13, Simplified Acquisition Procedures
- FAR Part 14, Sealed Bidding
- FAR Part 15, Contracting by Negotiation
- FAR Part 19, Small Business Programs
- FAR Part 36, Construction and Architect-Engineering Contracts

The Ordering Process

Step 1: Plan the Acquisition

Orders against GSA Schedules are not exempt from acquisition planning as prescribed in FAR Part 7.

Conduct market research for your requirement in accordance with regulations the same way you would with any procurement. The complexity and circumstances of each acquisition should determine the level of detail of the market research. You are encouraged to submit Requests for Information (RFI), draft solicitations, and other documents to Schedule contract holders as part of your market research efforts.

Using GSA eBuy for market research: GSA's online Request for Quotation (RFQ)/Request for Information (RFI) platform, eBuy, is an excellent tool for market-research purposes. Ordering activities may use eBuy to issue an RFI to all prospective Schedule contract holders. Ordering activities are encouraged to register for and use eBuy at www.ebuy.gsa.gov

Generally, for orders placed against Schedule contracts, the contracting professional shall follow the ordering procedures at FAR Subpart 8.4. Unless an authorized exception applies, fair-opportunity procedures prescribed for the dollar value of the order must be used. When the OCO plans to award an order based on an exception to fair opportunity, a Limited Sources Justification (LSJ) must be prepared and approved as part of the planning process. All required notices and postings must also be issued. Refer to FAR 8.405-6 – Limited Sources.

Order-Level Contract Types

Subject to FAR and agency-level required consideration criteria, limitations, and/or prohibitions, you may use any appropriate contract type within an order against a Schedule contract except cost reimbursement. Appropriate contract types generally include:

- ❖ Firm-Fixed-Price (FFP)
- ❖ Time-and-Materials (T&M)
- ❖ Labor-Hour
- ❖ Hybrids of any of these types, e.g., FFP with T&M Contract Line Item Numbers (CLINs)

Assign a NAICS Code to Each Order

The OCO must assign a North American Industry Classification System (NAICS) code to each task order solicitation, which comes from the Schedule contract. **The NAICS code assigned should reflect the principal nature of the work required under the task order.**

Caution: In accordance with regulation, contracting professionals must select the NAICS code for the order based upon the work to be performed and not based upon the applicable size standard.

NAICS codes must flow down from the Schedule contract. NAICS codes not represented on the Schedule contract may not be used at the order level.

Size Standard Representations

Orders placed against Schedule contracts may be credited toward the ordering activity's small-business goals. For purposes of reporting an order placed with a small-business Schedule contractor, an ordering agency may only take credit if the awardee meets a size standard that corresponds to the work performed.

Important: Ordering activities should rely on the small-business-size representations made by Schedule contractors at the Schedule-contract level. These representations and certifications are maintained by the GSA CO and the site of record is GSA eLibrary. OCOs should not rely on the System for Award Management (SAM) for the size standard of a Schedule contractor. Schedule contractors certify at the time of the initial offer for the Schedule contract and the size standard is valid for five years. The size standard reflected in GSA eLibrary is the official size standard for all orders placed against the Schedule contract.

Ordering activities may consider socioeconomic status when identifying contractors for consideration or competition for award of an order or Blanket Purchase Agreement (BPA) – see FAR 8.405-3. At a minimum, ordering activities should consider, if available, at least one small business, veteran-owned small business, service disabled veteran-owned small business, HUBZone small business, women-owned small business, or small disadvantaged business Schedule contractor(s). *GSA Advantage!*[®] (www.gsaadvantage.gov) and eLibrary (www.gsaelibrary.gsa.gov) contain information on the socioeconomic status of Schedule contractors.

Order Funding and Funding Limitations

All orders made against Schedule contracts must be funded by the agency requiring and requesting the supplies or services. Orders placed under Schedule contracts may not be used to circumvent conditions and limitations imposed on the use of funds. Funds management is the responsibility of the ordering activity.

Security Clearance Considerations

The order solicitation should clearly express all requirements for security clearances, both facility and personnel. These requirements must be prescribed and administered at the order level.

Order Period of Performance

The period of performance (POP) for each order awarded under a Schedule contract shall be specified in the order when it is initially awarded by the ordering activity. Orders must be solicited and awarded prior to the Schedule-contract POP expiration.

After the POP of any Schedule contract expires, that Schedule contract may remain active for administrative purposes only. The Schedule contract (even if expired) shall govern the terms and conditions of any active order to the same extent as if the work were completed during the Schedule contract POP.

Maximum Order Limitations

There is no maximum-per-order limitation under Schedule contracts. At the Schedule-contract level, GSA uses the term “maximum order threshold (MOT)” for contract-management purposes. Additionally, contractors have the right to refuse any order exceeding the MOT. However, this is simply a threshold for contract-administration purposes and does not constitute a maximum order limitation.

Service Contract Act (SCA)

Schedule contracts contain both SCA and non-SCA labor categories. Bona-fide executive, administrative, and professional labor categories are exempt from the SCA. GSA has applied the SCA at the Schedule-contract level where applicable.

Construction

Minor amounts of ancillary repair and alterations may be included as ancillary services in orders under GSA MAS 03FAC for facilities management and under certain SINs under GSA MAS 56, Buildings and Building Materials.

The following instructions apply under GSA MAS 03FAC, SIN 003 97:

(See <http://go.usa.gov/3Favw> [case sensitive].)

003 97 Ancillary Repair and Alterations: Repair and alterations ancillary to existing SINs are available under this Schedule. Ancillary repair and alterations projects are those (1) solely associated with the repair, alternation, delivery, or installation of products or services also purchased under this Schedule and (2) routine and non-complex in nature, such as routine painting or carpeting, simple hanging of drywall, basic electrical or plumbing work, landscaping, and similar noncomplex services. This SIN **excludes:** (1) major or new construction of buildings, roads, parking lots, and other facilities, (2) complex R&A of entire facilities or significant portions of facilities, and (3) Architect-Engineering services subject to Public Law 92-582 (The Brooks Act).

The work performed under this SIN shall be associated with existing SINs that are part of this Schedule. Ancillary repair and alterations shall not be the primary purpose of the work ordered, but be an integral part of the total solution offered. Ancillary repair and alteration services may be ordered only in conjunction with or in support of products or services purchased under this Federal Supply Schedule contract.

This SIN includes all regulatory guidance outlined in accordance with FAR 36, including the Davis Bacon Act and the Miller Act.

Special instructions: No award will be made under 003-97 Ancillary Repair and Alteration unless an offeror is awarded (or receives award concurrently) for another SIN under this Schedule. The repair and alteration work must be ancillary (i.e., incidental) to the primary services or products offered under the Schedule.

For federally owned space managed by GSA's Public Building Service (PBS), approval of the PBS building manager must be received by the ordering activity and contractor before any repair and alteration work may be ordered. A copy of the approval must be retained by both the ordering activity's CO and the contractor.

Owned or leased space outside the PBS inventory may also include approval requirements. A copy of the approval must be retained by both the ordering activity's CO and the MAS contractor performing the R&A services.

This R&A SIN shall not be used for PBS-leased space.

Any agency CO ordering services under this SIN for ancillary repair and alterations is responsible for complying with his or her agency's internal policies when procuring R&A services. This may include a specific warrant delegation for procuring construction services when the estimated amount of this portion of the task order exceeds \$2,000 (refer to FAR 22.4).

Special notice to ordering agencies: GSA or another landlord may require re-performance of any nonconforming work at agency expense. If applicable, agencies may seek appropriate recourse from the contractor responsible for the nonconforming work.

Rights Reserved by the Schedule Contract Procuring Contracting Officer

Only the GSA Schedule CO is authorized to modify the Schedule contract terms and conditions. Ordering activities may include their own local terms and conditions in their orders if they do not conflict with the basic terms and conditions set forth by GSA in the Schedule contracts.

Other Significant Planning Considerations

Other key considerations to address in developing your acquisition plan and preparing for an order solicitation include:

- ❖ The Economy Act does not apply to Schedule orders; GSA is specifically authorized by law to purchase supplies and non-personal services on behalf of other agencies. No documentation is required unless mandated by your agency's policy (see FAR 17-502-2(b)).
- ❖ The requirements official should provide the OCO with a written determination that inherently governmental functions are not included in the scope, when applicable.
- ❖ Personal services are not authorized on Schedules contracts.
- ❖ Commerciality determination is made by GSA, but may also be required at the order level, based on agency policy.
- ❖ Performance-based contracting methods are preferred.
- ❖ Identifying and evaluating potential organizational conflicts of interest (OCIs).
- ❖ Preparation of the Quality Assurance Surveillance Plan and identification of performance metrics as applicable.
- ❖ Evaluation factors and methodology.

Cancellation of Solicitations

Cancellation of an order-level Request for Quotation (RFQ) is at the discretion of the OCO. It is a good practice for the OCO to document the cancellation decision rationale and communicate the rationale with the affected Schedule contractors.

Step 2: Define the Requirements and Develop the Solicitation

Requirements-Development Support Resources

Agencies have access to a considerable array of support resources during the requirements development phase, such as

- ❖ Sample SOWs/PWSs at www.gsa.gov/sowlibrary
- ❖ Contract terms and conditions at www.gsaelibrary.gsa.gov
- ❖ OMB guidance on structuring contracts, including
 - ◆ Increasing competition
 - ◆ Using Performance-Based Service Acquisition (PBSA) and commercial solutions
 - ◆ Selecting the best contract type
 - ◆ Mitigating risk on T&M/Labor-Hour types
 - ◆ Using incentives effectively
 - ◆ Transitioning to lower-risk contract types
- ❖ Best practices postings at <https://interact.gsa.gov/groups/multiple-award-schedules>
- ❖ Schedule Services Pricing Tool (Contract-Awarded Labor Category [CALC]) at <https://calc.gsa.gov>

Developing the Solicitation

Use the solicitation form and format for task and delivery orders normally prescribed and used by your agency for task/delivery order solicitations, consistent with FAR 8.4 procedures. Keep in mind that FAR 15 guidelines do not apply to orders placed against Schedule contracts.

Note: Use of the Uniform Contract Format found at FAR 15.2 is not required for Schedule orders. Furthermore, it is not recommended for use for Schedule orders, because it can lead to confusion between the ordering procedures found in FAR 8.4 versus the source selection procedures found in FAR 15.3, which are not applicable to Schedule orders.

Evaluation Factors

The procedures in FAR Subpart 15.3 (Source Selection) do not apply to the Schedules ordering process (see FAR 8.404(a)).

Ordering activities must establish their own evaluation factors at the order level.

The order solicitation and award process should be as streamlined as practical to reduce solicitation and proposal preparation costs and time for both the government and contractor.

Step 3: Issue the Solicitation

Methods of Issuing the Order Solicitation

A Request for Quotation (RFQ) against a GSA Schedule contract can be issued:

- ❖ By posting the notice on GSA's eBuy at www.ebuy.gsa.gov
- ❖ By contacting Schedule contractors directly via email, phone, etc., as long as adequate competition requirements are met
- ❖ Through the ordering agency's preferred method, e.g., agency website, databases, contracting software, etc.

The use of any one of the preceding mediums to broadcast an RFQ notice to as many contractors as practicable satisfies the "fair opportunity" notification requirement.

FedBizOpps shall not be used for Schedule solicitations (see FAR 8.404(a)).

Step 4: Evaluate Proposals

OCOs should evaluate proposals based on the methodology stated in the order solicitation to maintain fairness in the ordering process and mitigate protest risk.

Prices

GSA Schedule contract prices have been determined to be fair and reasonable (see FAR 8.404(d)). However, for DOD, DPAP issued a class deviation dated March 13, 2014, Subject: Class Deviation – Determination of Fair and Reasonable Pricing When Using Federal Supply Schedule Contracts. This deviation places the requirement on DOD activities to document the determination of fair and reasonable prices even when adequate price competition existed at the order level <http://www.acq.osd.mil/dpap/policy/policyvault/USA001004-14-DPAP.pdf>

Overall price reasonableness determination for services: The ordering activity is responsible for considering the level of effort and the mix of labor proposed to perform a specific task being ordered, and for determining that the total price is reasonable (see FAR 8.405-2(d)).

Cost-reimbursement Type Orders

Cost-reimbursement orders are **not** allowed under Schedules. Only Firm-Fixed-Price, Time-and-Materials, and Labor-Hour orders may be issued.

Step 5: Award the Task Order

Order Award Documentation

Document your awards in accordance with regulations and local policy.

Schedule order documentation includes:

Minimum Documentation Requirements – FAR 8.405-1(g) Products	
Schedule contracts considered, noting the awardee	✓
Description of the supply purchased	✓
Price	✓
Limited Source Justification, if applicable (See 8.405-6)	✓
When the order exceeds the SAT, evidence of compliance with the ordering procedures at 8.405-1(d)	✓
<i>The basis for the award decision should include the evaluation methodology used in selecting the contractor, the rationale for any tradeoffs in making the selection, and a price reasonableness determination for services requiring an SOW.</i>	✓

Minimum Documentation Requirements – FAR 8.405-2(f) Services	
Schedule contracts considered, noting the awardee	✓
Description of the service purchased	✓
Price	✓
The evaluation methodology used in selecting the contractor to receive the order	✓
The rationale for any tradeoffs in making the selection	✓
The price reasonableness determination required by paragraph (d) of this FAR subsection	✓
The rationale for using other than a Firm-Fixed-Price order or a performance-based order	✓
When an order exceeds the simplified acquisition threshold, the ordering contracting officer must document the file with evidence of compliance with the ordering procedures at 8.405-2(c).	✓

Minimum BPA Documentation Requirements – FAR 8.405-3(a)(7)	
Schedule contracts considered, noting the awardee	✓
Description of the supply or service purchased	✓
Price	✓
Limited Source Justification, if applicable (see 8.405-6)	✓
Justification for Single-Award BPA, if applicable	✓
Determination for a single-award BPA exceeding \$103 million, if applicable	✓
Documentation supporting the decision for multiple or single award BPAs	✓
Evidence of compliance with competitive procedures – See 8.405-3(b)	✓
<i>The basis for the award decision should include the evaluation methodology used in selecting the contractor, the rationale for any tradeoffs in making the selection, and a price reasonableness determination for services requiring an SOW.</i>	✓

Use of Limited Sources Justification

Schedule orders may be awarded on a sole-source or brand-name basis as required by the ordering activity. Such orders must have an approved Limited Sources Justification (LSJ – see FAR 8.405-6 for procedures), and the OCO must post the required public notice within 14 days after placing the order. This posting requirement includes posting the approved LSJ at the government point of entry at www.fedbizopps.gov for a minimum of 30 days (see FAR 8.405-6(a)(2)).

Order-Level Protests

All protests at the order level are handled by the ordering activity. FAR Subpart 33.1 is applicable to orders of any dollar amount under Schedules. Protests may be filed with GAO or the ordering activity. Protest risks include:

- ❖ Mixing procedures from FAR Part 15 with FAR Subpart 8.4 procedures
- ❖ Scope issues, i.e., placing orders under the wrong Schedule
- ❖ Not following the ordering procedures in FAR Subpart 8.4
- ❖ Not following evaluation procedures as stated in the ordering activity's solicitation

Step 6: Administer the Order/Execute the Work/Close Out the Order

Quality Assurance – Contractor Surveillance

The OCO is responsible for ensuring contractor performance meets the minimum requirements established in the order, documenting the order file and communicating with the contractor to ensure the government is receiving the contracted services.

Monitoring contractor performance should be delegated to a properly trained and certified Contracting Officer's Representative (COR). The specific authority/limitations of the COR should be delineated in an appointment letter from the OCO, a copy of which should be provided to the contractor.

Subcontracting and Limitations on Subcontracting

Subcontracting may be used under Schedules at the discretion of the OCO. However, FAR Clause 52.219-14, Limitations on Subcontracting, applies to all contracts or orders that have been set aside or reserved for small business or 8(a) concerns, including orders under the GSA MAS Program. For a prime/subcontractor structure, the small-business prime must perform at least 50 percent of the value of the work to meet the limitations on subcontracting requirements.

Performance Evaluation

OCO is responsible for ensuring that the contractors' performance on each order exceeding the Simplified Acquisition Threshold is reported in CPARS in accordance with the policies in FAR Subpart 42.1502(c). Follow agency procedures for preparation, review, and submission of performance reports. GSA will consider order performance information as part of performance evaluations at the master indefinite-delivery/indefinite-quantity (IDIQ) contract level.

Order Closeout

Order files shall be closed out in accordance with the policies in FAR Subpart 4.804-1, or, if the order is administered by another office, FAR Subpart 4.804-2 applies. The procedures prescribed at FAR Subpart 4.804-5 shall be used except when it is appropriate to use the quick closeout procedures at FAR Subpart 42.708.

Appendix A: Order Checklist

GSA Schedule Order: Contract File Checklist

Current as of February 13, 2015

This checklist may be used for the award of task or delivery orders against General Services Administration (GSA) Federal Supply Schedule (FSS) contracts (also referred to as “Multiple Award Schedule,” “GSA Schedule,” or “GSA MAS” contracts) and the establishment of Blanket Purchase Agreements (BPAs) against GSA FSS contracts.

Note 1: Additional agency-level and/or local requirements may apply and should be followed in addition to the items identified below.

Note 2: All items listed below will not apply to every order. This is a comprehensive checklist and should be used at the Contracting Officer’s discretion. It is recommended that an “N/A” be placed to the left of items that do not apply at the individual-order level.

Note 3: The Economy Act does not apply to orders placed against GSA Schedules (see FAR 17.502-2(b)).

Note 4: Procedures in FAR 15 do not apply to orders placed against GSA Schedules, except DOD activities – see class deviation on determination of fair and reasonable pricing.
<http://www.acq.osd.mil/dpap/policy/policyvault/USA001004-14-DPAP.pdf>

GSA Schedule Contract Number:
Contractor Name:
Contractor Point-of-Contact Information: [Insert name] [Insert address] [Insert email address] [Insert telephone number]
Delivery/Task Order or BPA Number:
Award Date:
Base Period of Performance (excluding options):
Period of Performance (including options):

Tab Section/Tasks	Complete	Date
Tab A – Award Documents		
Signed original task or delivery order		
Signed original modifications		
Tab B – Pre-solicitation		
Acquisition Requirements Package (check each sub-task below):		
❖ Acquisition strategy		
❖ Acquisition plan (AP – See FAR 8.404(c)(1), FAR Subpart 7.1.)		
❖ Independent Government Estimate (IGE)		
❖ Description of the supplies or services (e.g., Performance Work Statement)		
❖ Funding document		
❖ Other acquisition request document(s) _____		
Market research documentation (See FAR 10.002(e).)		
Information technology (IT) acquisition strategy (See FAR 8.404(c)(1); FAR 39.101(b)(2).)		
Limited Source Justification (See FAR 8.405-6.)		
Procedures for placing orders under Blanket Purchase Agreements (BPAs) (See FAR 8.405-3(a)(3).)		
Small Business Review Form (e.g., DD Form 2579) (See FAR 7.104(d), FAR 8.405-5.)		
Certifications for assisted or direct acquisitions by a non-DOD agency, if applicable		
Other _____		
Tab C – Determinations and Pre-solicitation Clearances		
SAM Exclusions, www.sam.gov (See FAR 9.405(b).)		
Use and evaluation of options (See FAR Subpart 17.2.)		
Non-personal services (See FAR 37.103(a).)		
Use of government-furnished property, equipment, or information (See FAR Subpart 45.3.)		
Service Contract requirements (See FAR 37.103, DFARS 237.170-1.)		
IT clearance (See FAR Part 39.)		
Acquisition of printing and other related supplies (See FAR Subpart 8.8.)		
Determination of best procurement approach for orders exceeding \$500,000 (See FAR 17.500(c)(2); 17.502-1.)		
Other _____		

Tab Section/Tasks	Complete	Date
Tab D – Solicitation/Ordering Procedure		
Request for quotation and amendments (See FAR 8.405-1(c)(2); 8.405-2(c))		
Rating/evaluation plan		
GSA eBuy posting (See FAR 8.405-1(c)(2); 8.405-2(c).)		
List of Federal Supply Schedule (FSS) contractors surveyed and their prices quoted (See FAR 8.405-1(c)(1).)		
Solicitation correspondence		
Other _____		
Tab E – Technical Evaluation		
Signed technical evaluation score sheets/report (See FAR 8.405-2(d).)		
Conflict of interest/confidentiality forms for reviewers (See FAR 3.104.)		
Other _____		
Tab F – Successful Quotation		
Successful respondent's original/final technical and price quotation (See FAR 4.803.)		
Approved Pricing Schedule/Table ²		
Other _____		
Tab G – Price Evaluations/Reductions		
Evaluation-team analysis of contractor's price/technical quotation		
Record of price reductions and discounts sought/obtained (See FAR 8.404(d); 8.405-1(d); 8.405-2(c)(3); 8.405-4.)		
Questions and responses, including record of oral discussions (See FAR 4.803.)		
Price evaluation/best value analysis and award decision documentation (See FAR 8.405-1(c)(3); 8.405-1(e). For DOD activities, determination of fair and reasonable pricing is required; IAW DOD Class Deviation to FAR 8.404(d) issued on March 13, 2014.)		
Determination to use a T&M or Labor-Hour task order (See FAR 8.405-2(e).)		
Other _____		

²Approved price list may be a screenshot from GSAAAdvantage!® for products or other pricing list provided by contractor and verified through GSAAAdvantage!. For services, the approved labor rates should come from the price list posted in GSA eLibrary in the contractor's terms and conditions file (found on the contractor detail page).

Tab Section/Tasks	Complete	Date
Tab H – Pre-award Documentation, Funding, and Clearances		
SAM exclusions (See FAR 9.405(d)(4).)		
Funding document (e.g., requisition)		
Internal/other file review		
System for Award Management verification (See FAR Subpart 4.11.)		
Data entry in FPDS (See FAR 4.602.)		
GSA Schedule Contractor Team Agreement		
COR certification of training		
COR designation memorandum (See FAR 7.104(e).)		
Other _____		
Tab I – Notices, Reports, Debriefings, and Protests		
Award notification to unsuccessful respondents (See FAR 8.405-2(d).)		
Feedback documentation (See FAR 8.405-2(d).)		
Protest documentation, if applicable (See FAR 33.103; 33.104.)		
Award transmittal letter(s)		
Other _____		
Tab J – Task Order Administration		
Post-award orientation (See FAR Subpart 42.5.)		
Annual reviews for BPAs (See FAR 8.405-3(e).)		
Post-award correspondences		
Tab K – Task Order Closeout		
Final reports including certification from COR		
Notification letter to contractor		
Final invoice/voucher (marked final)		
Final Past Performance Evaluation Report		
Data entry in the Federal Procurement Data System (FPDS)		

Appendix B: Schedule Tools and Resources Available to the OCO

GSA eLibrary: the source for the latest GSA contract award information. www.gsaelibrary.gsa.gov

GSA eBuy: an electronic Request for Quotation (RFQ) system designed to allow government buyers to request information, find sources, and prepare RFQs online for the myriad of services and products offered through GSA's Multiple Award Schedule (MAS) Program. Government buyers can use eBuy to obtain quotations for services, large-quantity purchases, and purchases with complex requirements. www.ebuy.gsa.gov

GSA Advantage!®: the online shopping portal for Schedule products. www.gsaadvantage.gov

MAS Desk Reference: www.gsa.gov/masdeskreference

Training:

- ❖ Webinars on Schedule topics are conducted monthly. The schedule for upcoming webinars is posted at www.gsa.gov/masnews.
- ❖ DAU Continuous Learning Modules: GSA has posted continuous learning modules on the DAU portal at <http://icatalog.dau.mil/onlinecatalog/tabnavcl.aspx?tab=FAC>.

Courses:

FAC 023	Basic Contracting for GSA Schedules
FAC 027	GSA Schedules and Small Business
FAC 028	GSA Schedules and Sustainable Acquisition
FAC 029	GSA Schedules vs. Open Market
FAC 036	GSA Schedules BPAs and CTAs
FAC 037	GSA Schedules eBuy
FAC 048	GSA MAS Program: Buying Services through GSA Schedules
FAC 052	GSA ReverseAuctions SM Platform

Acquisition Gateway:

The Acquisition Gateway, built by GSA, helps federal government buyers from all agencies act as one acquisition community. The Acquisition Gateway is a workspace that provides accurate, useful, and unbiased advice. It helps federal acquisition professionals learn what they need to know, connect with others to collaborate and communicate, and act to accomplish their tasks effectively. Our goal is to help make government acquisition great.

Please visit <https://hallways.cap.gsa.gov/>.



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