Acquisition Source Selection Interactive Tool (ASSIST)

ASSIST USER GUIDE

30 June 2016

30 June 2016 Revisions:

2.8.1 "Completing a Source Selection Decision Document" - p.48
2.8.1 "SSAC Recommendation" - p. 49
2.9 "Export" has been revised to read "Export and Export to PCF" - p. 52
2.9.1 "Export" has been added - p. 52
2.9.2 "Export to PCF" has been added - p. 54

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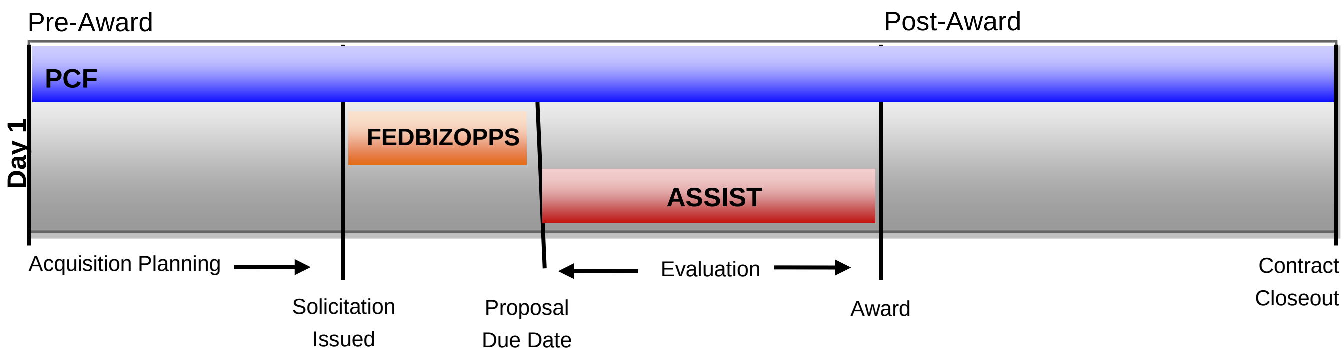
1.0 Introduction

1.1 What is ASSIST?

The Acquisition Source Selection Interactive Support Tool (ASSIST) is a secure web-based contracting tool used to facilitate the coordination and management of all evaluation documentation generated in a source selection**.** It is used by all functional areas within the acquisition community including Contracting, Legal, Small Business, and Program Management/Customers.

Where ASSIST falls in the Acquisition Life Cycle in relation to other web-based contracting tools:



ASSIST is only used for the evaluation portion of a Source Selection – from the closing date of a Solicitation and receipt of proposals through contract award. **Initial proposal submissions are received outside of ASSIST**. The Federal Business Opportunities Page (FEDBIZOPPS) website is used for the solicitation process (e.g. posting, questions and responses, amendments, etc.). The Paperless Contract File (PCF) tool is where the contracting personnel uploads, stores, and archives all of the official pre/post-award contractual records and documentation, which must eventually be stored in PCF.

ASSIST Functionality

The functionality of the application contains the following primary components:

- **Setup & Administration**: the process involved in creating and configuring a Source Selection to adhere to an evaluation approach.
- **Evaluation Results**: the process involved in documenting the results of the Government's evaluation (e.g. Findings/ENs, Summaries, and Evaluation Reports) within ASSIST.
- **Document Workflow**: the process involved in submitting documents for reviews and approvals.
- **Exchanges with Offerors**: the process involved in conducting on-line exchanges between the Government and each Offeror through ASSIST2Industry.

1.2 ASSIST Groups

ASSIST users can be categorized into three (3) groups. Each group has its own rights and responsibilities within the tool. The main group is the User. This is the working level group within ASSIST. The other two (2) groups (Local Admin and VCE Admin) provide tool guidance and support when required. See below for more information.

Group Name	Rights	Responsibilities
USER	• Request 'new' Source Selection • Access assigned Source Selection • View/access documentation needed to perform evaluation(s) (e.g. proposal files, solicitation, etc.) • Document evaluation results • Review/approve evaluation results • Have exchanges with Offerors	• Serve as a role with specific permissions/privileges within a Source Selection Team. (See section 2.5 "Members" for more information on Source Selection Team Roles.)
LOCAL ADMIN	• Same functionality available to a USER for Source Selections within an assigned command/organization • Ability to create Source Selections for an assigned command/organization	• Setup 'new' Source Selections for their Command/Agency. • Perform administrative functions. • Train evaluation team(s). • Provide Tier I Helpdesk support.
VCE ADMIN	• Same functionality available to a USER for all Source Selections within ASSIST • Ability to create Source Selections for all commands/organizations	• Provide Tier II Helpdesk Support. • Perform fixes and upgrades to ASSIST.

1.3 Accessing ASSIST

The URL for ASSIST is https://assist1.army.mil. To login to ASSIST:

1. The user must have a valid, active AKO account.
2. An ASSIST Account must then be created for a user using the individual's correct AKO name. The user/account must be assigned a role within a Source Selection. See section 2.5 "Members" - to add, edit, or remove members.
3. An individual may log into ASSIST with either an AKO Username/Password or via a CAC Login. However, the user's CAC must be registered and up to date on the AKO website (www.us.army.mil) otherwise the CAC login to ASSIST may not work.

NOTE: A Procuring Contracting Officer (PCO), Contract Specialist, or Source Selection Evaluation Board (SSEB) Chair with a CAC can visit the ASSIST homepage to submit a request to use ASSIST in support of an evaluation (see section 1.5 "How to Request Use of ASSIST"). However, any user can view the process training videos available in the Source Selection University on the homepage. A user will only be able to view or enter a Source Selection if they have an ASSIST Account and are assigned a role within a Source Selection.

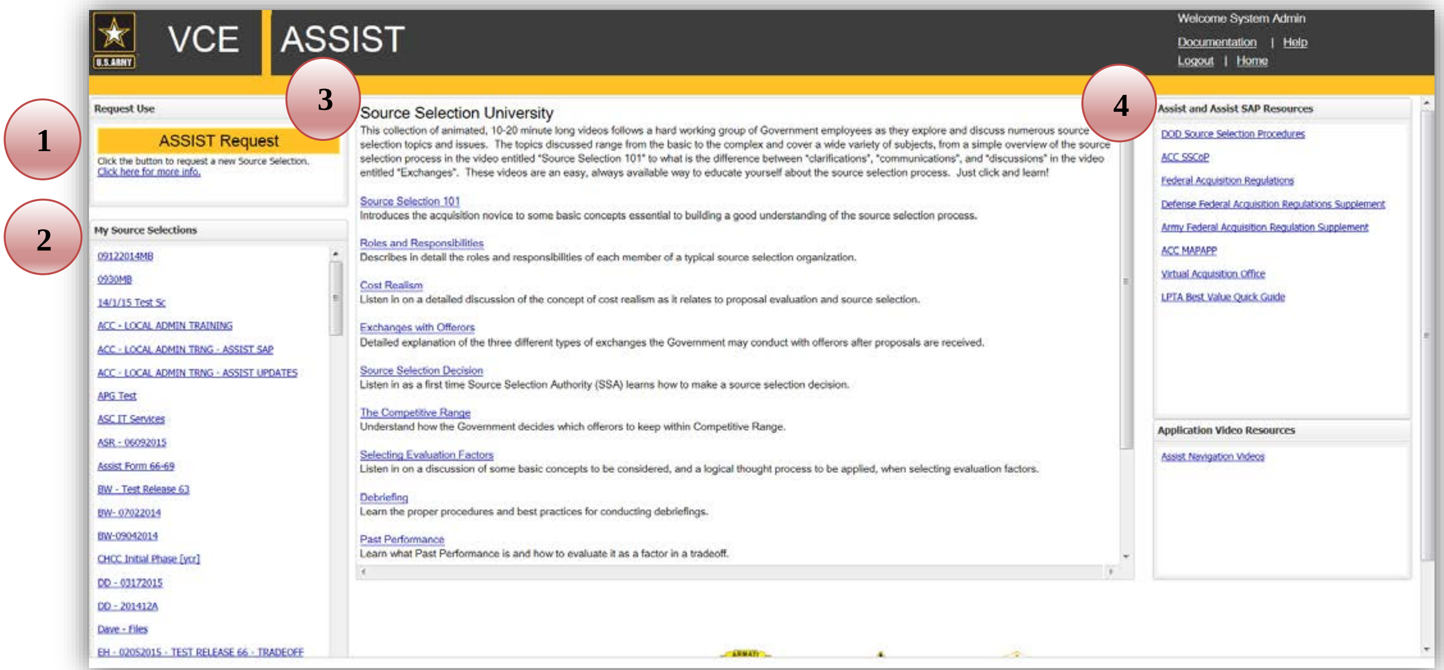
1.3.1 Login Instructions

1. Enter https://assist1.army.mil as web address in internet browser.

NOTE: ASSIST is optimized for Microsoft Internet Explorer and Firefox. Not all features will work if attempting to use ASSIST with another browser (e.g. Safari or Google Chrome).

2. Read the Consent Conditions and click I ACCEPT
3. Read the Classified Information warning and click I ACCEPT.
4. Either click AKO LOGIN to login in using AKO username and password or click CAC LOGIN to login using CAC.

1.4 ASSIST Homepage



Four (4) sections of Homepage:

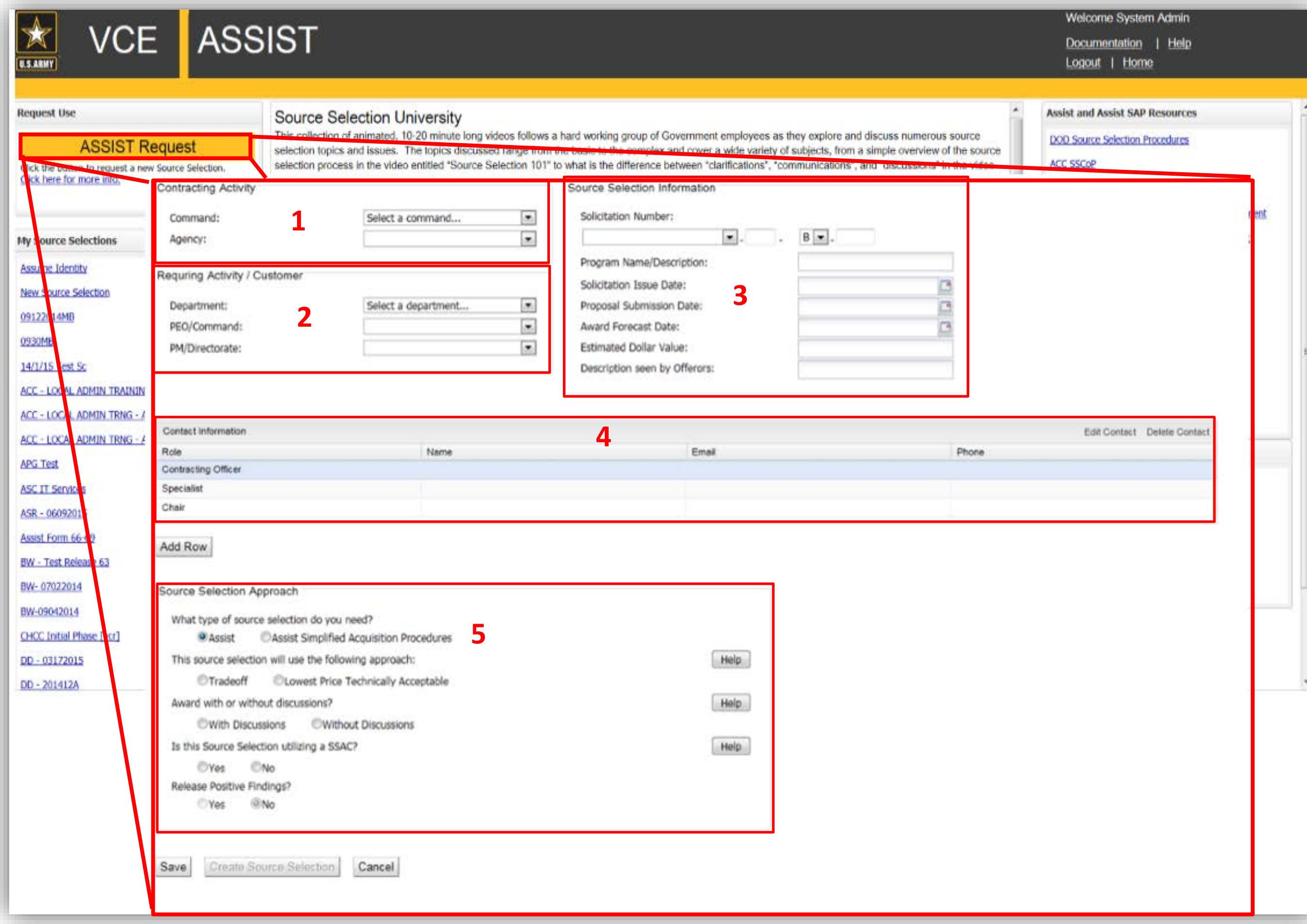
1. **Request Use**: Provides a user the ability to request the use of ASSIST. For instructions on submitting request, see section 1.5 "How to Request Use of ASSIST".
2. **My Source Selections**: Displays a list of past and present Source Selections a user has access to. Name of Source Selection will appear as a link. Click on specified link to enter desired Source Selection.
3. **Source Selection University**: Collection of animated, 10-20 minute long videos that educate users on numerous Source Selection specific topics and processes. Videos can be launched within a browser or can be saved to a local desktop or document folder and then viewed with Microsoft Media Player or equivalent application.
4. **Resources**: Links to external websites where users can find additional information on the Source Selection process.
5. **Application Video Resources:** Links to a collection of videos on topics such as: how to navigate ASSIST, evaluation documentation that can be created, document actions, review/approval workflow of documents, etc.

1.5 How to Request Use of ASSIST

A Procuring Contracting Officer (PCO), Contract Specialist, or Source Selection Evaluation Board (SSEB) Chair with a CAC can visit the ASSIST homepage to submit a request to use ASSIST in support of an evaluation. The user can request to use ASSIST for a new Source Selection event by clicking the ASSIST REQUEST button on the ASSIST home page, complete the request form, and click SAVE to submit the request to an ASSIST Administrator. See below for instructions on completing the form. An ASSIST Administrator will perform the initial creation/setup of the Source Selection in ASSIST based upon information provided in the request form and will contact the requestor with further instructions.

NOTE: If a user is trying to access an existing Source Selection, but it is not listed for him/her under My Source Selections on the ASSIST Homepage, the user should contact the Contracting Officer and/or

Specialist to request or verify access. ASSIST REQUEST should be used to request new Source Selections **only**.

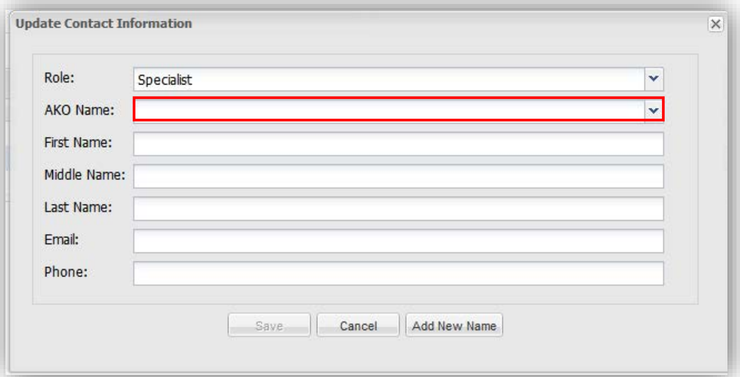


Request Form Instructions

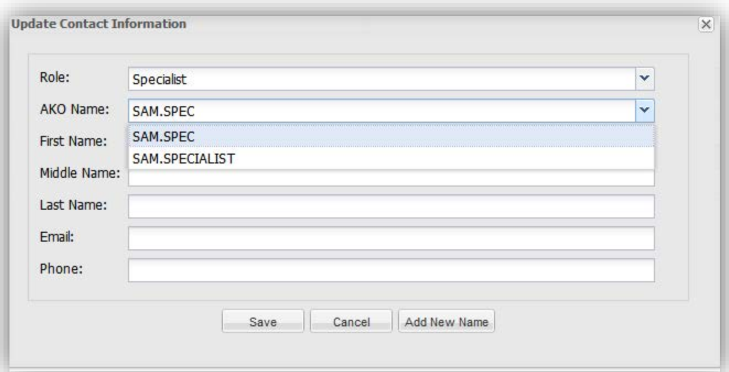
1. Identify the Contracting Activity.
   a) Select the COMMAND.
   b) Select the AGENCY. NOTE: No values will be appear until a COMMAND is selected.
2. Identify Requiring Activity and/or Customer.
   a) Select the DEPARTMENT.
   c) Select the PEO/COMMAND. NOTE: No values will be appear until DEPARTMENTis selected.
   b) Select the PM/DIRECTORATE. NOTE: No values will be appear until DEPARTMENT and PEO/COMMAND is selected.
3. Provide required information about Source Selection.
   a) Fill out the Soliciation Number. NOTE: The available DODAAC values (first six characters of a Solicitation Number) are determinded by seleted COMMAND and AGENCY.
   b) Provide PROGRAM NAME/DESCRIPTION (free text). The PROGRAM NAME/DESCRIPTION is how the Source Selection will appear under My Source Selections to all users with access to evaluation.
   c) Identify the SOLICITATION ISSUE DATE.
   d) Identify the PROPOSAL SUBMISSION DATE.

e) Identify the AWARD FORECAST DATE.
f) Fill in ESTIMATED DOLLAR VALUE.
g) Provide DESCRIPTION SEEN BY OFFERORS. The DESCRIPTION SEEN BY OFFERORS is what will be used in ASSIST2Industry to identify the Source Selection to Offerors.

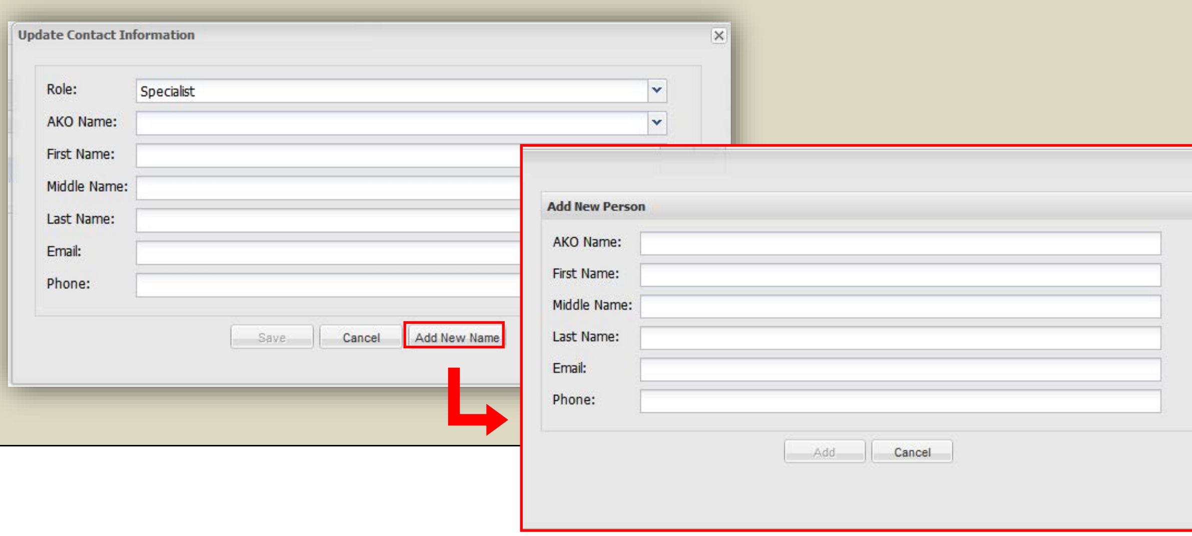
4. Identify the Contact Infromation for the PCO, Specialist and SSEB Chair. Only the PCO is required.
   a) Highlight a role from the contact grid and click on the “EDIT CONTACT” button to receive the UPDDATE CONTACT INFORMATION dialog box (see below).



   b) Type in the AKO NAME of the Contact. This field is “type ahead” enabled. If user has an exisiting ASSIST acount, the AKO username will appear in a dropdown as it is being entered (see below).



NOTE: If the AKO username does not appear, the Contact does not have an existing ASSIST Account. An ASSIST Account must be created for the Contact using their AKO username. Click on the “ADD NEW NAME” button to create an Account.



Complete all fields in dialog box. **DO NOT** include @us.army.mil in AKO NAME. Also, a Middle Name does not have to be identified. Upon completion, click on ADD button to create ASSIST ACCOUNT.

c) Click on the AKO Username name from dropdown. The remaining fields will be automatically populated (first name, middle name, last name, email and phone).

d) Click SAVE to update contact.

5. Answer the source selection approach questions.

a) What type of source selection? ASSIST or ASSIST Simplified Acquisition Procedures.

b) **LPTA or Tradeoff?** *Tradeoff and Lowest Priced Technically Acceptable (LPTA) are two different bases for selecting the successful Offeror in an acquisition utilizing the competitive negotiation process. Tradeoff means that the Government will choose the successful Offeror by evaluating some combination of cost/price factors and non-cost factors such as Technical, Past Performance, and Small Business Participation and making tradeoffs between the cost/price and the non-cost merits of competing proposals. Such tradeoffs may allow the Government to exercise the discretion to select other than the lowest priced Offeror or other than the highest technically rated Offeror as the successful Offeror. LPTA means that the Government will choose the successful Offeror by first evaluating some non-cost factors to determine which Offerors are considered to have met the minimum standard of being "Acceptable". Once all the Offerors who are at least "Acceptable" have been identified, the successful Offeror will be the one who has the lowest cost/price proposal. No tradeoffs are allowed and the lowest cost/price always wins. Which basis for award is being utilized by a particular acquisition can be found in the Source Selection Plan and in Section M of the solicitation.*

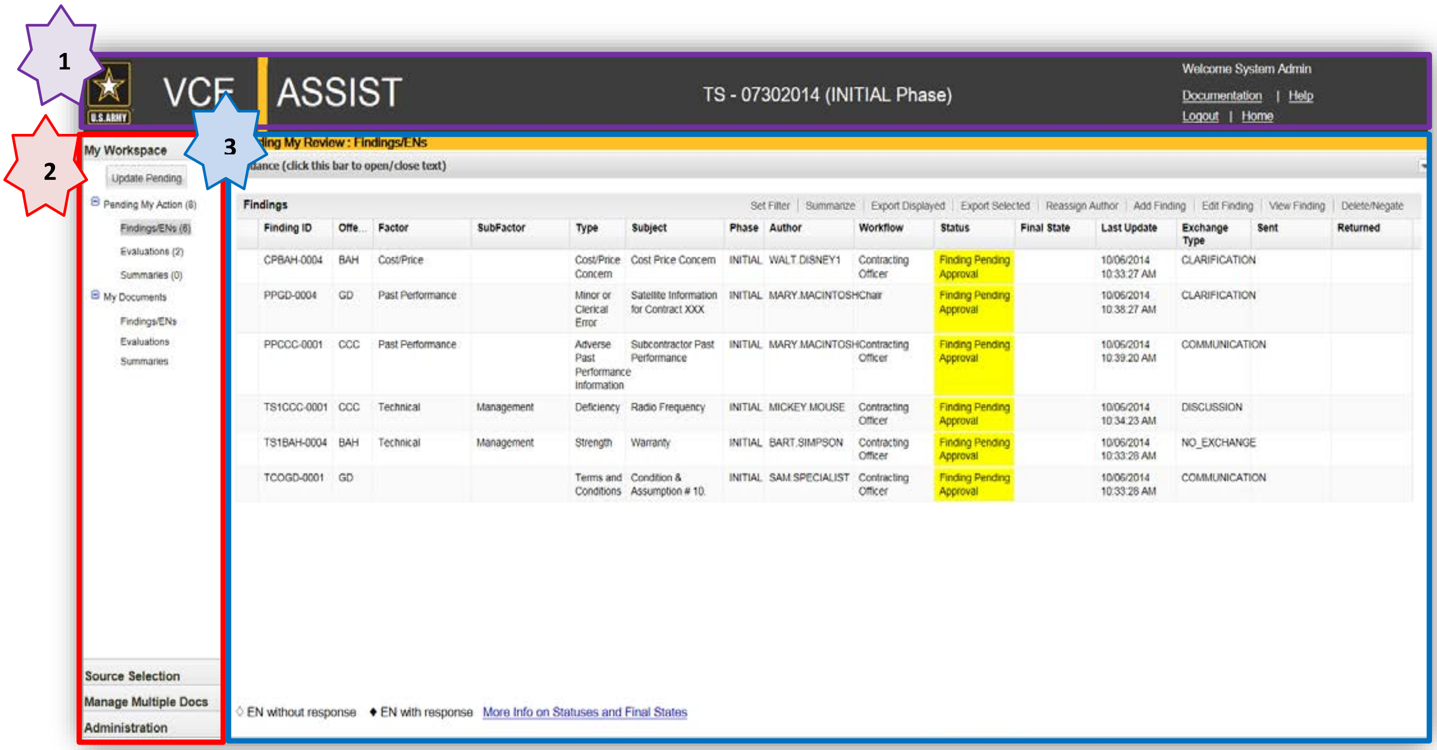
NOTE: The selection of LPTA or Tradeoff determines the evaluation methodologies and resulting ratings/definitions available for factors in the Source Selection. If LPTA is selected, acceptable/not acceptable ratings are available for all non-cost/price factors. If tradeoff is selected combined technical/risk ratings, separate technical and risk ratings, performance confidence assessments and/or acceptable/not acceptable ratings are available for all non-cost/price factors. See section 2.4 “Factors” for more information.

c) Award with or without discussions? *Award **without** discussions means the government intends to evaluate proposals and select the successful Offeror without having any exchanges with the competing Offerors, except for the very limited type of exchange called "clarifications." Award **with** discussions means the Government intends to evaluate proposals, make a competitive range determination, conduct meaningful discussions with all Offerors included in the competitive range, allow Offerors to revise proposals, and evaluate final proposal revisions before selecting the successful Offeror. All exchange types permissible by the Federal Acquisitions Regulations (clarifications, communications, and discussion) can be utilized when awarding **with** discussions.*

d) Is this Source Selection utilizing a SSAC? *The Source Selection Advisory Council (SSAC) is a group of senior Government officials with functional expertise who are appointed to assist the Source Selection Authority (SSA) throughout the source selection process. The SSAC, if utilized, is required by DOD to prepare a written comparative analysis of the competing proposals and provide award recommendation to the SSA. DOD requires an SSAC for acquisitions with a value equal to or greater than $100M. The SSAC is optional for acquisitions less than $100M.*

e) Release Positive Findings? *Set to **NO** by default.*

1.6 Layout of ASSIST



The ASSIST application is laid out into three (3) main sections; each section is used for different purposes.

1. ASSIST Banner: Provides access to Documentation view. In Documentation, users have access to Source Selection Files (e.g. Solicitation, SSP, etc…), Basis for Award, Offerors' proposals, and miscellaneous reference material including: factors criteria, member information, workflow, external reference links and Finding Types (rating/definitions). See Section 1.6.2 "Documentation" for more information on this view. The Banner also provides quick access to Help, Logout and the Home Page.

2. Left Navigation Panel: Broken out into four (4) sections/stack panels:

   - **<u>My Workspace</u>: Available to all users**. Provides access to documents pending action by a user (Pending My Action) or access to all documents created by user no matter what their state is in the workflow (My Documents). More information on the "Pending My Action" view can be found in Section 4.0 "Workflow".
   - **<u>Source Selection</u>: Available to all users**. Provides access to all documents created and saved for the Source Selection, whether the documents are created by the user or a fellow Source Selection Team member. Every user is assigned a Source Selection Team role during Setup and Administration. Users will only see documents in the Source Selection view that pertains to their assigned role. See section 2.5 "Members" for more information on role based security. Documents can be viewed by "All Offerors" or can be sorted by specified Offeror.

> NOTE: Documents can be viewed by document type - Findings/ENs, Evaluations, or Summaries - in any of the My Workspace or Source Selection views. In My Workspace or Source Selection view, click on the plus (+) sign located to the left of any subcategory (e.g. Pending My Action, My Documents, All Offerors, Specific Offeror) to expand and show available document types. Click on desired type to view documents.

- **Manage Multiple Docs**: **This view is only available to PCO, Specialist, SSEB Chair, Legal and Administrators**. Provides the user assigned one of these roles with the ability to perform various administrative actions in bulk. See section 4.2.2 “Administrative Workflow Actions” for information on these actions. Manage Multiple Docs is also where the action of releasing ENs to an Offeror is performed. The action of accepting an EN and an Offerors response is also performed from this view. See section 5.0 “Exchanges with the Offerors” for more information on this process
- **Administration**: **This view is only available to PCO, Specialist, SSEB Chair and Administrators**. Provides the user assigned one of these roles with the ability to setup their source selection and administer ASSIST to meet the requirements of the Source Selection Team and their evaluation approach. See section 2.0 “Set Up and Administration” for more information on this process.

3. Workspace: Area where users view ASSIST generated documents (Findings/ENs, Evaluations and Summaries) and perform actions for these documents. Content changes as user selects different views from the stack panel.

1.6.1 Document Grid

Findings/ENs, Evaluations, and Summaries appear in a grid within ASSIST. These grids will appear within the workspace view after a specified document type is selected from any of the subcategories in My Workspace or Source Selection. Columns headings in the grid identify pertinent information about the documents listed in the rows below. The columns and displayed information will vary based upon the selected document type. The table below identifies all column headings used in ASSIST, what documents they are available for, and a brief description of what the displayed information means.

Column Heading	Finding/ENs	Evaluation	Summaries	Description
Finding ID	x			Identifier assigned to each Finding/EN created in system for reference
Offeror	x	x	x	Offeror document is created for
Factor	x	x	x	Factor document is created for
Subfactor	x	x	x	Subfactor (if applicable) document is created for
Type	x			Finding/EN Type (e.g. Strength, Weakness, Deficiency, etc…)
Subject	x			Subject of Finding/EN
Phase	x	x	x	Phase document was created in (e.g. Initial, Interim, Final)
Author	x	x	x	Author of document
Workflow		x	x	Current reviewer in control of document (person in workflow where document is sitting)
Status	x			Status of document in ASSIST
Final State	x			Final state of Finding/EN after evaluation
Last Update	x	x	x	Date/Time stamp of last update to document – in **Eastern Time**
Last Log Entry	Not by Default*	x	x	Last action taken on document
Exchange Type	x			Type of exchange for Finding/EN (e.g. No Exchange, Clarification, Communication, Discussions)
Sent	x			Date/Time stamp Finding/EN was sent to Offeror – in **Eastern Time**
Returned	x			Date/Time stamp Finding/EN was returned from Offeror – in **Eastern Time**
Rating		x		Rating assigned to Offeror

***Not available by default but can be made available in the grid (see Configuring the Grid below).**

Configuring the Document Grid

The grid provides some control on how information is listed. The grid/columns can be customized in three (3) ways: Add or remove columns to the grid, change the order of columns, or sort the grid by a specific column. Any changes made to the grid or columns will be persistent while working in the same session.

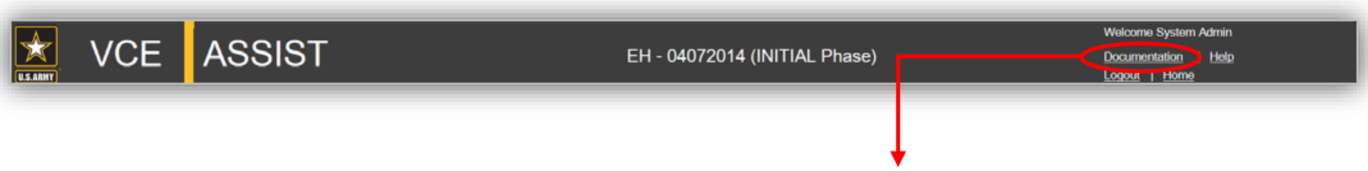
1) **Add or remove columns to the table:** To the right of the last column in the grid, hold the mouse to the right hand side of that last column heading in the grid, and a down-arrow will appear in the heading (right hand side). Click this down arrow, go to columns, and then click on the column name(s) to be added/removed.
2) **Change the order of columns in the table:** Click on the column heading and drag it across the column headers, and drop it (or release the mouse) when the column is in the desired location.
3) **Sort a table by a specific column:** Sorting a column can be done in the following two ways:

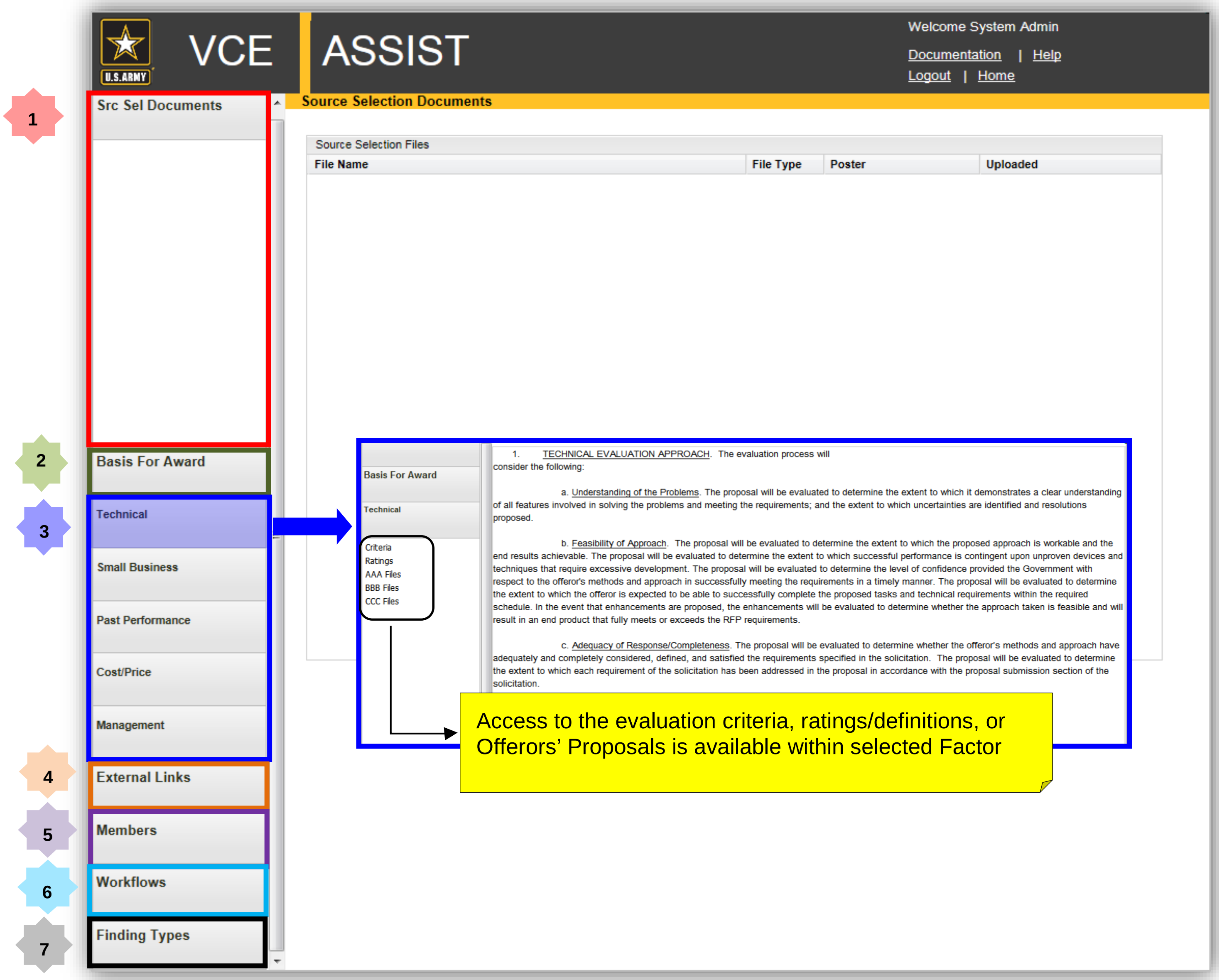
   a) Click a column heading to sort the list alpha numerically by that column (and click again to reverse the sort); or
   b) To the right of the last column in the grid, hold the mouse to the right hand side of that last column heading in the grid, and a down-arrow will appear in the heading (right hand side). Click this down arrow, then click SORT ASCENDING or SORT DESCENDING.

   The sort order of a grid will remain intact if the user leaves and comes back to the view. The selected sort will apply to all grids of the same document type (e.g. Findings/ENs, Evaluations or Summaries).

1.6.2 Documentation

The Documentation view provides read only access to Source Selection Files (e.g. Solicitation, SSP, etc…), Offerors' proposals, and miscellaneous reference material including: factor evaluation criteria, member's information, workflows, external reference links and Finding Types (ratings/definitions). Click on the **Documentation** link located in the ASSIST banner to open this view in a new browser window (see below).





The Documentation view has a left navigation panel that can be broken out into seven (7) sections:

1. Source Selection Documents: **Accessible to all members**. Provides access to non-factor specific files (e.g. Proposals) that are relevant to the conduct of the Source Selection evaluation. Examples include: Source Selection Plan (SSP), Solicitation, Amendments, Evaluation Templates, Training, or Other relevant files.
2. Basis for Award: **Accessible to all members**. Provides access to the Basis for Award. The Basis for Award is commonly defined in Section M of the Solicitation.
3. Factor Information: Accessible to Source Selection Team members assigned within that Factor/Subfactor (e.g. Evaluator, Subfactor Chair, and Factor Chair). Also accessible to members assigned a role of Contracting Officer, Contract Specialist, Lawyer, Chair, Deputy Chair, SSA, SSAC or Reader All. Provides access to evaluation criteria, ratings/definitions, and Offeror's proposals for selected factor.
4. External Links: **Accessible to all members**. Provides access to external websites where users can find additional information on the Source Selection process.

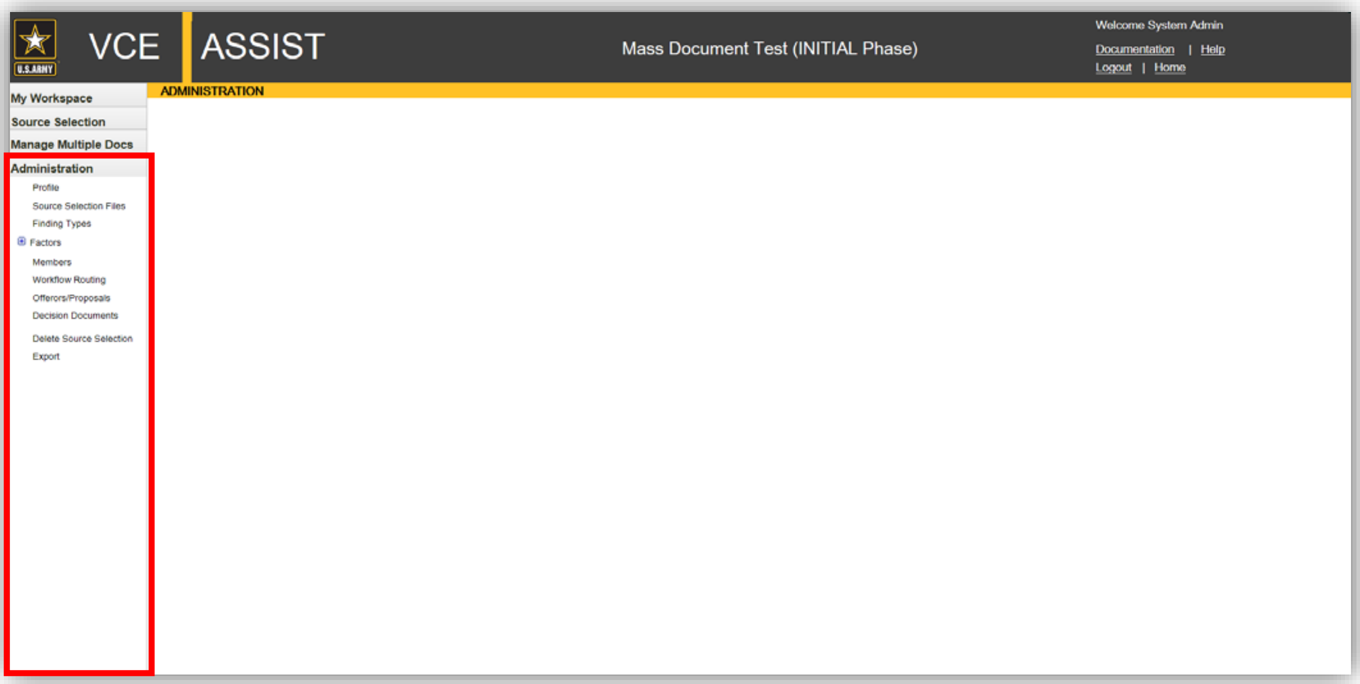
5. Members: **Accessible to all members, except Contract Advisors**. Provides access to list of members that make up the Source Selection Team. This list includes each member's role or roles and contact information.
6. Workflows: **Accessible to all members**. Pictorial of the workflows for an Evaluation, Finding/EN or Summary.
7. Finding Types: **Accessible to all members**. The term 'Finding', as used in ASSIST, refers to each individual aspect of merit (both positive and negative) that the Government evaluation team observes and documents as a result of assessing the proposal against the Government solicitation requirements. ASSIST has been programmed with eleven different types/categories of Findings that an evaluation team may use. This view provides access to the Finding Types that will be available for use in a Source Selection.

2.0 Setup & Administration

A Source Selection in ASSIST must be configured to support the requirements of each unique evaluation approach. The ability to configure a Source Selection is performed in Administration. Administration is accessible throughout the course of an evaluation to allow for the ability to update or modify a Source Selection as needed. As stated above, the Administration Tab is only available to the PCO, Specialist, SSEB Chair and Administrators.

To access Administration in ASSIST:

1. Enter a Source Selection by clicking on the appropriate link from the 'My Source Selections' section on the home page.
2. Click on 'Administration' located in the left navigation panel.



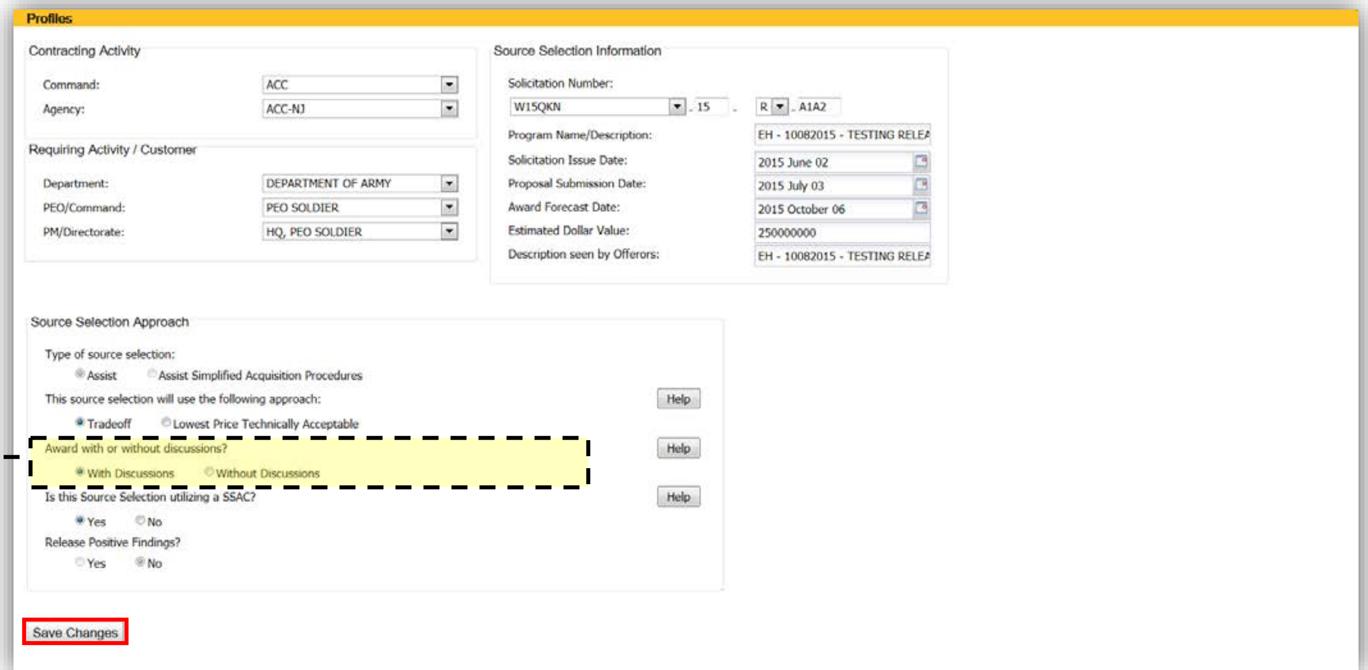
NOTE: Setup & Administration can only be performed by an Admin (Local or VCE) or a user assigned a role of Contracting Officer, Contract Specialist or SSEB Administrator.

There are nine (9) components of the Administration section.

- Profile: Modify the Source Selection profile.
- Source Selection Files: Add Source Selection files (e.g. Source Selection Plan (SSP), Solicitation, Amendments, Evaluation Templates, Training, or Other relevant files).
- Finding Types: Specify which Finding Types will be used for the Source Selection evaluation.
- Factors: Manage/add the Basis of Award, Factors, and Subfactors.
- Members: Add, edit or remove members and their roles.
- Workflow Routing: Define the review and approval sequence for documents created in ASSIST.
- Offerors/Proposals: Add Offerors, manage Offeror contacts and upload proposal files.
- Decision Documents: Change phase of evaluation (e.g. Initial, Interim, Final) by creating Decision Documents (e.g. Competitive Range Determination, the SSAC Recommendation or the SSA Decision).
- Export: Export all evaluation documents for Source Selection.

2.1 Profile

Profile provides the ability to update information submitted with Source Selection Request. See 1.5 How to Request Use of ASSIST for information pertaining to any of the fields on this page.



Update any field on page and click SAVE CHANGES button.

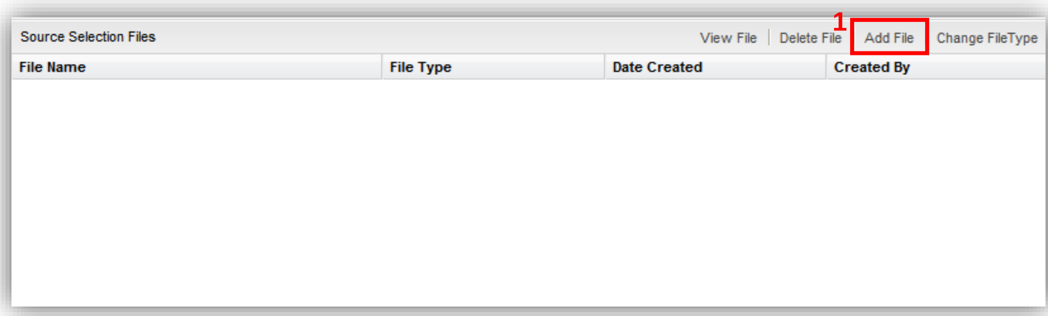
> The award with or without discussions question under the Source Selection Approach must be changed from ***without*** discussions to ***with*** discussions if the Source Selection was initially set up to award without discussions and during the course of the evaluation it was determined that discussions with the Offerors must be held. This change will permit the Source Selection to have a Competitive Range Determination and enter into discussions as opposed to going to award. See section 2.8 "Decision Documents" for more information.

2.2 Source Selection Files

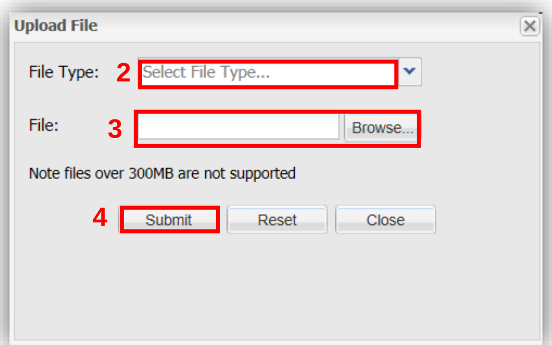
Source Selection Files provides the ability to upload and manage non-factor specific files relevant to the conduct of the Source Selection. Examples of files uploaded and managed from this page include: Source Selection Plan (SSP), Solicitation, Amendments, Evaluation Templates, Training, or Other relevant files. Files uploaded here will be accessible to ***all*** users by accessing "Documentation" from the link in the banner and then selecting Source Selection Documents tab on the left navigation panel (see section 1.6.2 "Documentation" view).

Adding a File

1. Click the ADD FILE button.



2. Select the 'File Type' from the first dropdown field in the Upload File dialog box. The 'File Type' can be used to sort all uploaded documents into categories, making it easier for users to find what they are looking for.

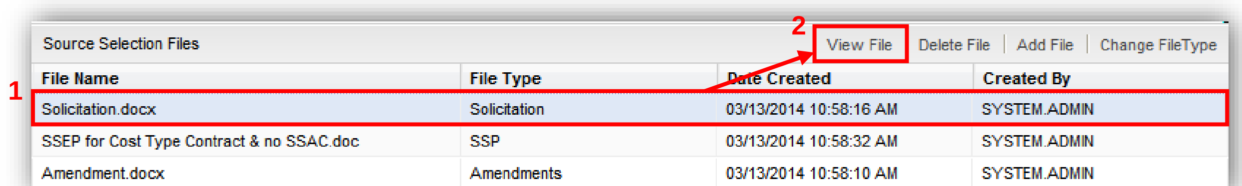


3. Click BROWSE to navigate to a local directory (or a share drive) where the files are saved. Select (single click) the file you want to add/upload then click OPEN.
   IMPORTANT! Files over 300MB are not supported and will not successfully upload into ASSIST.
4. Click SUBMIT.

The file, once uploaded, will appear in the Source Selection File grid. The Upload File dialog box will remain open to allow for further files to be uploaded until complete. When complete, click on CLOSE button to close dialog box. At any point in time, click the RESET button to return all fields to default values.

Viewing a File

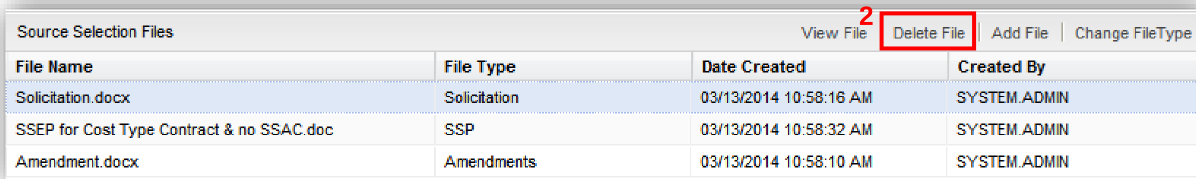
1. Select a file from the Source Selection File grid.
2. Click the VIEW FILE button located in upper right hand side of Source Selection Files grid.



3. Follow browser instructions to open or save file.

Deleting a File

1. Select a file from the Source Selection File grid (see Step 1 from viewing a file above).
2. Click the DELETE FILE button located in upper right hand side of Source Selection Files grid.

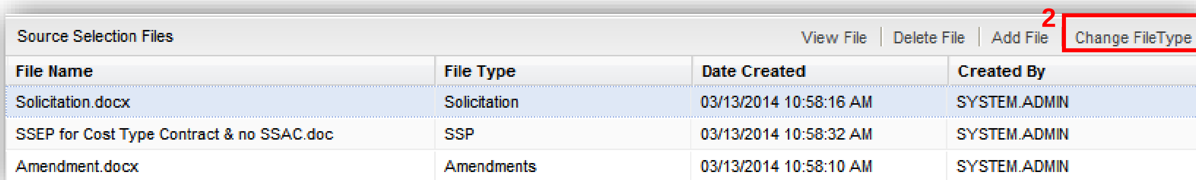


File Name	File Type	Date Created	Created By
Solicitation.docx	Solicitation	03/13/2014 10:58:16 AM	SYSTEM.ADMIN
SSEP for Cost Type Contract & no SSAC.doc	SSP	03/13/2014 10:58:32 AM	SYSTEM.ADMIN
Amendment.docx	Amendments	03/13/2014 10:58:10 AM	SYSTEM.ADMIN

3. A Dialog box will appear to confirm delete. Click YES and file will be removed.

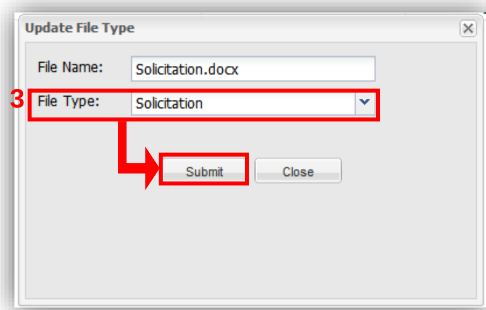
Changing File Type

1. Select a file from the Source Selection File grid (see Step 1 from viewing a file above).
2. Click the CHANGE FILE TYPE button located in upper right hand side of Source Selection Files grid.



File Name	File Type	Date Created	Created By
Solicitation.docx	Solicitation	03/13/2014 10:58:16 AM	SYSTEM.ADMIN
SSEP for Cost Type Contract & no SSAC.doc	SSP	03/13/2014 10:58:32 AM	SYSTEM.ADMIN
Amendment.docx	Amendments	03/13/2014 10:58:10 AM	SYSTEM.ADMIN

3. Select new File Type from dropdown in dialog box that appears and click SUBMIT button to change.



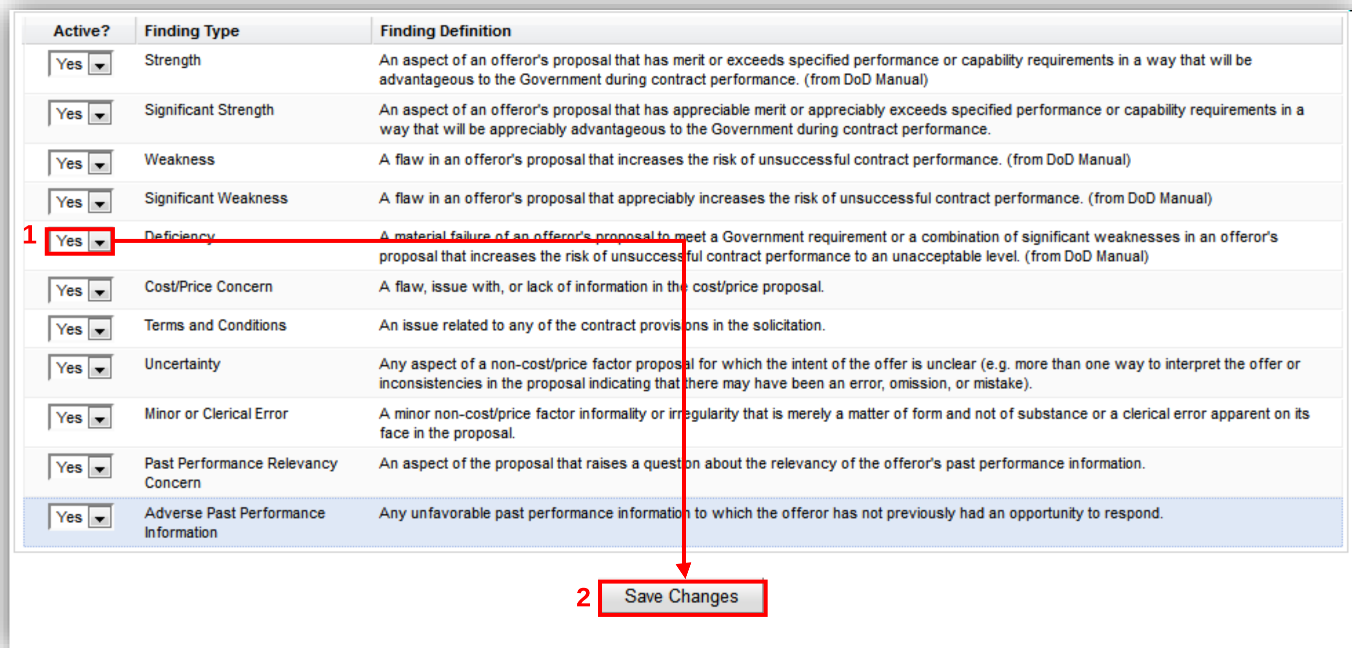
2.3 Finding Types

The term 'Finding', as used in ASSIST, refers to each individual aspect of merit (both positive and negative) that the Government evaluation team observes and documents as a result of assessing the proposal against the Government solicitation requirements. ASSIST has eleven default Findings types available for use. These types cover all possible types/categories that will be needed by a Government evaluation team. The Findings available in ASSIST are listed below. The plus (+) and minus (-) sign next to each Finding type signifies whether it is a positive or negative aspect.

Finding Type	**Finding Definition**
Strength (+)	An aspect of an Offeror's proposal that has merit or exceeds specified performance or capability requirements in a way that will be advantageous to the Government during contract performance. (***from DoD Manual***)
Significant Strength (+)	An aspect of an Offeror's proposal that has appreciable merit or appreciably exceeds specified performance or capability requirements in a way that will be appreciably advantageous to the Government during contract performance.
Weakness (–)	A flaw in an Offeror's proposal that increases the risk of unsuccessful contract performance. (***from DoD Manual***)
Significant Weakness (–)	A flaw in an Offeror's proposal that appreciably increases the risk of unsuccessful contract performance. (***from DoD Manual***)
Deficiency (–)	A material failure of an Offeror's proposal to meet a Government requirement or a combination of significant weaknesses in an Offeror's proposal that increases the risk of unsuccessful contract performance to an unacceptable level. (***from DoD Manual***)
Cost/Price Concern (–)	A flaw, issue with, or lack of information in the cost/price proposal.
Terms and Conditions (–)	An issue related to any of the contract provisions in the solicitation.
Uncertainty (–)	Any aspect of a non-cost/price factor proposal for which the intent of the offer is unclear (e.g. more than one way to interpret the offer or inconsistencies in the proposal indicating that there may have been an error, omission, or mistake).
Minor or Clerical Error (–)	A minor non-cost/price factor informality or irregularity that is merely a matter of form and not of substance or a clerical error apparent on its face in the proposal.
Past Performance Relevancy Concern (–)	An aspect of the proposal that raises a question about the relevancy of the Offeror's past performance information.
Adverse Past Performance Information (–)	Any unfavorable past performance information to which the Offeror has not previously had an opportunity to respond.

Finding Types in Administration provides the ability to specify whether a Finding type listed above is to be active or inactive for a Source Section. Active Finding types are available and able to be created by members of the Source Selection Team. Inactive types will not be available and will not be able to be created by members of the Source Selection Team. All Finding types are defaulted to 'active' for a new Source Selection. See the instruction below to change a Finding type to inactive for a Source Selection.

NOTE: The Finding types (with definitions) identified as active will be viewable to ***all*** users by accessing "Documentation" from the link in the banner and then selecting Finding Types (see section 1.6.2 "Documentation" view).



Active?	Finding Type	Finding Definition
Yes	Strength	An aspect of an offeror's proposal that has merit or exceeds specified performance or capability requirements in a way that will be advantageous to the Government during contract performance. (from DoD Manual)
Yes	Significant Strength	An aspect of an offeror's proposal that has appreciable merit or appreciably exceeds specified performance or capability requirements in a way that will be appreciably advantageous to the Government during contract performance.
Yes	Weakness	A flaw in an offeror's proposal that increases the risk of unsuccessful contract performance. (from DoD Manual)
Yes	Significant Weakness	A flaw in an offeror's proposal that appreciably increases the risk of unsuccessful contract performance. (from DoD Manual)
Yes	Deficiency	A material failure of an offeror's proposal to meet a Government requirement or a combination of significant weaknesses in an offeror's proposal that increases the risk of unsuccessful contract performance to an unacceptable level. (from DoD Manual)
Yes	Cost/Price Concern	A flaw, issue with, or lack of information in the cost/price proposal.
Yes	Terms and Conditions	An issue related to any of the contract provisions in the solicitation.
Yes	Uncertainty	Any aspect of a non-cost/price factor proposal for which the intent of the offer is unclear (e.g. more than one way to interpret the offer or inconsistencies in the proposal indicating that there may have been an error, omission, or mistake).
Yes	Minor or Clerical Error	A minor non-cost/price factor informality or irregularity that is merely a matter of form and not of substance or a clerical error apparent on its face in the proposal.
Yes	Past Performance Relevancy Concern	An aspect of the proposal that raises a question about the relevancy of the offeror's past performance information.
Yes	Adverse Past Performance Information	Any unfavorable past performance information to which the offeror has not previously had an opportunity to respond.

Making a Finding Type Active or Inactive

1. Select 'Yes' or 'No' from the dropdown in the Active column adjacent to the Finding Type to be made active or inactive.
2. Click SAVE CHANGES button.

NOTE: All Finding types are ***not*** available for each factor type (e.g. Technical, Past Performance, Small Business or Cost/Price). The Findings available to be created for each factor type is provided below. See the next section 2.4 "Factors", for more information on factor types.

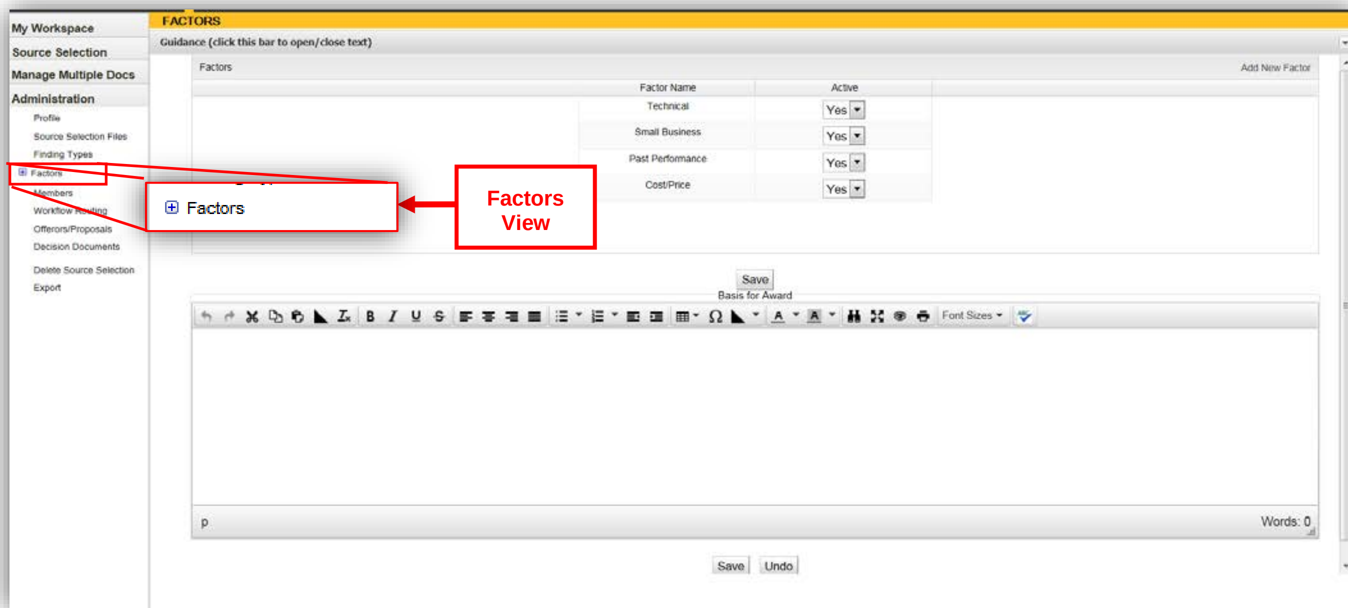
Finding Type	Factors
Strength	Technical/Past Performance/Small Business
Significant Strength	Technical/Past Performance/ Small Business
Weakness	Technical/Past Performance/ Small Business
Significant Weakness	Technical/Past Performance/ Small Business
Deficiency	Technical/Past Performance/ Small Business
Cost/Price Concern	Cost/Price
Terms and Conditions	N/A – Not associated with any factors
Uncertainty	Technical/Past Performance/ Small Business/ Cost/Price
Minor or Clerical Error	Technical/Past Performance/Small Business/ Cost Price
Past Performance Relevancy Concern	Past Performance
Adverse Past Performance Information	Past Performance

2.4 Factors

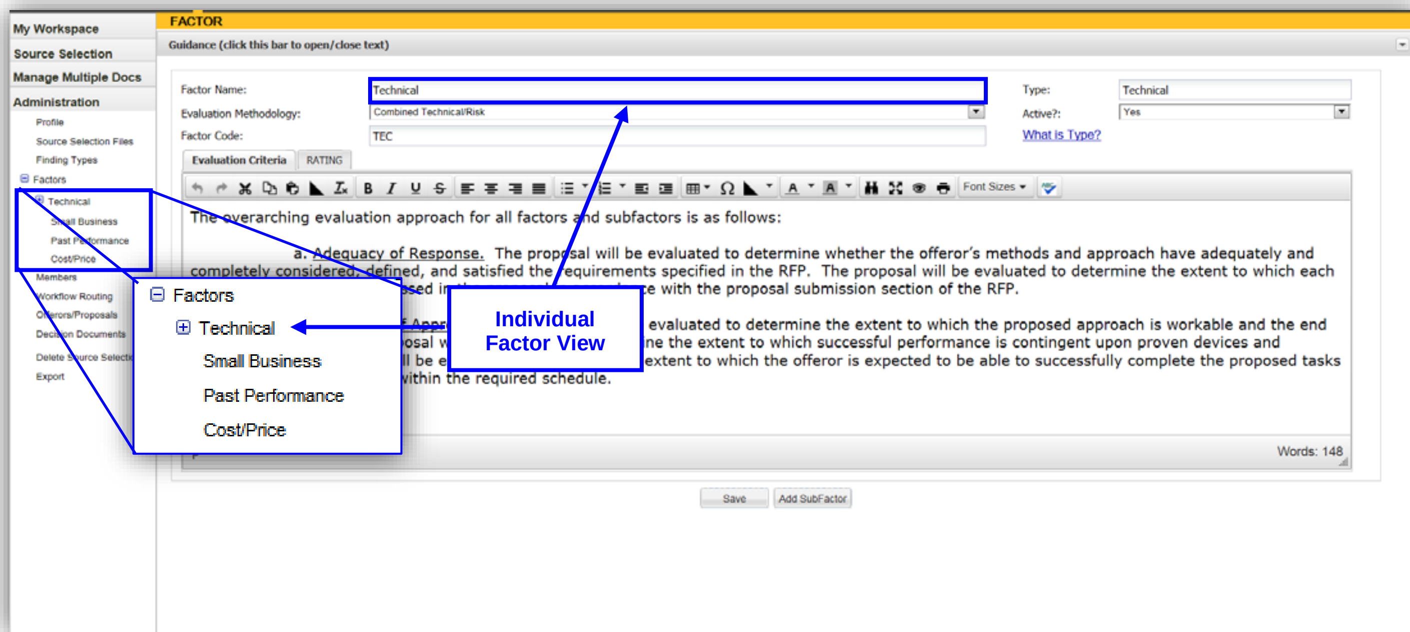
A Factor indicates the particular subject matter area that the Offeror must address in the proposal and that will be evaluated by the Government's evaluation team. The Factors component of Administration provides the ability to identify and configure the Factors for a Source Selection, enter the Basis for Award, and create/configure Subfactors for a Factor (if applicable).

The Factors component has (2) views: the main Factors view and the individual Factor view.

- **Main Factors view:** This view provides the ability to identify the Factors to be evaluated and input the Basis for Award. Subfactors are ***not*** added in this view. They are added from within the individual Factor view. The main view is accessible by clicking on the overall component heading ('Factors') under the Administration section. See section 2.4.1 "Factors View" for more information.

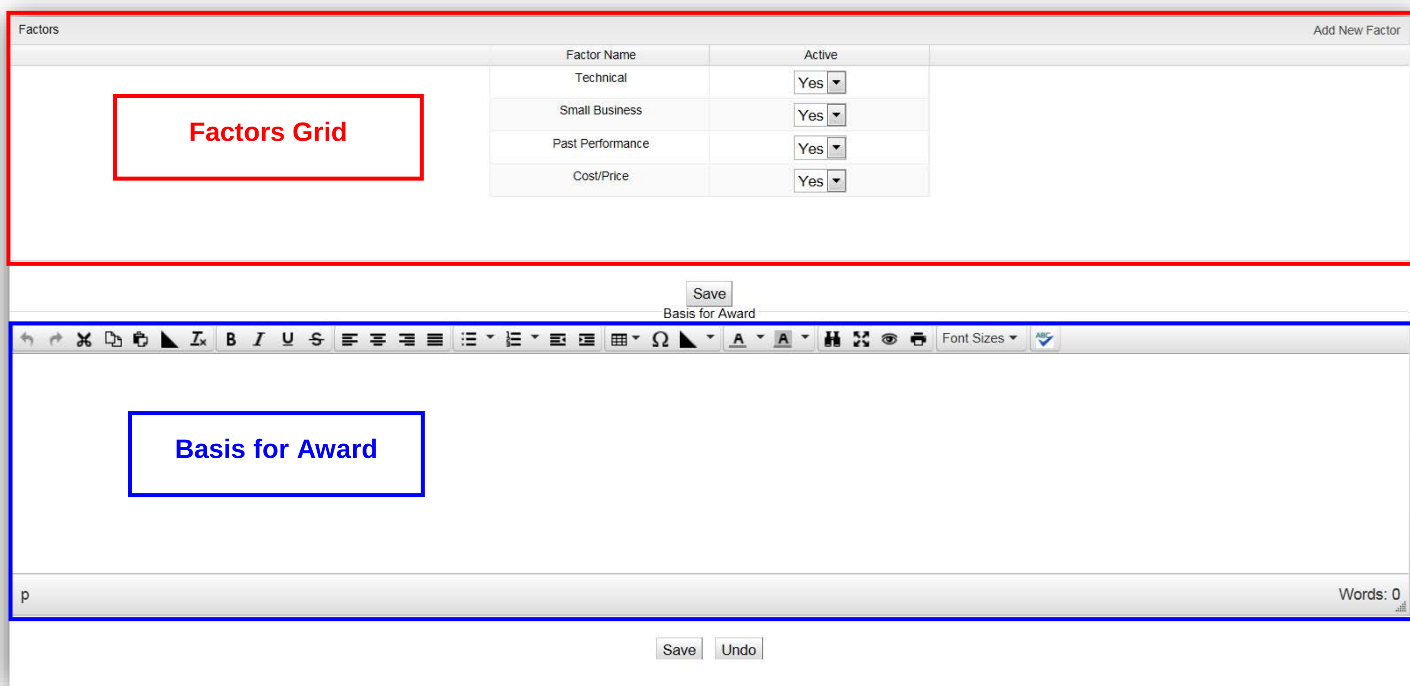


- **Individual Factor view**: Each Factor has its own view. This view provides the ability to individually configure each Factor by modifying the Factor name, selecting the evaluation methodology, identifying the factor code and entering the evaluation criteria. If applicable, Subfactors can also be created for a factor from within this view. To view each Factor and its contents, click the plus (+) sign next to the 'Factors' heading under Administration to expand the Factors tree and select a specified Factor. See section 2.4.2 "Individual Factors View" for more information.



2.4.1 Factors View

There is two main parts to the Factors View: the “Factors Grid” (section 2.4.1.1) and the “Basis for Award” (section 2.4.1.2).



2.4.1.1 Factors Grid

There are four (4) default Factor “Types” provided for every new Source Selection: Technical, Small Business, Past Performance and Cost/Price. These Factors can be seen from the Factors grid located at the top of the main factors view. The "Type" designation refers to the four (4) types of evaluation Factors prescribed in the mandatory Department of Defense (DoD) Source Selection Procedures.

The DoD prescribes the evaluation methodologies that can be used for each “Type” of evaluation Factor. The selection of the type of Factor in ASSIST provides the methodologies as prescribed by DoD. If there is more than one methodology available for use within a particular type of Factor, the appropriate methodology for an evaluation approach be can selected from the “Evaluation Methodology” dropdown located with the individual Factor view (see section 2.4.2 “Individual Factor View”). The methodologies available for use for each factor are provided below.

Factor Type	Evaluation Methodologies
Technical	Combined Technical/Risk Separate Technical/Risk Acceptable/Not Acceptable
Small Business	Combined Technical/Risk Separate Technical/Risk Acceptable/Not Acceptable
Past Performance	Performance Confidence Assessments Acceptable/Not Acceptable
Cost/Price	Not Applicable

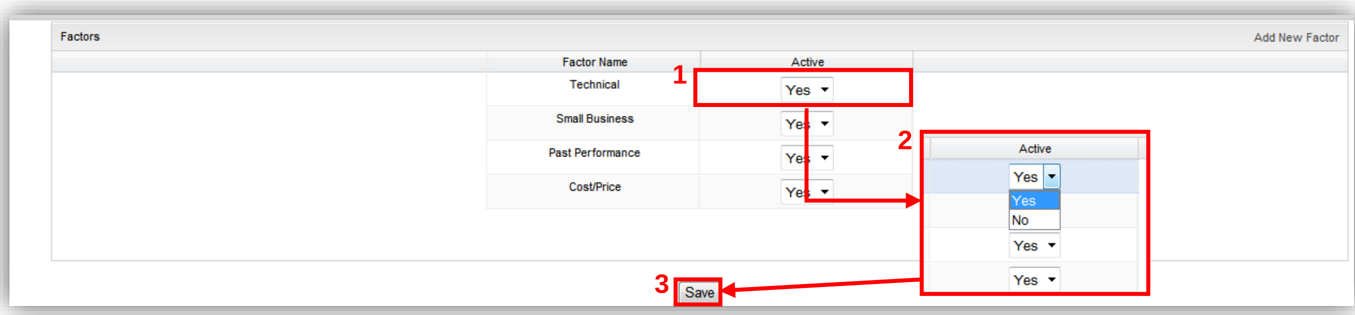
The selection of the evaluation methodology will automatically populate the prescribed rating/definitions that must be used with that methodology. The "rating" is how the end result of the evaluation of a particular subject matter area (Factor or Subfactor) will be expressed in a summary fashion. See Appendix A for the rating/definitions that will populate based upon the selected evaluation methodology.

NOTE: The selection of Lowest Price Technically Acceptable (LPTA) in the Source Selection request will limit the selection of evaluation methodologies for all non-cost/price factors to only acceptable/not acceptable ratings. If tradeoff is selected, the combined technical/risk ratings, separate technical and risk ratings, performance confidence assessments and/or acceptable/not acceptable ratings will be available for all non-cost/price factors.

From the Factors view, a default Factor can be made inactive for a Source Selection. Additionally, new Factor(s) (if needed) can be added for a Source Selection from this view (see below).

Making a Factor Inactive/Active:

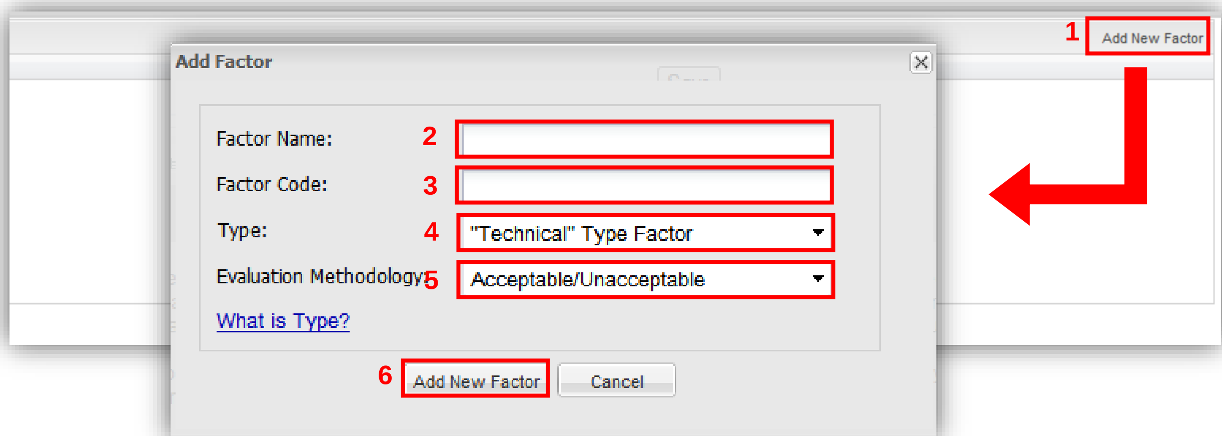
1. Click on the dropdown field in the Active column adjacent to a Factor.
2. Select ‘No’ from dropdown to make inactive. Select ‘Yes’ to make active.
3. Click the SAVE button.



Upon saving, the Factor name will appear in the grid with strikethrough (e.g. ~~Technical~~) indicating that it is no longer “active” for a Source Selection. If necessary, an inactive Factor can be made active again by returning to the Factor and changing the dropdown selection from ‘No’ to ‘Yes’ and resaving.

Adding a New Factor

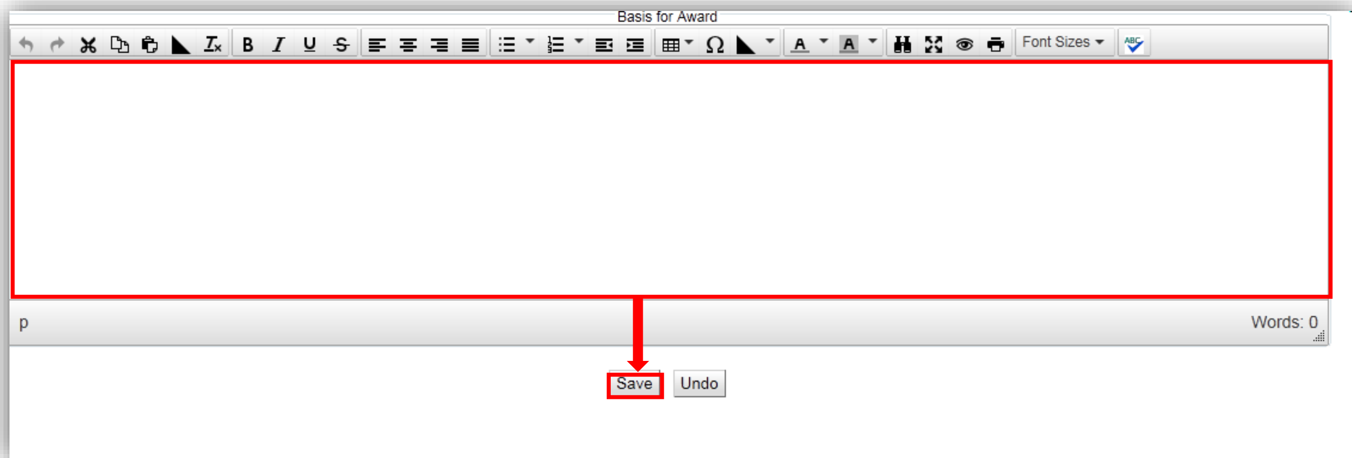
1. Click on ADD NEW FACTOR button to receive Add Factor dialog box.
2. Enter the Factor Name in provided text field (e.g. Management, Sample Tasks, etc.).
3. Enter the Factor Code in provided text field. See section 2.4.2 “Individual Factor View” for more information on the Factor Code.
4. Select the “Type” of Factor from dropdown field. Note: The "Technical" type is a generic type that should be selected for any non-Cost/Price factor other than Past Performance and Small Business.
5. Select the Evaluation Methodology for identified type of factor. This can be updated from within the individual Factor view (see section 2.4.2).
6. Click on the ADD NEW FACTOR button.
7. Confirm the addition new factor.



The added Factor will appear as a new row within the Factors grid and name of the Factor will appear under an expanded Factors tree in the stack panel. From the Factors grid an added Factor can be made inactive/active by following the same instructions provided above for a default factor.

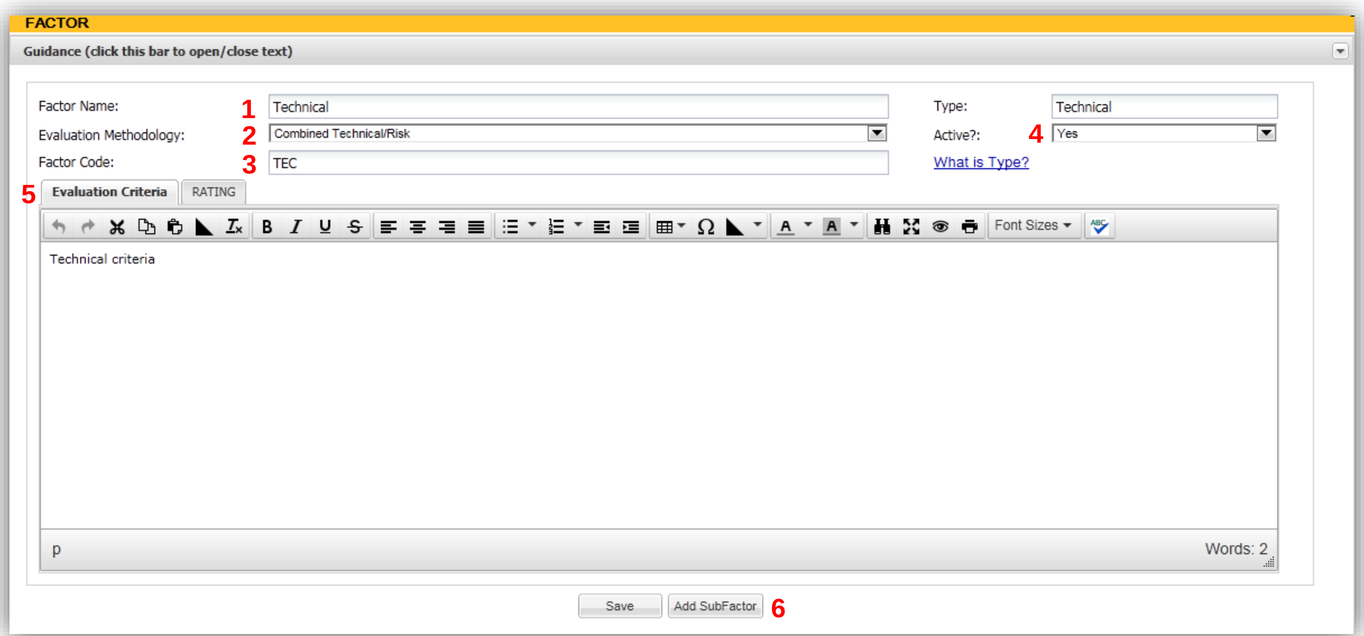
2.4.1.2 Basis for Award

Enter the Basis for Award into the rich text field provided at the bottom of the Factors view and click the SAVE button. Any text entered into the Basis for Award field will be viewable to ***all*** users by accessing “Documentation” from the link in the banner and then selecting Basis for Award (see section 1.6.2 “Documentation” view).



2.4.2 Individual Factor View

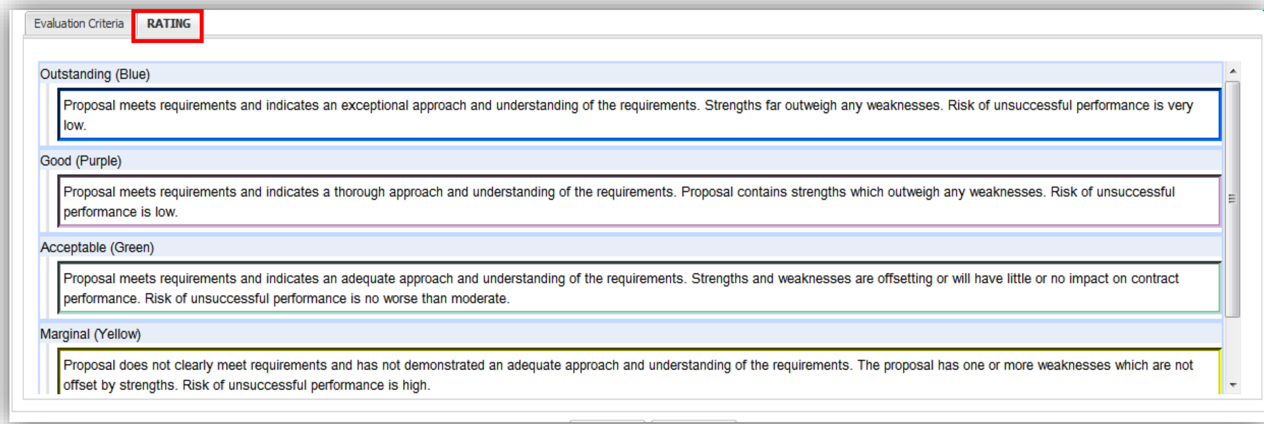
This view provides the ability to individually configure each Factor. A separate view is available for each 'active' default Factor. An 'inactive' Factor will not have a view within ASSIST. A new view will be created for any added Factor. To configure a Factor, modify or update any of the fields identified below and click on SAVE button when complete.



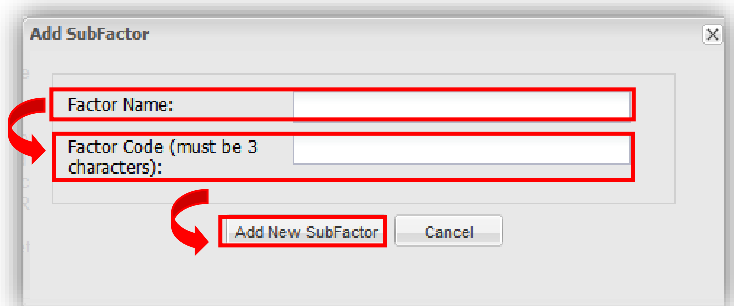
Configuring a Factor

1. **Factor Name:** Enter the name of a Factor. The name, as identified within this field, will be how the Factor appears in all other views within ASSIST.
2. **Evaluation Methodology:** Select the evaluation methodology for the Factor. The methodologies that will appear in the dropdown field are dependent upon whether the Source Selection is LPTA or Tradeoff (see section 1.5 "How to Request Use of ASSIST") and the selected factor "Type" (see above). The selection of the evaluation methodology will automatically populate the prescribed rating/definitions that must be used with that methodology. The ratings/definitions can be seen by clicking on the ratings tab (see below). The ratings/definitions for each factor are viewable to ***all*** users by accessing

"Documentation" from the link in the banner, selecting the Factor, and then clicking on RATINGS (see section 1.6.2 "Documentation" view).



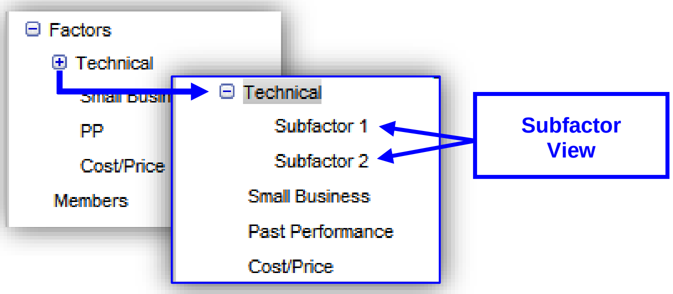
3. **Factor Code:** Enter a Factor Code. A Factor code can be 1-3 characters in length. The code is part of the identifier assigned by the system to each Finding/Evaluation Notice (EN) created within ASSIST. See Findings/ENs in Evaluation Results for more information on the Finding/EN identifier. The Factor Code will be prepopulated for a default Factor. A user can modify or update the prepopulated code as required.
4. **Active:** Identify from within the Factor whether Factor is active or inactive for the Source Selection. Change dropdown from 'yes' to 'no' and click the SAVE button to make the Factor inactive. The Factor will be removed from the stack panel. It will appear in the Factors grid with a strikethrough. The Factor will no longer be able to be accessed once leaving the view unless the Factor is made 'active' again. This action can be performed from the main factors view (see section 2.4.2 "Individual Factor View" above).
5. **Evaluation Criteria:** Enter the Evaluation Criteria for the Factor into the rich text field provided at the bottom of the view. Any text entered in this field will be viewable to ***all*** users (based on their assigned role in the source selection*) by accessing "Documentation" from the link in the banner and then selecting the Factor (see 1.6.2 "Documentation" view). *NOTE: If a user is assigned to the Technical Factor team, then ***all*** users of that team will see the Technical Factor information. If a user is assigned to the Past Performance Factor team, then those team members will be unable to view information for the Technical Factor, unless a user is assigned dual roles for Technical and Past Performance then that user would see information for both Factors.
6. **Add Subfactors (if applicable):** Click on the ADD SUBFACTOR button to create a Subfactor for the Factor. Complete the dialog box (see below) that appears after clicking the button by entering the name of the Subfactor in the Factor Name field and entering the 1-3 character in length code to be used when assigning the identifier to each Finding/EN created in ASSIST for the Subfactor. This code can be different than the code used for the overall factor. When finished click on the ADD NEW SUBFACTOR button to create the Subfactor.



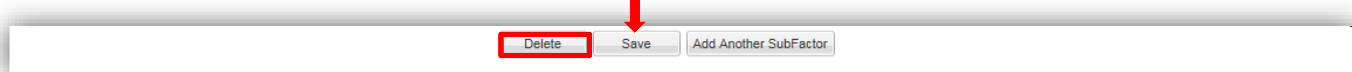
Upon clicking ADD NEW SUBFACTOR, the user will be brought to the individual Subfactor view. The Subfactor view looks the same as the Factor view. Similar to the Factor view, the Subfactor view provides the ability to modify or update the name of the Subfactor name, the Subfactor Code, and the evaluation criteria. The evaluation methodology, however, **cannot** be changed from within the Subfactor view. **The evaluation methodology for the Subfactor will be the same as the parent Factor (the factor the Subfactor was created for).**

Upon configuring the Subfactor, click on the SAVE button and navigate to another view within ASSIST or click on ADD ANOTHER SUBFACTOR to continue adding Subfactors for the factor.

Added Subfactors will appear under the associated Factor in the stack panel. Click the plus (+) sign next to the parent Factor to expand the tree to select and view a Subfactor.

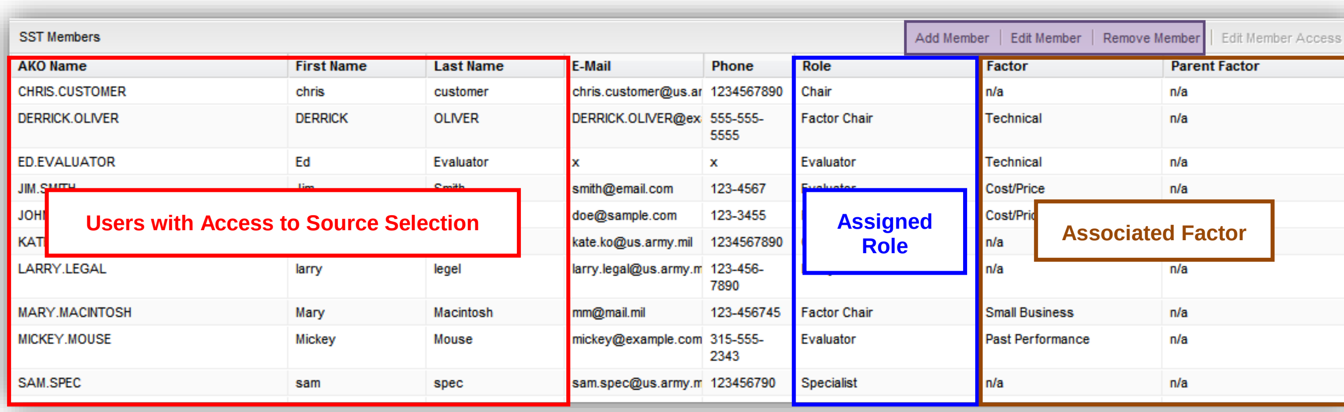


NOTE: A Subfactor can be deleted. This is performed by clicking on the DELETE button located at the bottom of this view. A deleted Subfactor is completely removed from ASSIST. All changes to any field within the Subfactor view will be lost if the delete action is taken.



2.5 Members

The source selection is accomplished by a team that is tailored to the unique acquisition. This team, known as the Source Selection Team (SST), is tasked with carrying out the Source Selection evaluation. The SST Members grid in the Members view displays the users with access to the Source Selection, their roles, and (if applicable) the factor they are associated with.



AKO Name	First Name	Last Name	E-Mail	Phone	Role	Factor	Parent Factor
CHRIS.CUSTOMER	chris	customer	chris.customer@us.ar	1234567890	Chair	n/a	n/a
DERRICK.OLIVER	DERRICK	OLIVER	DERRICK.OLIVER@ex	555-555-5555	Factor Chair	Technical	n/a
ED.EVALUATOR	Ed	Evaluator	x	x	Evaluator	Technical	n/a
JIM.S[illegible]	[illegible]	[illegible]	smith@email.com	123-4567	[illegible]	Cost/Price	n/a
JOH[illegible]	[illegible]	[illegible]	doe@sample.com	123-3455	[illegible]	Cost/Pri[illegible]	[illegible]
KAT[illegible]	[illegible]	[illegible]	kate.ko@us.army.mil	1234567890	[illegible]	n/a	[illegible]
LARRY.LEGAL	larry	legel	larry.legal@us.army.m	123-456-7890	[illegible]	n/a	n/a
MARY.MACINTOSH	Mary	Macintosh	mm@mail.mil	123-456745	Factor Chair	Small Business	n/a
MICKEY.MOUSE	Mickey	Mouse	mickey@example.com	315-555-2343	Evaluator	Past Performance	n/a
SAM.SPEC	sam	spec	sam.spec@us.army.m	123456790	Specialist	n/a	n/a

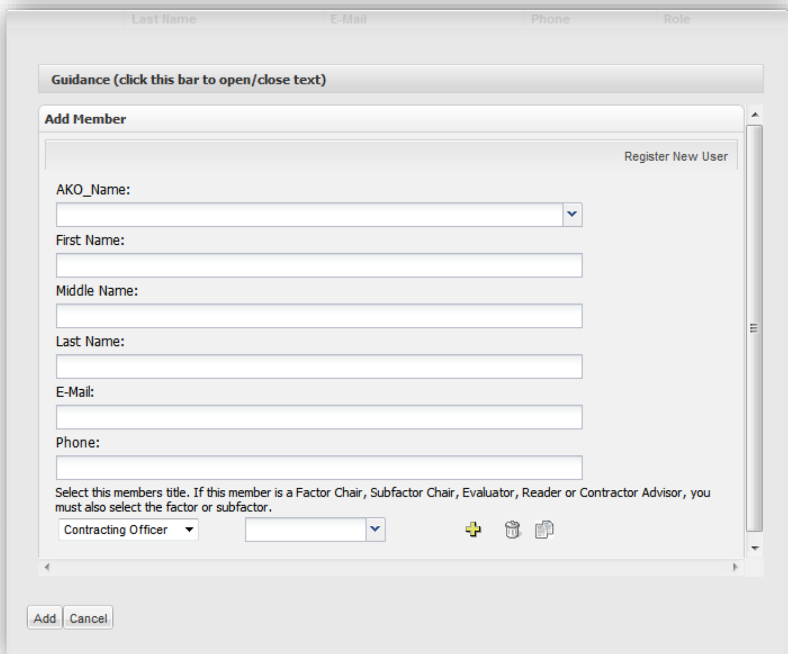
From the Members view the composition of this team can be managed using any of the three (3) available action buttons located in the upper right hand corner of the SST Members Grid (highlighted in purple above). The three (3) actions are ADD MEMBER, EDIT MEMBER and REMOVE MEMBER.

2.5.1 Adding a Member

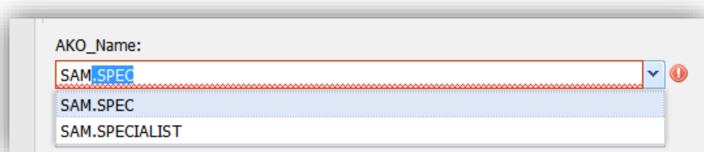
A user will only be able to access a Source Selection if they have an ASSIST Account and are assigned a role within a Source Selection. The ADD MEMBER action provides the ability to create or use an existing ASSIST Account to assign a user access to a Source Selection.

Instructions for Adding a Member

1. Click 'Add Member' button to receive dialog box below.

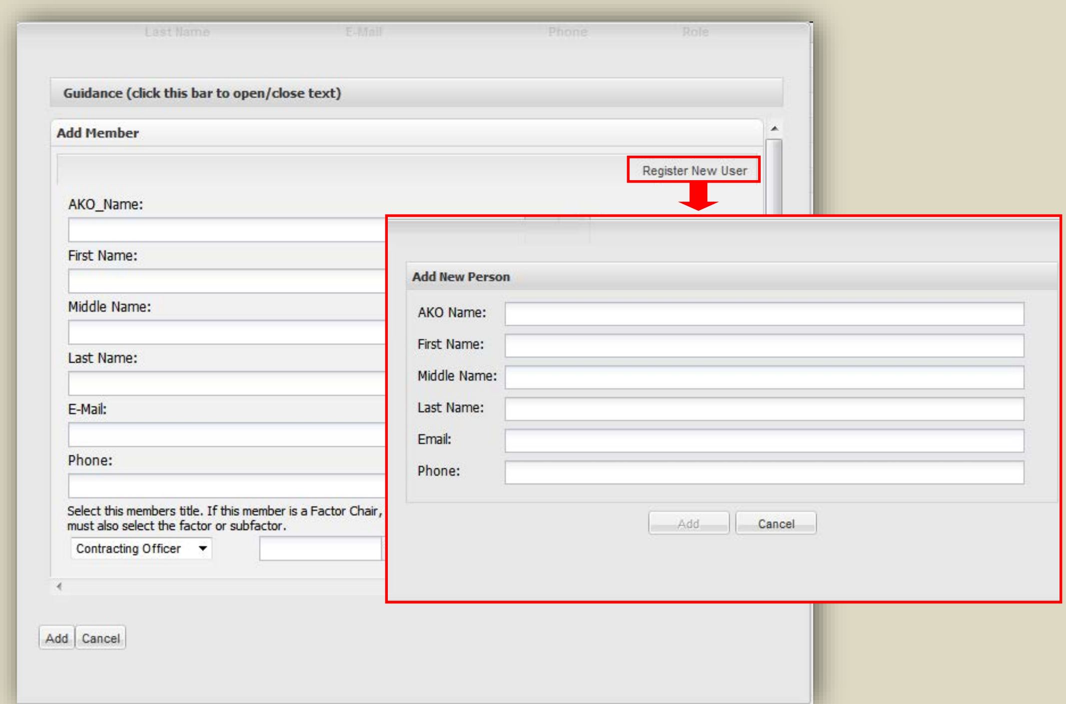


2. Type in the AKO NAME of user to be added to Source Selection. This field is "type ahead" enabled. If user has an exisiting ASSIST acount, the AKO username will appear in a dropdown as it is being entered.



3. Click on the AKO Username name from dropdown. The Remaining fields will be automatically populated (first name, middle name, last name, email and phone).

NOTE: If the AKO username does not appear, the user does not have an existing ASSIST Account. An ASSIST Account must therefore be created before user can be assigned a role within the Source Selection. Click on the "REGISTER NEW USER" button to create an Account.



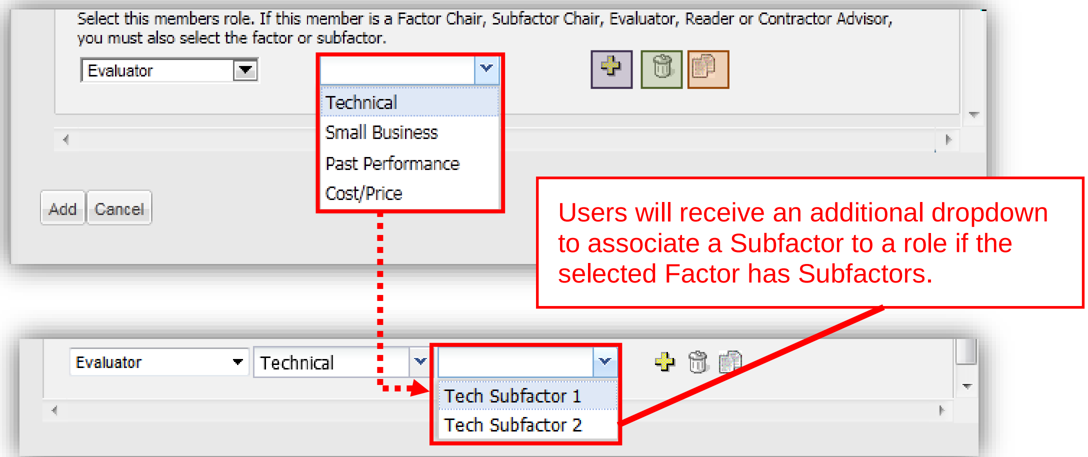
Complete all fields in dialog box that appears upon clicking button. **DO NOT** include @us.army.mil in AKO NAME. Also, a Middle Name does not have to be identified. Upon completion, click on ADD button to create ASSIST ACCOUNT. After creating new account return to Step 2 above.

4. Select a role to assign to the new user from the dropdown located at bottom of the dialog box. There are 14 available roles in ASSIST (see below).

Contracting Officer	Factor Chair	Reader
Contract Specialist	Subfactor Chair	Reader All
Lawyer	Evaluator	Contractor Advisor
Chair	SSA	SSEB Admin
Deputy Chair	SSAC	

Appendix B provides a general description/available tasks for each role. Appendix C provides a complete list of actions/permissions available for each role. Finally, Appendix D displays which views within ASSIST are available to a user based upon their assigned role.

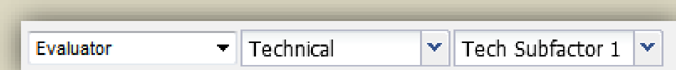
4a. If the user is assigned a role of Factor Chair, Subfactor Chair, Evaluator, Reader or Contractor Advisor, select the associated Factor and (if applicable) the Subfactor for the role. Depending upon the specific role of the user, that individual may be able to create, edit, or view documents/files within an associated Factor or Subfactor. A user that is assigned a role of Contracting Officer, Contract Specialist, Lawyer, Chair, and Deputy Chair, (depending upon the specific role) that user may be able to create, edit, or view documents/files for all Factors and Subfactors. SSA, SSAC or Reader All will be able to only view documents/files for all Factors and Subfactors. The ability to create, edit and view will depend upon a user's assigned role (e.g. Evaluator, Reader, etc.) See Appendix B for more information.



4b. A user can be assigned to more than one role. Click on the plus icon (highlighted in purple above) to receive a new row where an additional role can be assigned. To remove a role, click on the trash can icon (highlighted in green). If assigned the same role to multiple Factors/Subfactors, click on the copy icon (highlighted in orange) to clone the role and select a different Factor/Subfactor to associate to the role.

NOTE: A user that is assigned to a role of Subfactor Chair, Evaluator, Reader or Contractor Advisor can be associated to a Subfactor. Document access (i. e. create, edit or view) will be restricted to the associated Subfactor. No access will be provided to documents for the other Subfactors within the Factor or documents for the overall Factor unless specified when adding the new user.

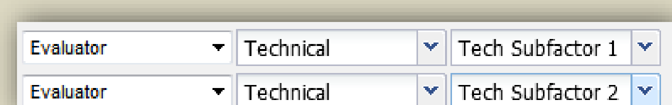
Example:



Access ***ONLY*** documents for Tech Subfactor 1

Use the clone feature to assign additional roles and associate additional Subfactors or Factors if further access is required.

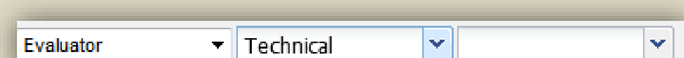
Example:



Access documents for Tech Subfactor 1 and Tech Subfactor 2

HELPFULL HINT! Leave the Subfactor dropdown blank if user requires access as same role to all Subfactors within a Factor and the overall Factor. **<u>If a Subfactor is not associated to the role, the user will be granted access to everything within the Factor.</u>**

Example:



Access **ALL** documents for Tech Factor (Tech Subfactor 1, Tech Subfactor 2 & overall Tech Factor)

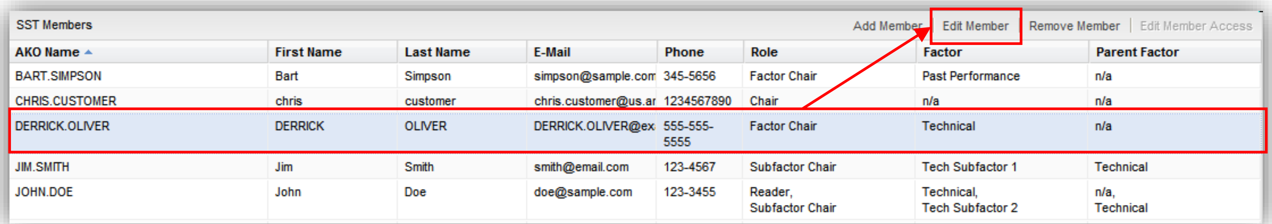
5. Click ADD button. User will be assigned role within the SST and will be granted access to the Source Selection. A new row will appear in SST grid for added user.

2.5.2 Editing a Member

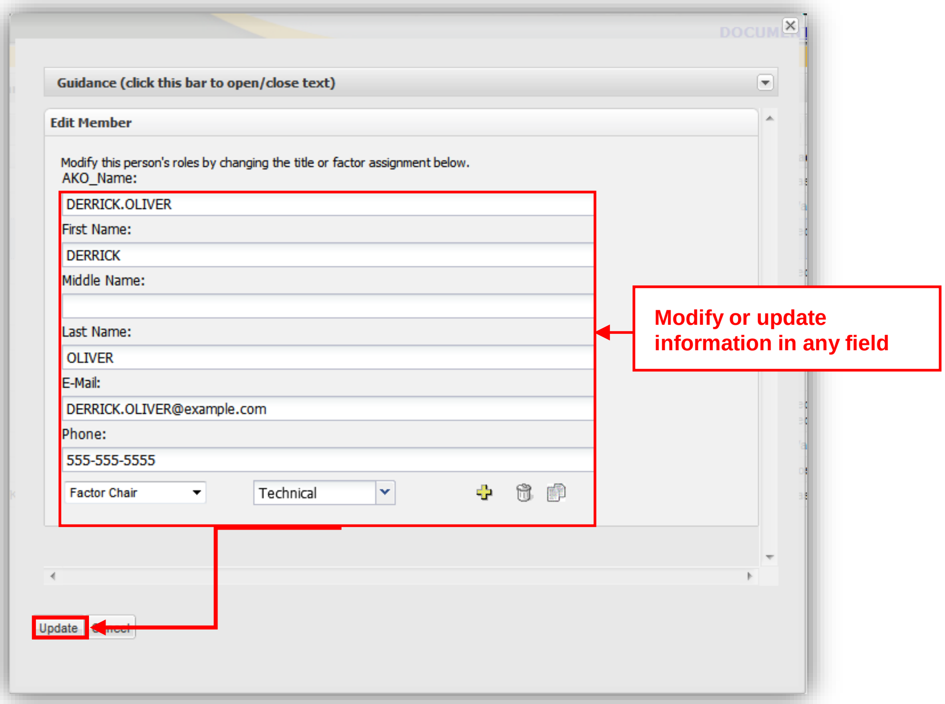
The EDIT MEMBER action provides the ability to update a user's ASSIST Account (e.g. modify AKO name, name or update email/telephone number) or modify a user's role(s) with the SST (e.g. change associated factor/Subfactors, add a new role or remove an existing role).

Instructions for Editing a Member

1. Select user from the SST Members grid and click EDIT MEMBER.



2. Modify or update the user's ASSIST Account information or role(s) in the dialog box.



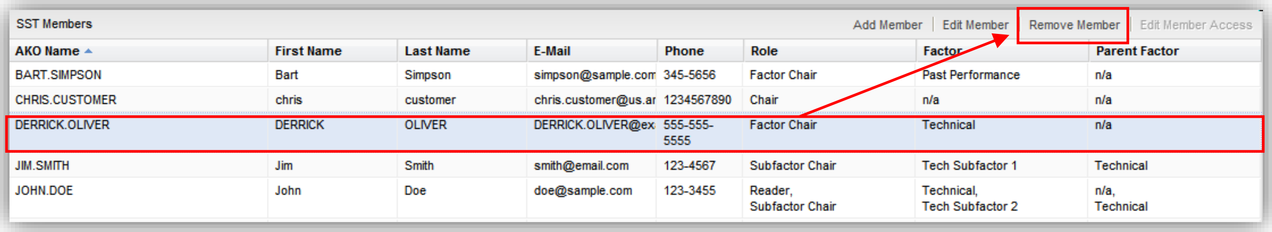
3. Click UPDATE button to submit changes.

2.5.3 Removing a Member

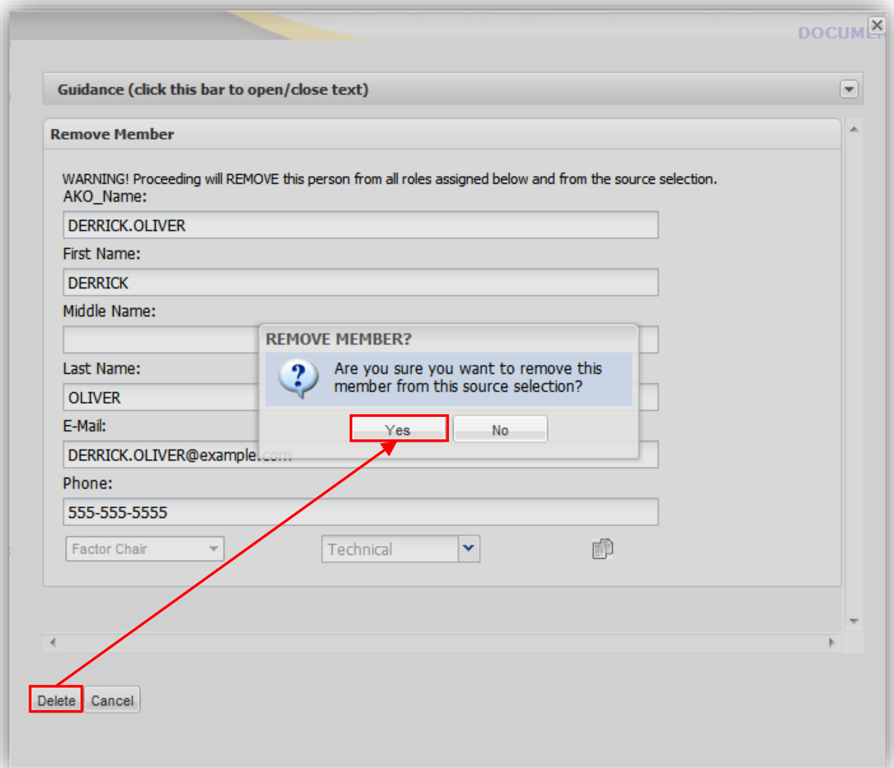
A user can be removed from the SST. Removing a user will take away all access to the Source Selection.

Instructions for Removing a Member

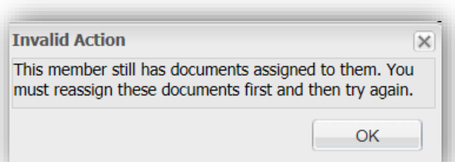
1. Select user from the SST Members grid and click REMOVE MEMBER.



2. Dialog box will appear displaying user's information. Click on the DELETE button located at the bottom of the dialog box and then confirm that user is to be removed from SST by clicking 'YES' in received prompt.



NOTE: If a user has authored any documents in ASSIST, he or she will be unable to be removed from the source selection until the user's documents are reassigned to another user. The REASSIGN AUTHOR action can be performed from any document view in My Workspace or Source Selection. See section 3.4 "Document Actions" for more information on reassigning documents. An "Invalid Action" prompt with be received until all documents have been reassigned. This prompt will indicate that the selected user still has documents assigned to them. Reassign these documents first and then try again.



2.6 Workflow Routing

Three (3) document types can be created in ASSIST for an evaluation: Findings/ENs, Evaluations, and Summaries. Each document created within ASSIST, no matter the type, is routed through a review/approval workflow.

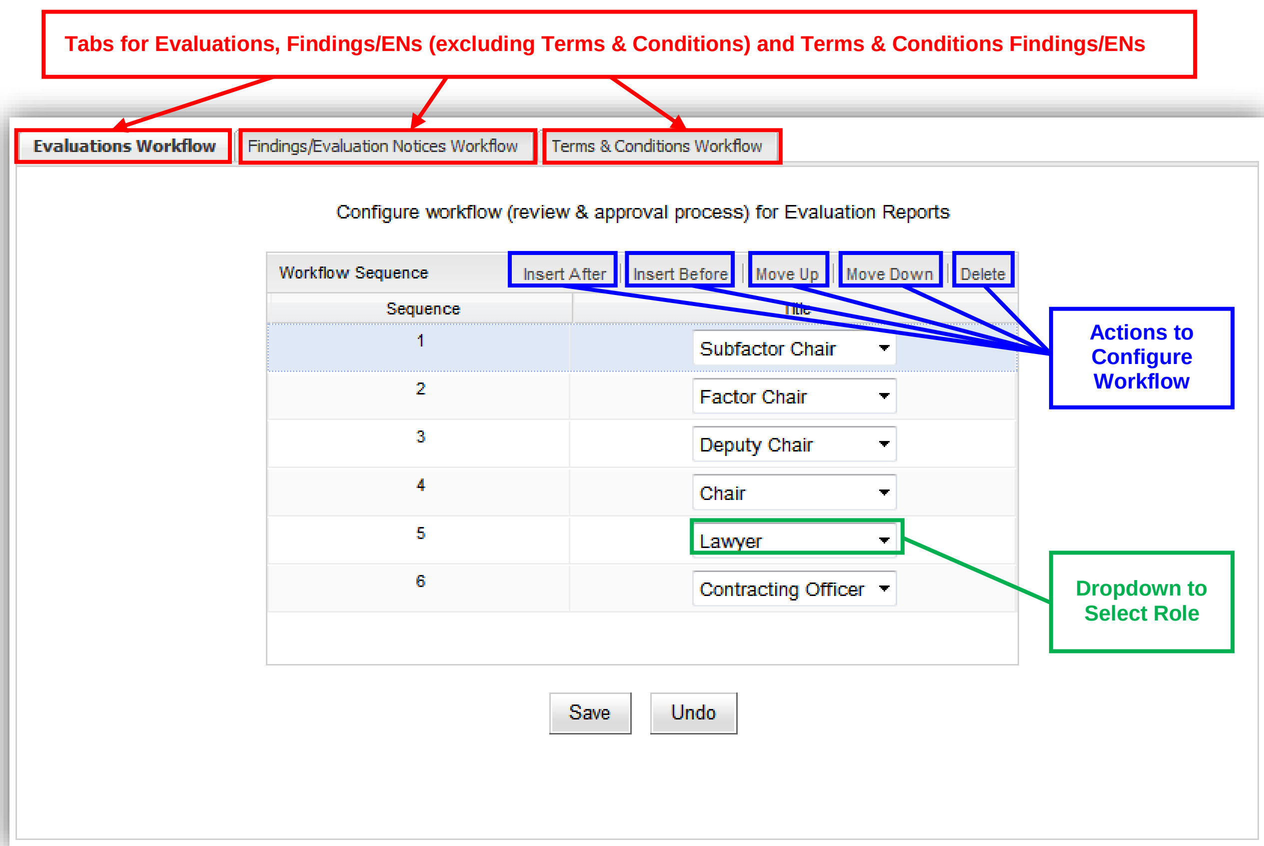
Document Type	User Defined*	System Defined
Findings/ENs	X	
Evaluations	X	
Summaries		X

***Defined in Workflow Routing under ADMINISTRATION tab.**

As seen above, the user can configure and define the sequence of reviewers/approvers in the workflow for Evaluations and Findings/ENs. The sequence for Summaries, however, **cannot** be configured by the user. It is defined in ASSIST and **cannot** be changed. The workflow sequence for a Summary is:

Document Generator (Author) → Subfactor Chair (if applicable) → Factor Chair →FINAL (Approved)

The workflow sequence for Findings/ENs and Evaluations is defined by the user. Two (2) workflows can be configured for Findings/ENs, i.e. a workflow can be defined for all Findings/ENs excluding Terms & Conditions (e.g. Strengths, Weaknesses, Uncertainties, Cost/Price Concerns, etc.) and a workflow can be defined for Terms & Conditions Findings/ENs. Three (3) tabs that run across the top of the Workflow Routing area provide the user the ability to view and configure these workflows.



A default workflow is provided for each document type for each new Source Selection. Click on a tab to view and (if necessary) configure the workflow for selected document. **The workflow sequence can be configured until the first document (Finding/EN, Evaluation, or Summary) is created/saved in the ASSIST. After the first document is created and saved, the workflow sequence CANNOT be changed.**

NOTE: The workflow sequences displayed in Workflow Routing only includes reviewers/approvers. The document generator (author of document) is not displayed here (the first role listed in the workflow sequence is the first reviewer/approver).

Configuring a Workflow

The roles below can be included in a workflow sequence as reviewers/approvers. These roles are available from within the dropdown located in the right column (column titled Role). **If required, a role can be included in sequence more than once.**

Contracting Officer	Chair	Subfactor Chair
Contract Specialist	Deputy Chair	Evaluator
Lawyer	Factor Chair	

Five (5) actions are available to configure the sequence of these roles in the workflow: INSERT AFTER, INSERT BEFORE, MOVE UP, MOVE DOWN, and DELETE. To initiate one of these actions, click on the corresponding action buttons located in the upper right hand corner of the Workflow sequence view (see above). A description of the resulting action when each button is clicked upon is provided below. Make all necessary updates/changes using these actions and then click SAVE. To reset workflow sequence to previously saved sequence (undoing any changes/updates), click UNDO.

Action	Resulting Action
Insert After	Inserts a new row in the sequence **after** the selected sequence/role. The specific role can then be selected from the dropdown in the new row.
Insert Before	Inserts a new row in the sequence **before** the selected sequence/role. The specific role can then be selected from the dropdown in the new row.
Move Up	Moves the position of the selected sequence/role **up** in the workflow. Role will be required to review/approve a document prior to previously identified position in sequence.
Move Down	Move the position of the selected role **down** in the workflow sequence. Role/title will be required to review/approve document after previously identified position in sequence.
Delete	Removes selected sequence/role from workflow.

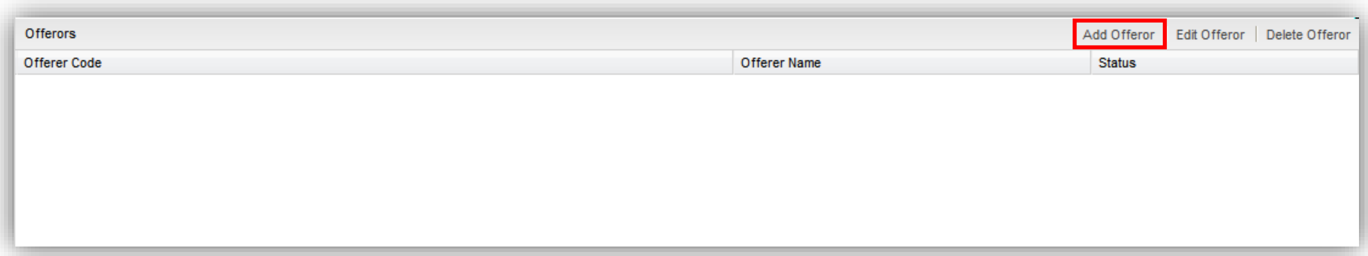
2.7 Offerors/Proposals

This component of Administration provides the ability to create and manage the Offerors to be evaluated in the Source Selection. **Only the Contracting Officer, Contract Specialist and Administrators have access to this view.** Offeror information and any other relevant to the conduct of the Source Selection (e.g. the proposal files) is provided to the remaining users in other views within ASSIST (e.g. Documentation) based upon their assigned role within the Source Selection Team. See section 2.5 “Members” for more information on roles and their associated access.

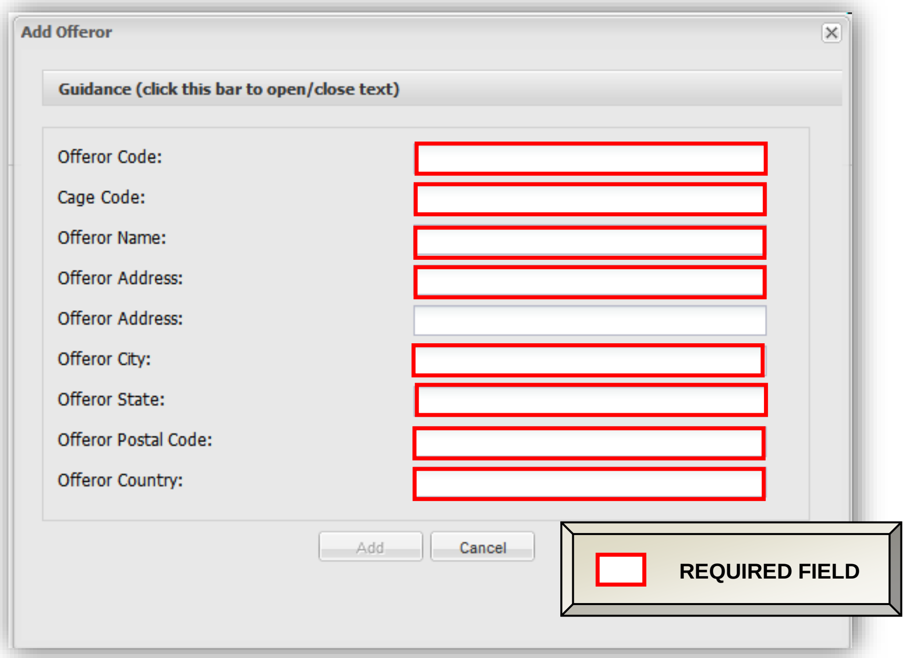
IMPORTANT: An Offeror added in the Offerors/Proposals section must be evaluated in ASSIST. Do not include an Offeror that will not be evaluated.

Instructions for Adding an Offeror

1. Click on ADD OFFEROR button located in upper right hand corner of Offerors grid.

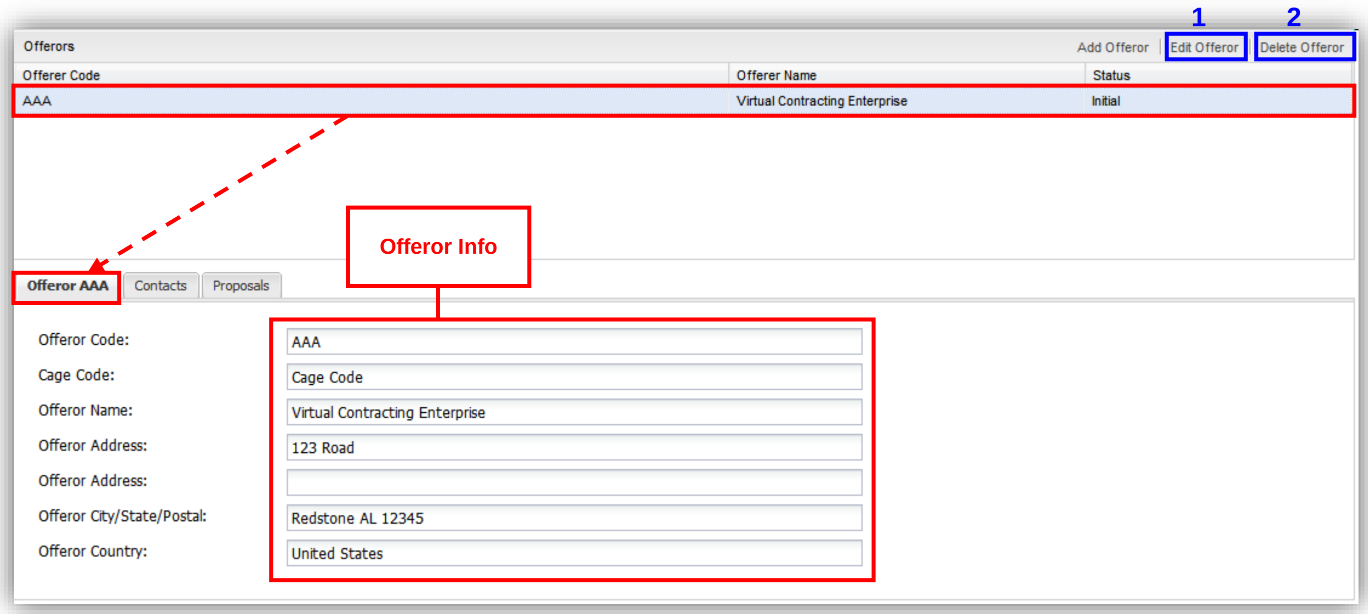


2. Complete the dialog box. All fields (excluding the second Address field) are required to be filled in before an Offeror can be added. **The Offeror Code is how the Offeror will be identified to the Source Selection Team throughout the other views in the application (e.g. My Documents, Source Selection, Documentation, etc.)**. The Code can be 1-3 characters in length.



3. Click ADD.

An added Offeror will appear as a new row in the Offerors grid. Select an Offeror from the grid to view that Offeror's complete information (see below).



An Offeror can be updated/modified after it is created. To edit an Offeror follow the instructions below.

Editing an Offeror Profile

1. Select an Offeror from grid.
2. Click EDIT OFFEROR (button #1 above).
3. Update/modify any of the fields in the dialog box.
4. Click UPDATE.

If necessary, an Offeror can be deleted from ASSIST. A deleted Offeror is no longer able to be evaluated in ASSIST. To remove an Offeror follow the instructions below.

Deleting an Offeror

1. Select an Offeror from grid.
2. Click DELETE OFFEROR (button #2 above).
3. Click DELETE in dialog box to confirm that Offeror is to be removed.

NOTE: An Offeror can only be deleted if there are no files (e.g. proposal files) and documents (e.g. Findings/ENs, Evaluation and Summaries) associated with the Offeror.

Offeror Tabs

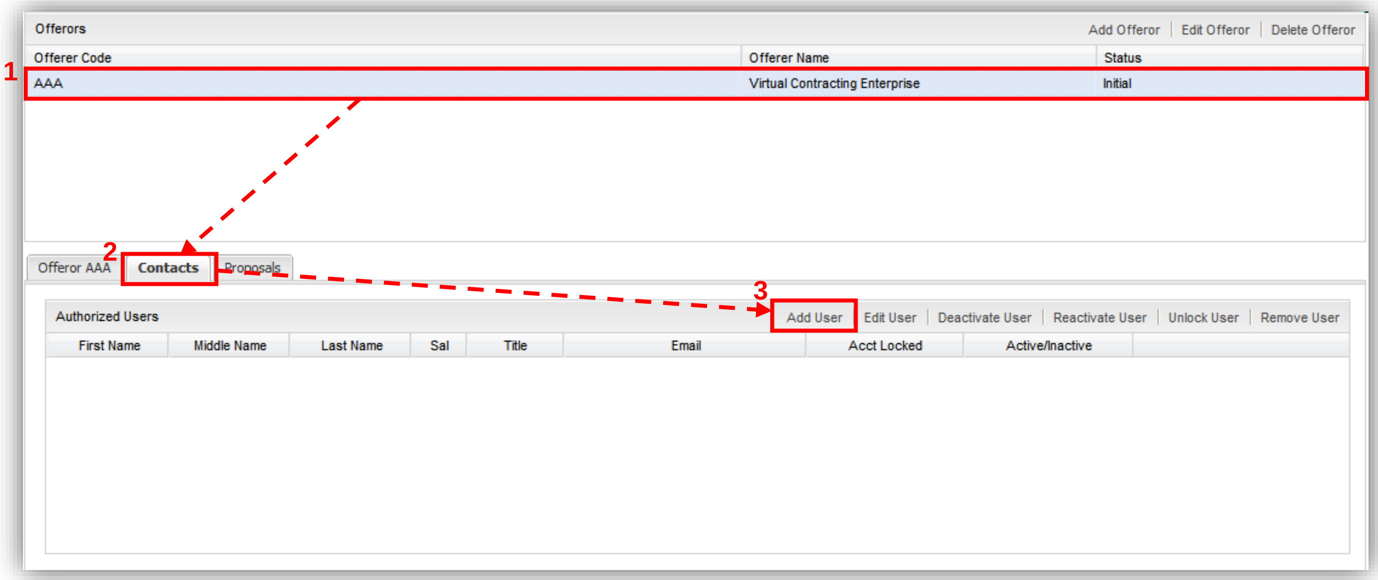
There are two (2) additional parts to each Offeror: Contacts, Proposals and Subcontractors. These parts can be accessed by clicking on the appropriately named tab located adjacent to the Offeror Information.

- Contacts: Individual(s) identified by Offeror to have access to ASSIST2Industry. For more information on ASSIST2Industry see Section 5.0 “Exchanges with Offerors”.
- Proposals: Files submitted by an Offeror that make up their proposal.

2.7.1 Offeror Contacts

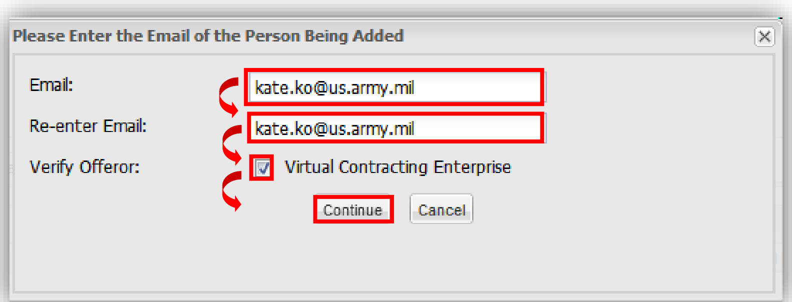
ASSIST2Industry is used in conjunction with ASSIST to accomplish all exchanges with Offerors after receipt of proposals pursuant to Federal Acquisition Regulation (FAR) 15.306 by providing Offerors the ability to receive and respond to ENs in a secure online environment. See section 5.0 “Exchanges with Offerors” for more information regarding ASSIST2Industry. In order to initiate the use of ASSIST2Industry, the names, company titles, telephone numbers, and email addresses of the individuals that an Offeror has designated as responsible for receiving and responding to ENs through ASSIST2Industry must be input in the Contacts tab of an Offeror's profile.

NOTE: The required information regarding these individuals should be submitted with the Offeror's proposal and included in the cover letter. Appendix E has sample language that can be incorporated as part of the proposal submission instructions in a solicitation.

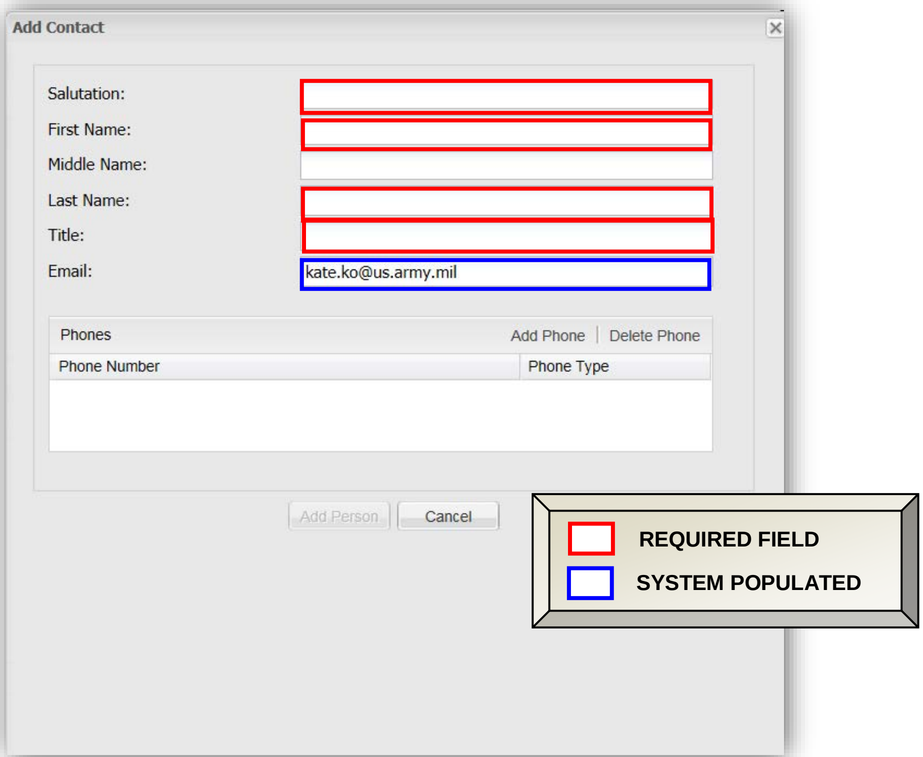


Adding a Contact

1. Select an Offeror from grid.
2. Click on CONTACTS tab.
3. Click ADD USER
4. Enter email address of Contact and verify that Contact is to be set for identified Offeror. Then click CONTINUE.



5. Complete fields within dialog box.



6. Click ADD PERSON.

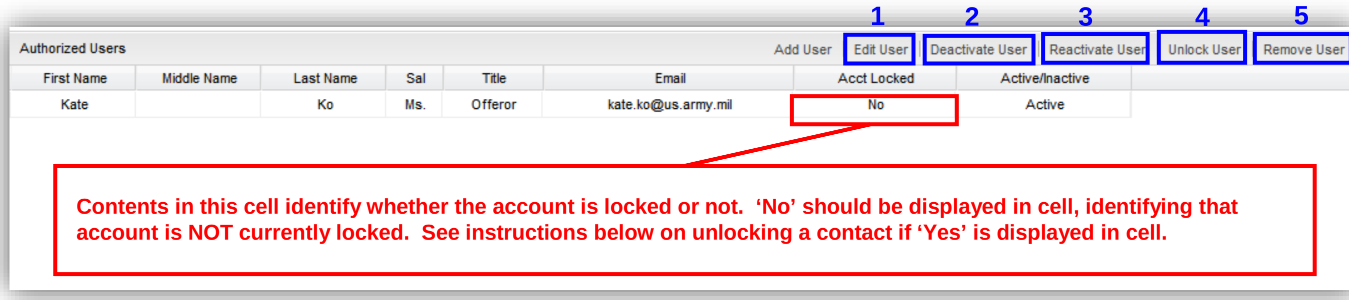
NOTE: Two (2) separate system generated emails are sent to an individual **immediately** upon being added. One of the emails will contain the individual's ASSIST2Industry username. The other email will contain the individual's temporary password. Using the provided username and temporary password, each individual can then go to https://assist2industry.army.mil. The emails sent to the Offerors can be seen in Appendix F.

HELPFULL HINT! Do not add a Contact for an Offeror until there is a task in ASSIST2Industry to be accomplished (e.g. respond to EN or submit proposal files in response to ENs).

Managing Contacts

There are five (5) actions that can take place with regard to Contacts:

- Edit User: Update/modify the Contact (e.g. salutation, name, title, email, and telephone number) for selected Contact.
- Deactivate User: Remove/suspend access to ASSIST2Indusry for selected Contact. User will remain assigned to Offeror in Contacts tab but status will be changed from 'active' to 'inactive'. Access can be restored at a later point in time. However, the user will not be able to access ASSIST2Industry for the Source Selection while inactive.
- Reactivate: For an inactive user, restore access to ASSIST2Industry for a Source Selection.
- Unlock User: Unlock a locked Contact (e.g. locked as a result of too many failed login attempts).
- Remove User: Completely remove a Contact, their profile, and access from a Source Selection.



Editing a Contact

1. Select a Contact from grid.
2. Click EDIT USER (see #1 above).
3. Update/modify any of the fields in the dialog box.
4. Click UPDATE PERSON.

Deactivating

1. Select a Contact from grid.
2. Click DEACTIVATE USER (see #2 above)
3. Click DEACTIVATE USER in dialog box to make account *inactive*.

Reactivating a Contact

1. Select a Contact from grid.
2. Click REACTIVATE USER (see #3 above)
3. Click REACTIVATE USER in dialog box to make account *active*.

Unlocking a Contact

1. Select a Contact from grid.
2. Click UNLOCK USER (see #4 above)
3. Click ENABLE PERSON in dialog box to unlock account.

Removing a Contact

1. Select an Offeror from grid.
2. Click REMOVE USER (see #5 above)
3. Click REMOVE PERSON in dialog box to delete contact.

2.7.2 Proposals

This tab provides the ability to upload and manage the proposal files submitted by an Offeror. A Factor or Subfactor is associated with each uploaded proposal file in ASSIST. Users assigned to a role within the Source Selection Team will only be able to view the files for those Factor(s) and/or Subfactor(s) that their role provides them access to. A user with a role of Factor Chair, Subfactor Chair, Evaluator, Reader or Contractor Advisor is only able to view files for their associated Factor and/or the Subfactor. A user with a role of Contracting Officer, Contract Specialist, Lawyer, Chair, Deputy Chair, SSA, SSAC, Reader All, and SSEB Admin is able to view all uploaded files (for all Factors and Subfactors). This information is summarized in the table below.

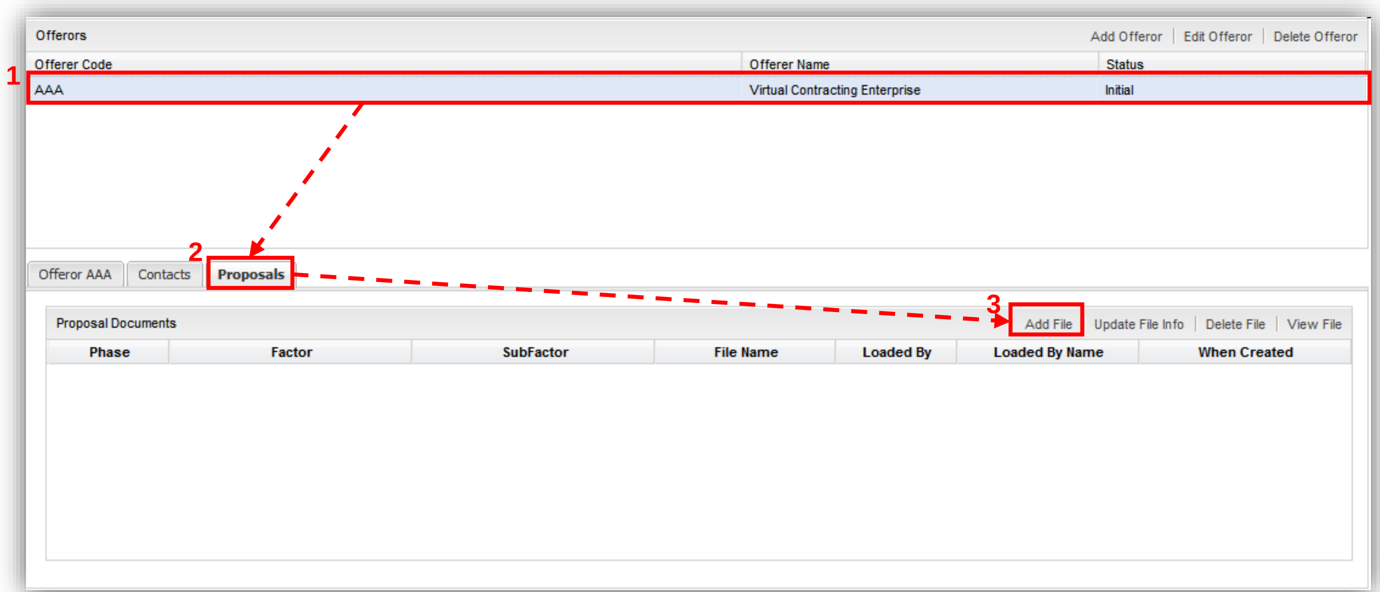
Roles	Access
Contracting Officer	All Proposal Files
Contract Specialist	All Proposal Files
Lawyer	All Proposal Files
Chair	All Proposal Files
Deputy Chair	All Proposal Files
Factor Chair	Associated Factor/Subfactor
Subfactor Chair	Associated Factor/Subfactor
Evaluator	Associated Factor/Subfactor

SSA	All Proposal Files
SSAC	All Proposal Files
Reader	Associated Factor/Subfactor
Reader All	All Proposal Files
Contractor Advisor	Associated Factor/Subfactor
SSEB Admin	All Proposal Files

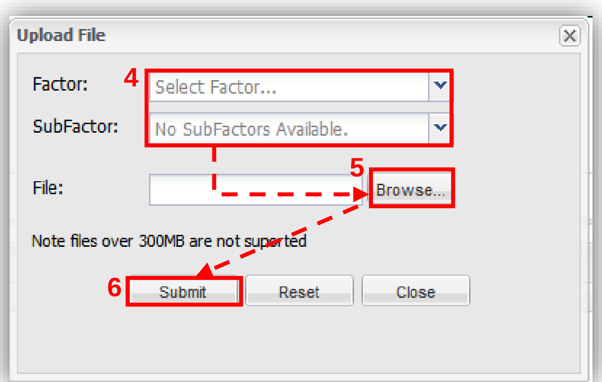
See section 2.5 “Members” for more information on assigning roles and Factor/Subfactor access.

Only the Contracting Officer, Contract Specialist and Admins have access to Offerors/Proposals view and corresponding information (including the Proposal tab). The proposal files uploaded in the Proposal tab are accessible to ***all*** other users (based on assigned role) by accessing “DOCUMENTATION” from the link in the banner and then selecting the appropriate Factor/Subfactor (see section 1.6.2 “Documentation” view).

Adding a Proposal File



1. Select an Offeror from grid.
2. Click on PROPOSAL tab.
3. Click ADD FILE.
4. Select the Factor and/or Subfactor to associate to file.



NOTE: If Factor is identified as 'Not Applicable' the file will **only** be accessible to the Contracting Officer and Specialist in the Offerors/Proposals. It will not be accessible to the other team members in Documentation. This can be changed at a later point by using the UPDATE FILE INFO action (see Updating File Info below).

HELPFULL HINT! Use 'Not Applicable' for cover pages, signed Solicitations/Amendments, Offer and Award Documents and Certifications/Representations (or other related type documents).

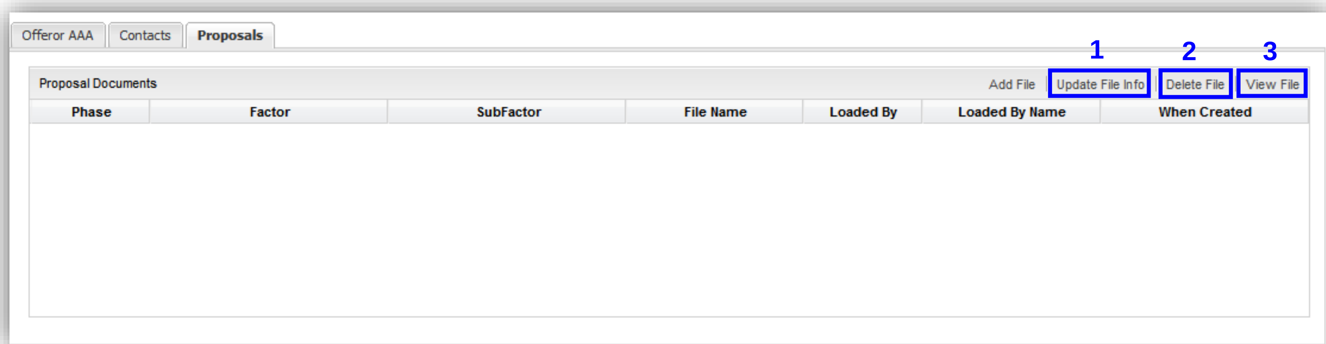
5. Click BROWSE to navigate to a local directory (or a share drive) where the file is saved. Select (single click) the file you want to add/upload then click OPEN.
   IMPORTANT! Files over 300MB are not supported and will not successfully upload into ASSIST.
6. Click SUBMIT.

NOTE: Multiple files can be uploaded for a Factor/Subfactor. A proposal file can **only** have a Factor or Subfactor associated to it when uploaded. If a proposal file is required to be accessible to more than one Factor/Subfactor, the same file must be uploaded multiple times - associating it to the different Factor/Subfactor requiring access each time.

Managing Proposal Files

There are three (3) actions that can be taken on a proposal file:

- Update File Info: Change the associated Factor/Subfactor.
- Delete File: Remove file from ASSIST.
- View File: Open and view file.



Update File Info

1. Select file from grid.
2. Click UPDATE FILE INFO (see #1 above)
3. Update/modify the Factor/Subfactor in the dialog box.
4. Click SUBMIT.

Delete File

1. Select file from grid.
2. Click DELETE FILE (see #2 above)
3. Confirm delete in dialog box by clicking YES.

View File

1. Select file from grid.
2. Click VIEW FILE (see #3 above).
3. Follow browser instructions to open or view file.

2.8 Decision Documents

A Source Selection must follow a definite and distinct series of steps so that the proper information is considered when making the award decision. These steps must be completed one at a time and in order; and may vary depending upon whether award is to be made **without** or **with** discussions (see below).

Award without Discussions
- Receive proposals - Technical, Past Performance, Price/Cost, Small Business and any other factors that are being evaluated.
- Conduct initial proposal evaluations - all factors*.
- Conduct "Clarifications" (if appropriate).
- Source Selection Decision.
- Award.

Award with Discussions
- Receive proposals - Technical, Past Performance, Price/Cost, Small Business and any other factors that are being evaluated.
- Conduct initial proposal evaluations - <u>all</u> factors***.**
- Conduct "Clarifications/Communications" (if appropriate).
- Establish Competitive Range (eliminate non-competitive proposals from further consideration).
- Conduct "Meaningful Discussions"- <u>all</u> factors.
- Conduct interim proposal evaluations (based on responses to discussions)***.**
- Re-assess Competitive Range (if appropriate).
- Request final proposal revisions.
- Conduct final proposal evaluations*.
- Source Selection Decision.
- Award.

***As part of this proposal evaluation process, the Findings (e.g. strengths, weaknesses, deficiencies) of the proposals are identified and a resultant Rating is assigned. This information is summarized in Factor and Subfactor Reports.**

ASSIST is set up in phases (e.g. Initial, Interim, and Final). Each of these phases has a set of tasks/actions that are performed to ensure that the series of steps identified above are complete before moving to award. Every Source Selection begins in the Initial phase (whether awarding **without** or **with** discussions). The tasks/actions performed in the Initial phase will vary depending on whether the source selection is proceeding directly to award (award **without** discussions) or proceeding to a Competitive Range Determination (award **with** discussions). If awarding **with** discussions, the Initial phase will be followed by a subsequent Interim phase and Final phase, each phase having their own corresponding tasks/actions. The phases and tasks/actions for each condition (award without or with discussions) are provided below.

Award without Discussions
Initial Phase
- Review proposals – <u>all</u> factors created in ASSIST.
- Create Findings/ENs and review/approve through workflow.
- Exchange Findings/ENs with exchange type of Clarifications.
- Assess Offerors' responses to any exchanged Findings/ENs and review/approve assessment through workflow.
- (Optional) Create and review/approve Summaries and review/approve through workflow.
- Create and review/approve initial Evaluation reports and review/approve through workflow.
- Source Selection Decision Document.

Award with Discussions
Initial Phase
- Review proposals – <u>all</u> factors created in ASSIST.
- Create and review/approve Findings/ENs and review/approve through workflow.
- Exchange Findings/ENs with exchange type of Clarifications or Communications.
- Assess Offerors' responses to any exchanged Findings/ENs and review/approve assessment through workflow.

- (Optional) Create and review/approve Summaries for Initial phase and review/approve through workflow.
- Create and review/approve Initial Evaluation reports and review/approve through workflow.
- Competitive Range Determination.

Interim Phase*

- Exchange Findings/ENs with exchange type of Discussions.
- Assess Offerors' responses to any exchanged Findings/ENs and review/approve assessment through workflow.
- (Optional) Create additional new Findings/ENs and review/approve through workflow.
- (Optional) Exchange additional Findings/ENs with exchange type of Discussions
- (Optional) Assess additional responses to any exchanged Findings/ENs and review/approve assessment through workflow.
- (Optional) Create and review/approve Summaries for Interim phase and review/approve through workflow.
- Create and review/approve Interim Evaluation reports and review/approve through workflow.
- Close Discussions/Re-assess Competitive Range Determination.

*There can be multiple iterations of the Interim phases if a subsequent Competitive Range is determined. Documents created during these additional Interim phases will be indicated by the phase and a sequential sequence number. For example: Interim-1, Interim-2, Interim-3, etc. **<u>The tasks/actions are the same for each phase.</u>**

Final Phase

- Receive/review Final Proposal Revisions.
- (Optional) Create Findings/ENs and review/approve through workflow.
- (Optional) Create Summaries for Final phase and review/approve through workflow.
- Create Final Evaluation reports and review/approve through workflow.
- Source Selection Advisory Council Recommendation (if applicable).
- Source Selection Decision Document.
- Export data out of ASSIST to store in official contract file (e.g. PCF).

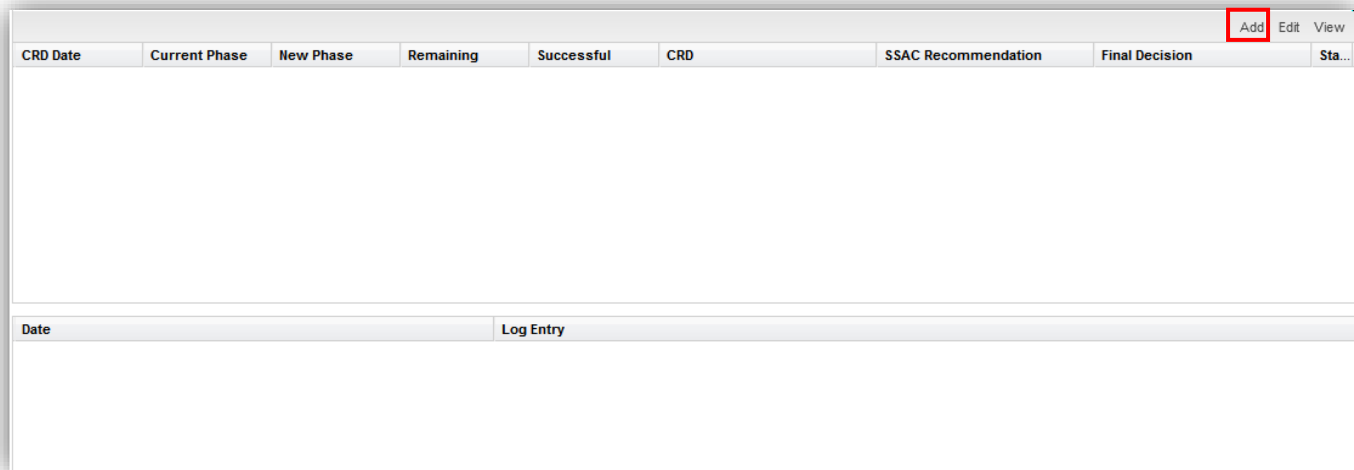
Each phase in ASSIST is culminated by the appropriate Decision Document (e.g. Competitive Range Determination, Source Selection Advisory Council Recommendation (if applicable) and/or Source Selection Decision Document). This is what moves the Source Selection from one phase to the next or award. The Decision Documents component of Administration is where this process is performed. To move the Source Selection forward to award or a subsequent phase, add and submit a Decision Document. There is logic built in ASSIST so that the correct form is automatically presented, based on award without or with discussions question found in the profile and the subsequent selected phase (see below).

Award without Discussions
INITIAL to Award → Source Selection Decision

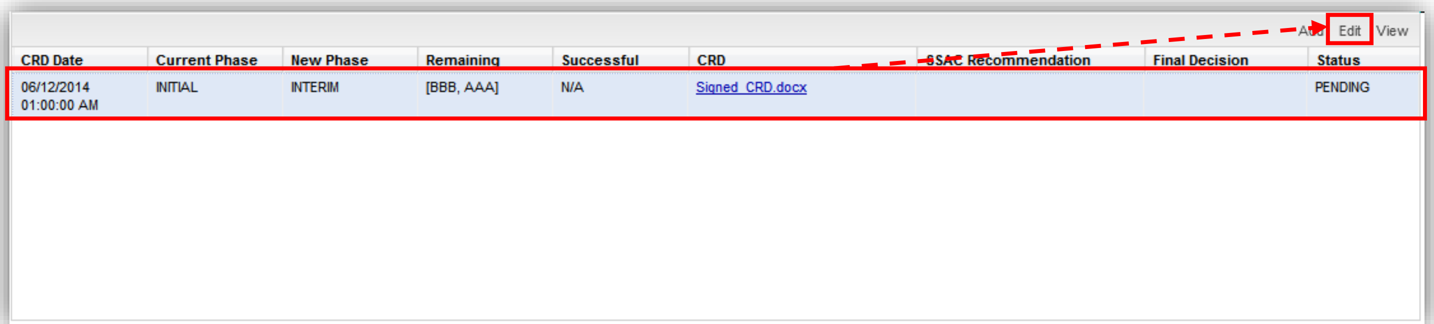
Award with Discussions
INITIAL to INTERIM → Competitive Range Determination
INTERIM to INTERIM → Competitive Range Determination
INTERIM to FINAL → Close Discussion/Competitive Range Determination
FINAL to Award → Source Selection Decision/SSAC Recommendation

2.8.1 Adding and Submitting a Decision Document

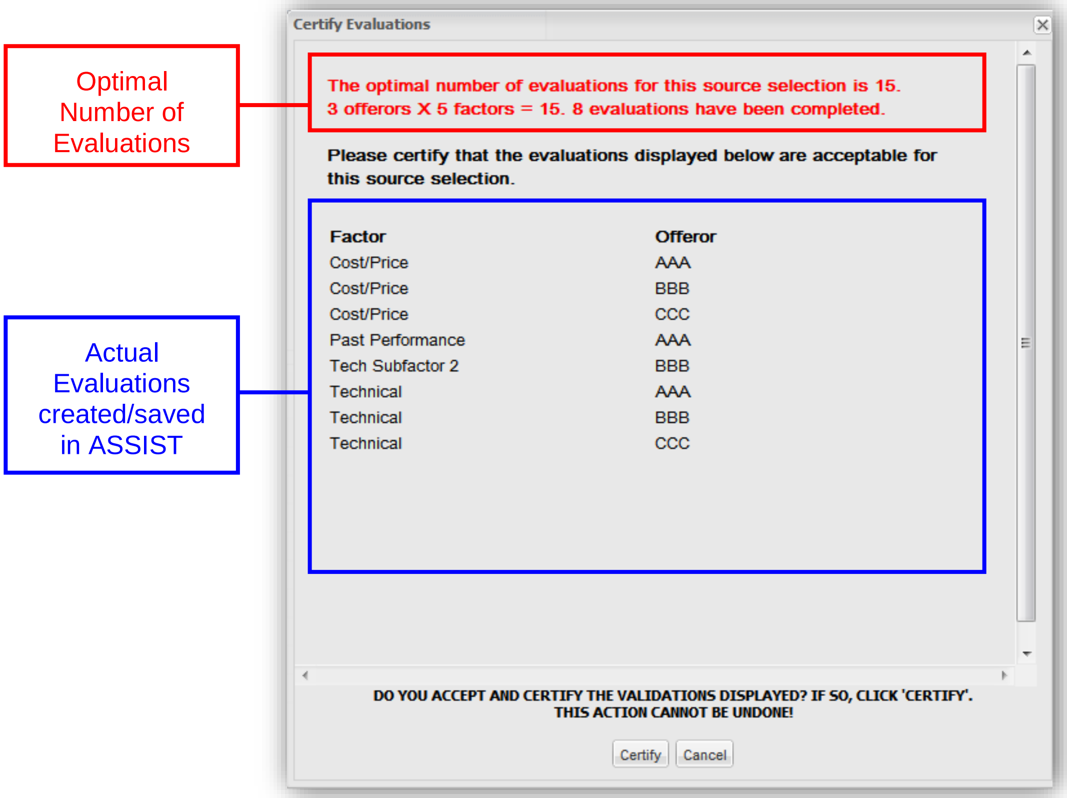
1. Click Add.



2. Complete the dialog box by filling in the appropriate information regarding the Competitive Range Determination or Source Selection Decision Document and SSAC Recommendation (if applicable). See instructions below on completing a Competitive Range Determination, Source Selection Decision Document and SSAC Recommendation.
3. Upon clicking save the dialog box will close and the added Decision Document will appear as new row in grid.



4. Select Decision Document and click EDIT to reopen Decision Document.
5. Click SUBMIT.
6. Dialog box will open that displays the optimal number of Evaluations that should be created for Source Selection in order to move on to next phase or award.



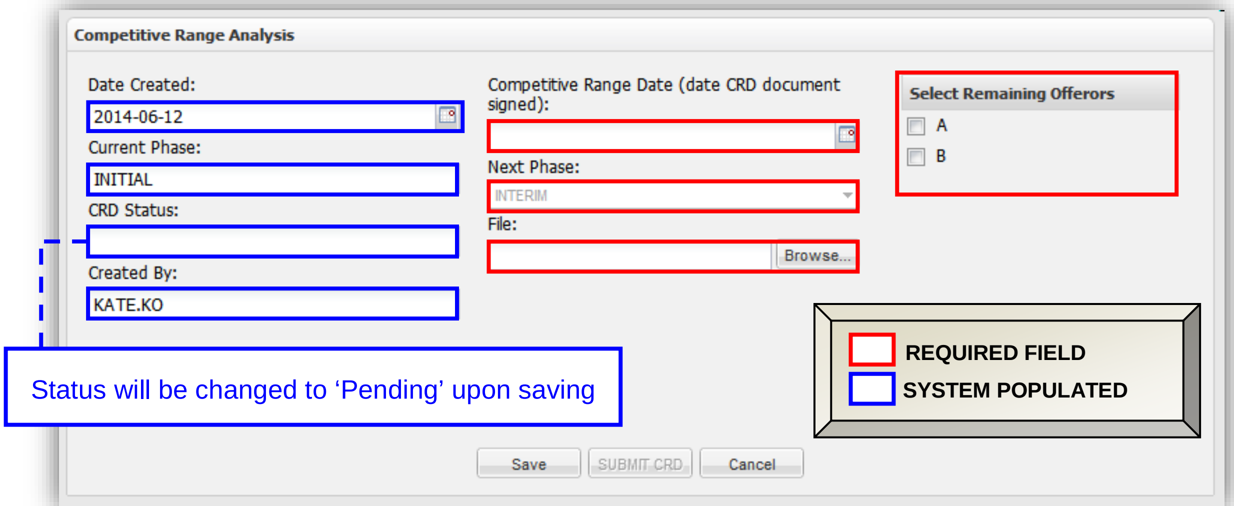
The optimal number of Evaluations is calculated using the following equation: Total Number of Factors and Subfactors x Total Number of Offerors from previous phase. This number represents an Evaluation for each Offeror for each Factor and Subfactor.

Example:
Factor in Source Selection: Technical + Past Performance + Cost/Price = 3 Factors
Subfactors in Source Selection: Technical Subfactor 1 + Technical Subfactor 2 = 2 Subfactors
Offerors: Offeror AAA + Offeror BBB + Offeror CCC = 3 Offerors
Optimal Number of Reports = 15 (5 Factor and Subfactors x 3 Offerors)

The actual Evaluations created and saved in ASSIST for the Source Selection is displayed below the optimal number. Review the actual number and type of Evaluations and determine if it is acceptable for the Source Selection, whether equal to the optimal number or not equal as the result of differing documenting/formatting requirements required by the specific evaluation approach for the Source Selection (e.g. no Subfactor level Evaluations because it is included in Factor Evaluation or an Evaluation for a Factor that includes all Offerors). Click CERTIFY if acceptable to submit the Decision Document.

Click CANCEL if the actual number of Evaluations is not acceptable (e.g. missing a required Evaluation for evaluation approach or a non-required Evaluation is created/saved in ASSIST). This will cancel the submission of the Decision Document, providing the ability to return to the Source Selection and remedy any issue.

Completing a Competitive Range Determination (CRD)



a) Enter the date the Competitive Range Determination was signed.

b) Select the next phase of Source Selection.
   - If currently in the Initial phase, the phase will default to Interim phase. This **cannot** be changed.
   - If in the Interim phase, choose the appropriate next phase – Interim (if reducing the number of Offerors in the competitive range further and continuing discussions with those remaining Offerors) or Final phase.

c) Upload a copy of the signed Competitive Range Determination by clicking BROWSE to navigate to a local directory (or a share drive) where the file is saved. Select (single click) the file you want to add/upload then click OPEN.

NOTE: A document is not required to be uploaded if moving from the Interim to Final phase. If, however, the Competitive Range is reassessed and a new Competitive Range Determination is on hand it should be uploaded. If preferred, a Memorandum for Record documenting the closing of discussions can also be uploaded.

d) Select the Offerors determined to be in the Competitive Range and moving forward to the next phase of the evaluation by clicking on the appropriate box adjacent to each successful Offeror.

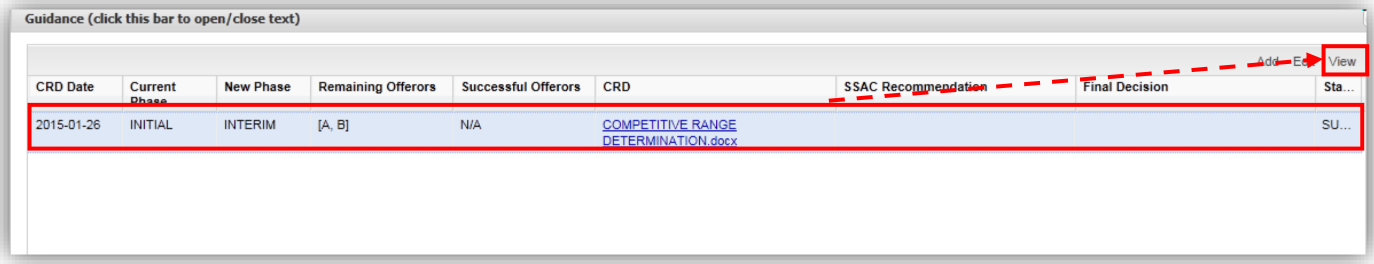
e) Click Save.

Reactivating an Offeror from a Previous Phase

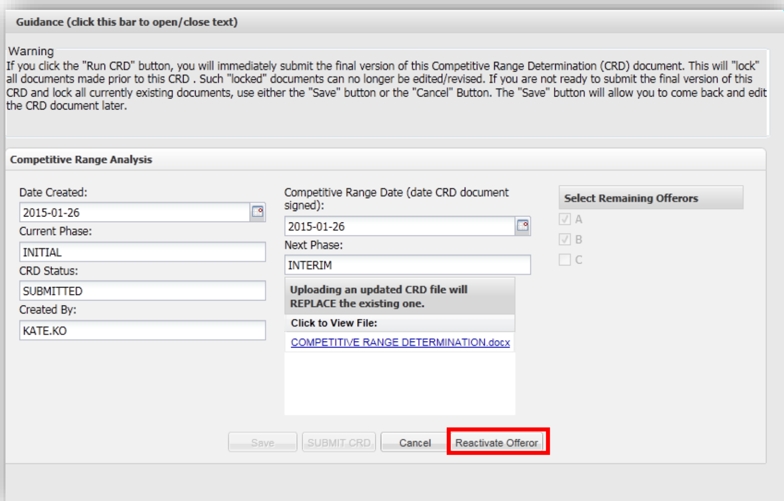
If the Source Selection has multiple Offerors in the Initial phase and after the evaluation establishes the competitive range, e.g., limiting the number of Offerors moving to forward to the next phase (Initial to Interim) to conduct Discussions with those remaining Offerors, the PCO or Specialist **will not** check the box adjacent to the Offeror, as stated in the CRD paragraph d above. However, an Offeror that was eliminated in a previous phase can be reactivated and placed in the current phase. An example for the need to reactivate an Offeror would be if as a result of a protest, the PCO/Specialist must take corrective action and reinstate the Offeror, they could do so by using the ASSIST reactivate feature.

To reactivate an Offeror:

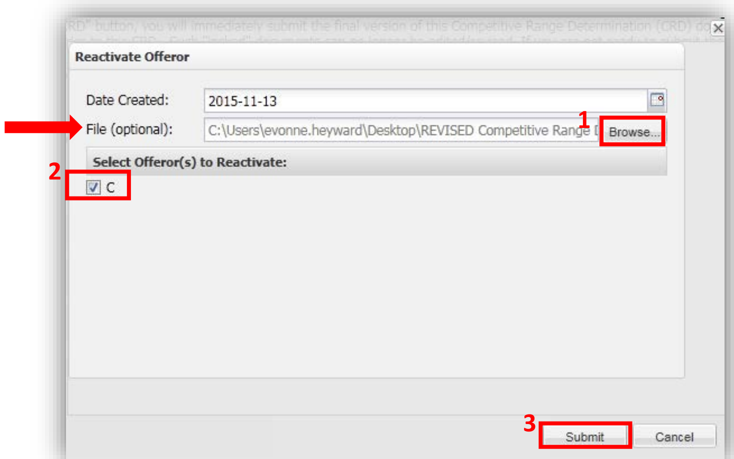
a) Select Decision Document and click VIEW.



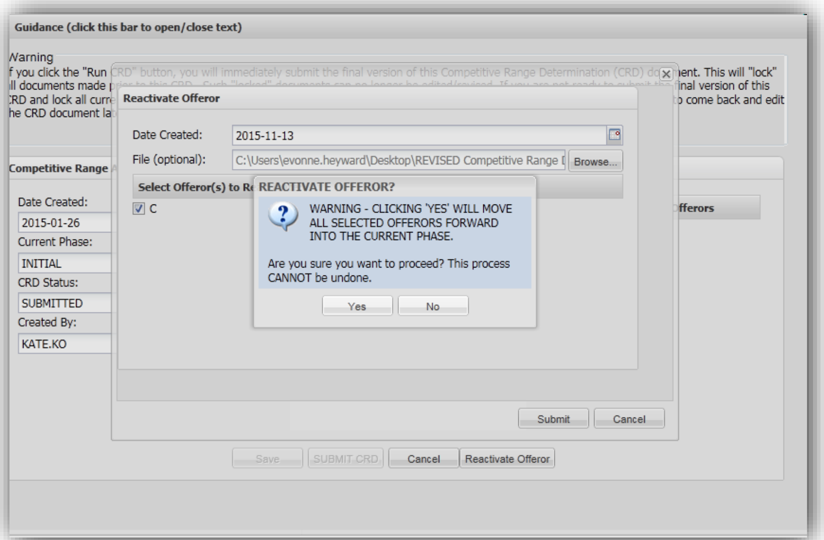
b) When the dialog box opens, click REACTIVATE OFFEROR.



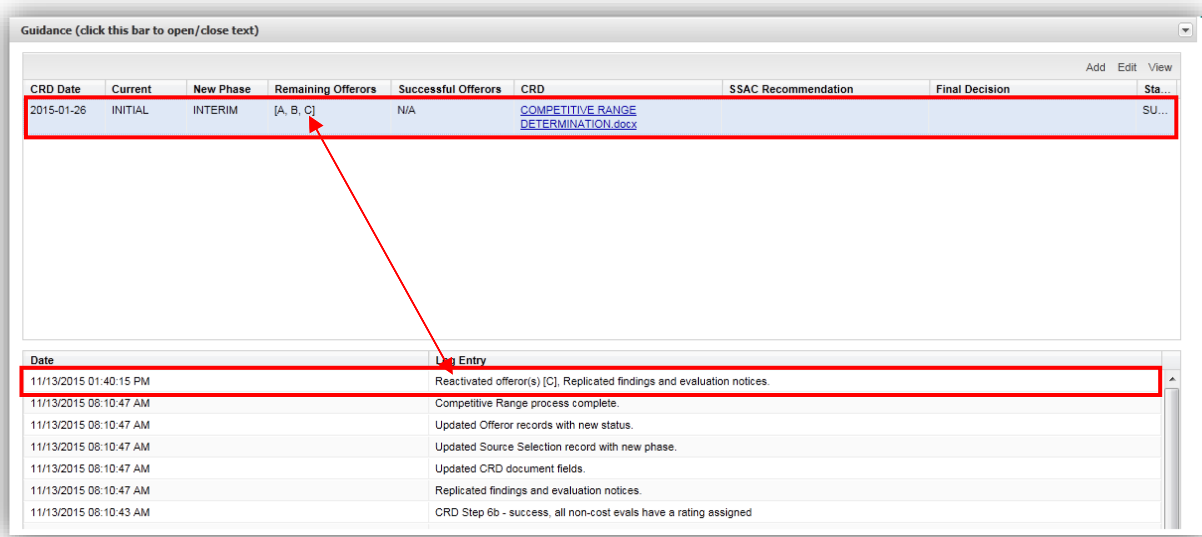
c) A second dialog box will open giving the PCO/Specialist the option to upload an additional file, e.g. Revised CRD. To load an additional file, click BROWSE to navigate to a local directory (or a share drive) where the file is saved. Select (single click) the file you want to add/upload. Next, check the box adjacent to the Offeror to be reactivated. Click SUBMIT.



d) A warning dialog box will appear, click YES to reactivate an Offeror or NO to cancel.

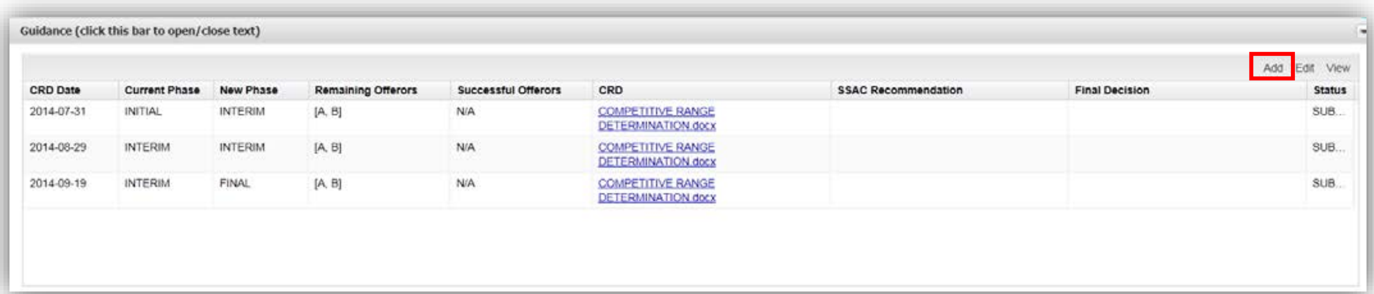


e) Upon selecting YES, the reactivated Offeror will appear in the Decision Documents grid as (C-). Refresh your screen and the (C-) will disappear and the user will now see the reactivated Offeror. ASSIST will also provide a Log Entry detailing the date/time of the reactivation.

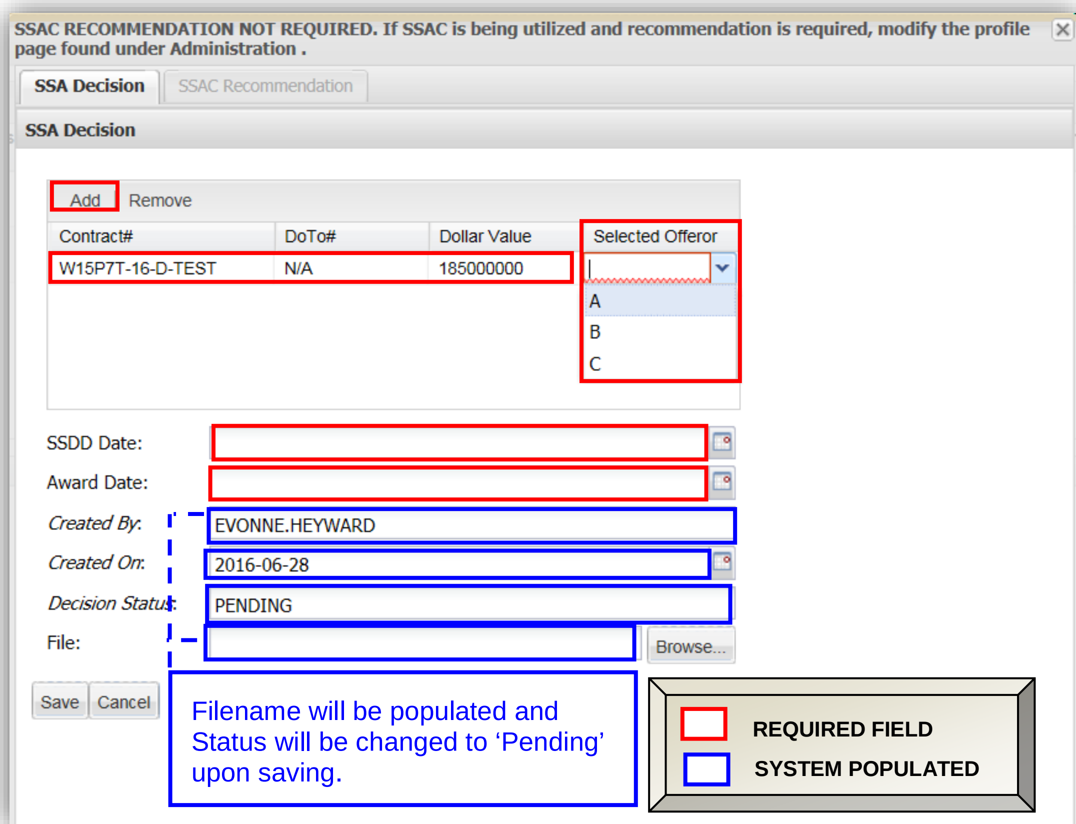


Completing a Source Selection Decision Document

a) Click Add.



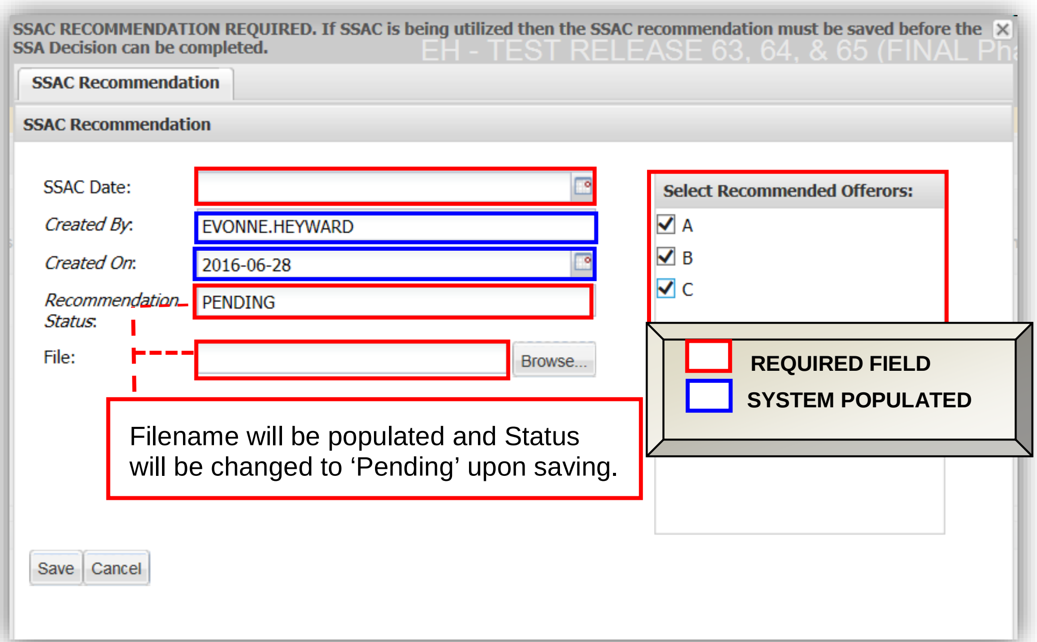
b) Click Add to enter the Contract Number, Delivery Order or Task Order Number.
c) Select the Offeror(s) receiving award from the dropdown.
d) Enter the Source Selection Decision Date.
e) Enter the Award Date.
f) Upload a copy of signed Source Selection Decision Document by clicking BROWSE to navigate to a local directory (or a share drive) where the file is saved. Select (single click) the file you want to add/upload then click OPEN.
g) Click SAVE.



<u>SSAC Recommendation</u>

If a Source Selection Advisory Council (SSAC) was identified as being utilized on the Source Selection request (see section 1.5 “How to Request Use of ASSIST”) and is therefore identified as ‘yes’ in the Profile (see section 2.1 “Profile”), a SSAC Recommendation must be created and saved **<u>before</u>** a Source Selection Decision document can be entered. Upon completion of the SSAC Recommendation, return to the instructions on completing a Source Selection Decision Document.

Completing a SSAC Recommendation



a) Enter the SSAC Date.
b) Upload a copy of a signed SSAC Recommendation by clicking BROWSE to navigate to a local directory (or a share drive) where the file is saved. Select (single click) the file you want to add/upload then click OPEN.
c) Select the recommended Offeror(s).
d) Click SAVE.

2.8.2 Decision Document Validations

Before the Source Selection can move to the next phase or award it must meet certain qualifications. Validations are run as part of the Decision Document process to ensure the Source Selection meets these qualifications and is in the proper state to move forward. A Source Selection will not be able to move forward if any validations fail. The validations are run after SUBMIT is clicked from with the Decision Document. The validations that are run to qualify that change in phase or award can occur are provided below.

INITIAL to INTERIM:

- All Findings/ENs have been approved through workflow (no unapproved Findings/ENs).
- All Findings/ENs have an exchange type set.

- ENs have been created for all Findings with exchange type of Discussions and are Pending Release.
- Verify that all Findings/ENs with exchange type of Communications or Clarifications have been sent, responded to and assessed. The assessment has been approved through workflow.
- Any Evaluation created in ASSIST has been approved through workflow (no unapproved Evaluations) and all non-cost evaluations have a rating assigned.

INTERIM to INTERIM:
- All Findings/ENs have been approved through workflow (no unapproved Findings/ENs).
- All Findings/ENs have an exchange type set.
- ENs have been created for all Findings with exchange type of Discussions and are Pending Release.
- Verify that all Findings/ENs released in current phase to Offerors as Discussions have been responded to and assessed. The assessment has been approved through workflow.
- Any Evaluation created in ASSIST has been approved through workflow (no unapproved Evaluations) and all non-cost evaluations have a rating assigned.

INTERIM to FINAL:
- All Findings/ENs have been approved through workflow (no unapproved Findings/ENs).
- All Findings/ENs have an exchange type set.
- Verify that all Findings/ENs released in current phase to Offerors as Discussions have been responded to and assessed. The assessment has been approved through workflow.
- Any Evaluation created in ASSIST has been approved through workflow (no unapproved Evaluations) and all non-cost evaluations have a rating assigned.
- There are no Findings/ENs Pending Release.

INIITIAL to AWARD (if awarding without discussions) or Final to AWARD (if awarding with discussions)
- All Findings/ENs have been approved through workflow (no unapproved Findings/ENs).
- All Findings/ENs have an exchange type set.
- Verify that all Findings/ENs released in current phase to Offerors as Clarifications if awarding **without** discussions have been responded to and assessed. The assessment has been approved through workflow.
- (If applicable) Verify that all Findings/ENs released in current phase to Offerors as the result of having to reopen discussions have been responded to and assessed. The assessment has been approved through workflow.
- Any Evaluation created in ASSIST has been approved through workflow (no unapproved Evaluations) and all non-cost evaluations have a rating assigned.
- There are no Findings/ENs Pending Release.

The status of each validation as well as each step taken by ASSIST to move Source Selection into the next phase is documented in the log located directly below the grid displaying any saved Decision Documents. To view the log, select the appropriate Decision Document.

Add Edit View

CRD Date	Current Phase	New Phase	Remaining	Successful	CRD	SSAC Recommendation	Final Decision	Status
05/22/2014 09:00:39 AM	INITIAL	INTERIM	[BBB, AAA]	N/A	Signed_CRD.docx			SUBMITTED

Date	Log Entry
05/20/2014 11:14:43 AM	Competitive Range process complete.
05/20/2014 11:14:42 AM	Updated Offeror records with new status.
05/20/2014 11:14:42 AM	Updated Source Selection record with new phase.
05/20/2014 11:14:41 AM	Updated CRD document.
05/20/2014 11:14:41 AM	Replicated findings and evaluation notices.
05/20/2014 11:14:23 AM	CRD Step 6b - success, all non-cost evals have a rating assigned
05/20/2014 11:14:23 AM	CRD Step 6a - success, all evals have been approved through workflow and are in final queue.
05/20/2014 11:14:22 AM	CRD Step 4A - success, all Communications or Clarifications responses have been assessed.
05/20/2014 11:14:22 AM	CRD Step 4 - success, all Communications & Clarifications have been sent and responded to.
05/20/2014 11:14:21 AM	CRD Step 3 - success, all findings have exchange type set.
05/20/2014 11:14:21 AM	CRD Step 2 - success, ENs have been created for all findings with an exchange type of 'Discussions'.
05/20/2014 11:14:21 AM	CRD Step 1 - success, all findings have been approved.
05/20/2014 11:14:19 AM	1 evaluations are on fil Double click to view

If any validation fails the Source Selection will not move to next phase or award. User will be prompted of failure notice(s) and directed to view the log description of failed validation. Reselect the appropriate Decision Document to refresh and view new log entries (including failures).

Example:

02/27/2014 09:45:15 AM	CRD Step 1 - FAILED. There are unapproved findings remaining.

Upon taking appropriate action(s) in Source Selection, My Workspace or Manage Multiple Documents, return to Decision Documents. Reselect the appropriate document → click edit to reopen and resubmit document. The validations will rerun. If no further validations fail, the Source Selection will move to next phase or award.

2.8.3 Impact of Successful Decision Documents Submittal

When a Source Selection moves to the next phase or award, the content of the documents (Findings/ENs, Evaluations and Summaries) created in previous phase become locked. No further changes are permitted for these documents.

If moving to another phase as a result of a Competitive Range, additional steps are taken within ASSIST to move the evaluation to proper state. These steps appear as log entries for a Decision Document. The log entries and the impact are described below.

Log Entry	Impact
Replicated Findings/ENs	Replicate (make copies) of Findings/EN meeting conditions below: 1. Findings/ENs that have a status of 'Pending Release'. The original Finding/EN remains in previous phase as part of the record. No further changes are permitted on this Finding/EN. The copy is placed in subsequent phase where it can be released to Offeror, responded to, and assessed. See section 4.0 "Document Workflow" for more information statuses. 2. Findings/ENs with a final state of 'Active' or 'Active (Leave As Is)'. The original Finding/EN remains in previous phase as part of the record. No further changes are permitted on this Finding/EN. The copy is placed in subsequent phase where, if necessary, it can be unapproved and updated/modified. See section 4.0 "Document Workflow" for more information on final states.
Updated CRD document	Change status of CRD document from 'Pending' to 'Submitted'.
Updated Source Selection record with new phase	Updated phase identified in Banner and the updated documents will be displayed within any grid in My Workspace, Source Selection and Manage Multiple Docs. Only documents in the current phase will appear within the document grid. See section 1.6 "Layout of ASSIST" for more information on Banner and document grid. **HELPFULL HINT**! To view documents from a previous phase, use the SET FILTER action to set the display settings for the grid. Select the phase or phases and APPLY FILTER to view. See section 3.4 "Document Actions" for more information on the SET FILTER action.
Updated Offeror records with new status	Updated status of each Offeror in ASSIST. Selected Offerors will remain active in Source Selection and move forward to next phase. Additional documents can be created for these Offerors in new phase. Unselected Offerors will not move forward to next phase. No further documents can be created for these Offerors. All previous documents created for Offeror will remain in ASSIST as part of the Source Selection record.

2.9 Export and Export to PCF

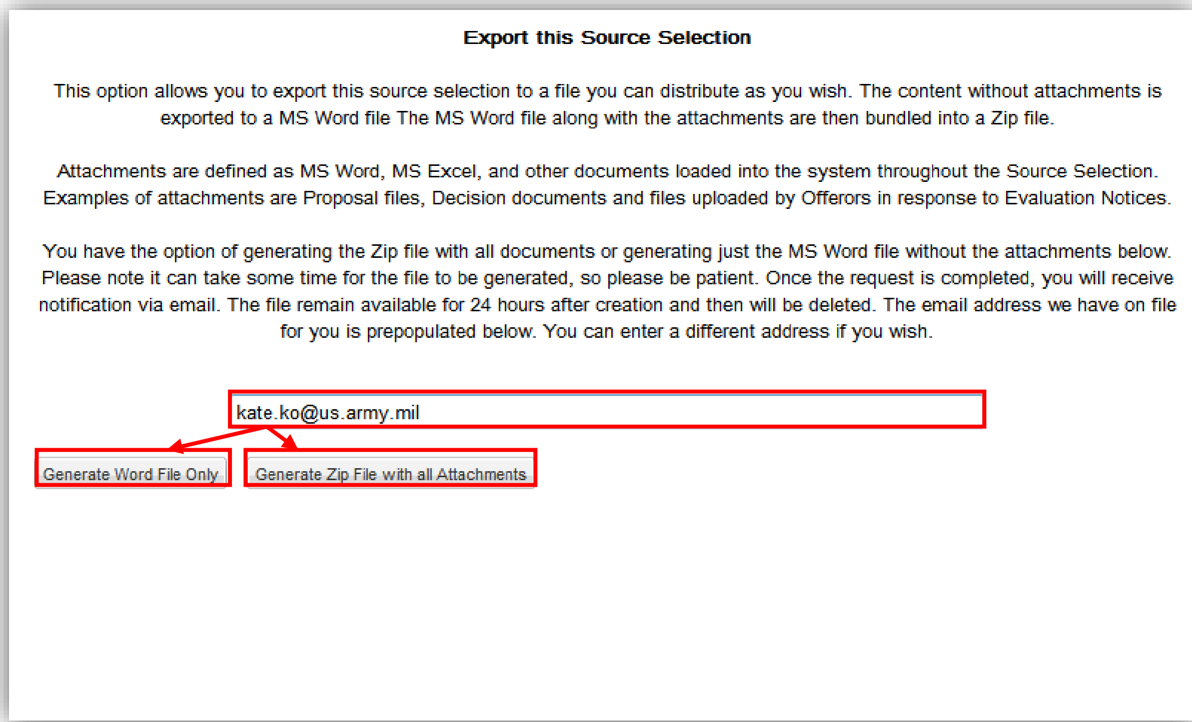
2.9.1 Export

This component of Administration provides the ability to export the entire Source Selection (documents created and/or uploaded into ASSIST) to a file to save or distribute as desired. **This is only available to the Contracting Officer, Contract Specialist, and any Admin (Local or VCE).** Documents created in ASSIST are exported to a MS Word file. The MS Word file is bundled with any attached or uploaded document into a Zip file that is logically structured (e.g. by Phase, Offeror(s), Factor, etc.). Examples of attachments or uploaded files are Proposal files, Decision documents and files uploaded by Offeror(s) in response to Evaluation Notices.

Users are provided the option of generating the Zip file with all documents or generating just the MS Word file without the attachments. Please note it can take some time for the file to be generated, so please be patient. Once the request is completed, a notification will be sent via email. **The file remains available for 24 hours after creation and then will be deleted.**

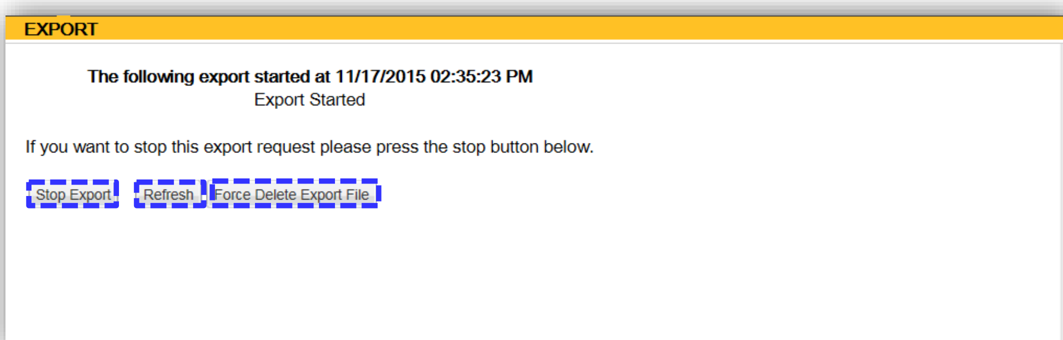
NOTE: A user can only compile a single export for a Source Selection at a given time. An export file can be manually deleted after it is successfully compiled and downloaded by user. This will provide a user the ability (if necessary) to compile an additional export if required prior to the file being automatically deleted 24 hours after creation. See below for more details.

How to Export Source Selection



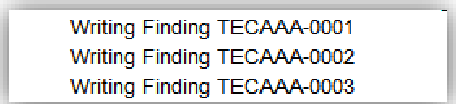
1. Verify provided email address. Update or change email address if required.
2. Click on GENERATE WORD FILE ONLY or GENERATE ZIP FILE WITH ALL ATTACHMENTS

ASSIST will begin compiling file. The time/date the export was started will appear in view. If necessary, user can stop the export request by clicking on STOP EXPORT or delete the export request by clicking on FORCE DELETE EXPORT FILE.

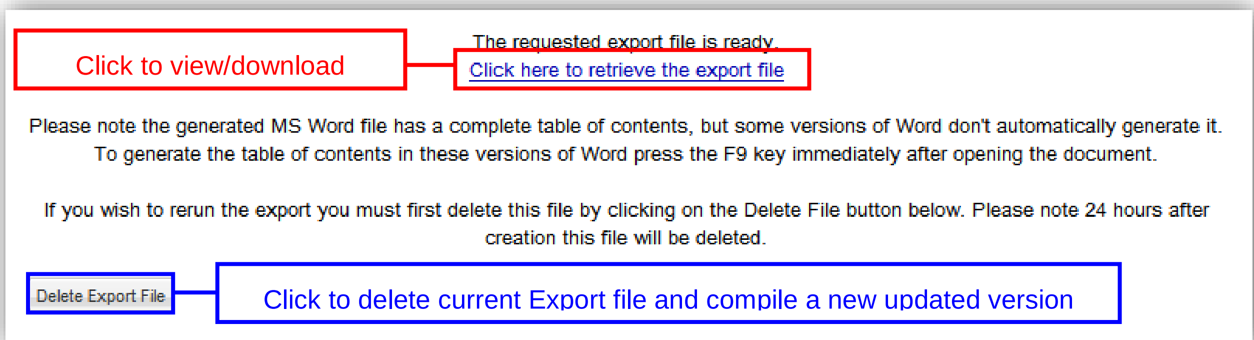


If a user remains in Export view (e.g. did not navigate to another view in ASSIST or exit the Source Selection and logged back in), he/she can click on REFRESH to view the export progress. The progress will be automatically displayed to the users as long as the user does not navigate away and return to this view.

Example:



When export is complete an email will be sent to previously provided email address. After email is received, go to Export view and click on the appropriate link to retrieve file.



NOTE: If user did not navigate away from Export view and email is received, they must click REFRESH to update view and retrieve file.

2.9.2 Export to PCF

This component of Administration provides the ability to export the entire Source Selection (documents created and/or uploaded into ASSIST) into the Paperless Contract File (PCF) cabinet. **This is only available to the Contracting Officer, Contract Specialist, and any Admin (Local or VCE). <u>This function is available for use when making a single award or multiple awards.</u>** Documents created in ASSIST are exported to a MS Word file. The MS Word file is bundled with any attached or uploaded document into a Zip file that is logically structured (e.g. by Phase, Offeror(s), Factor, etc.). Examples of attachments or uploaded files are Proposal files, Decision Documents and files uploaded by Offeror(s) in response to Evaluation Notices.

Users <u>can only</u> Export to PCF when:

1. The source selection is in the FINAL Phase and the Source Selection Advisory Council Recommendation (SSAC) and/or the Source Selection Decision Document (SSDD) has been uploaded into ASSIST under the DECISION DOCUMENTS tab.
2. A cabinet has been created in PCF with a Solicitation Number. (NOTE: The PCF Solicitation Number and the Solicitation Number under the ASSIST PROFILE tab should reflect the same Solicitation Number; if not the user must update the Solicitation Number in ASSIST.)

There are <u>two ways</u> that users can Export to PCF:

1. When a single Solicitation/PCF cabinet is established, the users can either Export to PCF into a single cabinet when making a single award; however, if making multiple awards, users can utilize the "Clone Cabinet" function in PCF to replicate multiple cabinets.
2. When making multiple awards, users can establish the necessary multiple cabinets in PCF and must list all Contract Numbers under the ASSIST DECISION DOCUMENTS tab under Administration. (NOTE: All cabinets must have the same Solicitation Number, but the Contract Numbers can be different. Although the Contract Numbers can be varied, they must match in both ASSIST and PCF).

A video detailing the Export to PCF function has been posted to the ASSIST Homepage under the APPLICATION VIDEO RESOURCES section.

3.0 **Evaluation Results**

Proposal evaluation is the examination of the merits of each proposal against the requirements of the solicitation and rating the Factors and Subfactors. The SSEB team does this phase and this is the actual process that ASSIST supports. There are three types of Evaluation documentation, which are discussed below, that can be created, uploaded, and stored in ASSIST to document the SSEB's results: Findings/ENs, Evaluations, and Summaries.

3.1 Findings/ENs

The term 'Finding', as used in ASSIST, refers to each individual aspect of merit (both positive and negative) that the Government evaluation team observes and documents as a result of assessing the proposal against the Government solicitation requirements. **A Finding must be created for <u>each</u> positive or negative aspect identified by the evaluation team.** Every individual Finding that is documented and used in the evaluation must be tracked back to three things: 1) the part of the proposal where the aspect it is based on can be found, 2) the Government solicitation requirement it is related to, and 3) the evaluation criteria that is its source.

For each negative Finding that is documented and used in the evaluation, the Government may elect to exchange this Finding with the Offeror during Clarifications, Communications, or Discussions. If one of these exchanges types is selected for the Finding, an EN will automatically be generated by ASSIST for use in exchanges with the Offerors. See section 3.1.2.5 "Evaluation Notice" below for more information regarding the correlation between negative Findings and ENs.

HELPFULL HINT! It is helpful to think of a Finding to be exchanged with an Offeror as an EN. Remember, a Finding with an exchange type identified as Clarifications, Communications, or Discussions = an EN.

In ASSIST, there are eleven different Finding types/categories for the evaluation team to use. These types cover all possible types/categories that will be needed by a Government evaluation team.

<u>**Finding Type**</u>	<u>**Finding Definition**</u>
Strength (+)	An aspect of an Offeror's proposal that has merit or exceeds specified performance or capability requirements in a way that will be advantageous to the Government during contract performance. (***from DoD Manual***)
Significant Strength (+)	An aspect of an Offeror's proposal that has appreciable merit or appreciably exceeds specified performance or capability requirements in a way that will be appreciably advantageous to the Government during contract performance.
Weakness (–)	A flaw in an Offeror's proposal that increases the risk of unsuccessful contract performance. (***from DoD Manual***)
Significant Weakness (–)	A flaw in an Offeror's proposal that appreciably increases the risk of unsuccessful contract performance. (***from DoD Manual***)
Deficiency (–)	A material failure of an Offeror's proposal to meet a Government requirement or a combination of significant weaknesses in an Offeror's proposal that increases the risk

	of unsuccessful contract performance to an unacceptable level. (***from DoD Manual***)
Cost/Price Concern (–)	A flaw, issue with, or lack of information in the cost/price proposal.
Terms and Conditions (–)	An issue related to any of the contract provisions in the solicitation.
Uncertainty (–)	Any aspect of a non-cost/price factor proposal for which the intent of the offer is unclear (e.g. more than one way to interpret the offer or inconsistencies in the proposal indicating that there may have been an error, omission, or mistake).
Minor or Clerical Error (–)	A minor non-cost/price factor informality or irregularity that is merely a matter of form and not of substance or a clerical error apparent on its face in the proposal.
Past Performance Relevancy Concern (–)	An aspect of the proposal that raises a question about the relevancy of the Offeror's past performance information.
Adverse Past Performance Information (–)	Any unfavorable past performance information to which the Offeror has not previously had an opportunity to respond.

All Finding types are ***not*** available for each factor type (e.g. Technical, Past Performance, Small Business or Cost/Price). The Findings available to be created for each factor type is provided below.

Finding Type	**Factors**
Strength	Technical/Past Performance/Small Business
Significant Strength	Technical/Past Performance/ Small Business
Weakness	Technical/Past Performance/ Small Business
Significant Weakness	Technical/Past Performance/ Small Business
Deficiency	Technical/Past Performance/ Small Business
Cost/Price Concern	Cost/Price
Terms and Conditions	N/A – Not associated with any factors. Only available to PCO and Specialist.
Uncertainty	Technical/Past Performance/Small Business/ Cost/Price
Minor or Clerical Error	Technical/Past Performance/Small Business/ Cost Price
Past Performance Relevancy Concern	Past Performance
Adverse Past Performance Information	Past Performance

NOTE: Some Finding/EN types may not be available for a Source Selection. This determination is made by the Contracting Officer and/or Contract Specialist in the Finding Types component of the Administration section (see section 2.3 "Finding Types"). If a Finding/EN type is not available, contact the Contracting Officer or Contract Specialist for the Source Selection for more information.

3.1.1 Adding a Finding/EN

A Finding/EN can be created from any Finding/EN view in My Workspace or Source Selection.

1. Click on either My Workspace or Source Selection from stack panel.
2. In My Workspace, click on the plus (+) sign located to the left of Pending My Action or My Documents to expand the tree and display the three (3) document types: Findings/ENs, Evaluations and Summaries. In

Source Selection, click on the plus (+) sign located to the left of All Offerors or a specified Offeror (e.g. Offeror AAA, Offeror BBB, etc.) to display tree.

3. Click on 'Findings/ENs from the tree to display the Findings/ENs grid in the main workspace.

NOTE: Grid will display all Findings/ENs that meet selected view settings from the stack panel (e.g. Pending My Action, My Documents, All Offerors, Offeror AAA, etc.). The grid will be empty until the first Finding/EN is saved in ASSIST.

4. Click on ADD FINDING located in the upper right hand corner of the grid to create a new Finding/EN. See section 3.4 "Document Actions" for additional information on the add action.

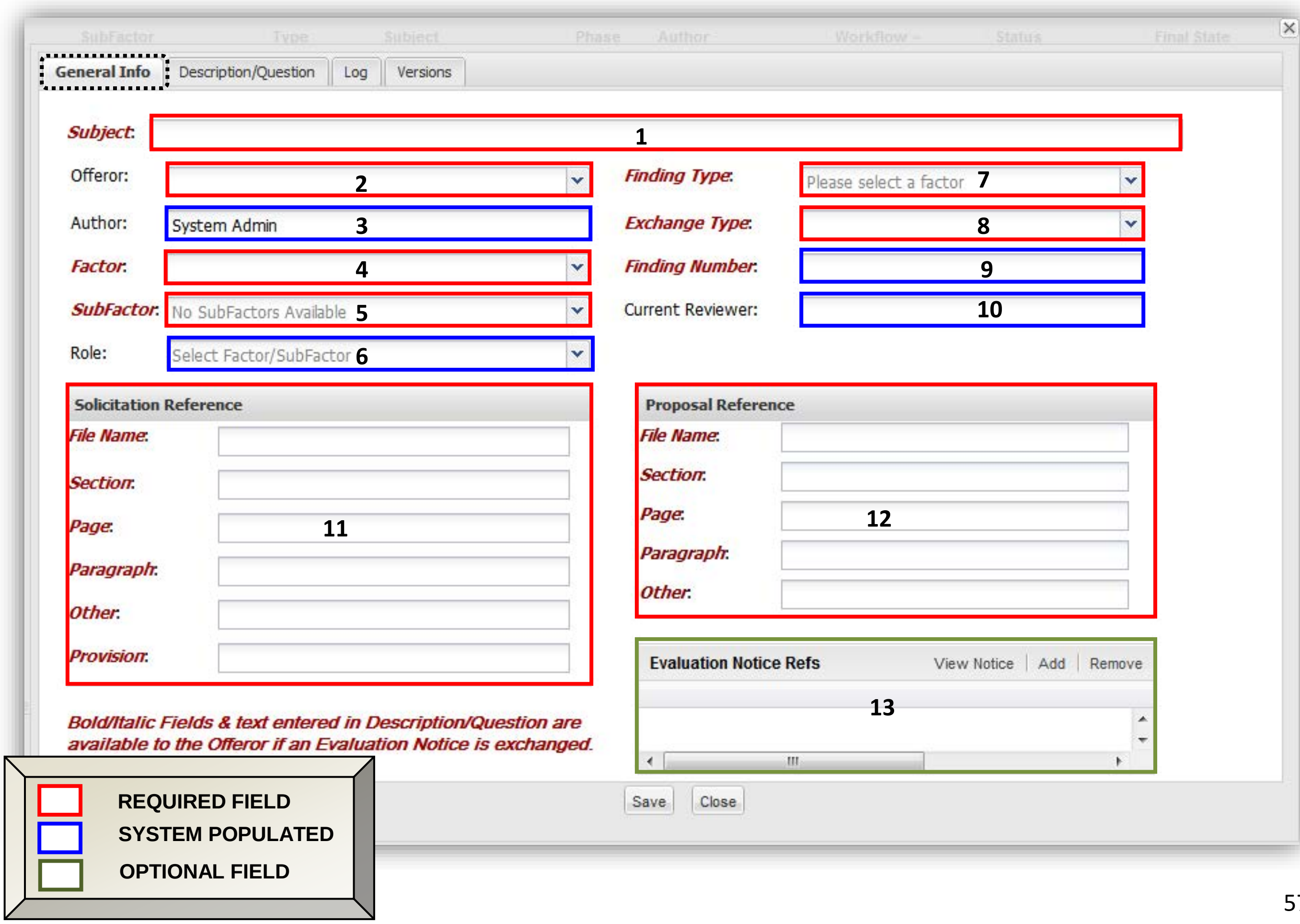
NOTE: A user does not have to be in the view for a specified Offeror (e.g. Offeror AAA) to create a Finding/EN for that Offeror. A Finding/EN can be created for any Offeror from any view where Findings/ENs are displayed. The newly created Finding/EN may not appear within view depending upon selected view settings (e.g. creating a new Finding/EN for Offeror BBB when in the Findings/EN view for Offeror AAA). If this occurs, select appropriate view setting from the stack panel to locate newly created Finding/EN.

3.1.2 Finding/EN Tabs

There a six (6) possible components of a Finding/EN in ASSIST. These components appear as tabs in any opened Finding/EN. There are four (4) default tabs for every Finding/EN: General Info, Description/Question, Document Log and Versions. The remaining two (2) tabs, Evaluation Notice and Assessment, appear depending upon the specific state of the Finding/EN in ASSIST. See below for more information on each tab.

3.1.2.1 General Info (Default Tab)

This tab contains general information regarding the Finding/EN. All fields identified as required below must be completed. Remaining fields are populated automatically by system or are optional. Additional information about each field is provided below.



1. **Subject**: Enter title or brief description of Finding/EN. **Limit of 255 characters.**
2. **Offeror:** Select the Offeror that the Finding is being created from dropdown. Field contains list of all Offerors created in ASSIST. **Field cannot be changed after Finding/EN is saved.**

NOTE: Findings/ENs cannot be created for an Offeror that was not brought forward from a previous phase into the current phase as a result of a Decision Document (e.g. Competitive Range Determination). These Offerors will no longer appear in the dropdown in phases following the Decision Document. See section 2.8 "Decision Documents" for more information.

3. **Author:** Identifies the creator of the Finding/EN. Field is automatically populated when the Finding/EN is created and can only be changed/modified via the REASSIGN AUTHOR function. See section 3.4 "Document Actions" for more information on reassigning a Finding/EN.
4. **Factor:** Select the Factor that the Finding/EN is being created from the dropdown. User will only be able to select a Factor associated to their assigned role in Members (e.g. An Evaluator associated to the Technical Factor will only be able to select Technical). See section 2.5 "Members" for more information on roles and associated Factors. **Field cannot be changed after Finding/EN is saved.**
5. **Subfactor (IF APPLICABLE):** Select the Subfactor that the Finding/EN is being created from the dropdown. User will only be able to select a Subfactor associated to their assigned role in Members (e.g. an Evaluator assigned to the Technical Subfactor 1 will only be able to select Technical Subfactor 1). See section 2.5 "Members" for more information on roles and associated Subfactors. **Field cannot be changed after Finding/EN is saved.**
6. **Role:** Populated by system based upon the author's assigned role and associated Factors/Subfactors.

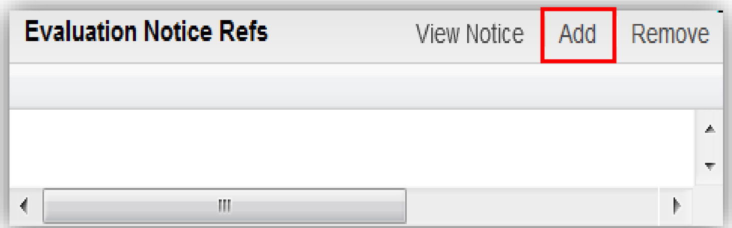
NOTE: If a user is assigned to more than one role within an associated Factor/Subfactor (e.g. Factor Chair and Evaluator for Technical Factor) the role can be changed/updated. Click on dropdown to view and select from all assigned roles within Factor/Subfactor.

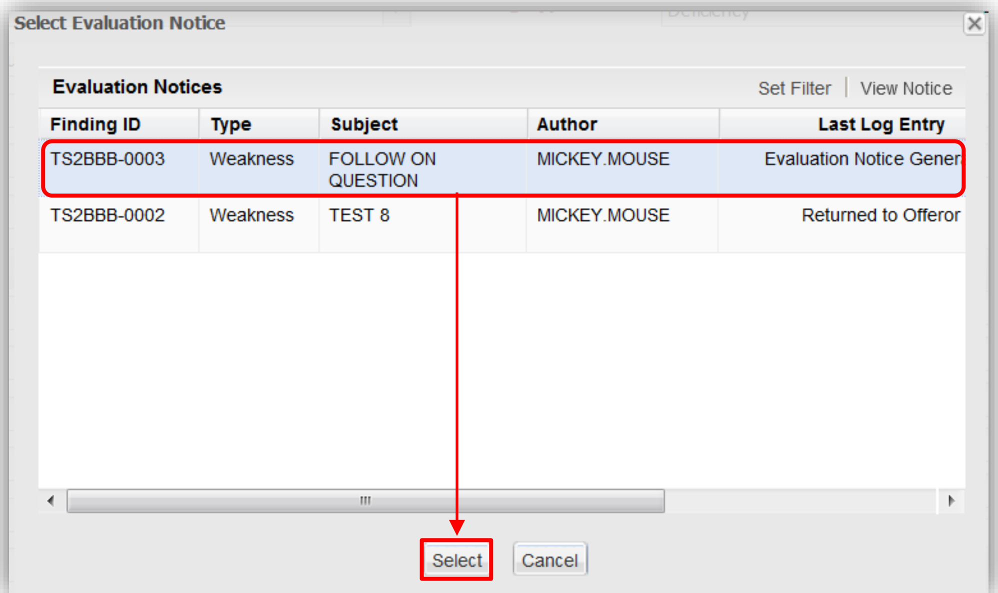
7. **Finding Type:** Select type of Finding/EN being created from dropdown.
8. **Exchange Type:** Select type of exchange for Finding/EN. Exchange types available for selection are: *Clarifications*, *Communications*, *Discussions*, and *No Exchange*.
9. **Finding Number:** Populated by system when Finding is initially saved. The Finding Number is computed using the following format: AAABBB-CCCC, where
   a) AAA represents the Factor/Subfactor code assigned when each Factor/Subfactor is created.
   b) BBB represents the Offeror code assigned when Offeror was created.
   c) CCC represents a 4 digit sequential numerical number within that source selection database. It will be computed by incrementing by 1 number on the last finding for that Offeror for the Factor/Subfactor created in. Numbers less than 4 digits will be preceded by zeroes.
10. **Current Reviewer:** Populated by the system when Finding is initially saved. Identifies where document is in workflow. Upon being saved the current reviewer will be identified as the 'author'. After being released into the workflow it will identify the role in workflow sequence that currently has the document for review/approval (e.g. factor chair, chair, Contracting Officer, etc…).
11. **Solicitation Reference:** Enter a minimum of one solicitation reference into the provided text fields. There is no character limit for the File Name. **There is a 40 character limit for all other field within this section (Section, Page, Paragraph, Other and Provision).**
12. **Proposal Reference:** Enter a minimum of one proposal reference into the provided text fields. **There is 250 character limit for the File Name.** **There is a 40 character limit for all other field within this section (Section, Page, Paragraph, and Other).**
13. **Evaluation Notice Refs (IF APPLICABLE):** Reference another Finding/EN in a new Finding. Only Findings/ENs that have been previously exchanged with an Offeror by way of Clarifications,

Communications, or Discussions can be referenced. Follow instructions below to reference a previously exchanged Finding/EN in a new Finding.

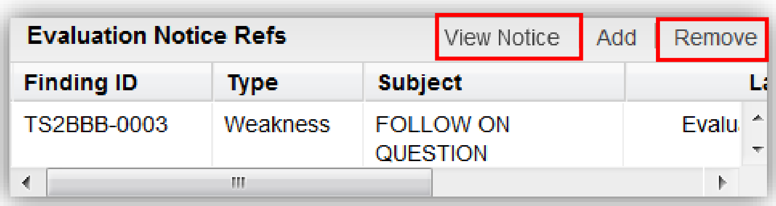
Referencing a Finding/EN within a new Finding:

1. Click ADD.
2. Select (single click)/highlight the desired Finding/EN.
3. Click SELECT.





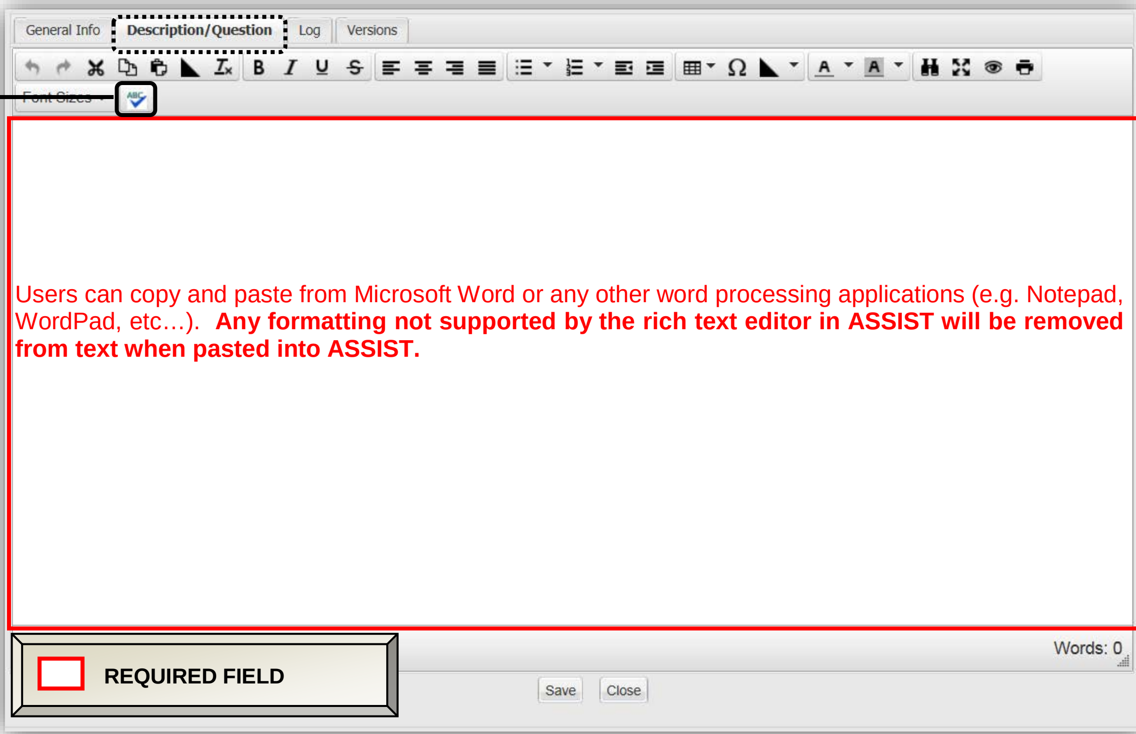
After a Finding/EN is added to EN reference, it can be viewed by selecting the Finding/EN and clicking on VIEW NOTICE. It can be removed by selecting the FINDING/EN and clicking on REMOVE.



3.1.2.2 Description/Question (Default Tab)

This tab is where the Finding is described in detail and if it is to be released to the Offeror as an EN (if an exchange type of Clarifications, Communications, or Discussions is identified in the exchange type field in the General Info tab) is also where the narrative/question pertaining to the Finding is entered. This field must be completed in order to save the Finding. The text field is rich text enabled. Enter text into Description/Question field and then click SAVE.

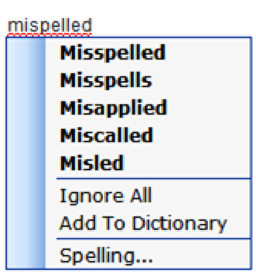
WARNING!!! Remember, any text entered into this field will be viewable not only to the Government, but also the Offeror if the Finding/EN is to be exchanged as Clarifications, Communications or Discussions. Users are therefore cautioned to only input text that can be seen by both the Government and Offeror if Finding/EN is to be exchanged.



Spell Check

Spell check can be performed on any text entered in the rich text fields. To perform a spell check:

1. Click on Spell Check icon after entering and saving text.
2. Any words spelled incorrectly will appear as follows: mispelled
3. Left click on word to receive suggested spellings.

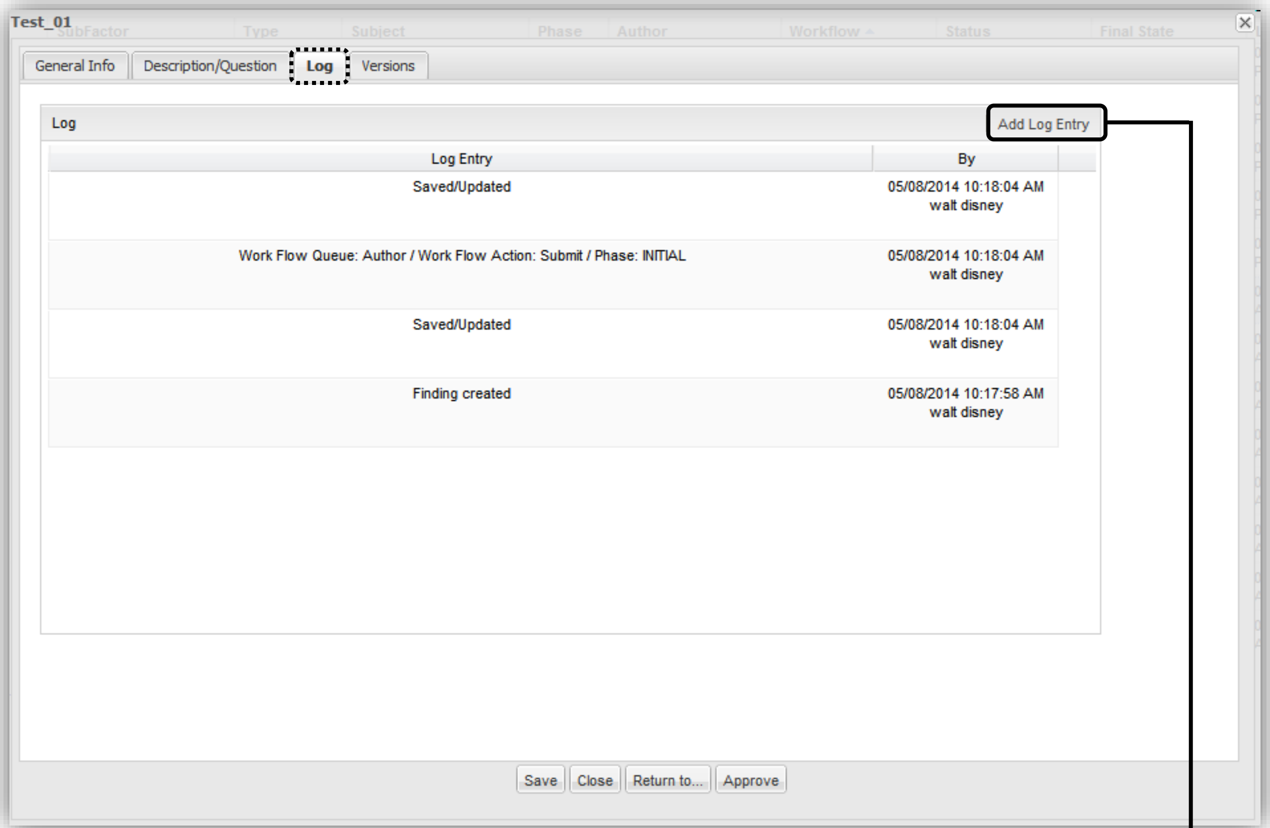


4. Select (click on) correct spelling.

3.1.2.3 Document Log (Default Tab)

The document log displays the complete history of the Finding/EN. The log displays:

1. Each action taken on the Finding/EN (e.g. created, updated, approved, etc.).
2. User who performed the action on the Finding/EN.
3. Time and date each action was performed.



Adding Log Entry

Additional log entries can be added by a user when the Finding is in their queue as the author or as a reviewer/approver. To add a log entry:

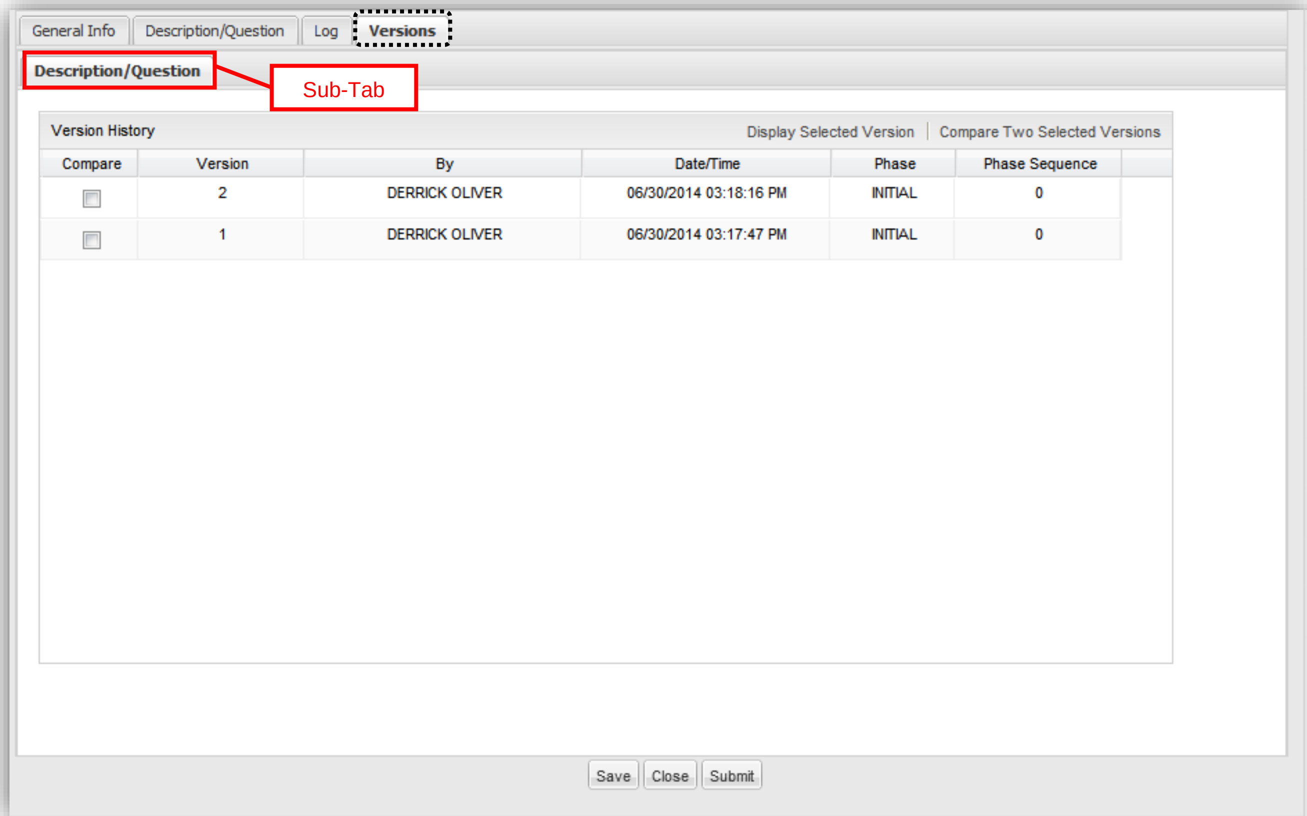
1. Click on ADD LOG ENTRY located in upper right hand corner.
2. Enter text in dialog box.
3. Click on ADD LOG ENTRY in dialog to confirm and create entry.

3.1.2.4 Versions (Default Tab)

The Versions tab maintains the edit history of text entered in the **Description/Question** or **Assessment** tab. When text is initially entered and saved in the Description/Question or Assessment tab, version 1 is created. When/if that text is updated and saved, the version number will increase by ‘1’. Click on the appropriately named sub-tabs within the Version tab, Description/Question or Assessment, to view the desired version history. The history is displayed in a grid. This grid displays all versions, the user who created the new version(s) and the time/date the version was made.

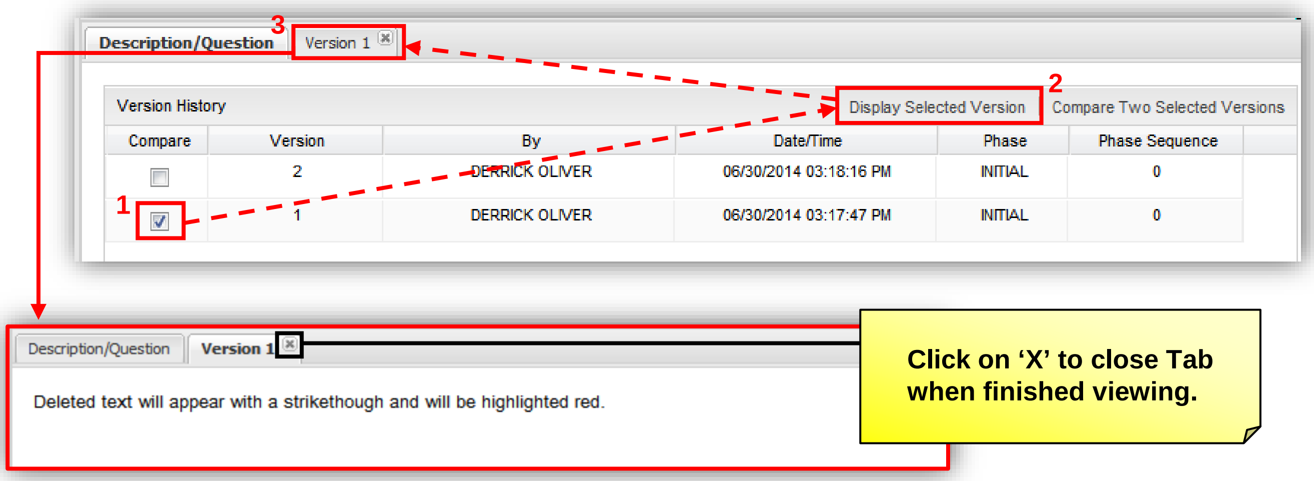
NOTE: The Assessment sub-tab will only appear in Versions for Findings/ENs that have been released to an Offeror, responded to, and the response is being assessed by the Government. For more information on assessing an Offeror’s response see section 5.0 “Exchanges with Offerors”.

Users can view a previous version of text entered or perform a comparison of two selected versions.



Viewing a Prior Version

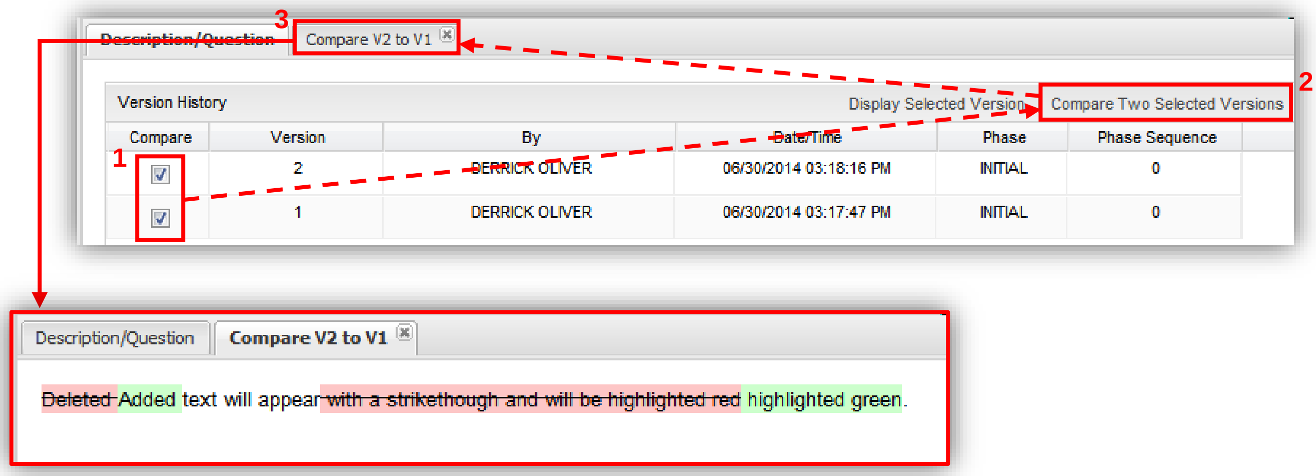
1. Click on box adjacent to desired version.
2. Click DISPLAY SELECTED VERSION.
3. A new sub-tab will appear. This tab will display the previous version number selected to be viewed. Click on this tab to display previous version.



Comparing Two Versions

1. Click on box adjacent to two (2) versions to compare.
2. Click COMPARE TWO SELECTED VERSIONS.

3. A new tab will appear. This tab will display the two (2) versions selected to be compared. Click on this tab to view the version comparison.

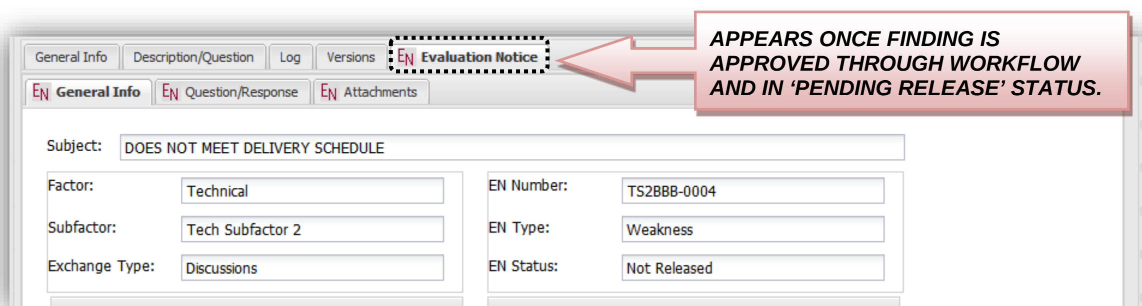


NOTE: When comparing two (2) versions:

- Any text that was removed will appear highlighted in **red** and with a strikethrough;
- New text will appear highlighted in **green**; and
- Any formatting changes will appear highlighted in **purple**.

3.1.2.5 Evaluation Notice

An EN is the PCO's written notification to the Offeror for purposes of Clarifications, Communications, or in support of Discussions. ENs are automatically created by ASSIST if one of the aforementioned exchange types is selected in the exchange type field in the General Info tab of the Finding. This is not a default tab in a Finding. The EN tab is created and viewable as a new tab within the Finding once it has been approved through the entire workflow. It will show up as the fifth tab when the Finding is in a 'Pending Release' status. See section 4.0 "Document Workflow" for more information on statuses. The EN is what is released to the Offeror. The EN as it appears within the Findings is exactly what the Offeror will see in ASSIST2Industry. For more information on ASSIST2Industry see the User Guide located on the ASSIST Homepage under the RESOURCES section.



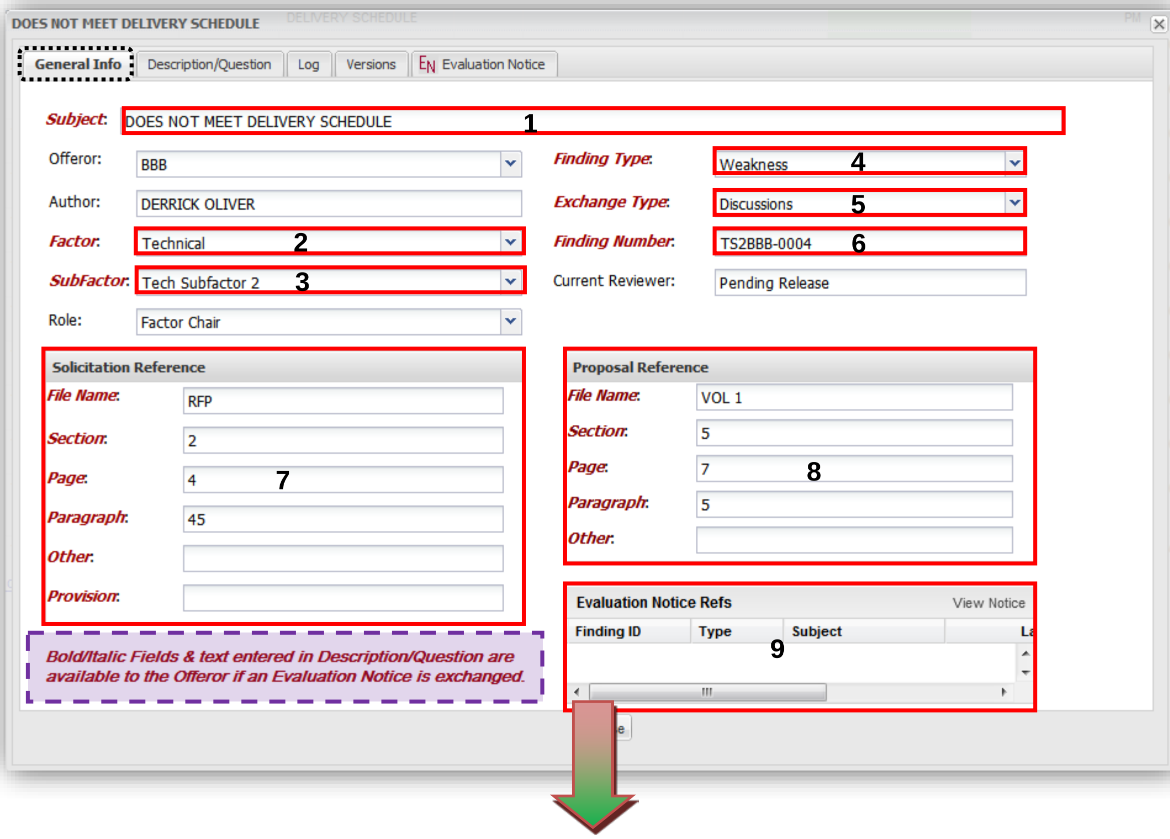
There are three parts to an EN: General Info, Question/Response and Attachments. These parts are accessible as sub-tabs.

General Info Sub-Tab

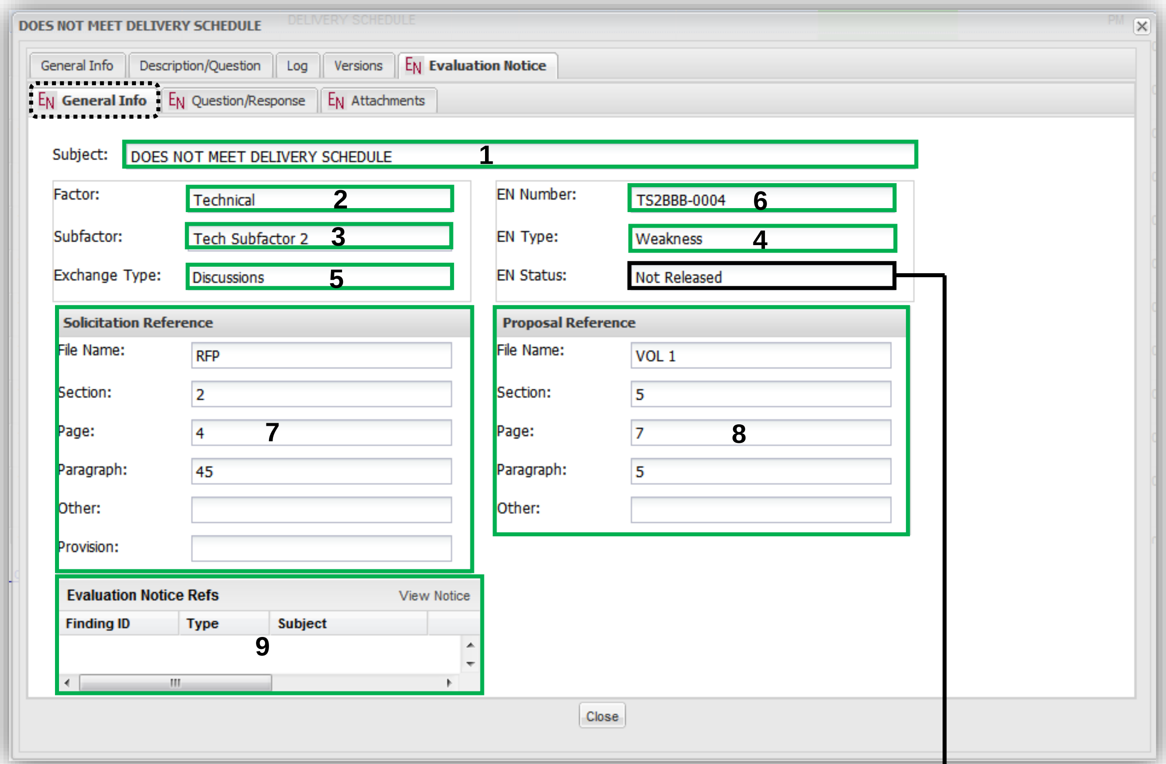
This sub-tab displays general information pertaining to the EN. The fields within the General Info sub-tab are populated using information from the General Info tab of the Finding. The fields used from the General Info tab of the Finding are identifiable by the ***red, bold and italic*** text in the field name (see text highlighted in purple in screenshot below).

Below is a side by side look of the General Info tab for the Finding and the General Info sub-tab of the EN. The fields that make it from the General Info tab of the Finding that are used to create the General Info sub-tab of the EN are outlined in **red** below**.** These fields are outlined in **green** in the General Info sub-tab of the EN. The fields are numbered below so that they may be traceable when viewing them together.

FINDING



EVALUATION NOTICE (EN)



EN Status

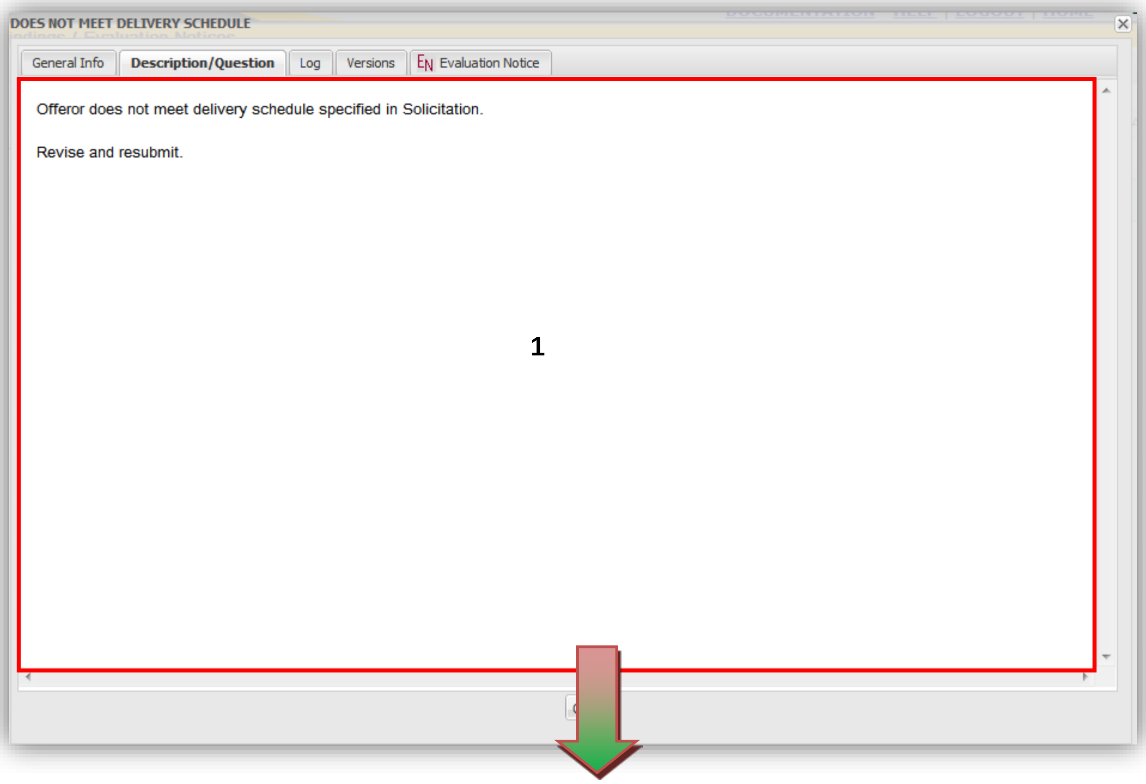
The EN Status as displayed in ASSIST is for Government purposes only. The Offeror is not privy to this information, nor is it is displayed in ASSIST2Industry.

Question/Response Sub-Tab

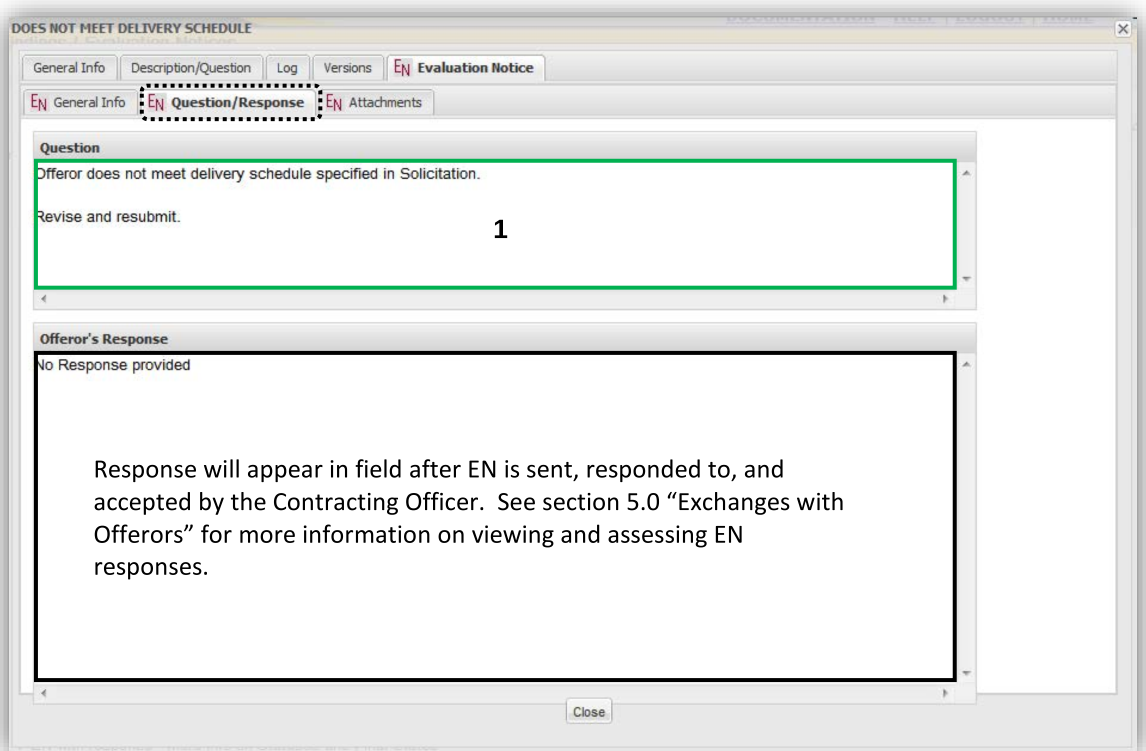
This sub-tab is comprised of two fields: the Question field and the Response field. The question field displays the Government question/narrative to Offerors. This field will contain any text entered into the Description/Question tab of the Finding. Below is comparison of the Description/Question tab of the Finding and the Question/Response sub-tab of the EN. As with the graphics above, **red** and **green** outlines as well as numbers are used so that fields may be traceable when viewing the tab of the Finding and sub-tab of the EN together.

The Response field is where the Offeror's response will be viewable once the EN has been sent to the Offeror, responded to, and the response has been accepted by the Contracting Officer. See section 5.0 "Exchanges with Offerors" for more information on this process. "No Response Provided" will appear in this field until the EN is accepted by the Contracting Officer. After, the EN with the response is accepted; it will display the Offeror's response to the question so that Government may perform their assessment. See section 5.0 "Exchanges with Offerors" for more information on viewing and assessing an Offeror's response to an EN.

FINDING

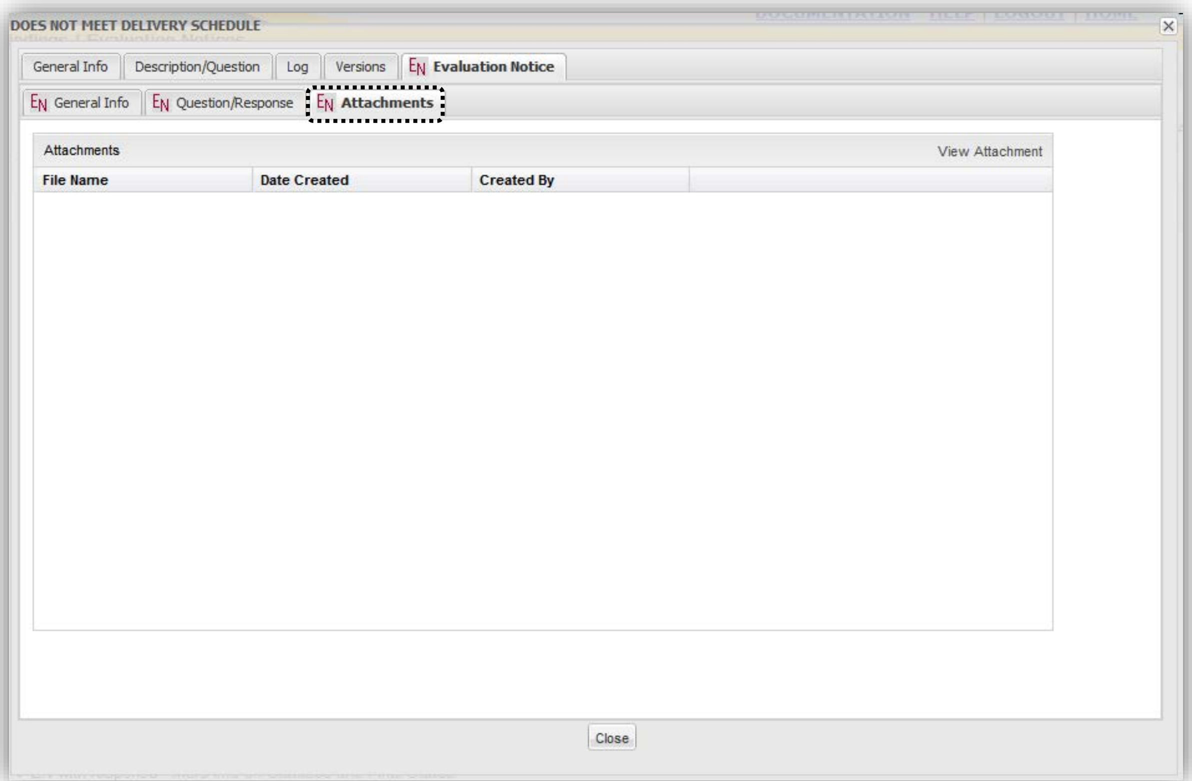


EVALUATION NOTICE (EN)



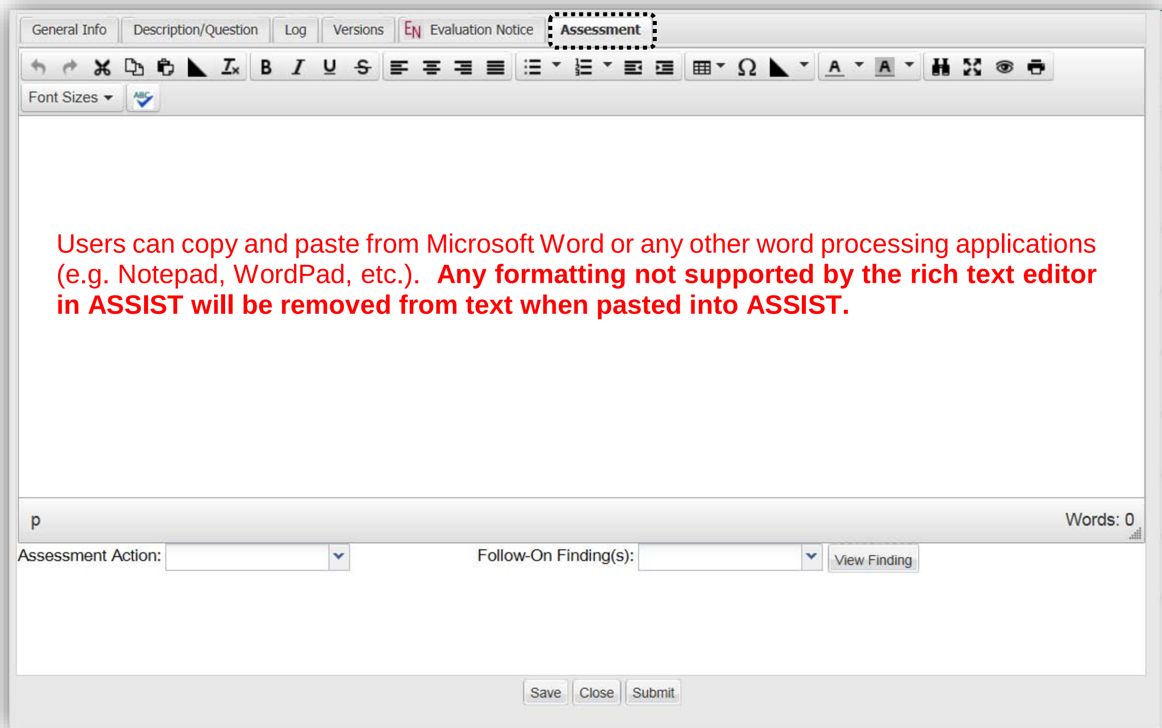
Attachment Sub-Tab
The attachments sub-tab will display any files attached to the EN as part of an Offeror's response (e.g. revised proposal volumes, missing files, change page(s), etc.). See section 5.0 "Exchanges with Offerors" for more information on viewing EN attachments.

NOTE: This sub-tab does not provide the Government the ability to attach files to an EN as part of the question. **ASSIST does not provide this capability.** These types of files must be provided to the Offeror outside of ASSIST. **The attachment sub-tab only provides access to files submitted by an Offeror.**



3.1.2.6 Assessment

The Assessment is where the Government will input their assessment of the Offeror's response to an EN. This is not a default tab. It **only** appears in Findings that have an EN that has been sent to an Offeror, responded to, and the response has been accepted by the Contracting Officer. It is not viewable within a Finding/EN until after the Contracting Officer has accepted the EN response. It will show up as the sixth tab when the EN is in an "Assessing EN Response' status. See section 5.0 "Exchanges with Offerors" for more information on this process.



3.2 Evaluations

An evaluation, broken out by the evaluation Factors and Subfactors, is conducted on each proposal relative to the requirements of the solicitation. As part of this process the Findings, e.g. the strengths, weaknesses, and deficiencies of the proposals, are identified and a resultant rating is assigned. This information is summarized in Factor and Subfactor Evaluation reports.

Any member assigned to a Factor and/or Subfactor as an Evaluator, Subfactor Chair, or Factor Chair can create an Evaluation for an Offeror within their assigned factor and/or Subfactor. **Across all Factor/Subfactor members, only one Evaluation can be created for each Offeror for each Factor and each Subfactor in each phase.** A new Evaluation can be created for each Offeror for each Factor/Subfactor for every phase of the evaluation (Initial, Interim, and Final). See section 2.8 “Decision Documents” for more information on phases.

To document their Evaluation, users can either enter text in the Narrative tab or browse their local directory (or a share drive) where files are saved to select and add/upload a file in the Attachment tab. More information pertaining to these tabs as well as other tabs that make up an Evaluation are discussed in section 3.2.2 below.

3.2.1 Adding an Evaluation

An Evaluation can be created from any Evaluation view in My Workspace or Source Selection.

1. Click on either My Workspace or Source Selection from the stack panel.
2. In My Workspace, click on the plus (+) sign located to the left of Pending My Action or My Documents to expand the tree and display the three (3) document types: Findings/ENs, Evaluations and Summaries. In Source Selection, click on the plus (+) sign located to the left of All Offerors or a specified Offeror (e.g. Offeror AAA, Offeror BBB, etc.) to display tree.
3. Click on ‘Evaluations’ from the tree to display the Evaluation grid in workspace.

NOTE: Grid will display all Evaluations that meet selected view setting from the stack panel (e.g. Pending My Action, My Documents, All Offerors, Offeror AAA, etc.) The grid will be empty until the first Evaluation meeting select view setting is saved in ASSIST.

4. Click on ADD EVALUATION located in the upper right hand corner of the grid to create a new Evaluation. See section 3.4 "Document Actions" for additional information on the add action.

NOTE: A user does not have to be in view for a specified Offeror (e.g. Offeror AAA) to create an Evaluation for that Offeror. An Evaluation can be created for any Offeror from any view where Evaluations are displayed. The newly created Evaluation may not appear within view depending upon selected view settings (e.g. creating a new Evaluation for Offeror BBB when in the Evaluation view for Offeror AAA). If this occurs, select appropriate view setting from the stack panel to locate newly created Evaluation.

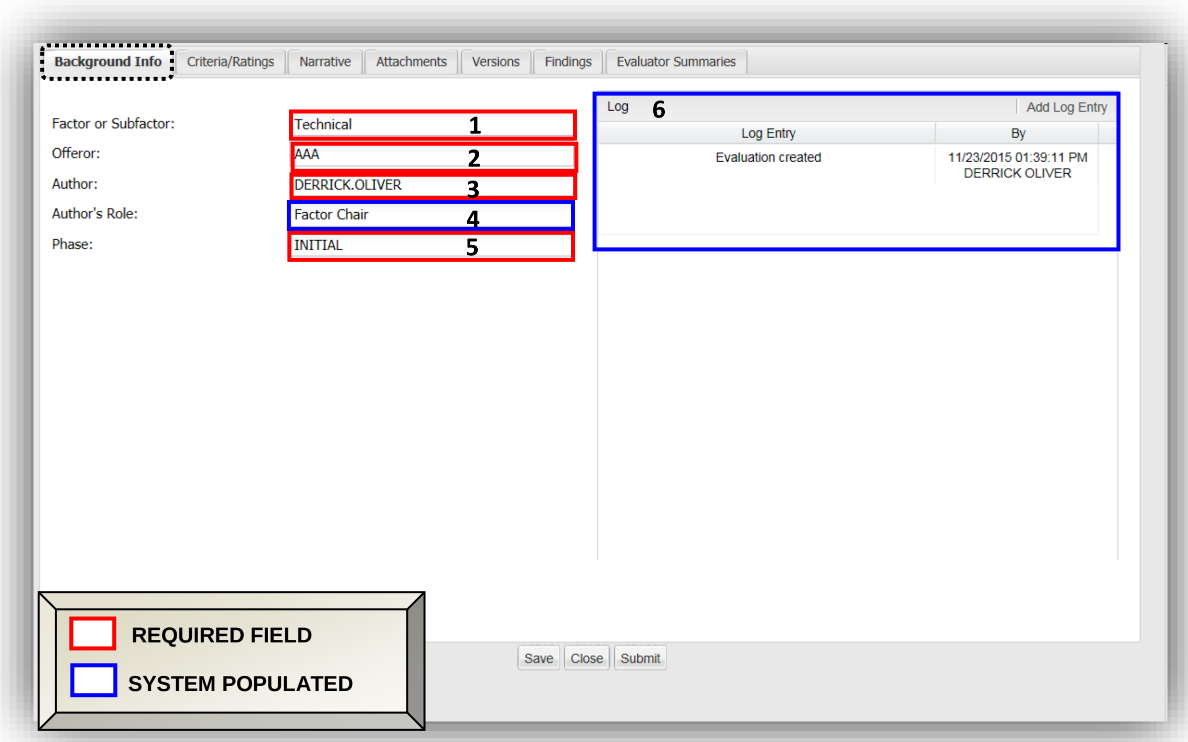
3.2.2 Evaluation Tabs

There are (7) basic components of an Evaluation in ASSIST. These components appear as tabs in any opened Evaluation. The seven (7) tabs for every Evaluation are: Background Info, Criteria/Rating, Narrative, Attachments, Versions, Findings, and Evaluator Summaries.

NOTE: There is one (1) additional tab if creating and/or viewing an Evaluation for a Past Performance factor type: the Past Performance tab. See section 2.4 "Factors" for more information on factor types. More information on this tab can also be seen below.

3.2.2.1 Background Info

This tab contains the background information of the Evaluation (e.g. Factor and Offeror created for, author of evaluation, etc.). Complete the fields identified as required below. See below for additional information about each field.



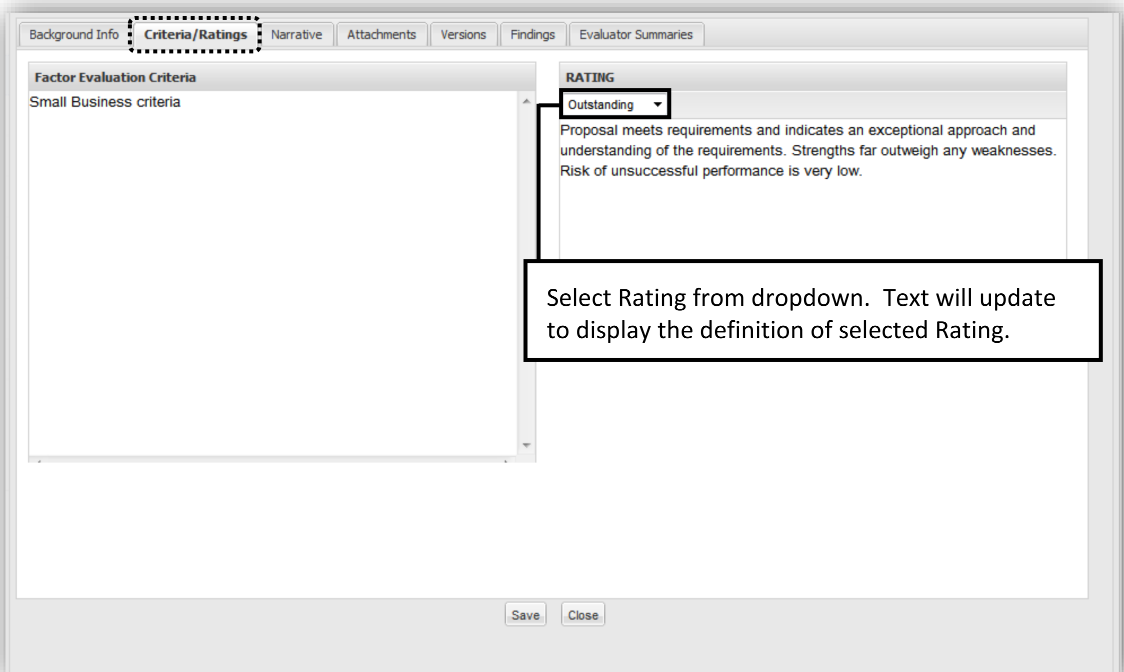
1. **Factor or Subfactor:** Select the Factor or Subfactor that the Evaluation is being created for from the dropdown. User will only be able to select a Factor associated to their assigned role in Members (e.g. an Evaluator associated to the Technical Factor will only be able to select Technical). See section 2.5 "Members" for more information on roles and associated Factors. **Field cannot be changed after Evaluation saved.**
2. **Offeror:** Select the Offeror that the Finding is being created from dropdown. Field contains list of all Offerors created in ASSIST. **Field cannot be changed after Evaluation is saved.**
3. **Author:** Identifies the creator of the Evaluation. Field is automatically populated when the Finding/EN is created and can only be changed/modified via the REASSIGN AUTHOR function. See section 3.4 "Document Actions" for more information on reassigning an Evaluation.
4. **Role:** Populated by system based upon the author's assigned role and associated Factors/Subfactors.

NOTE: If a user is assigned to more than one role within an associated Factor/Subfactor (e.g. Factor Chair and Evaluator for Technical Subfactor) the role can be changed/updated. Click on dropdown to view and select from all assigned roles within the Factor/Subfactor.

5. **Phase:** Identifies the phase (e.g. Initial, Interim, or Final) that the Evaluation was created in. This is automatically populated with phase that the Source Selection was in when the Evaluation was created. See section 2.8 "Decision Documents" for more information on Evaluation phases.
6. **Log:** A system generated document log will first appear after the initial save. A log entry will occur when there is any updates/edits to the document. The log displays all log entries, the user who performed the updates/edits, and the time/date the log entry was made. A user can create a manual log entry by selecting/clicking on ADD LOG ENTRY. A log entry box will populate for the user to input rationale for the entry. Once the rationale has been entered, select/click on ADD LOG ENTRY.

3.2.2.2 Criteria/Ratings

This tab provides the user the ability to view the Evaluation Criteria for the Factor/Subfactor and select the resultant rating to be assigned to the Offeror. The Cost/Price Factor will not have a rating. The Evaluation Criteria and rating selections are configured during the source selection setup of the Factor/Subfactor in Administration. See section 2.4.2 "Individual Factor View" for more information.

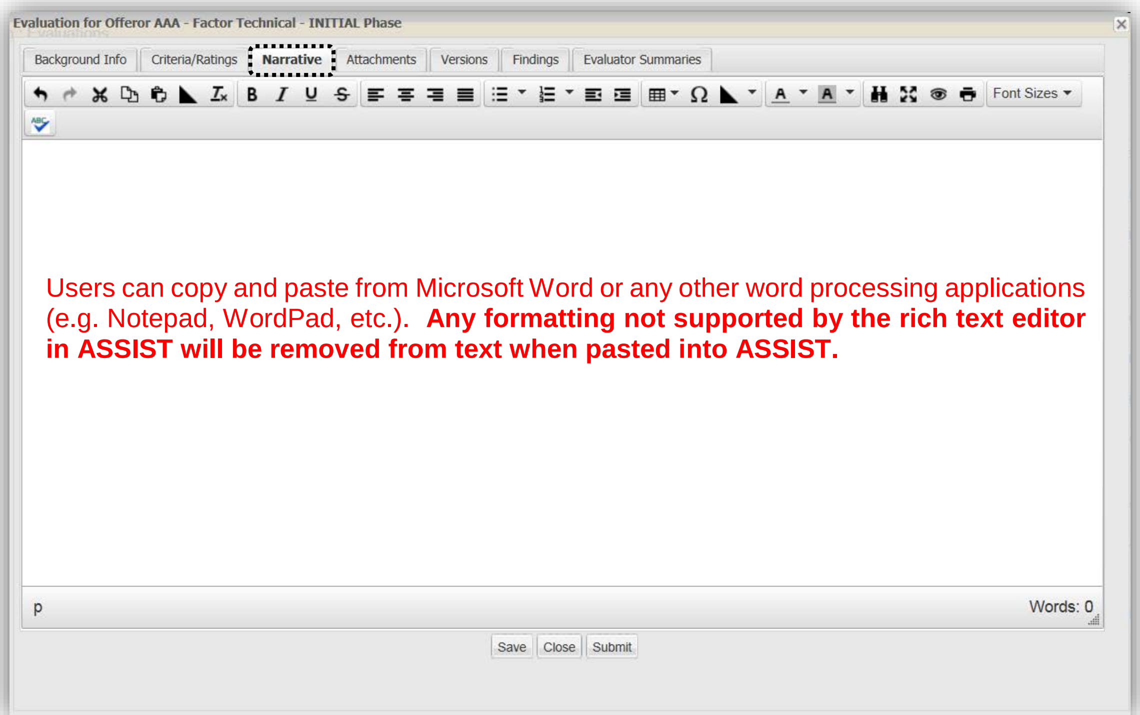


3.2.2.3 Narrative

(Optional) Enter text in provided field. This text field is rich text enabled. For any non-cost/price Factor/Subfactor, the text should (at a minimum) roll up information gathered through exchanges with Offerors and information identified by the Source Selection Team as Findings (e.g. strengths, weaknesses, and deficiencies, etc...) to assign and substantiate a rating.

NOTE: Text is ***not required*** to be entered in this tab***.*** **Users can either:**

- Enter text in the Narrative tab; **or**
- Browse to their local directory (or a share drive) where files are saved to select and add/upload a file in the Attachment tab.

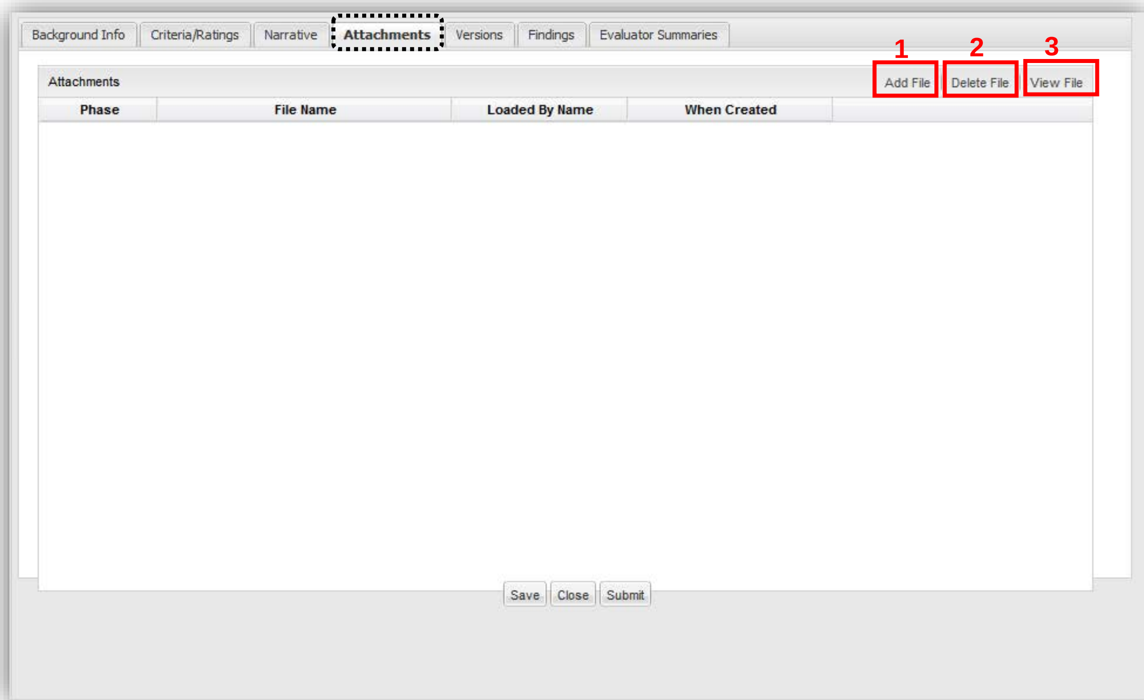


3.2.2.4 Attachments

(Optional) Browse a local directory (or a share drive) where files are saved to select and add/upload an Evaluation created outside of ASSIST or to add/upload attachments (e.g. drawings or images) to an Evaluation documented in the Narrative tab. More than one (1) file can be uploaded. **A newly added file will not overwrite a previously uploaded file. Users must manually manage all attachments using the ADD FILE and DELETE FILE actions (see instructions below).**

NOTE: Files are ***not required*** to be added/uploaded in the Attachment tab***.*** **Users can either:**

- Enter text in the Narrative tab; **or**
- Browse to their local directory (or a share drive) where files are saved to select and add/upload a file in the Attachment tab.



Adding a File

1. Click ADD FILE (button #1 above).
2. Click BROWSE.
3. Navigate to local directory (or share drive), select/single-click it and click OPEN (or double click it).
4. Click Submit. Repeat process to add multiple files.

File will appear as new row in grid.

IMPORTANT! Files over 300MB are not supported and will not successfully upload into ASSIST.

Deleting a File

5. Select/single click file from grid.
6. Click DELETE FILE (button #2 above).
7. Confirm delete by clicking YES.

Viewing a File

8. Select/single click file from grid.
9. Click VIEW FILE (button #3 above).
10. Select open or save file to local directory (or share drive).

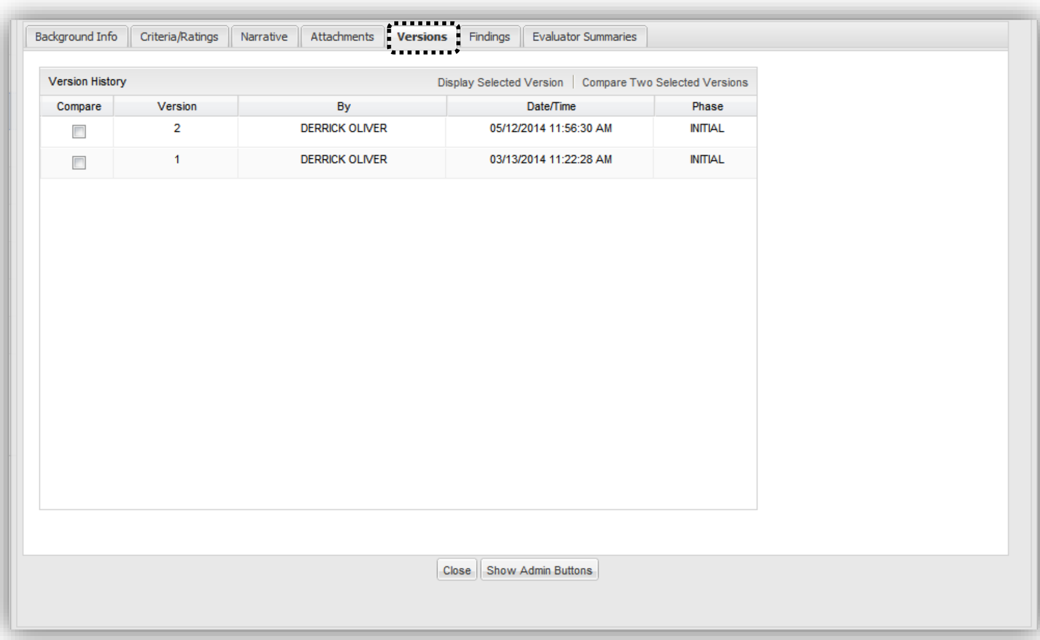
Modifying an Attached Document
Modifying an attached document in ASSIST involves replacing that document in ASSIST with a locally saved version of the file.

It's recommended that you start this process by downloading/saving the file from ASSIST to your local computer to ensure any changes are made to the most current version. The user must then make the necessary changes to the downloaded version, save the document and then perform the ADD a File steps 1-3. However, you can replace an existing version of a file in ASSIST with a new locally saved version without performing these steps (but you risk overwriting content in the ASSIST version of the file if you do this).

1. (optional) Select and save a copy of the current file (see "Viewing a File" above for more information).
2. (optional) Make any desired changes as needed to the local copy of the document.
3. (optional) Save the updated local copy to a specific folder location on the local computer…note that location.
4. Go back into the Attachment tab and select the document to be replaced.
5. Click DELETE FILE.
6. Click BROWSE.
7. Navigate to the updated local copy (saved in step 3), select/single-click it and click OPEN (or double click it).
8. Click SUBMIT.

3.2.2.5 Versions

When text is initially entered and saved in Narrative tab, version 1 is created. When/if that text or the rating is updated and saved, the version number will increase by '1'. The version history is displayed in a grid located in the Version Tab. This grid displays all versions, the user who created new version and the time/date version was made. If a user DOES NOT make changes to the narrative text nor the rating, and only updates/adds Attachments, a version will not be created.



Users can view a previous version of text entered or perform a comparison of two selected versions.

Viewing a Prior Version

1. Click on box adjacent to desired version.
2. Click DISPLAY SELECTED VERSION.
3. A new tab will appear next to the Evaluator Summaries tab. This tab will display the previous version number selected to be view.

Comparing Two Versions

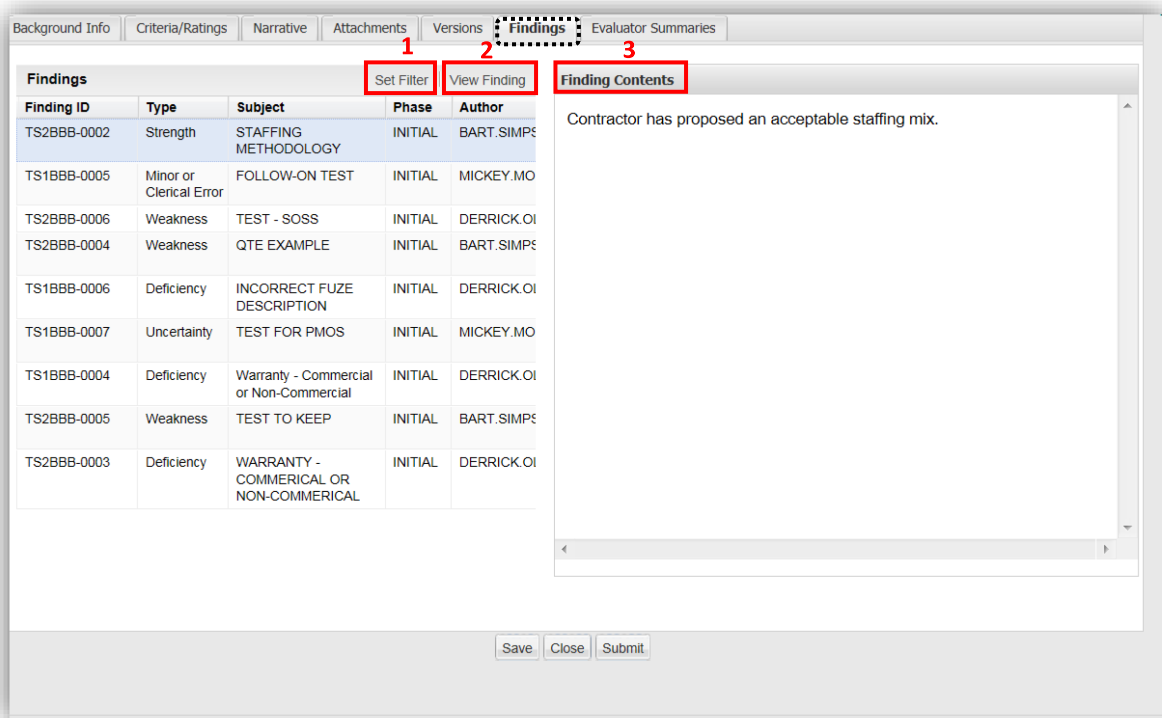
1. Click on box adjacent to two (2) versions to compare.
2. Click COMPARE TWO SELECTED VERSIONS.
3. A new tab will appear. This tab will display the two (2) versions selected to be compared.

NOTE: When comparing two (2) versions:

- Any text that was removed will appear highlighted in **red** and strikethrough;
- New text will appear highlighted in **green**; and
- Any formatting changes will appear highlighted in **purple**.

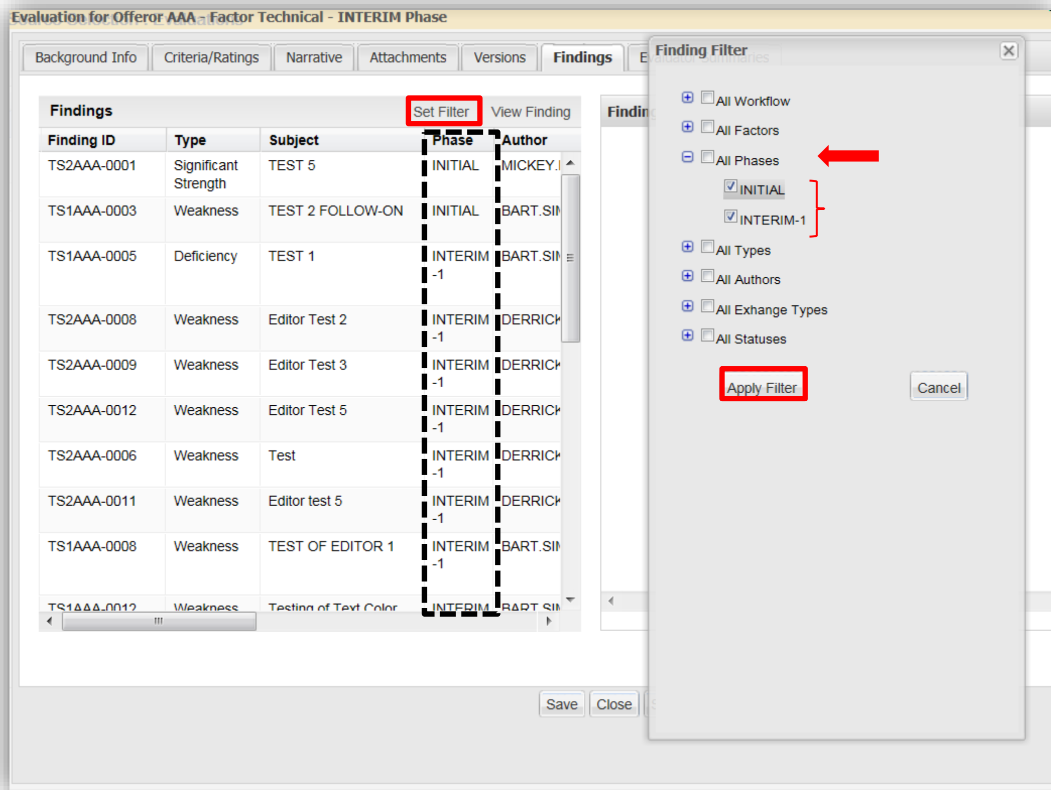
3.2.2.6 Findings

A user can view a list of all active Findings for the Factor/Subfactor associated with the Offeror. You may also SET FILTER to view Findings from a previous phase, a particular Subfactor, Finding Type, etc. Findings can be viewed in its entirety or just the narrative, which would be displayed in the FINDING CONTENTS field.



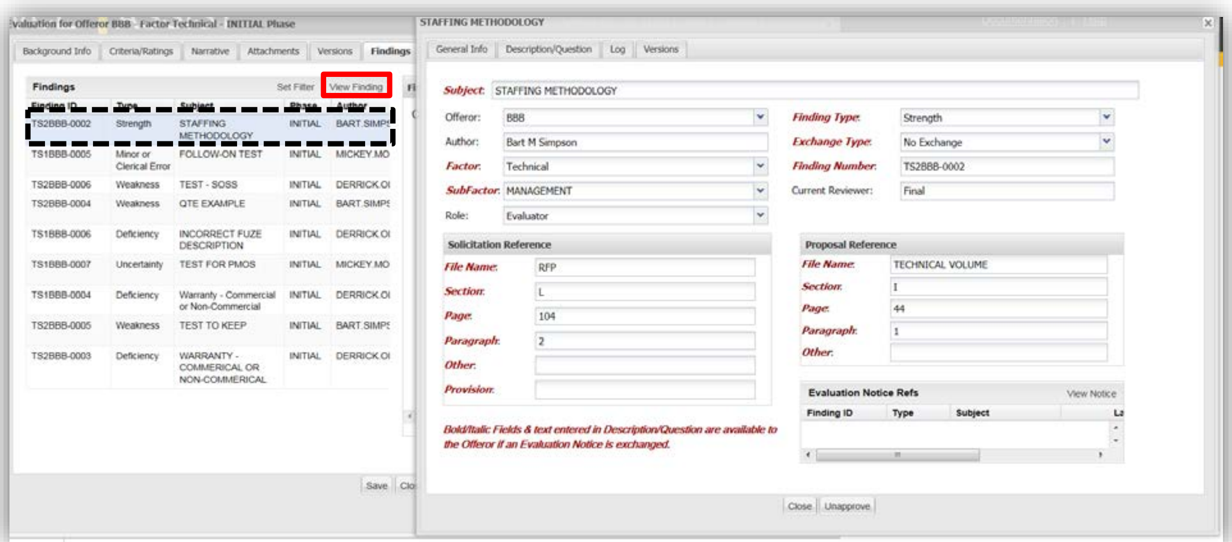
Set Filter

1. Select SET FILTER.
2. Click on the plus (+) sign located to the left of the view(s) (e.g. All Workflow, All Factors, All Phases, etc.) to display tree. Check the box for your view(s).
3. Click APPLY FILTER.



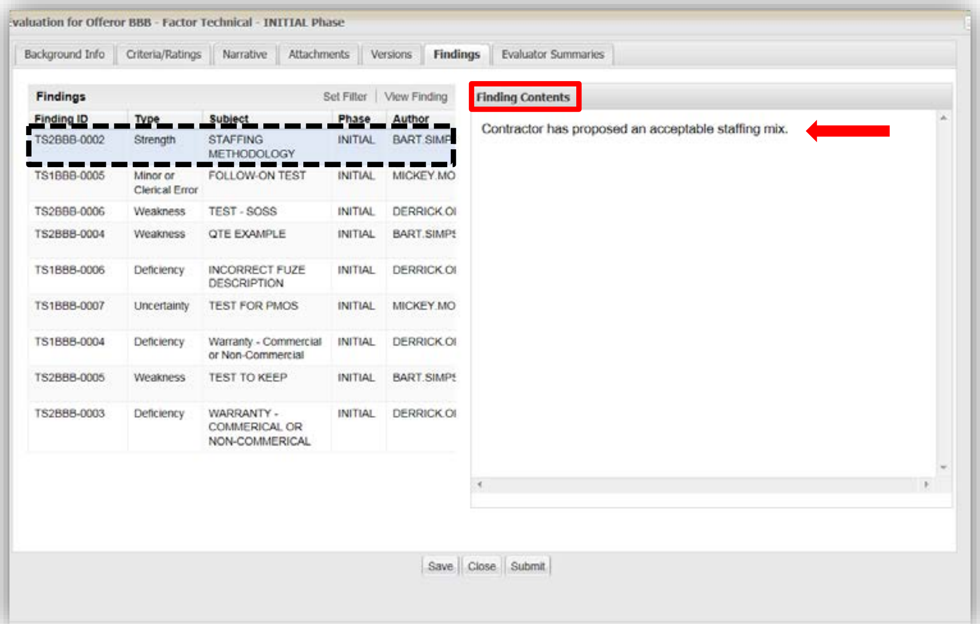
Viewing Finding

1. Select/single click on Finding from the grid. The Finding will be highlighted in blue.
2. Click VIEW FINDING
3. A separate window will open to display the Finding.



Viewing Finding Narrative

1. Select/single click Finding from the grid. The Finding will be highlighted in blue.
2. Narrative will be displayed in the FINDING CONTENTS field.

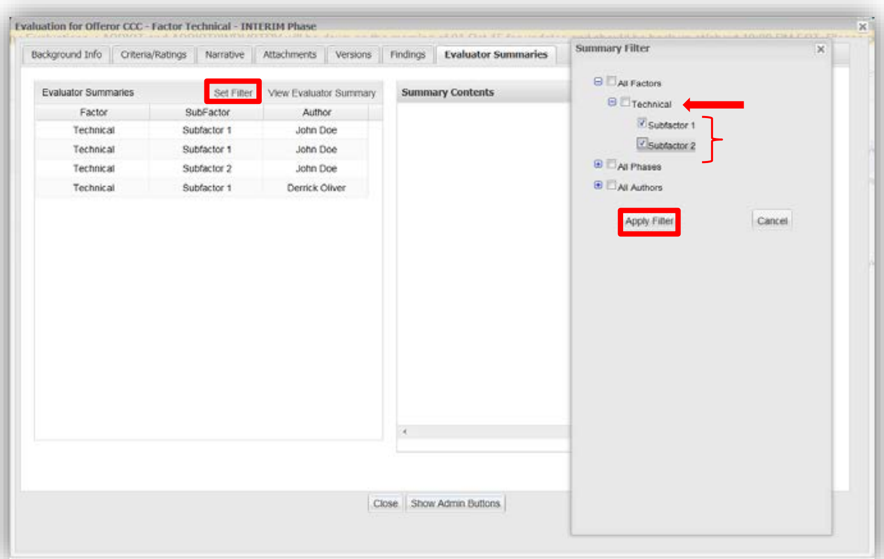


3.2.2.7 Evaluator Summaries

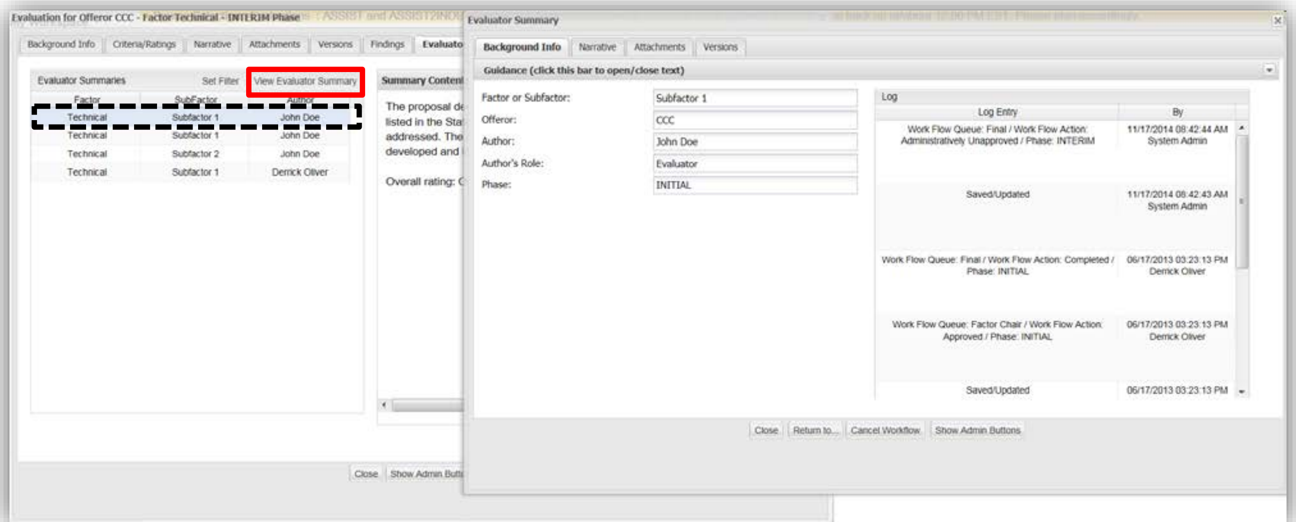
A user can view a list of all Evaluator Summaries for the Factor/Subfactor associated with the Offeror. You may also SET FILTER to view Summaries from a previous phase, a particular Subfactor, and by a specific author. Summaries can be viewed in its entirety or just the narrative, which would be displayed in the SUMMARY CONTENTS field. See section 3.3 below on further information pertaining to Evaluator Summaries.

Set Filter

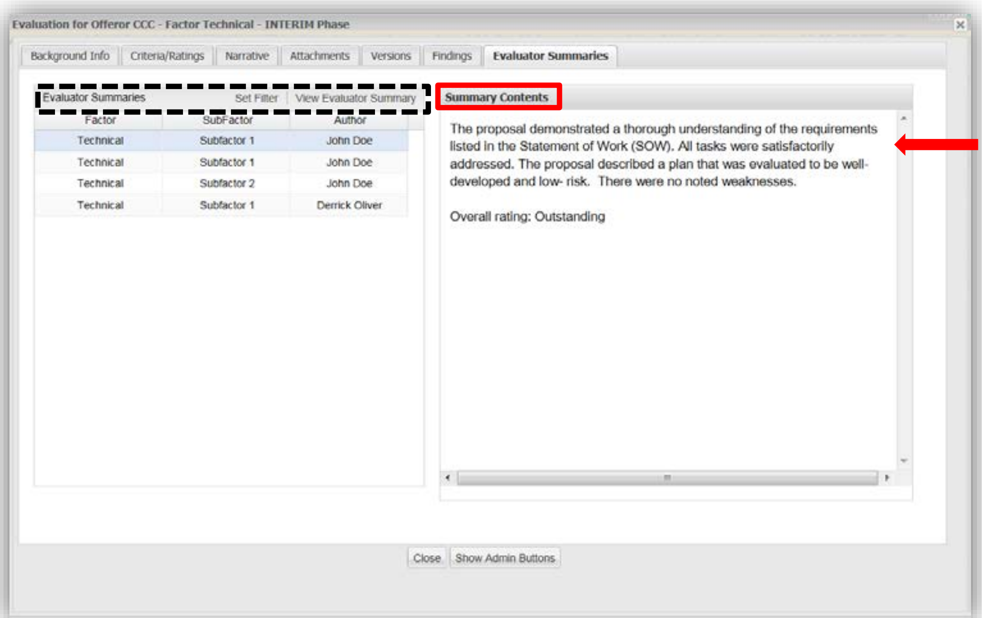
1. Select SET FILTER.
2. Click on the plus (+) sign located to the left of the view (e.g. All Factors, All Phases, All Authors) to display tree. Check the box for your view(s).
3. Click on APPLY FILTER.



Viewing Summary
1. Select/single click on Summary from the grid. The Summary will be highlighted in blue.
2. Click VIEW EVALUATOR SUMMARY.
3. A separate window will open to display the Summary.



Viewing Summary Narrative
1. Select/single click Summary from the grid. The Summary will be highlighted in blue.
2. Narrative will be displayed in the SUMMARY CONTENTS field.

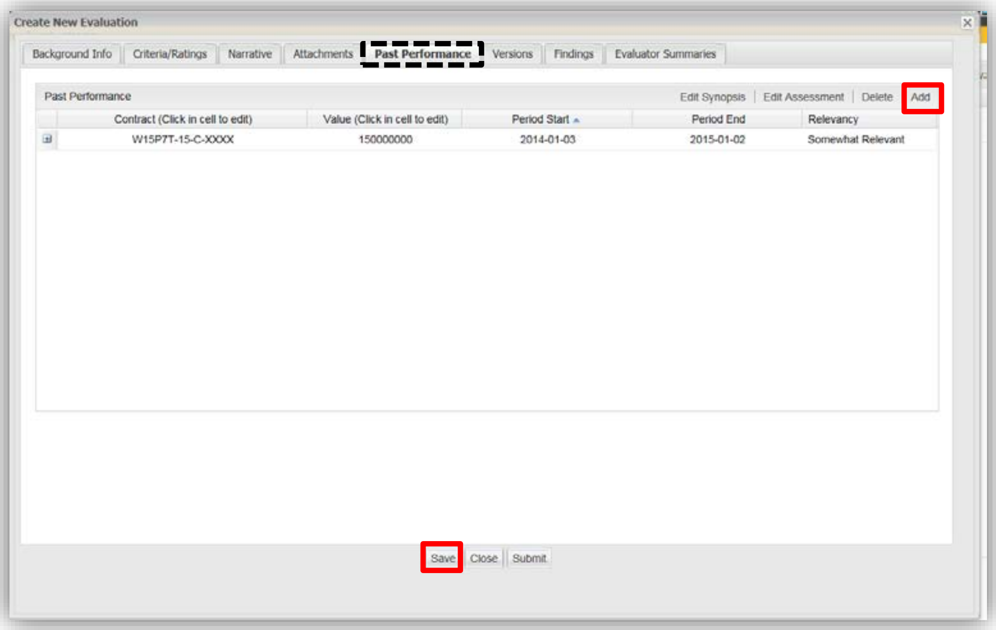


3.2.2.8 Past Performance

As stated under paragraph 3.2.2. above, there are seven (7) basic components of an Evaluation that appear as a tab. However, there is one (1) additional component/tab if creating and/or viewing an Evaluation for a Past Performance factor type: the Past Performance tab will allow Past Performance team members to enter Past Performance contract information submitted by the Offeror(s) such as: contract number(s), the dollar value of the contract, the contract start and end dates, and relevancy rating for the contract. The Past Performance evaluator can also enter a synopsis of the information and provide an assessment of the Past Performance contractual information that was submitted. See 2.4 Factors for more information on factor types.

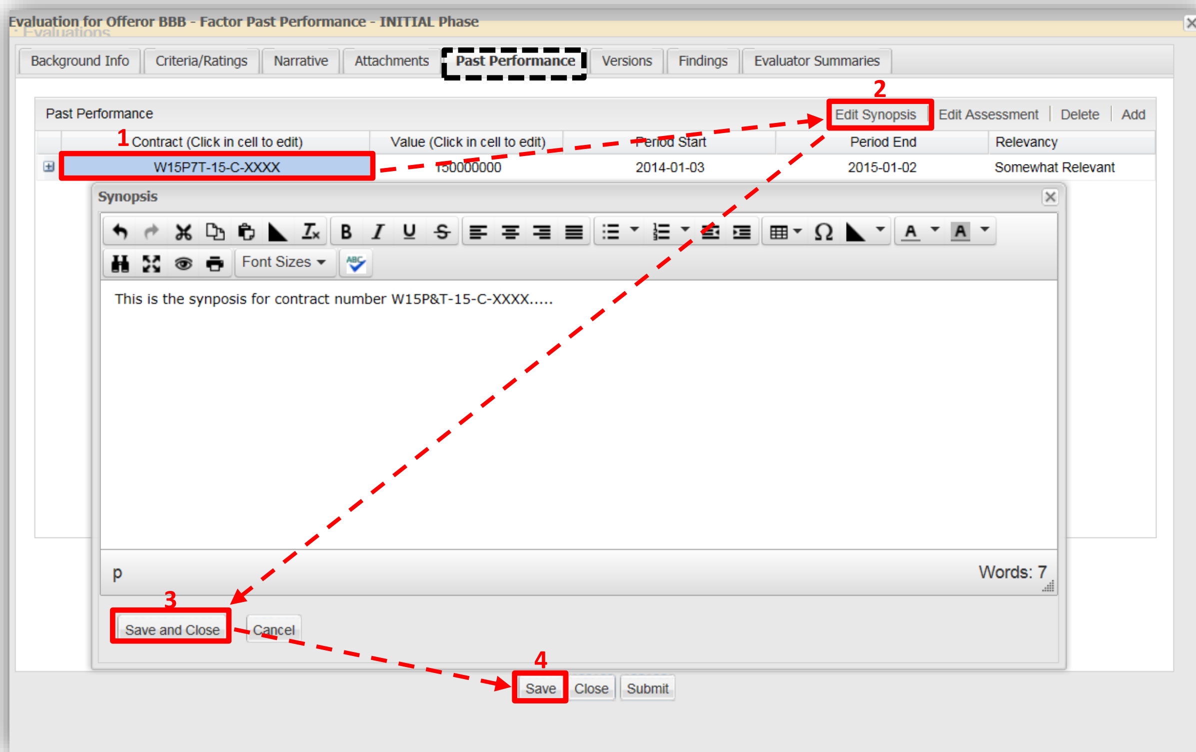
Adding Past Performance Information

1. Click ADD.
2. Click on the cell area to the right of the plus (+) sign and input CONTRACT number.
3. Click on VALUE cell to enter contract dollar amount.
4. Click on the PERIOD START/End cells and CALENDAR to enter the contract start/end dates.
5. Click on the RELEVANCY cell and from the dropdown menu select the relevancy rating.
6. Click SAVE.



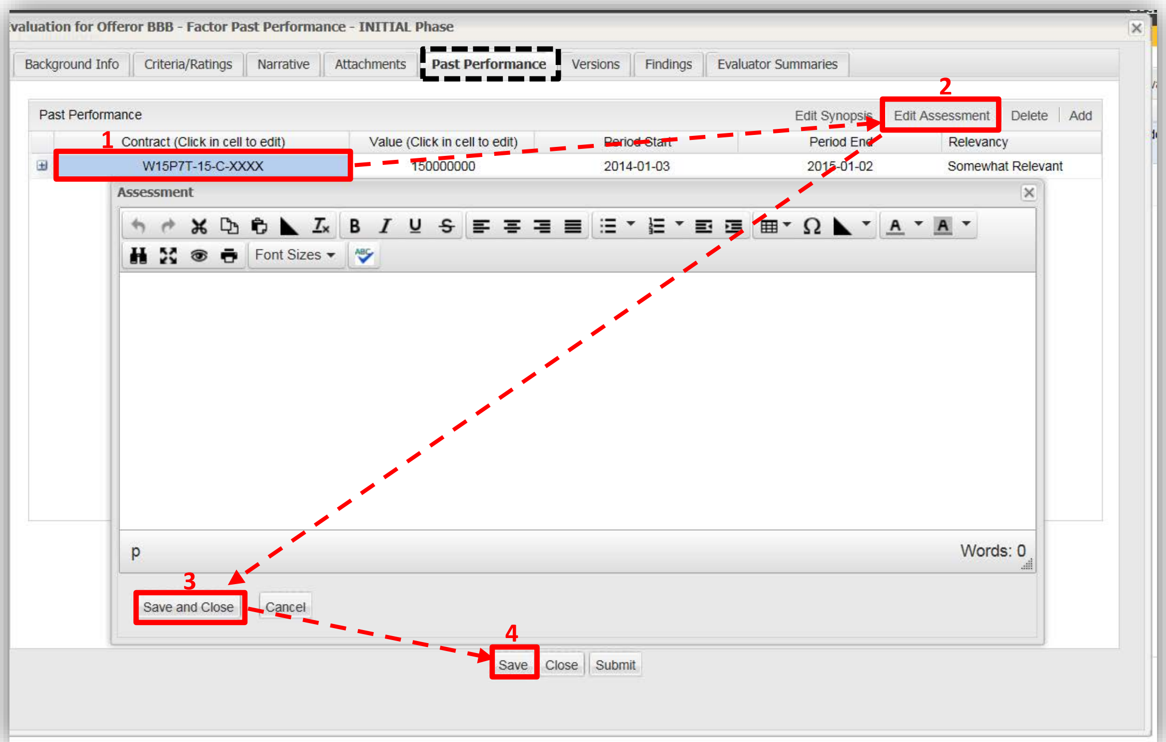
Adding a Past Performance Synopsis

1. Select/single click on the contract number.
2. Click EDIT SYNOPSIS. Another window will appear for the user to enter a synopsis of the past performance contract information.
3. Once the synopsis has been entered, click SAVE AND CLOSE to save/close the synopsis narrative window.
4. In order to save the Past Performance SYNOPSIS in the Evaluation Report, you must click SAVE.



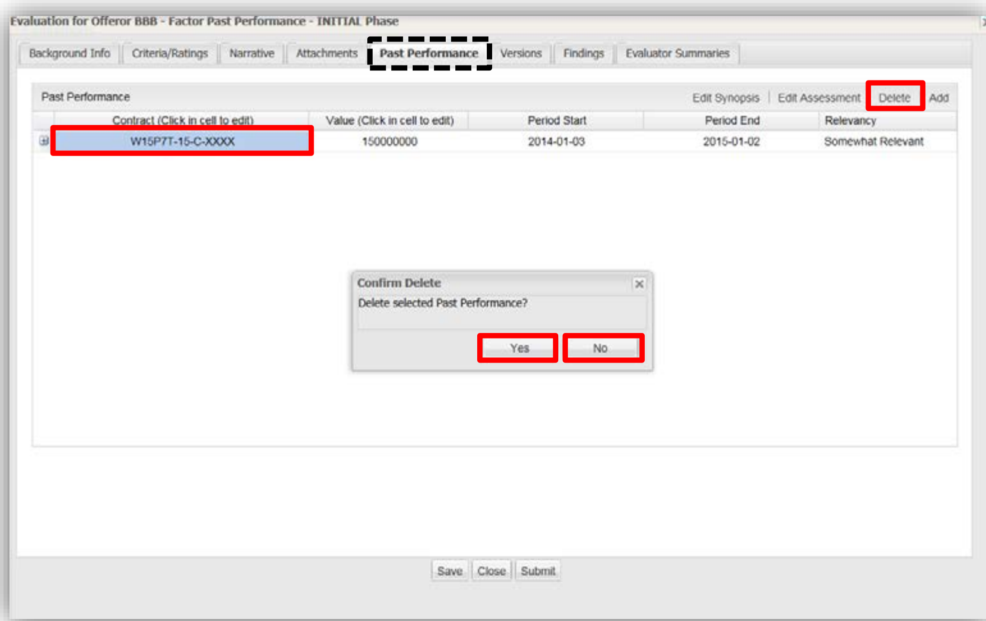
Adding a Past Performance Assessment

1. Select/single click on the contract number.
2. Click EDIT ASSESSMENT. Another window will appear for the user to enter an assessment of the past performance contract information.
3. Once the assessment has been entered, click SAVE AND CLOSE to save/close the assessment narrative window.
4. In order to save the Past Performance ASSESSMENT in the Evaluation Report, you must click SAVE.



Deleting the Past Performance Information

1. Select/single click on the contract number.
2. Click Delete. A window will populate to confirm the deletion.
3. Click YES to delete or NO to cancel the request.



3.3 Evaluator Summaries

The purpose of the "Evaluator Summary" is to allow evaluators to provide information, based upon their individual subject matter expertise, as input to the person who is responsible for writing the Evaluation Report that will support the Rating assigned to the Factor/Subfactor. **The use of the "Evaluation Summary" is optional and should be at the discretion of the person responsible for writing the Evaluation Report.**

Any member assigned to a Factor and/or Subfactor as an Evaluator, Subfactor Chair, or Factor Chair can create their own Summary for an Offeror within their assigned Factor and/or Subfactor. **Across all Factors/Subfactors, only one Summary can be created by a member for each Offeror for each factor and each Subfactor in a phase.** A new Summary can be created by each member for each Offeror for each Factor/Subfactor for every phase of the evaluation (Initial, Interim, and Final). See section 2.8 “Decision Documents” for more information on phases.

To document their Summary, users can either enter text in the Narrative tab or browse to their local directory (or a share drive) where files are saved to select and add/upload a file(s) in the Attachment tab. More information pertaining to these tabs as well as other tabs that make up a Summary are discussed in section 3.3.2 below.

3.3.1 Adding a Summary

An Evaluator Summary can be created from any Summary view in My Workspace or Source Selection.
1. Click on either My Workspace or Source Selection from the stack panel.
2. In My Workspace, click on the plus (+) sign located to the left of Pending My Action or My Documents to expand the tree and display the three (3) document types: Findings/ENs, Evaluation and Summaries. In Source Selection, click on the plus (+) sign located to the left of All Offerors or a specified Offeror (e.g. Offeror AAA, Offeror BBB, etc.) to display tree.
3. Click on ‘Summary’ from the tree to display the Summary grid in workspace.

NOTE: Grid will display all Summaries that meet selected view setting from the stack panel (e.g. Pending My Action, My Documents, All Offerors, Offeror AAA, etc.) The grid will be empty until the first Summary meeting selected view setting is saved in ASSIST.

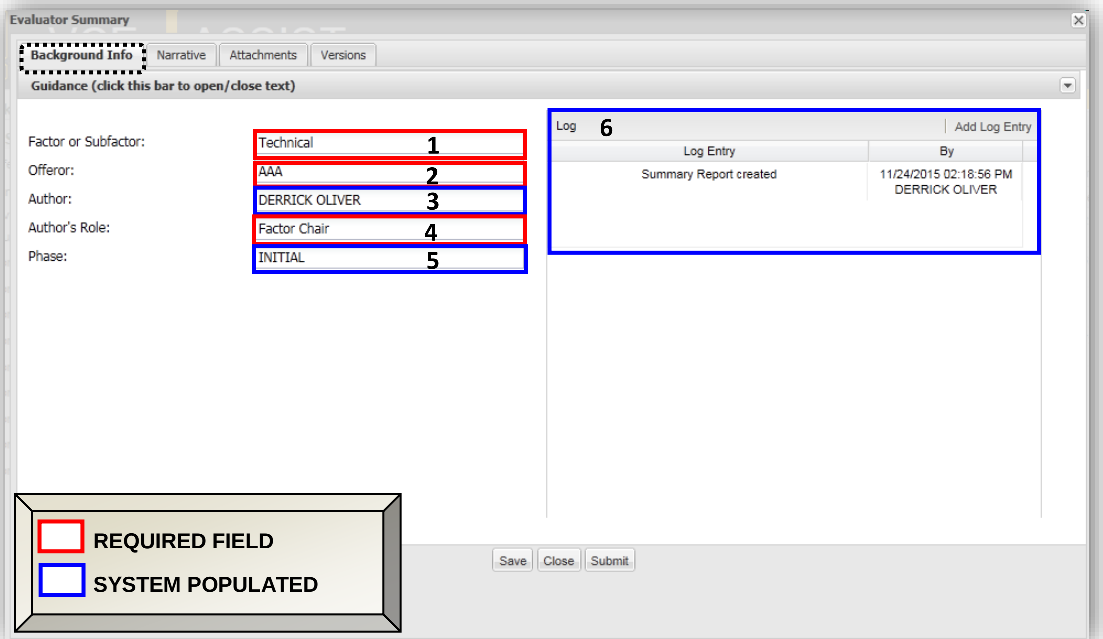
1. Click on ADD located in the upper right hand corner of the grid to create a new Summary. See section 3.4 “Document Actions” for additional information on the add action.

NOTE: A user does not have to be in a view for a specified Offeror (e.g. Offeror AAA) to create a Summary for that Offeror. A Summary can be created for any Offeror from any view where Summaries are displayed. The newly created Summary may not appear within view depending upon selected view settings (e.g. creating a new Summary for Offeror BBB when in the Summary view for Offeror AAA). If this occurs, select appropriate view setting from the stack panel to locate newly created Summary.

3.3.2 Summary Tabs

There are four (4) basic components of a Summary in ASSIST. These components appear as tabs in any opened Summary. The four (4) tabs for every Summary are: Background Info, Narrative, Attachments, and Versions. See below for more information on each tab.

3.3.2.1 Background Info
This tab contains the background information of the Summary (e.g. Factor and Offeror created for, author of Summary, etc.). Complete the fields identified as required below. See below for additional information about each field.



1. **Factor or Subfactor:** Select the Factor or Subfactor that the Summary is being created for from the dropdown. User will only be able to select a Factor associated to their assigned role in Members (e.g. an Evaluator associated to the Technical Factor will only be able to select Technical). See section 2.5 "Members" for more information on roles and associated Factors. **Field cannot be changed after Summary is saved.**
2. **Offeror:** Select the Offeror that the Summary is being created from dropdown. Field contains list of all Offerors created in ASSIST. **Field cannot be changed after Summary is saved.**
3. **Author:** Identifies the creator of the Summary. Field is automatically populated when the Summary is created and can only be changed/modified via the REASSIGN AUTHOR function. See section "3.4 Document Actions" for more information on reassigning a Summary.
4. **Role:** Populated by system based upon the author's assigned role within associated Factors/Subfactors.

NOTE: If a User assigned to more than one role within an associated Factor/Subfactor (e.g. Factor Chair and Evaluator for Technical Factor) the role can be changed/updated. Click on dropdown to view and select from all assigned roles within Factor/Subfactor.

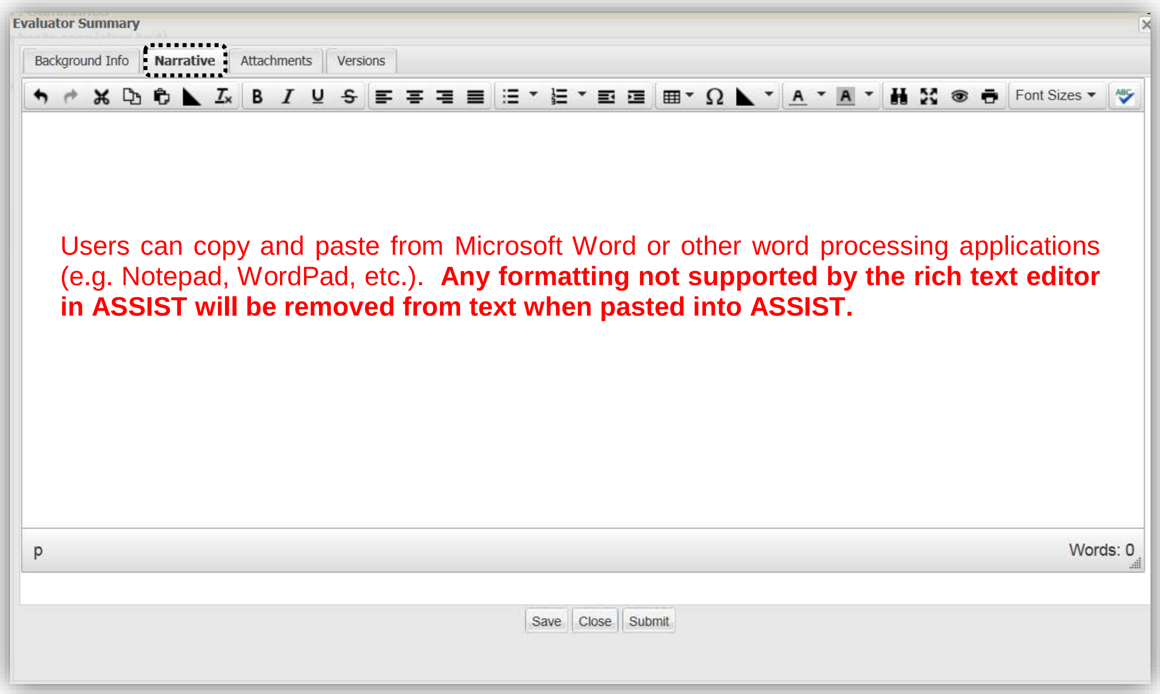
5. **Phase:** Identifies the phase (e.g. Initial, Interim, or Final) that the Summary was created in. This is automatically populated with phase that the Source Selection was in when the Summary was created. See section 2.8 "Decision Documents" for more information on Summary phases.
6. **Log:** A system generated document log will first appear after the initial save. A log entry will occur when there is any updates/edits to the document. The log displays all log entries, the user who performed the updates/edits, and the time/date the log entry was made. A user can create a manual log entry by selecting/clicking on ADD LOG ENTRY. A log entry box will populate for the user to input rationale for the entry. Once the rationale has been entered, select/click on ADD LOG ENTRY.

3.3.2.2 Narrative

(Optional) Enter text in provided field. This text field is rich text enabled. For any non-cost/price Factor/Subfactor, the text should (at a minimum) roll up information gathered through exchanges with Offerors and information identified by the Source Selection Team as Findings (e.g. strengths, weaknesses, and deficiencies, etc...).

NOTE: Text is ***not required*** to be entered in this tab***.*** **Users can either:**

- Enter text in the Narrative tab; **or**
- Browse to their local directory (or a share drive) where files are saved to select and add/upload a file in the Attachment tab.



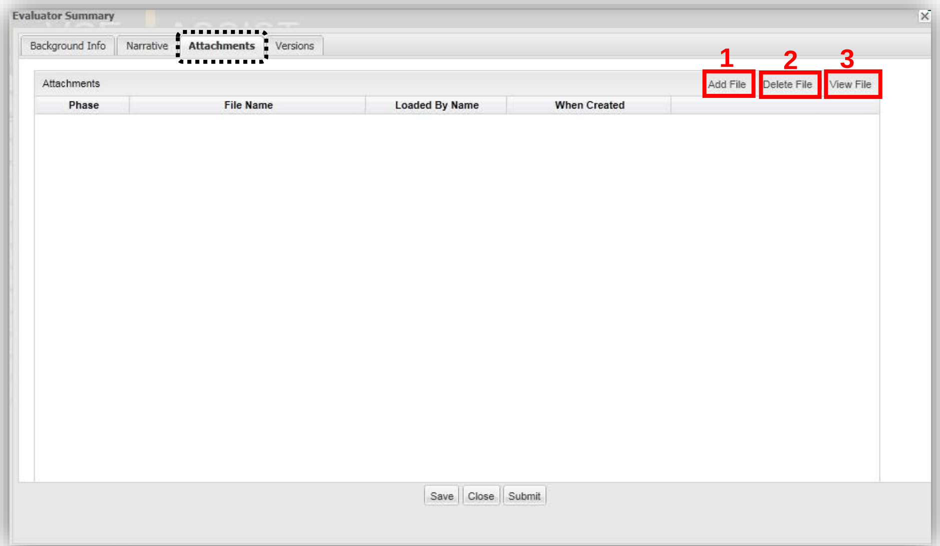
NOTE: The Summary **does not** have a Criteria/Ratings tab. If a rating is required for your evaluation approach, include resultant rating and supporting rationale in text field in Narrative tab.

3.3.2.4 Attachments

(Optional) Browse a local directory (or a share drive) where files are saved to select and add/upload a Summary created outside of ASSIST or to add/upload attachments (e.g. drawings or images) to a Summary documented in the Narrative tab. More than one (1) file can be uploaded. **A newly added file will not overwrite a previously uploaded file. Users must manually manage all attachments using the ADD FILE and DELETE FILE actions (see instructions below).**

NOTE: Files are ***not required*** to be added/uploaded in the Attachment tab***.*** **Users can either enter:**

- Enter text in the Narrative tab; **or**
- Browse their local directory (or a share drive) where files are saved to select and add/upload a file in the Attachment tab.



Adding a File

1. Click ADD FILE (button #1 above).
2. Click BROWSE.
3. Navigate to local directory (or share drive), select/single-click it and click OPEN (or double click it).
4. Click Submit.

File will appear as new row in grid.

IMPORTANT! Files over 300MB are not supported and will not successfully upload into ASSIST.

Deleting a File

1. Select/single click file from grid.
2. Click DELETE FILE (button #2 above).
3. Confirm delete by clicking YES.

Viewing a File

11. Select/single click file from grid.
12. Click VIEW FILE (button #3 above).
13. Open or save file to local directory (or share drive)

Modifying an Attached Document

Modifying an attached document in ASSIST involves replacing that document in ASSIST with a locally saved version of the file.

It's recommended that you start this process by downloading/saving the file from ASSIST to your local computer to ensure any changes are made to the most current version (steps 1-3), however, you can replace an existing version of a file in ASSIST with a new locally saved version without performing these steps (but you risk overwriting content in the ASSIST version of the file if you do this).

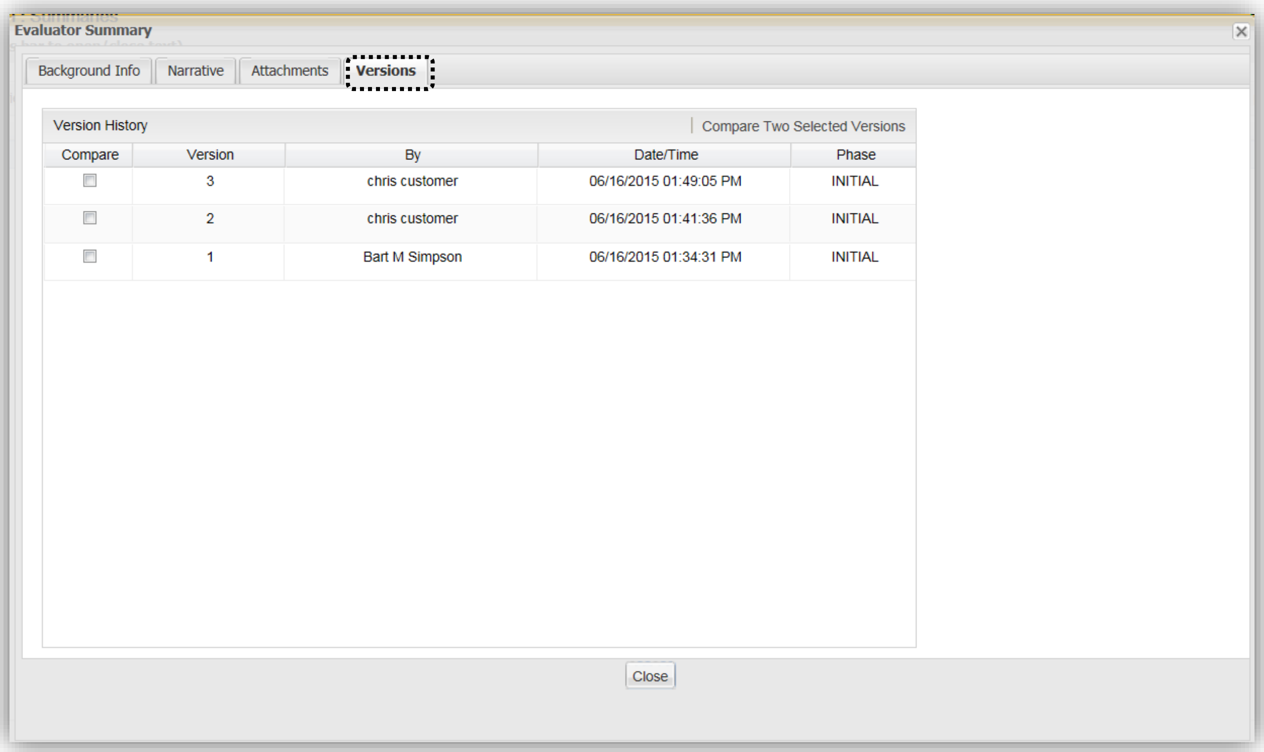
1. (optional) Select and save a copy of the current file (see Viewing a File above for more information).
2. (optional) Make any desired changes as needed to the local copy of the document.
3. (optional) Save the updated local copy to a specific folder location on the local computer…note that location.

4. Go back into the Attachment tab and select the document to be replaced.
5. Click DELETE FILE.
6. Click BROWSE.
7. Navigate to the updated local copy (saved in step 3), select/single-click it and click OPEN (or double click it).
8. Click SUBMIT.

3.3.2.5 Versions

When text is initially entered and saved in Narrative tab, version 1 is created. When/if that text is updated and saved, the version number will increase by '1'. The version history is displayed in a grid located in the Version Tab. This grid displays all versions, the user who created new version and the time/date version was made.

NOTE: A version is **only** created when changes are made to any text entered in the Narrative tab. Prior versions do not account for any changes made in the Background Info or Attachment tabs.



Comparing Two Versions

1. Click on box adjacent to two (2) versions to compare.
2. Click COMPARE TWO SELECTED VERSIONS.
3. A new tab will appear. This tab will display the two (2) versions selected to be compared. Click on this tab to view the version comparison.

NOTE: When comparing two (2) versions:

- Any text that was removed will appear highlighted in **red** and strikethrough;
- New text will appear highlighted in **green**; and
- Any formatting changes will appear highlighted in **purple**.

3.4 Document Actions

There are document actions available for each document type (Findings/ENs, Evaluations and Summaries) via buttons located in the upper right hand corner of any document grid viewed in My Workspace or Source Selection.

Set Filter: Click to further filter documents that appear in table. Select filter criteria from window that will appear once action is initiated and then 'Apply Filter' button to apply criteria. View will update to show documents meeting selected criteria. (All Document Types)

Export Displayed*: Exports all documents in current view to Microsoft Word format to be saved locally or printed. The CONFIGURE FILTER feature can be used in conjunction with EXPORT ALL to create reports (e.g. all weaknesses, all document for specified author, etc…) (All Document Types)

Export Selected*: Exports selected document to Microsoft Word format to be save locally or printed. More than one document can be selected. To select more than one document, click and hold the CRTL key on your keyboard and then select the one to multiple documents. (All Document Types)

Replace Author: Click to reassign author of document. A new window will appear that will identify existing author and will all allow user to select the new author from a dropdown field. Only users whose role provides them access to that document type for that factor or Subfactor will appear in dropdown. (All Document Types)

Add: Click to add a "new" document. Upon clicking a blank document will be created for user to complete. (All Document Types)

Edit: Click to edit selected document. User must first highlight desired document then click button to initiate action. Only a document within a user's control (either a document authored by user and not released into the workflow or a document that has come to them in the workflow) can be edit (All Document Types)

View: Click to view (only) a selected document. (All Document Types)

Delete/Negate: Click to delete a document from the source selection. User must first highlight desired document then click button to initiate action. If the selected document was created within the current phase, the document will be deleted from source selection. If was created in a prior phase and the action is initiated, the document will be negated. User will be required to input comments and document will be made inactive but kept as part of record. (**Findings/ENs & Summaries can be deleted/negated. <u>Evaluations can only be deleted in current phase – no ability to negate.</u>**)

Summarize: Summarizes status of Findings by Offeror and factors (Findings/ENs only)

***If the selected document has attachments the user will be asked whether to export just the document or export the document with all attachments. If user selects the latter, the user will receive a zip file containing the selected document and attachments.**

4.0 Document Workflow

4.1 Pending My Action

Documents that come to reviewer/approver through work flow can be seen in "Pending My Action" in My Workspace. Counters next to each document type identify the number pending a user's action. **Users must click on Update Pending button to refresh counters and check inbox.**

"Pending My Action" also includes:

- Any document created and saved by a user (as author) but not yet released into workflow; and
- Documents returned to a user in the workflow (e.g. rejected findings/assessments).

4.2 Workflow Actions

ASSIST provides an evaluation team a great amount of flexibility when routing documents (e.g. Findings, Evaluation Reports) through the workflow. ***Basic*** workflow actions are available for users involved in the workflow (e.g., the document author or a reviewer/approver) and ***administrative*** workflow actions are available only for the Source Selection Administrator(s), Source Selection Chairperson(s), Contract Specialist(s) or Contracting Officer(s). Buttons within the documents allow these actions to be completed. The buttons are available for a user depending on the specific user, the document, and/or the document's current status.

4.2.1 Basic Workflow Actions

The tables below describe the Available Conditions and Resulting Actions of the various Basic Workflow Actions available on documents in ASSIST.

Available Conditions: Describes when the workflow action (i.e. the button) would be available.
Resulting Actions: Describes what happens when the action is completed.

Save

Available Conditions	1. Available if the user is the author of the document and has **not** submitted it for review/approval; or 2. Available if the user is the current reviewer/approver of the document.
Resulting Action	Saves all changes made to document.

Close

Available Conditions	Available at all times.
Resulting Action	Closes the document (whether in edit or view mode). If in EDIT mode, any changes made will not be saved.

Submit

Available Conditions	Available if the user is an author of the document and has **not** submitted it for review/approval. **NOTE: The submit button is not available until the document has been saved for first time.**
Resulting Action	Submits the document for review/approval to the next reviewer/approver. The author will no longer have edit access to the document.

Cancel Workflow

Available Conditions	1. Available if the user is the author of the document and **has** submitted it for review/approval; or 2. Available if the user has already reviewed/approved the document.
Resulting Action	Cancels the workflow and sends the document back to the author.

Return to…

Available Conditions	Available if the user is the current reviewer/approver of the document.

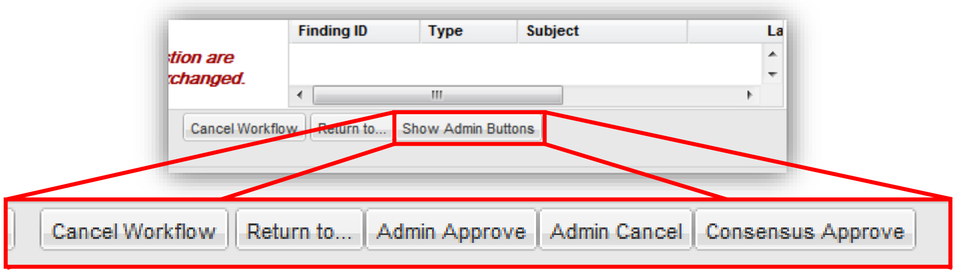
Resulting Action	Sends document back to the selected reviewer/approver. Only reviewers/approvers prior to current reviewer/approver can be selected.

Approve

Available Conditions	Available if the user is the current reviewer/approver of the document.
Resulting Action	Approves the document for the current reviewer/approver and sends it to the next reviewer/approver in the workflow.

4.2.2 Administrative Workflow Actions

Administrative actions can only be performed by the **Source Selection Administrator(s)**, **Source Selection Chairperson(s)**, **Contract Specialist(s)** or **Contracting Officer(s)**. The tables below describe the Available Conditions and Resulting Actions of the each administrative workflow action. The administrative workflow buttons are hidden in a newly opened document (Finding/EN, Evaluation or Summary). To see buttons and perform an administrative action when within a document click on SHOW ADMIN BUTTONS to display and select (click on) an action.



Some of the Administrative Workflow Actions can also be performed on one or more documents at once from the **'Manage Multiple Docs'** view. Instructions are provided below for those administrative actions that can be performed from the 'Manage Multiple Docs' view.

Available Conditions: Describes when the workflow action (i.e. the button) would be available.
Resulting Actions: Describes what happens when the action is completed.

Admin Submit

Available Conditions	Available if the document has been created and saved by the author but not released into the workflow.
Resulting Action	Submits document into the workflow. The selected document(s) will move from author to the next reviewer/approver in the workflow.

Performing action from 'Manage Multiple Docs' view:

1. Select a user from the dropdown field. The view will refresh to display a list of the documents that the selected user has authored and not released.
2. Check the box in the far left column adjacent to the document(s), identifying it as a document for administrative action.
3. Click the 'Submit' button located in the upper right hand corner. All selected (i.e., checked) documents will be submitted to the next reviewer/approver.

Return

Available Conditions	Available for any document that is currently submitted into the workflow.
Resulting Action	Sends document back to the selected reviewer/approver. Only reviewers/approvers prior to current reviewer/approver can be selected.

NOTE: This action is only available from within an individual document. It cannot be performed via the 'Manage Multiple Docs' view.

Admin Cancel

Available Conditions	Available for any document that is currently submitted into the workflow.
Resulting Action	Cancels the workflow and sends the selected document(s) back to the author.

Performing action from 'Manage Multiple Docs' view:

1. Check the box in the far left column adjacent to the document(s) identifying it as a document for administrative action.
2. Click the 'Cancel Workflow' button located in the upper right hand corner. All selected (i.e., checked) documents will be returned back to the respective author(s).

Admin Approve

Available Conditions	Available for any document that is currently submitted into the workflow.
Resulting Action	Marks the document(s) as (administratively) approved for the current reviewer/approver.

Performing action from 'Manage Multiple Docs' view:

1. Select a user from the dropdown field. The view will refresh to show the document(s) where the user is the current reviewer/approver.
2. Check the box in the far left column adjacent to the document(s), identifying it as a document for administrative action.
3. Click on 'Approve For' button located in the upper right hand corner. All selected (i.e., checked) documents will be marked as (administratively) approved for the current reviewer/approver and will be forwarded to the next reviewer/approver.

Consensus Approve

Available Conditions	Available for any document that is submitted into the workflow. NOTE: This function is ONLY available for the Contracting Officer.
Resulting Action	Marks the document as (consensually) approved for any reviewer/approver that has not already approved the document.

Performing action from 'Manage Multiple Docs' view:

1. Check the box in the far left column adjacent to the document(s), identifying it as a document for administrative action.
2. Click the 'Consensus Approve' button located in the upper right hand corner. All selected (i.e., checked) documents will be marked as (consensually) approved for all reviewers/approvers yet to approve the document(s).

Unapprove – Can be performed from within a document and from Manage Multiple Docs.

Available Conditions	Available for any document that has completed the workflow and is in a ***Final*** or ***Pending Release*** status.
Resulting Action	Removes the document's ***Final*** or ***Pending Release*** status and sets it back to a status of the workflow pending approval by the last reviewer/approver. Document will be placed into the workflow at the last reviewer/approver.

Performing action from 'Manage Multiple Docs' view:

1. Check the box in the far left column adjacent to the document or documents, identifying it as a document for administrative action.
2. Click the 'Unapprove' button located in the upper right hand corner. All selected (i.e., checked) documents will be unapproved and put back into workflow.

Change Exchange Type

Available Conditions	Available for any saved Finding/EN from current phase. Only available from Manage Multiple Docs. **NOTE: This function is ONLY available for the Contracting Officer and Contract Specialist.**
Resulting Action	Changes exchange type of Finding.

Performing action from 'Manage Multiple Docs' view:

1. Check the box in the far left column adjacent to the document or documents, identifying it as a document for administrative action.
2. Click the 'Change Exchange Type' button located in the upper right hand corner.
3. Select desired exchange type to change to from dialog box.
4. Click on 'Change Exchange Type.'
5. Confirm change.

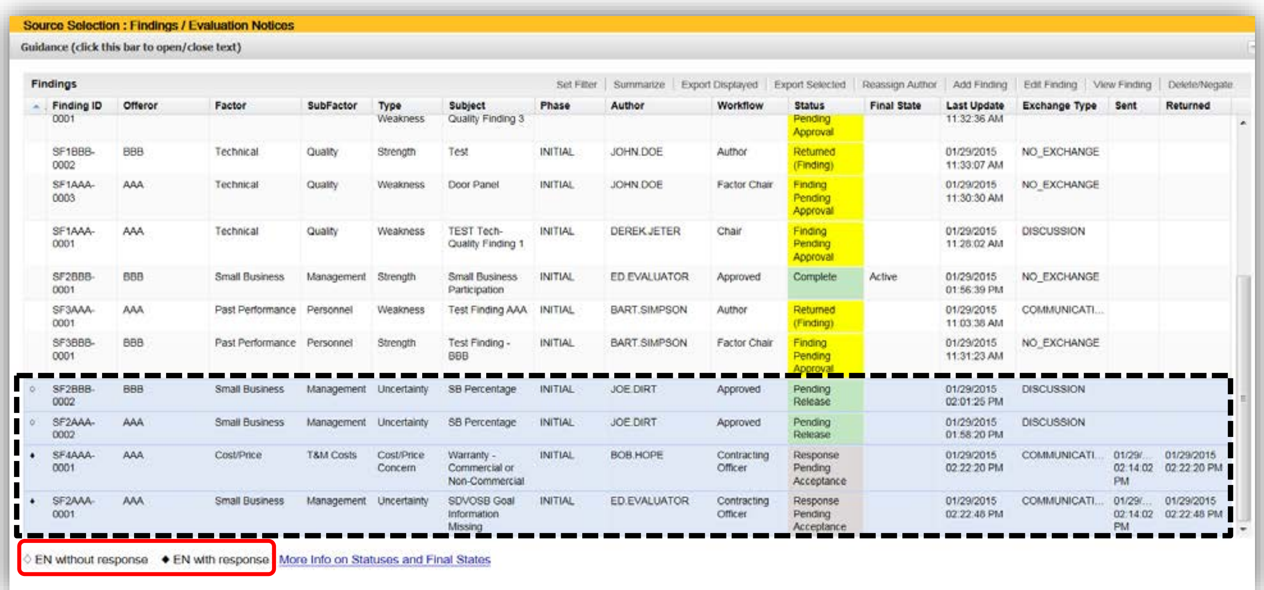
5.0 Exchanges with Offerors

As discussed in section 3.1 above, if the exchange types of Clarifications, Communications, and Discussions is selected for a Finding, an EN will automatically be generated by ASSIST for use in exchanges with the Offerors.

5.1 Releasing ENs

Findings/ENs with an exchange types of Clarifications are released, responded to by Offerors, and assessed by the Government if awarding ***without*** discussions in the Initial Phase. If awarding ***with*** discussions, Findings/ENs with exchanges types of Clarifications and Communications can be released, responded to by Offerors, and assessed by the Government in the Initial Phase. Findings/ENs marked with an exchange type of Discussions cannot be released until the Interim Phase in ASSIST.

In order to release, Findings/ENs must go through the entire review and approval workflow process and have a resulting status of Pending Release. As discussed in section 3.1.2.5 "Evaluation Notice", a fifth tab will populate for Findings/ENs with an exchange type of Clarifications, Communications, and Discussions. In addition, in the far left column of the document grid for the Findings/ENs, an unshaded diamond (♢) will appear representing those items that have an ***EN without a response*** and a shaded diamond (♦) will appear representing those ***ENs with a response***, i.e. Findings/ENs that have been released and the Offeror has provided a response.

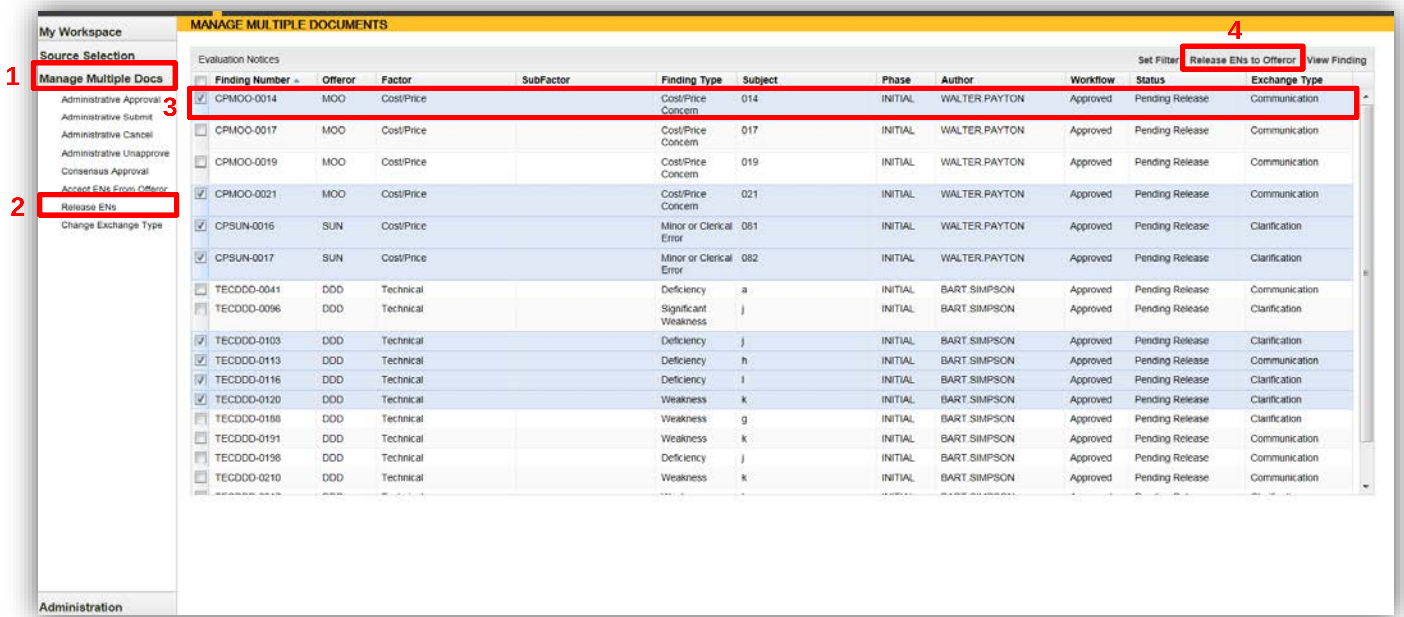


NOTE: Findings/ENs marked in the INITIAL Phase with an exchange type of DISCUSSIONS cannot be released until the INTERIM Phase.

Contracting Officers are the only users that can release and accept ENs.

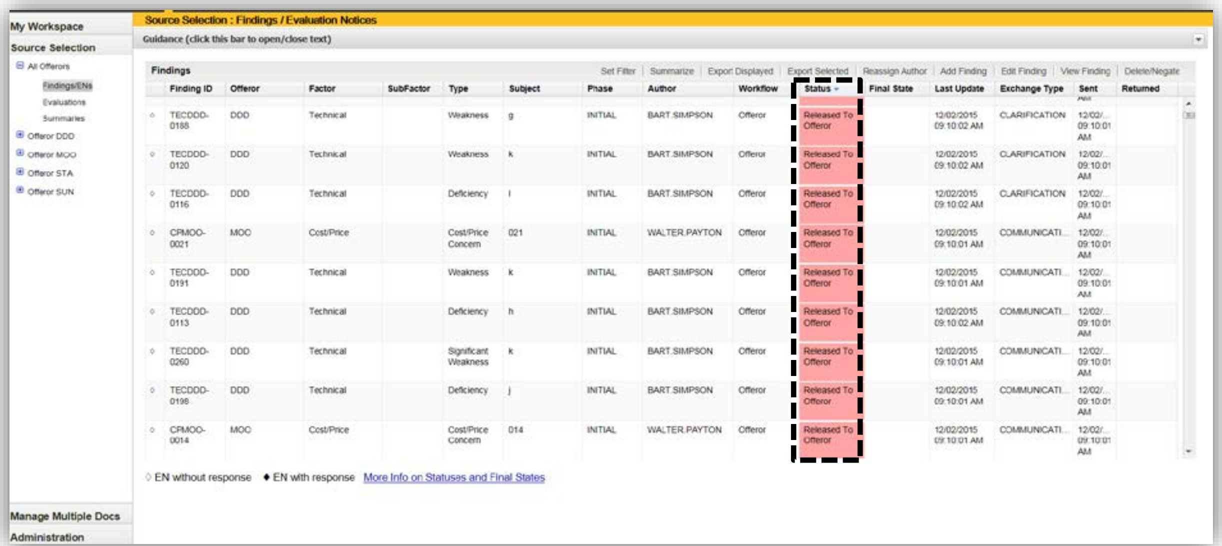
Releasing ENs

1. Select/click on MANAGE MULTIPLE DOCS tab.
2. Select/click on the RELEASE ENs tab. All ENs that are eligible to be released will appear in the document grid.
3. Next, check the box adjacent to the individual Finding/EN in the FINDING NUMBER column to be released. This will highlight the documents ready for release. **NOTE**: If you would like to ***select all*** of the Findings/ENs eligible for release check the box adjacent to FINDING NUMBER.
4. Click on RELEASE ENS TO OFFEROR button located in upper right hand corner of ENs grid.

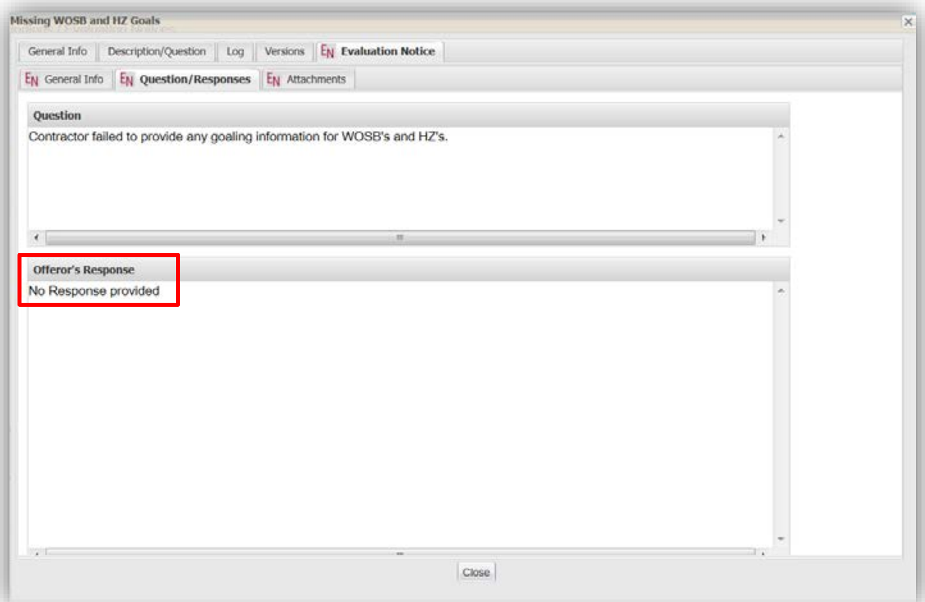


Once the PCO has released the ENs to the Offerors, the status will now be updated to reflect “Released to Offeror” in the Findings/ENs document grid. The Offerors will now have the ability to go into ASSIST2Industry to respond to the Government ENs.

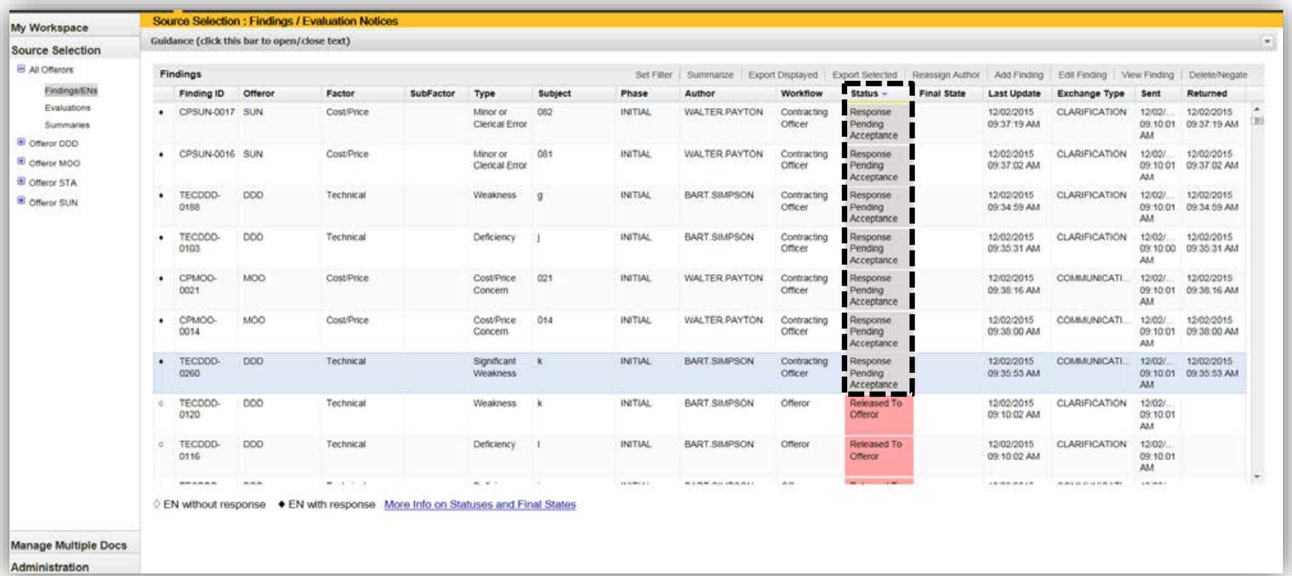
NOTE: ASSIST will not provide any notifications to the Offerors that there are ENs that they must respond to in ASSIST2Industry. The Contracting Officer/Specialists must notify all Offerors outside of ASSIST using another medium such as electronic mail of the ENs, date/time the responses are due back, etc.



A message will appear under the Evaluation Notice tab of “No Response Provided” until the PCO has accepted the response from the Offeror in ASSIST.



When the Offerors have added in their responses via ASSIST2Industry and have released/returned the ENs back to the Government, the status will be updated to reflect “Response Pending Acceptance”.



5.2 Accepting EN Responses

Contracting Officers must review (or vet) and accept the Offeror’s response prior to it appearing in the Author’s view. Contract Specialists and the Lawyers can also review but are not provided the ability to accept the responses. One way the responses to ENs are accepted would be from “Accept ENS from Offeror” in *Manage Multiple Docs.* A second way to accept the EN responses would be from within a viewed EN. The accepted ENs will show up in “Pending My Action” in *My Workspace* of the Author.

There are three available accepting actions that the Contracting Officer may take and they are as follows:

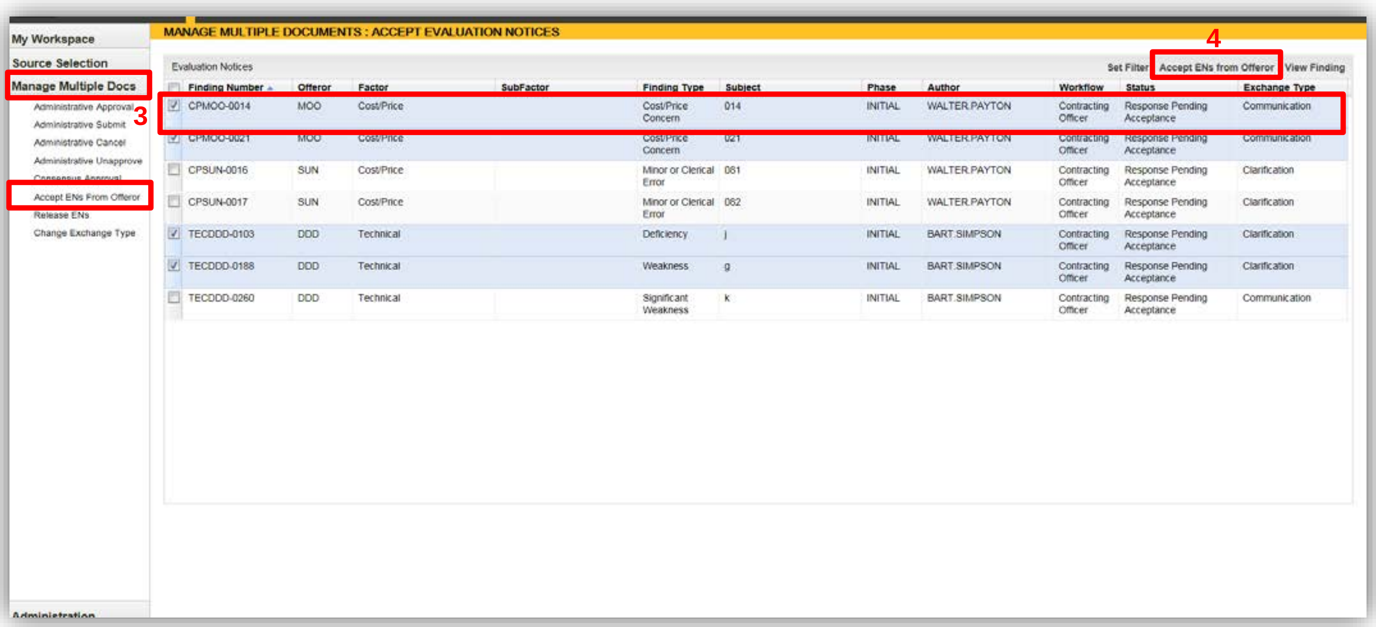
ACTION	AVAILABLE	RESULT
ACCEPT OFFEROR RESPONSE	In bulk from Evaluation Notice Table in “Accept ENs from Offeror” view ***or*** from within a viewed EN	Accepts response and places EN with response in Author’s “Pending My Action” for their assessment
RETURN TO OFFEROR…	From within a viewed EN	Returns EN with response to Offeror with comments. The Offeror can then revise accordingly and resubmit back to Government.*****
ACCEPT AND WITHHOLD OFFEROR RESPONSE	From within a viewed EN	Accepts response and places EN with response in Author’s “Pending My Action” for their assessment. The Offeror’s response and any attached files, however, is withheld. The following appears in its place: “Offeror's response withheld by Government, see PCO for details.”*****

*If performed, there will then be two copies of the EN in ASSIST. The original EN and response is kept in ASSIST and can be seen by the Contracting Officer and Specialist. This EN is labeled as superseded. A copy is then made. This copy becomes the active EN in the system.

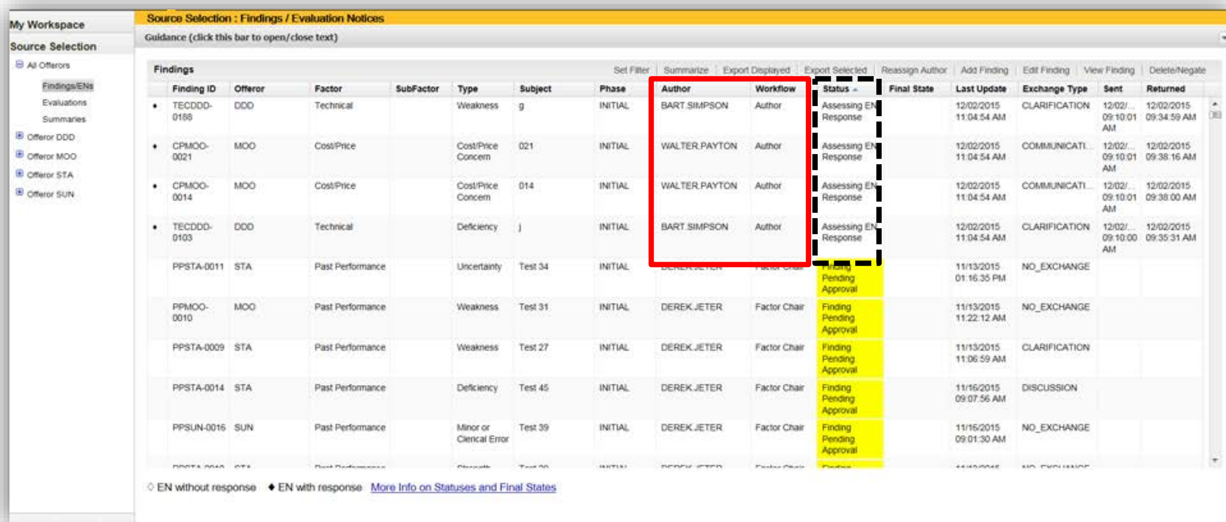
The three available accepting actions can be done within a ***viewed*** Finding/EN. However, if after the Contracting Officer has vetted the responses and would like to perform the ACCEPT OFFEROR RESPONSE action in bulk (large number of items to accept), the PCO can perform this function under the MANAGE MULTIPLE DOCS tab.

Accept Offeror Response – Manage Multiple Docs Tab

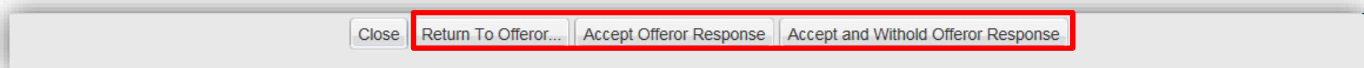
1. Select/click on MANAGE MULTIPLE DOCS tab.
2. Select/click on the ACCEPT ENS FROM OFFEROR tab. All ENs that are eligible to be accepted will appear in the document grid.
3. Next, check the box adjacent to the individual Finding/EN in the FINDING NUMBER column to be released. This will highlight the documents ready for release. **NOTE**: If you would like to ***select all*** of the Findings/ENs eligible for release check the box adjacent to FINDING NUMBER.
4. Click on ACCEPT ENS FROM OFFEROR button located in upper right hand corner of ENs grid.



When the PCO accepts the ENs, the status will be updated to reflect “Assessing EN Response” and as stated above the ENs show up in “Pending My Action” in *My Workspace* of the Author.

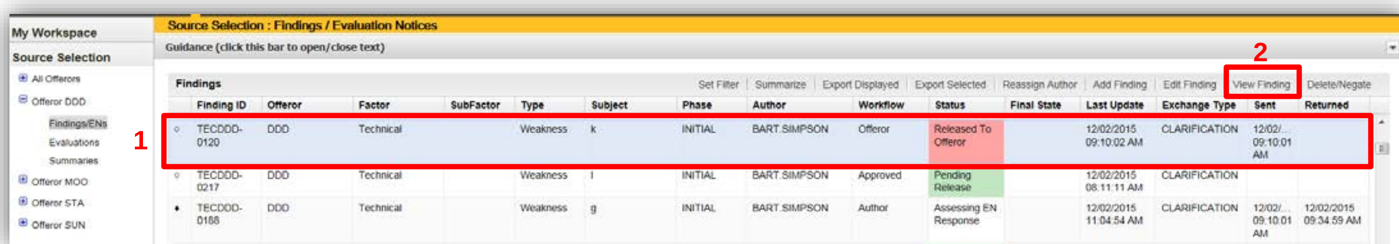


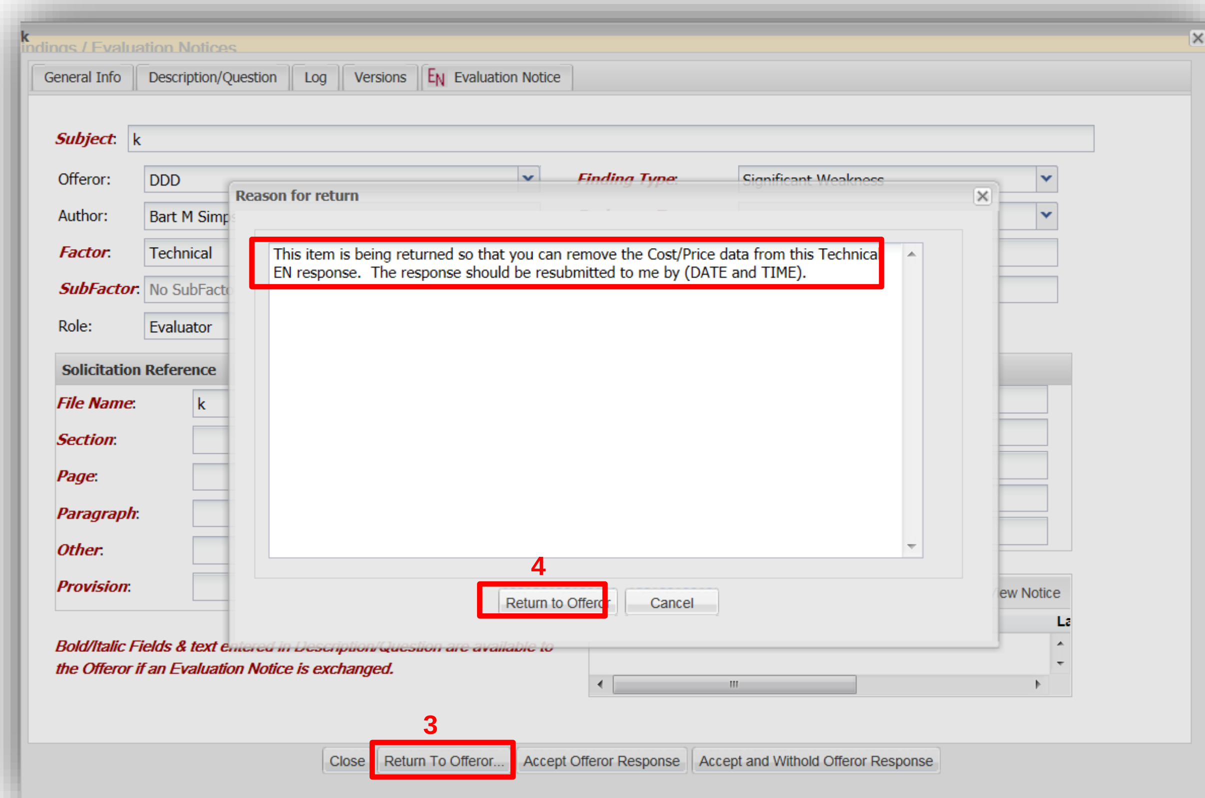
If the PCO would like to take one of the three available accepting actions from within a ***viewed*** EN, the three buttons will populate when the user selects the Finding/EN from the document grid and then clicks on VIEW FINDING in the upper right hand corner of the Findings/ENs grid.



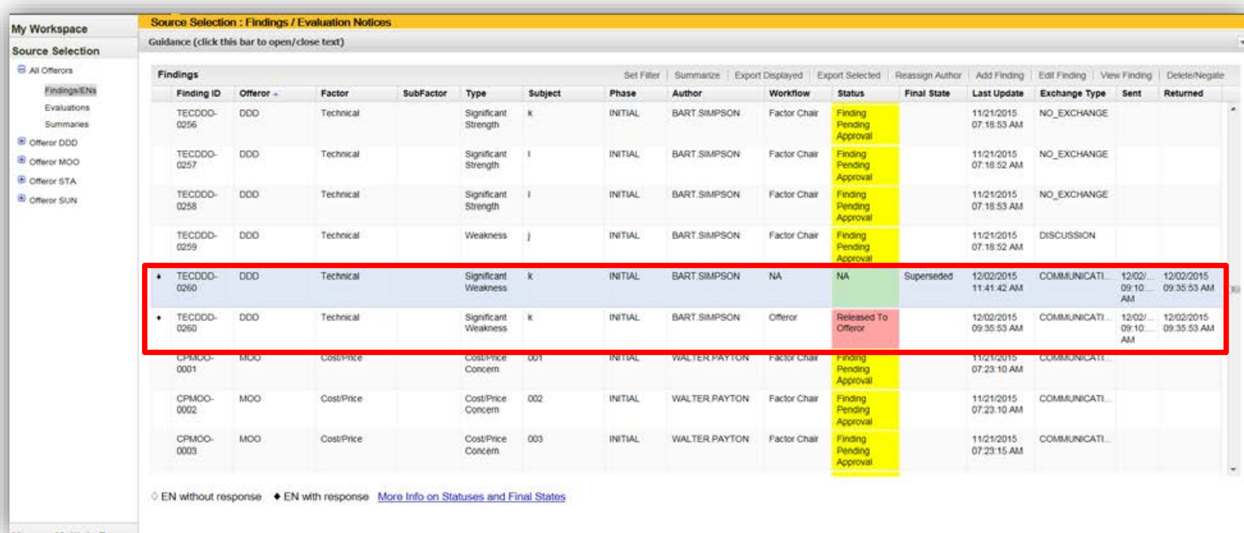
Return to Offeror

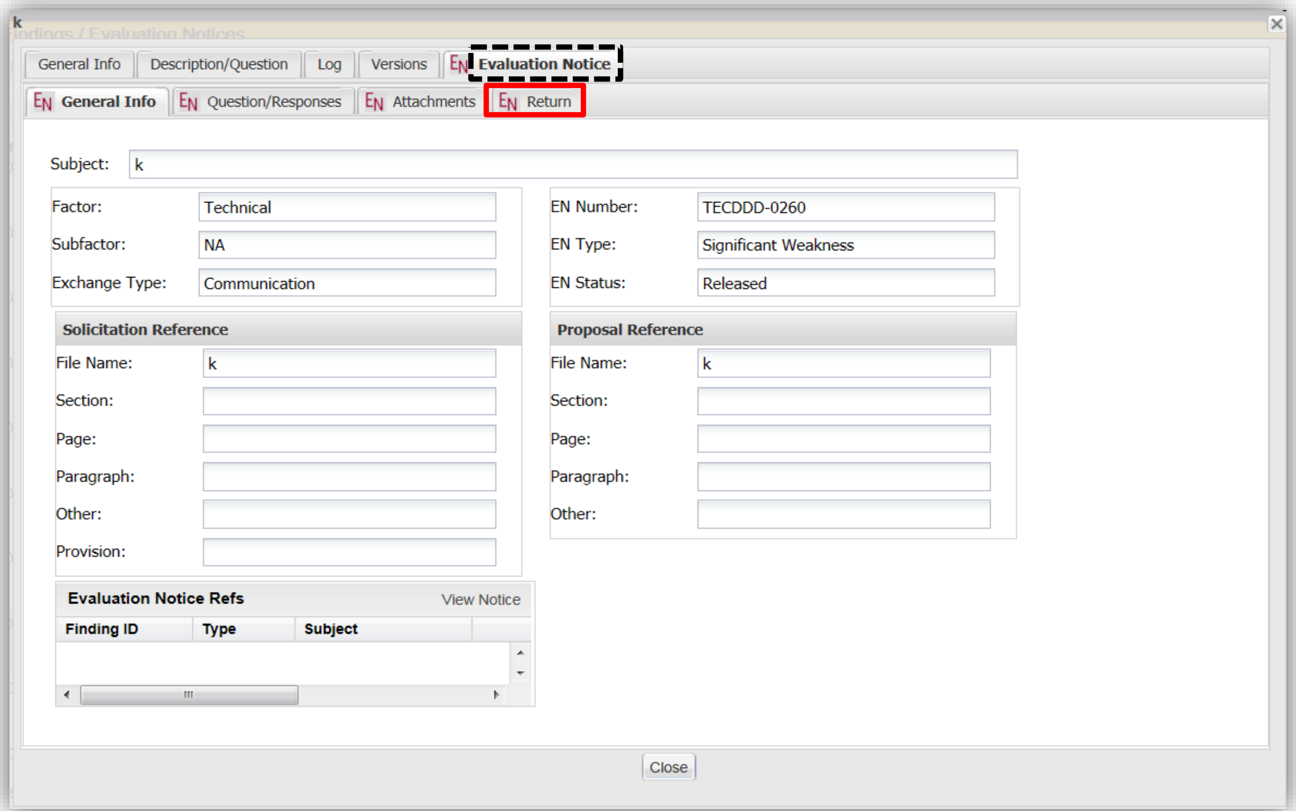
1. Select/click on the specific Finding/EN from the document grid.
2. Select/click on VIEW FINDING from the upper right hand corner of the document grid.
3. Select/click on RETURN TO OFFEROR.
4. A REASON FOR RETURN dialog box will populate for the user to type in narrative/rationale for returning the response to the Offeror. Type in the rationale and click on RETURN TO OFFEROR.





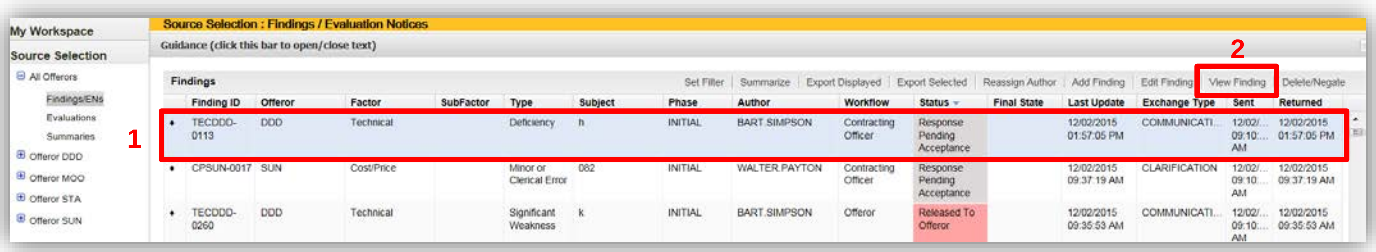
As stated in the note for the available accepting actions table above, if the PCO selects RETURN TO OFFEROR there will then be two copies of the EN in ASSIST. The original EN and response is kept in ASSIST and can be seen by the Contracting Officer and Specialist. This EN is labeled with a FINAL STATE of SUPERSEDED. A copy is then made. This copy becomes the active EN in the system with a status of RELEASED TO OFFEROR. A RETURN TAB will then be populated/viewable under the Evaluation Notice tab of the ACTIVE EN. To view the reason the item was returned to the Offeror, select/click on the ACTIVE Finding/EN from document grid, click VIEW FINDING in upper right corner, click EVALUATION NOTICE tab, and then click on the RETURN tab.

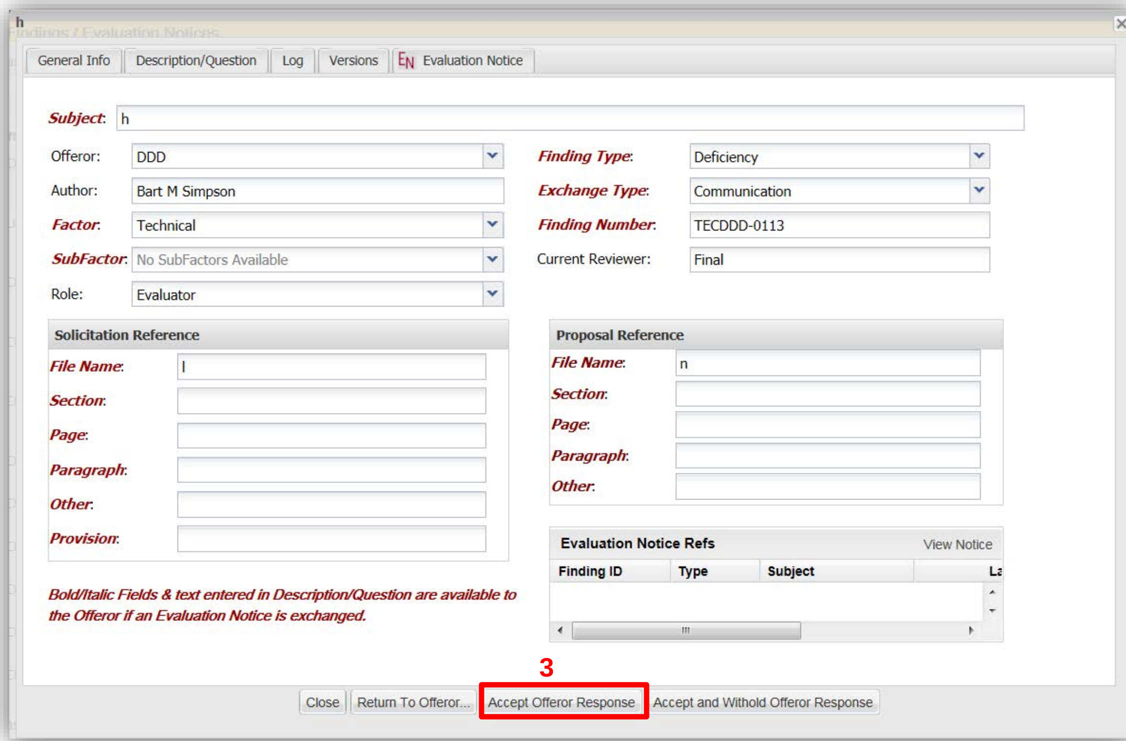


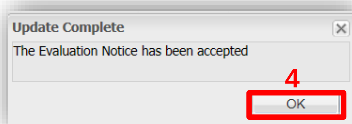


Accept Offeror Response

1. Select/click on the Finding/EN from the document grid.
2. Select/click on VIEW FINDING from the upper right hand corner of the document grid.
3. Select/click on ACCEPT OFFEROR RESPONSE.
4. A dialog box will appear stating "The Evaluation Notice has been accepted". Click OK.

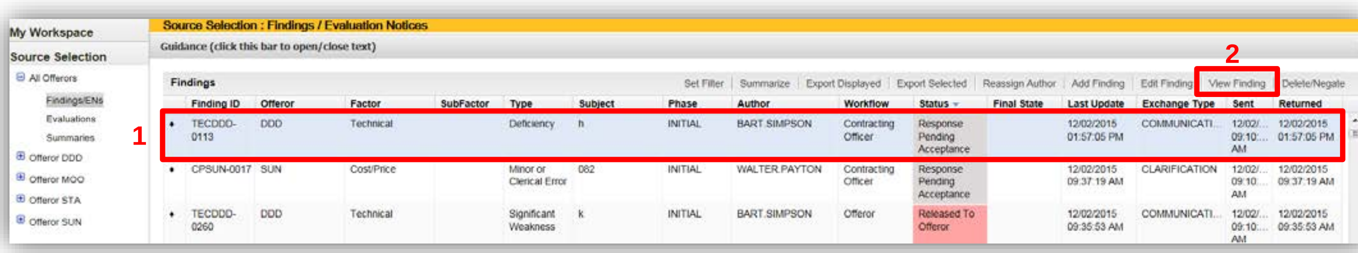


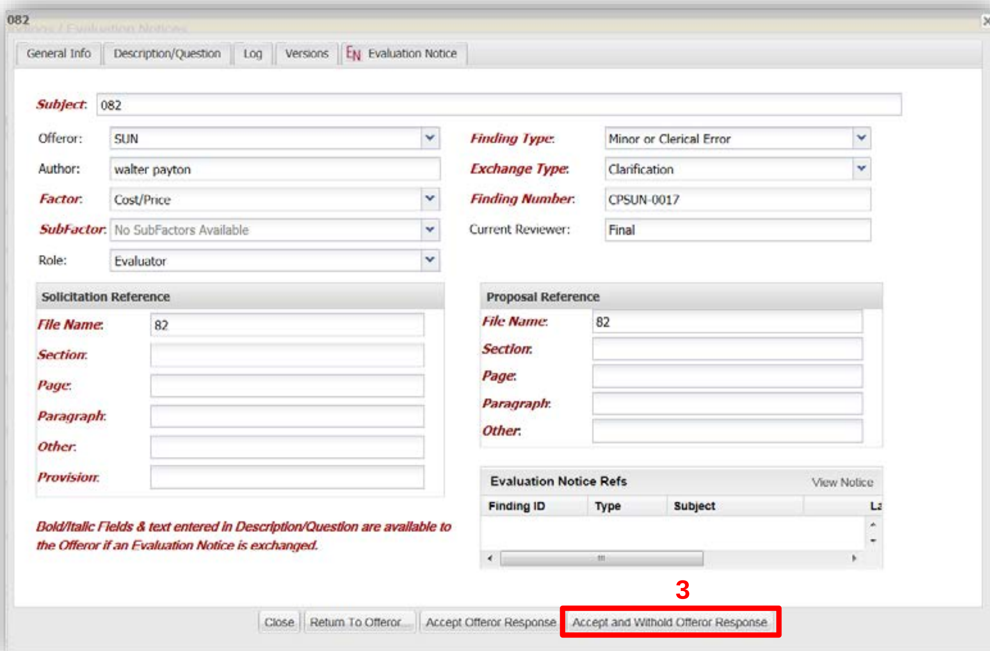


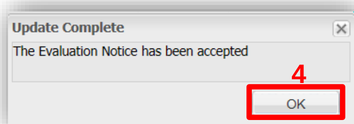


Accept and Withhold

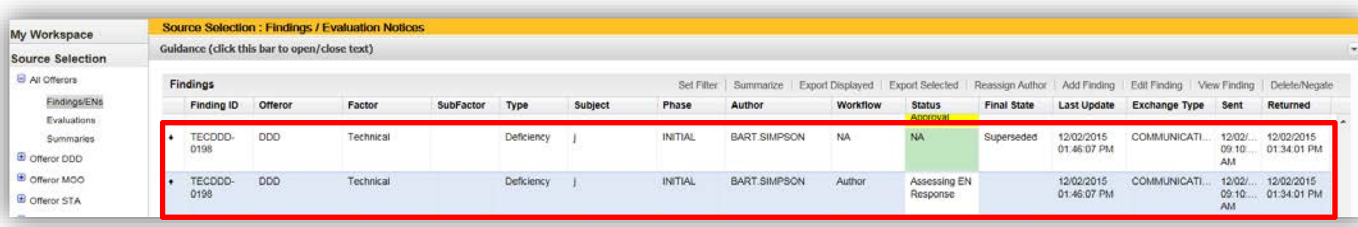
1. Select/click on the Finding/EN from the document grid.
2. Select/click on VIEW FINDING from the upper right hand corner of the document grid.
3. Select/click on ACCEPT AND WITHHOLD OFFEROR RESPONSE.
4. A dialog box will appear stating "The Evaluation Notice has been accepted". Click OK.

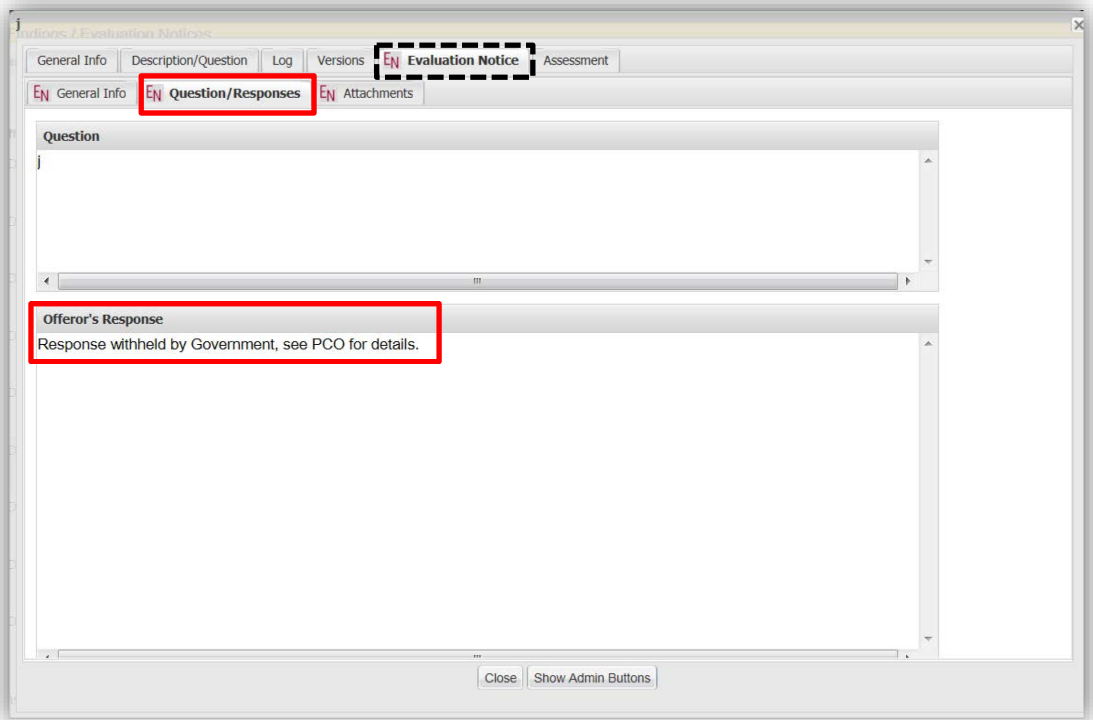






As stated in the note to the available accepting actions table above, if the PCO selects ACCEPT AND WITHHOLD OFFEROR RESPONSE, there will then be two copies of the EN in ASSIST. The original EN and response is kept in ASSIST and can be seen by the Contracting Officer and Specialist. This EN is labeled with a FINAL STATE of SUPERSEDED. A copy is then made. This copy becomes the active EN in the system with a status of "Assessing EN Response". However, in the ACTIVE EN under the EVALUATION NOTICE tab the author will see in the OFFEROR'S RESPONSE field a message "Response withheld by Government, see PCO for details. To view the message, select/click on the ACTIVE Finding/EN from document grid, click VIEW FINDING in upper right corner, click EVALUATION NOTICE tab, and then click on the QUESTION/RESPONSES tab.





5.3 Assessment of ENs

When the Contracting Officer accepts the EN responses, the Author of the Finding/EN must assess the Offeror's response. Assessment of the EN response is accomplished in the ASSESSMENT TAB of the Finding. **This tab is not available until the response is accepted by the Contracting Officer.** The Finding/EN with the response will then be viewable from 'Pending My Action' by the Author. The status will be ***Assessing EN Response***.

There are three available assessment actions that the Author of the document can select and are listed below:

- ***Resolved*** **- Identifies finding and associated EN as resolved (no longer an issue). Finding will be identified as 'Resolved' and will no longer be active in ASSIST.**

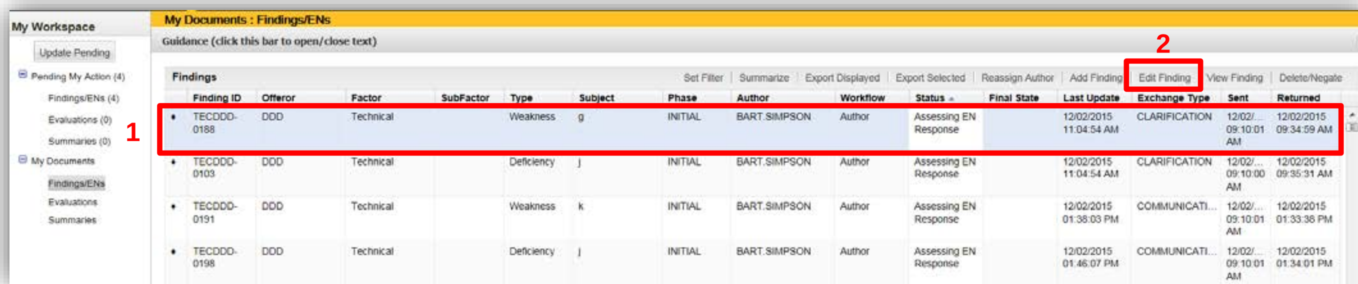
- ***Leave As Is*** **- Offerors response to EN did not change finding. It did not make it worse or better. The finding will remain as is. Finding will be identified as 'Leave As Is' and will remain active in ASSIST.**

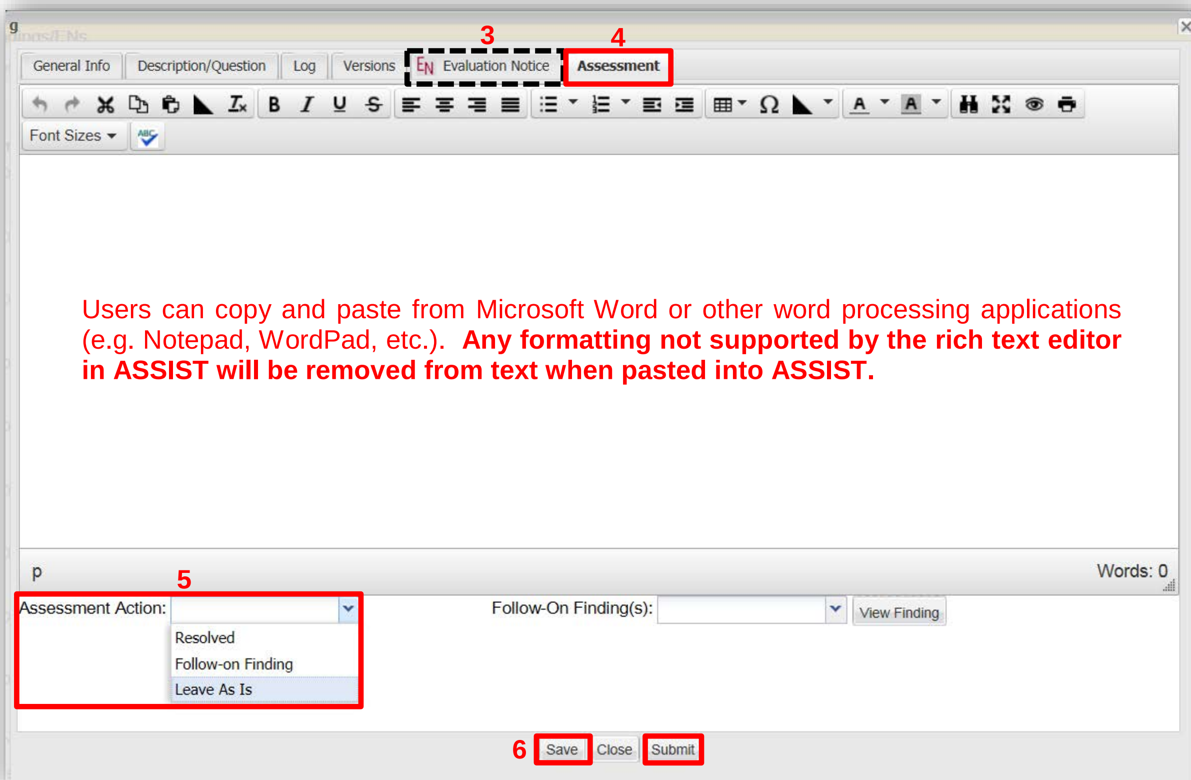
  IMPORTANT: REMEMBER TWO (2) CONDITIONS MUST BE MET TO BE 'LEAVE AS IS':
  1. FINDING TYPE REMAINS SAME; AND 2. NO FURTHER QUESTIONS.

- ***Follow-on Finding*** **- Offerors response to EN prompts a change to finding. Provides ability to create new finding that references previous finding/EN. New finding can be exchanged or not exchanged with the Offeror.**

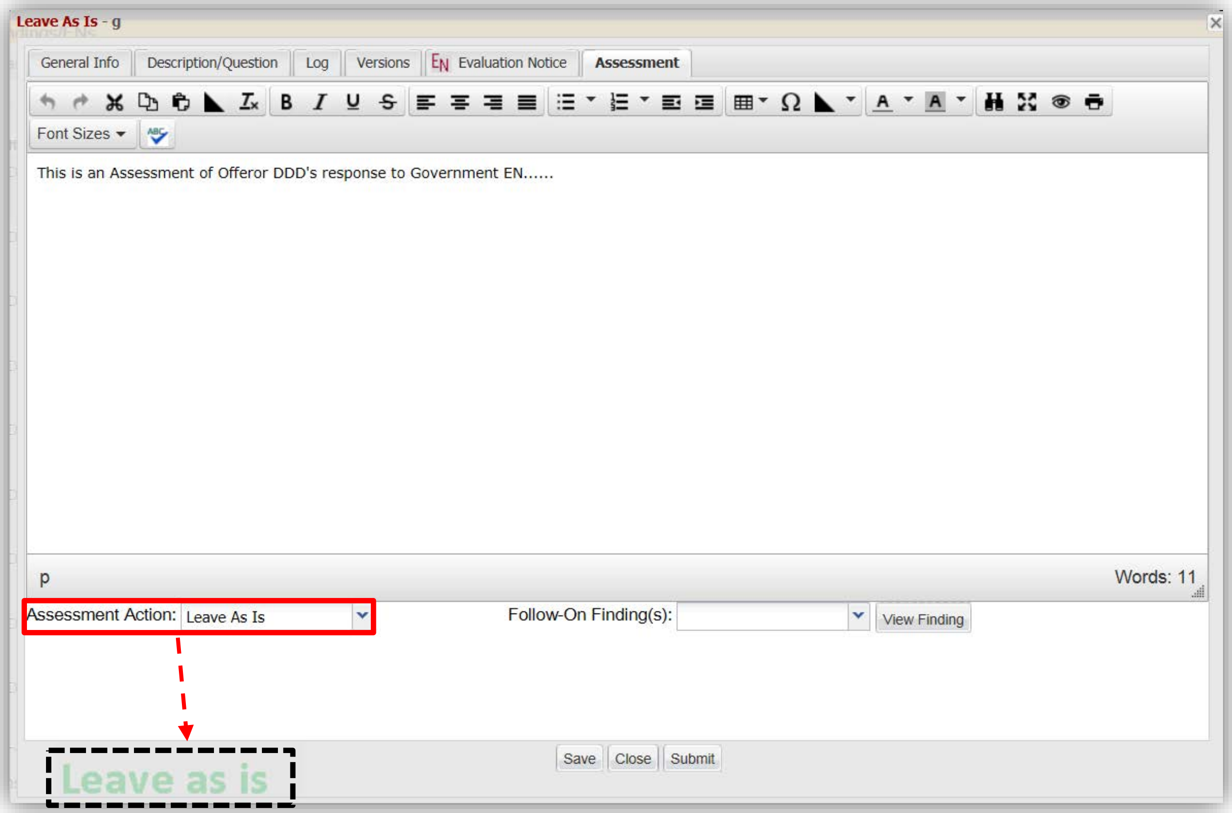
How to Assess EN Response
1. Select/click on the Finding/EN from the document grid.
2. Select/click on EDIT FINDING from the upper right hand corner of the document grid.
3. Select/click on EN tab to view Offeror's response.
4. Select/click on ASSESSMENT tab to input assessment of Offerors response and describe resulting action.
5. Select the Assessment action, e.g. Resolved, Follow-on Finding, or Leave As Is.

6. Click SAVE or SUBMIT.



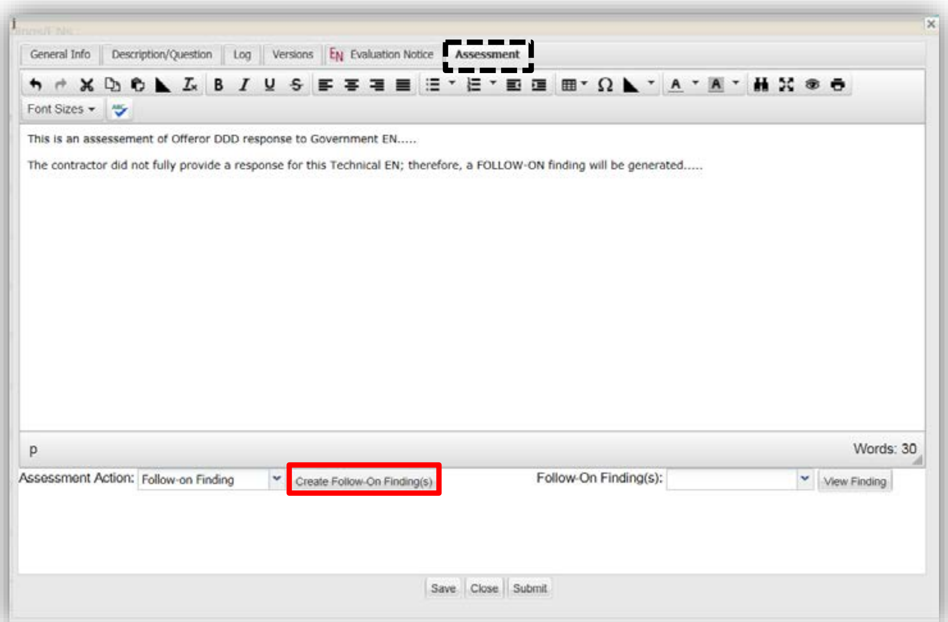


NOTE: ***A watermark of selected Assessment Action will appear after first save for quick reference when opening the Finding/EN.***

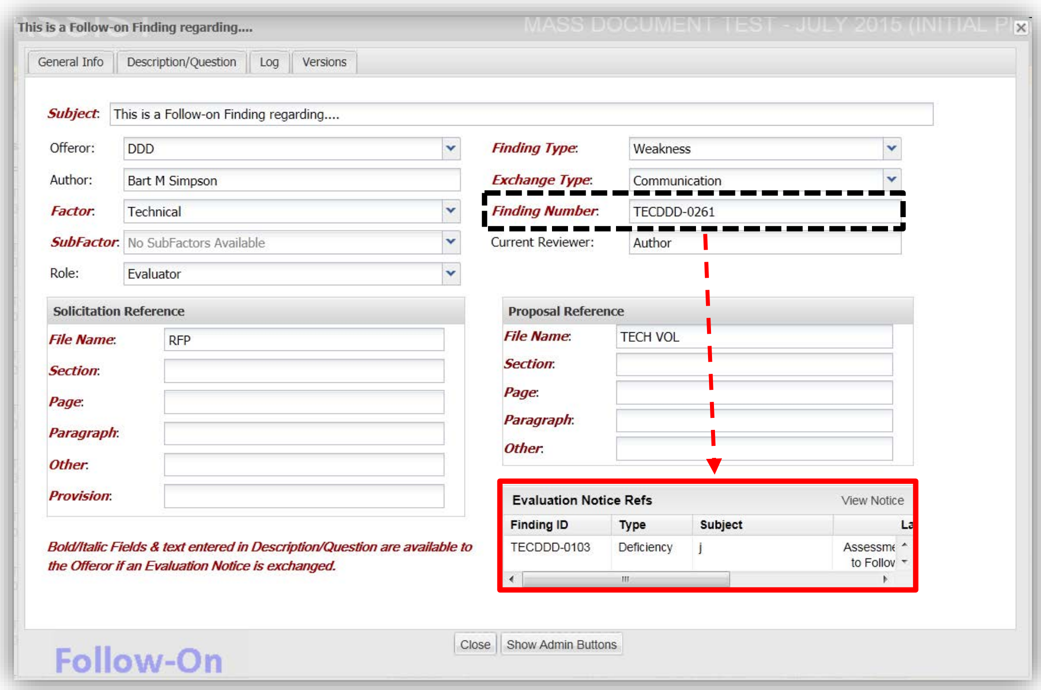


Creating a Follow-on Finding

1. Follow "How to Assess EN Response" steps 1 – 5 above.
2. After inputting the Assessment and selecting FOLLOW-ON FINDING as the Assessment Action, click SAVE.
3. A dialog box will appear stating "This Evaluation Notice has been saved". Click OK.
4. Select/click on CREATE FOLLOW-ON FINDING(S) to create the new Finding/EN.

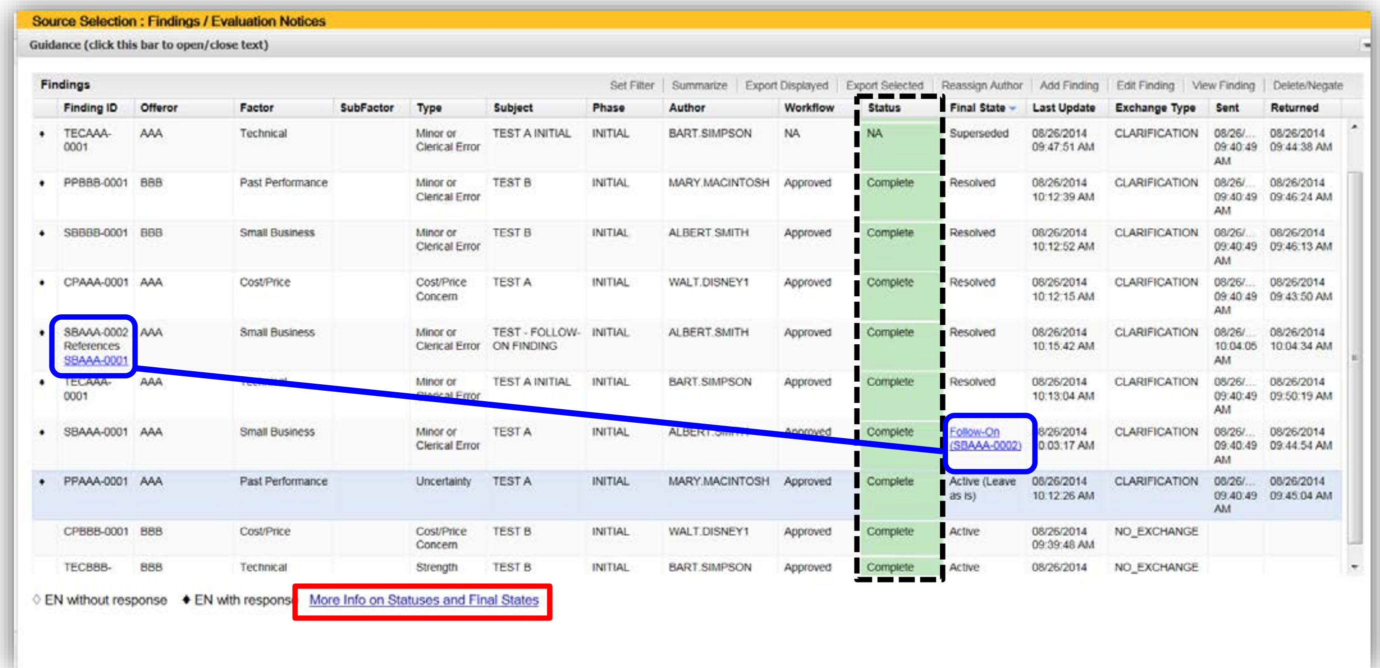


5. A newly created Finding will populate; therefore, the user must fill out all information for the Follow-on Finding.
6. Click SAVE.
7. A dialog box will appear stating "The new finding has been saved". Click OK.



NOTE: After the Follow-on Finding/EN is created, the original Finding/EN will be reference in the EVALUATION NOTICE REFs field.

After the Author has assessed the Offeror's response and has taken either one of the three Assessment, the FINAL STATE of the Finding/EN will populate. To obtain more information on statuses and final states, click on the link MORE INFO ON STATUSES AND FINAL STATES in the document grid, and also see section 5.4 "Finding/EN Statuses" below.



Follow-on Findings are crossed referenced in the Grid. Click on the link in the 'Final State' column to open up the follow-on Finding. Click on the link in 'Finding ID' column to open the original finding.

5.4 Finding/EN Statuses and Final States

5.4.1 Finding/EN Statuses

Below is a list and description of all new statuses as a Finding/EN goes through the workflow. The color of the cell in the column will change depending on status.

Status/Cell Color	**Description**
New Finding	Finding created by author and not released into workflow
Returned (Finding)	Finding previously submitted into the workflow has been returned to specified user
Pending Approval (Finding)	Finding submitted into the workflow and is pending review/approval
Pending Release	Finding approved through the workflow that had an exchange type of Clarification, Communication, or Discussions. EN has been created and can now be sent to Offeror.
Released to Offeror	Finding had an associated EN that has been sent to an Offeror
Response Pending Acceptance	Offeror has responded to EN. The EN with Offeror's response is pending acceptance by the Contracting Officer.
Assessing EN Response	EN has been accepted by Contracting Officer and the author is assessing response.
Pending Approval (Assessment)	Assessment of EN is submitted into the workflow and is pending review/approval
Returned (Assessment)	Assessment of EN previously submitted into the workflow has been returned to specified user
Complete	Finding with no EN has been approved through workflow *or* a Finding that had an EN that was sent to an Offeror has been sent, responded to, and assessed. The assessment has been approved through workflow and finding is in final state.

NA	Finding/EN has been superseded either because Findings was negated or the Contracting Officer performed one of the following two Accepting Actions when reviewing the response to the EN for Finding: 1. EN was returned to Offeror with comments; or 2. EN was Accepted but Offeror's response was withheld

What Colors Represent

Color	Meaning
White	Finding/EN not submitted into workflow
Yellow	Finding/EN in workflow (pending review/approval)
Red	No action can be taken on Finding/EN
Green	Workflow complete/Can proceed in Evaluation
Gray	Response pending action by Contracting Officer

5.4.2 Final State

The Final State column displays the final state of a Finding/EN. The Final State will display immediately after a Finding with ***no*** EN is approved through the workflow. For Findings ***with*** an EN, it will display after the assessment of the EN is approved through workflow. Every Finding/EN should have a 'final state' by end of source selection (award).

Final State	Description
Active	Finding with an exchange type of 'no exchange' has been approved through workflow. No EN will be sent to Offeror for Finding. Finding *applies* to the evaluation of Offeror.
Active (Leave as is)	Finding had an EN that was sent to an Offeror. Offeror responded to EN. Government finds that the response did not change the original issue (assessed as 'Leave as is'). Finding/EN still *applies* to the evaluation of Offeror.
Follow-On	Finding had an EN that was sent to an Offeror. Offeror responded to EN. Government finds that the response does not resolve issue completely or creates a need for a new Finding (assessed as 'Follow-On'). Final state of 'Follow-On' as well as the ID of the new Finding will be displayed in cell. This Finding *no* longer applies to the evaluation of Offeror but associated follow-on Findings may apply.
Resolved	Finding had an EN that was sent to an Offeror. Offeror responded to EN. Government finds that the response makes the Finding no longer an issue (assessed as 'Resolved'). Finding is *no* longer applies to the evaluation of Offeror.
Superseded	Contracting Officer performed one of the following two Accepting Actions when reviewing the Offeror's response: 1. EN was returned to Offeror with comments; or 2. EN was Accepted but Offeror's response was withheld. The new copy of the Finding/EN is the active document will have a status of something other than "Superseded." It will be visible to all appropriate members of the evaluation team. The original copy of the Finding/EN is no longer active in the evaluation and will have a status of "Superseded." *It will only be visible to the Contracting Officer, Specialist, Chair and Legal.*
Negated	Finding was previously approved through the workflow but has since been determined to no longer apply to the evaluation of Offeror based on new information (e.g., proposal revisions). Finding is listed as a matter of record during the phase it was negated in and would not be listed in subsequent phases move forward in subsequent phases.

FINAL NOTES ON ASSESSING ENS

1. Assessed ENs go through the same workflow as Findings.
2. Assessed ENs must be approved through the workflow in order to run a CRD or SSDD.
3. If a follow-on finding is created and is intended to be sent to an Offeror, the assessment of the referenced EN must be approved through the workflow before the new Finding/EN can be sent to the Offeror.
4. Assessed ENs can be viewed by all viewers with proper security rights.

Appendix A

Combined Technical/Risk

Color	Rating	Description
Blue	Outstanding	Proposal meets requirements and indicates an exceptional approach and understanding of the requirements. Strengths far outweigh any weaknesses. Risk of unsuccessful performance is very low.
Purple	Good	Proposal meets requirements and indicates a thorough approach and understanding of the requirements. Proposal contains strengths which outweigh any weaknesses. Risk of unsuccessful performance is low.
Green	Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements. Strengths and weaknesses are offsetting or will have little or no impact on contract performance. Risk of unsuccessful performance is no worse than moderate.
Yellow	Marginal	Proposal does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements. The proposal has one or more weaknesses which are not offset by strengths. Risk of unsuccessful performance is high.
Red	Unacceptable	Proposal does not meet requirements and contains one or more deficiencies. Proposal is unawardable.

Separate Technical/Risk Rating

Technical		
Color	Rating	Description
Blue	Outstanding	Proposal meets requirements and indicates an exceptional approach and understanding of the requirements. The proposal contains multiple strengths and no deficiencies.
Purple	Good	Proposal meets requirements and indicates a thorough approach and understanding of the requirements. Proposal contains at least one strength and no deficiencies.
Green	Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements. Proposal has no strengths or deficiencies.
Yellow	Marginal	Proposal does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements.
Red	Unacceptable	Proposal does not meet requirements and contains one or more deficiencies. Proposal is unawardable.

Risk Rating	
Rating	Description
Low	Has little potential to cause disruption of schedule, increased cost or degradation of performance. Normal contractor effort and normal Government monitoring will likely be able to overcome any difficulties.
Moderate	Can potentially cause disruption of schedule, increased cost or degradation of performance. Special contractor emphasis and close Government monitoring will likely be able to overcome difficulties.
High	Is likely to cause significant disruption of schedule, increased cost or degradation of performance. Is unlikely to overcome any difficulties, even with special contractor emphasis and close Government monitoring.

Performance Confidence Assessments

Rating	Description
Substantial Confidence	Based on the Offeror's recent/relevant performance record, the Government has a high expectation that the Offeror will successfully perform the required effort.
Satisfactory Confidence	Based on the Offeror's recent/relevant performance record, the Government has a reasonable expectation that the Offeror will successfully perform the required effort.
Limited Confidence	Based on the Offeror's recent/relevant performance record, the Government has a low expectation that the Offeror will successfully perform the required effort.
No Confidence	Based on the Offeror's recent/relevant performance record, the Government has no expectation that the Offeror will be able to successfully perform the required effort.
Unknown Confidence (Neutral	No recent/relevant performance record is available or the Offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned.

Acceptable/Unacceptable Ratings

Technical & Small Business	
Rating	Description
Acceptable	Proposal clearly meets the minimum requirements of the solicitation.
Unacceptable	Proposal does not clearly meet the minimum requirements of the solicitation.
Past Performance	
Rating	Description
Acceptable	Based on the Offeror's performance record, the Government has a reasonable expectation that the Offeror will successfully perform the required effort, or the Offeror's performance record is unknown.
Unacceptable	Based on the Offeror's performance record, the Government has no reasonable expectation that the Offeror will be able to successfully perform the required effort.

Appendix B

Role	Factor/Subfactor Access*	Description/Available Tasks
Contracting Officer	**All**	• Setup and administration of Source Selection • Review/approve Findings/ENs, Summaries and Evaluations created by Source Selection Team • Create Terms & Conditions Findings/ENs • Release ENs to Offerors • Accept Offeror responses • Decisions Document (e.g. Competitive Range, Source Selection Decision Document) • Manage and view Source Selection documents (e.g. Source Selection Plan, Solicitation, Proposal Files)
Contract Specialist	**All**	• Setup an Administration of Source Selection • Review/Approve Findings/ENs, Summaries and Evaluations created by Source Selection Team • Create Terms & Conditions Findings/ENs • Manage and view Source Selection documents (e.g. Source Selection Plan, Solicitation, Proposal Files)
Lawyer	**All**	• Review/Approve Findings/ENs, Summaries and Evaluations created by Source Selection Team • Access to Source Selection document (e.g. Source Selection Plan, Solicitation, Proposal Files)
Chair/ Deputy Chair	**All**	• Create Findings/ENs for a specified Factor/Subfactor • Review/approve Findings/ENs, Summaries and Evaluations created by Source Selection Team • View Source Selection documents (e.g. Source Selection Plan, Solicitation, Proposal Files)
Factor Chair/ Subfactor Chair/ Evaluator	**Specified Factor(s)/Subfactors**	• Create Findings/ENs, Summaries and Evaluations for a specified Factor/Subfactor • Review/approve Findings/ENs, Summaries and Evaluations created by Source Selection Team • View Source Selection documents (e.g. Source Selection Plan, Solicitation, Proposal Files)
SSA/ SSAC/ Reader All	**All**	• View Findings/ENs, Summaries and Evaluations created by Source Selection Team • View Source Selection documents (e.g. Source Selection Plan, Solicitation, Proposal Files)
Reader/ Contractor Advisor	**Specified Factor(s)/Subfactors**	• View Findings/ENs, Summaries and Evaluations created by Source Selection Team • View Source Selection documents (e.g. Source Selection Plan, Solicitation, Proposal Files)
SSEB Admin	**All**	• Setup and administration of Source Selection

*** Access to a factor/Subfactor is defined as having access to the documents both uploaded to and created in ASSIST that are specifically associated with that factor/Subfactor (e.g., Proposals, Findings/ENs, Summaries, and Evaluations)**

Appendix C

	ROLE													
ACTIONS/PERMISSIONS	CONTRACTING OFFICER	CONTRACT SPECIALIST	LAWYER	CHAIR	DEPUTY CHAIR	FACTOR CHAIR	SUBFACTOR CHAIR	EVALUATOR	SSA	SSAC	READER ALL	READER	CONTRACTOR ADVISOR	SSEB ADMIN
UPDATE PROFILE	x	x												x
ADD SOURCE SELECTION FILE	x	x												x
VIEW SOURCE SELECTION FILE	x	x	x	x	x	x	x	x	x	x	x	x	x	x
DELETE SOURCE SELECTION FILE	x	x												x
CHANGE 'FILE TYPE' OF SOURCE SELECTION FILE	x	x												x
MAKE FINDINGTYPE ACTIVE/INACTIVE	x	x												x
ADD NEW FACTOR	x	x												x
MAKE FACTOR ACTIVE/INACTIVE	x	x												x
ENTER BASIS FOR AWARD	x	x												x
UPDATE/MODIFY FACTOR	x	x												x
ADD SUBFACTOR	x	x												x
UPDATE/MODIFY SUBFACTOR	x	x												x
DELETE SUBFACTOR	x	x												x
ADD MEMBER	x	x												x
EDIT MEMBER	x	x												x
REMOVE MEMBER	x	x												x
UPDATE/MODIFIY WORKFLOW ROUTING	x	x												x
ADD OFFEROR	x	x												x
EDIT OFFEROR	x	x												x
DELETE OFFEROR	x	x												x
ADD OFFEROR POINT OF CONTACT	x	x												x
EDIT OFFEROR POINT OF CONTACT	x	x												x
DEACTIVATE OFFEROR POINT OF CONTACT	x	x												x
REACTIVATE OFFEROR POINT OF CONTACT	x	x												x
UNLOCK OFFEROR POINT OF CONTACT	x	x												x
REMOVE OFFEROR POINT OF CONTACT	x	x												x
ADD PROPOSAL FILE	x	x												x
UPDATE PROPOSAL FILE INFO	x	x												x
DELETE PROPOSAL FILE	x	x	x	x	x	x	x	x	x	x	x	x	x	x
VIEW PROPOSAL FILE	x	x												x
ADD DECISIION DOCUMENT	x	x												x
SAVE DECSISION DOCUMENT	x	x												x
EDIT DECISION DOCUMENT	x	x												x
VIEW DECESION DOCUMENT	x	x												x
SUBMIT DECISION DOCUMENT	x	x												x
REACTIVATE OFFEROR	x	x												x
EXPORT THE SOURCE SELECTION	x	x												x
SET FILTER	x	x	x	x	x	x	x	x	x	x	x	x	x	x
SUMMARIZE FINDINGS/ENS	x	x	x	x	x	x	x	x	x	x	x	x	x	x
EXPORT DISPLAYED	x	x	x	x	x	x	x	x	x	x	x	x	x	x
EXPORT SELECTED	x	x	x	x	x	x	x	x	x	x	x	x	x	x
REASSIGN AUTHOR	x	x		x	x	x	x	x						
ADD FINDING/EN	x	x		x	x	x	x	x						
ADD EVALUATION						x	x	x						

ADD SUMMARY						x	x	x						
EDIT FINDING/EN	x	x	x	x	x	x	x	x						
EDIT EVALUATION	x	x	x	x	x	x	x	x						
EDIT SUMMARY	x	x	x	x	x	x	x	x						
ADMIN EDIT FINDING/EN	x	x												
ADMIN EDIT EVALUATION	x	x												
ADMIN EDIT SUMMARY	x	x												
VIEW FINDING/EN	x	x	x	x	x	x	x	x	x	x	x	x	x	x
VIEW EVALUATION	x	x	x	x	x	x	x	x	x	x	x	x	x	x
VIEW SUMMARY	x	x	x	x	x	x	x	x	x	x	x	x	x	x
DELETE/NEGATE FINDING/EN	x	x	x	x	x	x	x	x						
DELETE EVALUATION	x	x	x	x	x	x	x	x						
DELETE SUMMARY	x	x				x	x	x						
SUBMIT FINDING/EN	x	x		x	x	x	x	x						
SUBMIT EVALUATION						x	x	x						
SUBMIT SUMMARY						x	x	x						
CANCEL WORKFLOW	x	x	x	x	x	x	x	x						
RETURN TO	x	x	x	x	x	x	x	x						
APPROVE	x	x	x	x	x	x	x	x						
ADMIN SUBMIT	x	x		x										
ADMIN RETURN TO	x	x		x										
ADMIN CANCEL	x	x		x										
ADMIN APPROVE	x	x		x										
CONSENSUS APPROVE	x													
UNAPPROVE	x	x												
CHANGE EXCHANGE TYPE (IN BULK)	x													
RELEASE ENS	x													
ACCEPT ENS	x													

Appendix D

VIEWS	ROLE: CONTRACTING OFFICER	CONTRACT SPECIALIST	LAWYER	CHAIR	DEPUTY CHAIR	FACTOR CHAIR	SUBFACTOR CHAIR	EVALUATOR	SSA	SSAC	READER ALL	READER	CONTRACTOR ADVISOR	SSEB ADMIN
MY WORKSPACE*														
PENDING MY ACTION	x	x	x	x	x	x	x	x	x	x	x	x	x	x
MY DOCUMENTS	x	x	x	x	x	x	x	x	x	x	x	x	x	x
SOURCE SELECTION*														
ALL OFFERORS	x	x	x	x	x	x	x	x	x	x	x	x	x	x
INDIVIDUAL OFFEROR	x	x	x	x	x	x	x	x	x	x	x	x	x	x
MANAGE MULTIPLE DOCS														
ADMINSTRATIVE APPROVAL	x	x		x										x
ADMINSTRATIVE SUBMIT	x	x		x										x
ADMINSTRATIVE CANCEL	x	x		x										x
ADMINSTRATIVE UNAPPROVE	x	x												x
CONSENSUS APPROVE	x													x
RELEASE ENS	x	x												x
ACCEPT ENS FROM OFFEROR	x	x												x
CHANGE EXCHANGE TYPE	x	x												x
ADMINSTRATION														
PROFILE	x	x		x										x
SOURCE SELECTION FILES	x	x		x										x
FINDING TYPES	x	x		x										x
FACTORS	x	x		x										x
MEMBERS	x	x		x										x
WORKFLOW ROUTING	x	x		x										x
OFFERORS/PROPOSALS	x	x												x
DECISION DOCUMENTS	x	x												x
EXPORT	x	x												x
REMOVE OFFEROR POINT OF CONTACT	x	x												x
DOCUMENATION*														
DOCUMENTATION	x	x	x	x	x	x	x	x	x	x	x	x	x	x

*** Users assigned a role of Factor Chair, Subfactor Chair, Evaluator, Reader or Contractor Advisor will only see documents within their assigned associated factor/Subfactor (e.g., Proposals, Findings/ENs, Summaries, and Evaluations)**

Appendix E

Sample Proposal Instructions for Solicitation

During the conduct of this acquisition, the Acquisition Source Selection Interactive Support Tool (ASSIST) will be used by the Government to support the proposal evaluation and source selection process. A separate tool, the ASSIST2Industry, will be used in conjunction with ASSIST to accomplish all exchanges with Offerors after receipt of proposals pursuant to Federal Acquisition Regulation (FAR) 15.306. ASSIST2Industry provides the ability for the Government to issue, and the Offerors to receive and respond to, all Evaluation Notices (ENs) in a secure online environment.

In order to initiate the use of ASSIST2Industry, the Government requires the names, company titles, telephone numbers, and email addresses of two (2) individuals that the Offeror has designated as responsible for receiving and responding to Government ENs through ASSIST2Industry. The designation of two (2) individuals is for the purpose of insuring availability of one individual if the other individual is not available. The required information regarding these two (2) individuals must be submitted with the Offeror's proposal and included in the cover letter. After the solicitation's closing date, the Government will establish an account in ASSIST2Industry for each individual identified by the Offeror that has submitted a proposal in response to this solicitation. The two individuals named by the Offeror will be authorized access to that account. Two (2) separate system generated emails will be sent to each individual. One of the emails will contain the individual's ASSIST2Industry username. The other email will contain the individual's temporary password. Using the provided username and temporary password, each individual can then go to https://ASSIST2Industry.army.mil to access the account. NOTE: The first time a user logs in, the user will be required to change the temporary password before the user can proceed to use the site.

Whenever the Government issues ENs to the Offeror through ASSIST2Industry, the Government's Contracting Officer will notify the Offeror through a medium independent of ASSIST2Industry (e.g., e-mail) that the Offeror has ENs in ASSIST2Industry waiting for a response. There will be no ENs in ASSIST2Industry until such notice is issued by the Contracting Officer.

All Offerors are advised that ASSIST2Industry has been updated and it is now the responsibility of PRIME Contractors to establish accounts for their SUBCONTRACTORS to respond to Government ENs. A separate area within ASSIST2Industry has been created to allow authorized Subcontractor POCs to upload proposal files only. Subcontractors will not be able to access any other information on the ASSIST2Industry website (e.g. Questions/Evaluation Notices, Responses, etc.). Once a Subcontractor has been added, they will receive a user ID (e.g. subcontractor0001) and password (an initial password) that will be sent via two separate system generated e-mails. **A Subcontractor will have one user ID for all PRIMES and solicitation responses**, i.e. if you are a Subcontractor to multiple Prime Contractors and multiple solicitation responses, you will only have one user ID. Once an account has been established for the Subcontractor, go to https://ASSIST2Industry.army.mil to access the account. **Prime Contractors will only be able to see the number of files submitted by their Subcontractors; but, will be UNABLE TO VIEW the Subcontractor's files.**

NOTE: Both Prime Contractors and Subcontractors are instructed to review the ASSIST2Industry User's Guide, located under the "Getting Started" tab on the website. The guide has been updated and provides step by step instructions on how to perform functions and navigate the website.

Offerors can contact Adam Rothschild at (609) 562-7050 or the ASSIST2Industry helpdesk at (609) 562-5988 for any technical assistance that may be needed.

THE OFFERORS ARE CAUTIONED THAT THE SYSTEM GENERATED EMAILS REFERRED TO ABOVE ARE INTENDED FOR ADMINISTRATIVE PURPOSES ONLY. RECEIPT OF THESE EMAILS DOES NOT CONSTITUTE THE COMMENCEMENT OF ANY TYPE OF EXCHANGE WITH THE OFFEROR IN ACCORDANCE WITH FAR 15.306(A), (B), OR (D) (I.E., CLARIFICATIONS, COMMUNICATIONS, OR

DISCUSSIONS). ALSO, RECEIPT OF THESE EMAILS DOES NOT SIGNIFY THAT A COMPETITIVE RANGE DETERMINATION IN ACCORDANCE WITH FAR 15.306(C) HAS BEEN MADE OR THAT THE OFFEROR'S PROPOSAL WILL BE INCLUDED IN THE COMPETITIVE RANGE WHEN THAT DETERMINATION IS MADE. ALL NOTIFICATIONS THAT ANY TYPE OF EXCHANGE WITH THE OFFEROR HAS COMMENCED AND THE OFFEROR HAS EVALUATION NOTICES (ENS) AVAILABLE TO RESPOND TO, OR ANY NOTIFICATION THAT THE OFFEROR'S PROPOSAL HAS BEEN INCLUDED IN OR EXCLUDED FROM THE COMPETITIVE RANGE, WILL BE SENT TO THE OFFEROR BY THE CONTRACTING OFFICER INDEPENDENTLY OF THE ASSIST2INDUSTRY.

Appendix F

Emails sent to Offeror Contact when added in ASSIST to provide access to ASSIST2Industry

Email 1:

Subject of Email: Account set up for ASSIST2Industry for PRIME Contractors

The Government is using the Acquisition Source Selection Interactive Support Tool (ASSIST) to support the evaluation of a proposal you submitted. ASSIST2Industry is used in conjunction with ASSIST to accomplish all exchanges with Offerors after receipt of proposals pursuant to Federal Acquisition Regulation (FAR) 15.306. ASSIST2Industry provides the ability for the Government to issue, and the Offerors to receive and respond to, all Evaluation Notices (ENs) in a secure online environment.

An account has been established for you in ASSIST2Industry. Your user ID is (**ENTER USERNAME**). You will receive an additional email containing your password. Once you receive this email, go to https://ASSIST2Industry.army.mil to access your account using your user ID and password to login.

If you have any problems logging in to ASSIST2Industry, contact the ASSIST2Industry helpdesk via e-mail at usarmy.jbmdl.acc.list.vce-helpdesk@mail.mil or by telephone at (609) 562-5988 or (609) 562-7050.

CAUTION: THIS IS A SYSTEM GENERATED EMAIL INTENDED FOR ADMINISTRATIVE PURPOSES ONLY. RECEIPT OF THIS EMAIL DOES NOT CONSTITUTE THE COMMENCEMENT OF ANY TYPE OF EXCHANGE WITH THE OFFEROR IN ACCORDANCE WITH FAR 15.306(A), (B), OR (D) (I.E., CLARIFICATIONS, COMMUNICATIONS, OR DISCUSSIONS). ALSO, RECEIPT OF THIS EMAIL DOES NOT SIGNIFY THAT A COMPETITIVE RANGE DETERMINATION IN ACCORDANCE WITH FAR 15.306(C) HAS BEEN MADE OR THAT THE OFFEROR'S PROPOSAL WILL BE INCLUDED IN THE COMPETITIVE RANGE WHEN THAT DETERMINATION IS MADE. ALL NOTIFICATIONS THAT ANY TYPE OF EXCHANGE WITH THE OFFEROR HAS COMMENCED AND THE OFFEROR HAS EVALUATION NOTICES (ENS) AVAILABLE TO RESPOND TO, OR ANY NOTIFICATION THAT THE OFFEROR'S PROPOSAL HAS BEEN INCLUDED IN OR EXCLUDED FROM THE COMPETITIVE RANGE, WILL BE SENT TO THE OFFEROR BY THE CONTRACTING OFFICER INDEPENDENTLY OF ASSIST.

Email 2:

Subject of Email: Password for ASSIST2Industry for PRIME Contractors

The password for your ASSIST2Industry account is (**ENTER TEMPORARY PASSWORD**). This is a temporary password. The first time you log in, you will be required to change this password before you can proceed to use the site.

Go to https://ASSIST2Industry.army.mil and login using your ASSIST2Industry user ID and password.

You should have received you ASSIST2Industry username in separate email. If you did not receive this email or if you have any other problems accessing your account, contact the ASSIST2Industry helpdesk via e-mail at usarmy.jbmdl.acc.list.vce-helpdesk@mail.mil or by telephone at (609) 562-5988 or (609) 562-7050.

CAUTION: THIS IS A SYSTEM GENERATED EMAIL INTENDED FOR ADMINISTRATIVE PURPOSES ONLY. RECEIPT OF THIS EMAIL DOES NOT CONSTITUTE THE COMMENCEMENT OF ANY TYPE OF EXCHANGE

WITH THE OFFEROR IN ACCORDANCE WITH FAR 15.306(A), (B), OR (D) (I.E., CLARIFICATIONS, COMMUNICATIONS, OR DISCUSSIONS). ALSO, RECEIPT OF THIS EMAIL DOES NOT SIGNIFY THAT A COMPETITIVE RANGE DETERMINATION IN ACCORDANCE WITH FAR 15.306(C) HAS BEEN MADE OR THAT THE OFFEROR'S PROPOSAL WILL BE INCLUDED IN THE COMPETITIVE RANGE WHEN THAT DETERMINATION IS MADE. ALL NOTIFICATIONS THAT ANY TYPE OF EXCHANGE WITH THE OFFEROR HAS COMMENCED AND THE OFFEROR HAS EVALUATION NOTICES (ENS) AVAILABLE TO RESPOND TO, OR ANY NOTIFICATION THAT THE OFFEROR'S PROPOSAL HAS BEEN INCLUDED IN OR EXCLUDED FROM THE COMPETITIVE RANGE, WILL BE SENT TO THE OFFEROR BY THE CONTRACTING OFFICER INDEPENDENTLY OF ASSIST.

Appendix G

Emails sent to Subcontractor Contact when added in ASSIST2Industry by the PRIME CONTRACTOR to provide access to the site.

Email 1:

Subject of Email: Account set up for ASSIST2Industry as a SUBCONTRACTOR

The Government is using the Acquisition Source Selection Interactive Support Tool (ASSIST) to support the evaluation of a proposal you and/or your Prime Contractor submitted. ASSIST2Industry is used in conjunction with ASSIST to accomplish all exchanges with Offerors after receipt of proposals pursuant to Federal Acquisition Regulation (FAR) 15.306. ASSIST2Industry provides the ability for the Government to issue, and the Offerors (Prime Contractors) to receive and respond to all Evaluation Notices (ENs) in a secure online environment.

As a subcontractor under a prime contractor's proposal response, a subcontractor account has been established for you in ASSIST2Industry.

Your Subcontractor user ID is subcontractorxxxx.

You will receive an additional email containing the password for this User ID. You can login to ASSIST2Industry with this user ID and password at https://ASSIST2Industry.army.mil. NOTE: Subcontractor's POCs have limited access to ASSIST2Industry, and can only upload proposal files. Subcontractors CANNOT respond to Government Evaluation Notices submitted to Prime Contractors. Please refer to the ASSIST2Industry User's Guide located on the homepage under the "Getting Started" tab.

If you have any problems logging in to ASSIST2Industry, contact the ASSIST2Industry helpdesk via e-mail at usarmy.jbmdl.acc.list.vce-helpdesk@mail.mil or by telephone at (609) 562-7050 or (609) 562-5988.

Email 2:

Subject of Email: Password for ASSIST2Industry for SUBCONTRACTORS

The password for your ASSIST2Industry SUBCONTRACTOR account is xxxxxxxxxx.

This is a temporary password. The first time you log in you will be required to change this password before you can proceed to use the site.

The URL for ASSIST2Industry is https://ASSIST2Industry.army.mil.

Your ASSIST2Industry Subcontractor User ID was sent in a previous email. If you did not receive this email, or if you have any other issues logging in, please contact the ASSIST2Industry helpdesk via e-mail at usarmy.jbmdl.acc.list.vce-helpdesk@mail.mil or by telephone at (609) 562-5988 or (609) 562-7050.