Data Sources:
- Transition Inventory (TI)
- Statement of Work Assist Tool (SOW Assist)
- All Agency Inventory (AAI)
- Networx Inventory Management (NIM)
- E-MORRIS Billing Reports
- Contractor Portals
- TOPS
- Service@Once
- Level 3 WITS 3 Portal
- Agency specific TEMs tools
- Agency specific data
- Agency specific technical telecom requirements
- Agency mission statement
- Agency Operational environment

Training Sources:
- TI User Guide
- QRG TI
- FAQ Inventory
- GSA Transition Webpage
- AAI User Guide
- TI to AAI Comparison Matrix
- Fair Opportunity and Ordering Guide
- Statement of Work Assist Tool (SOW Assist)
- Federal Acquisition Regulations (FAR) 16.505
- EIS RFP
- EIS Management and Operations Handbook
- Transition Handbook

Resources:
- Agency Manager: (https://gsa.gov/portal/content/103828)
- Agency Integrated Procurement Team
- TOA Team
- National Customer Service Center (NCSC)
  ITCSC@gsa.gov or 855-482-4348 (ITaid4U)
- TCC Task 8 Team: (eistcc.inventory@gsa.gov)
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- AAI Training Module I (ILT conducted by TCC Task 8 Team)
- AAI Training Module II (ILT conducted by TCC Task 8 Team)
- TCC Task 4 and Task 6 Teams
1. Establish Integrated Procurement Team (IPT) (FOOG §3.1)

1.1a Are you an ITT lead?

1.1b Identify and handoff to one of these critical roles: Sponsor, TOCO, LTM

1.2 Identify the ITT leadership team

1.3 Review the recommended skillsets for IPT team and any other agency-specific skills

1.4 Identify and contact your GSA Agency Manager (AM)

1.5 Include/update IPT contacts in Agency Transition Plan (ATP)

1.6 Update IPT contacts (as needed or each procurement)

Resources:
- Integrated Procurement Team (IPT) Handbook §3.1
- Executive Sponsor Handbook §5.1
- TSMP §4.2.1
- Lead Transition Manager (LTM) TSMP §5.2.2.1
- Handbook §5.2
- Transition Ordering Contracting Officer (TOCO) TSMP §5.2.2.3
- Handbood §5.3
- MOPS §3.1.1

Acronyms:
- IPT: Integrated Procurement Team
- TOCO: Transition Ordering Contracting Officer
- LTM: Lead Transition Manager
- DOO: Ordering Contract Officer
- AM: Agency Manager
- GSA: General Services Administration
- ITT: Integrated Transition Team

GSA Support Website: www.gsa.gov/nspsupport

Key:
- Agency
- TOA
- TOC
- Vendor
- GSA
2 Execute Delegation of Procurement Authority (DPA) with GSA (FOOG §3.1.1)

2.1 Are you the TOCO or OCO for this FO?
- Yes
- No

2.1a Identify and Handoff to the TOCO and/or OCO identified in your agency IPT

2.2 Did you register for training on DAU?
- Yes
- No

2.2a Register on Defense Acquisition University (DAU) for DPA training (FAC066)

2.3 Did you complete your training?
- Yes
- No

2.3a Complete training, and obtain Certificate of Completion

2.4 Do you have a .gov or .mil email address?
- Yes
- No

2.4a Submit the online request form. (www.gsa.gov/portal/content/137790)

2.4b Email your Warrant as a Federal Contracting Officer to EIS_DPA@gsa.gov

2.5 Email your DPA Training completion certificate to EIS_DPA@gsa.gov

2.6 DPA Letter should be sent within 2 business days.

2.7 Has it been more than 2 business days?
- Yes
- No

2.7a Email your DPA Training completion certificate to EIS_DPA@gsa.gov

2.8 Did you receive your DPA letter from the EIS CO?
- Yes
- No

2.8a Contact the Help Desk

2.9 You are now authorized to issue task orders under EIS (per DPA rules)

End Process

Resources:
- Fair Opportunity and Ordering Guide (FOOG) - § 3.1.1
- Management and Operations Handbook (MOPS) - § 3.1 para 6, § 3.1.1
- EIS Delegation of Procurement Authority Website - https://www.gsa.gov/portal/content/137790
- Defense Acquisition University (DAU) Website - https://www.dau.mil/

Acronyms:
- TOCO: Transition Ordering Contracting Officer
- OCO: Ordering Contracting Officer
- DPA: Delegation of Procurement Authority
- DAU: Defense Acquisition University
- EIS: Enterprise Infrastructure Solutions
- GSA: General Services Administration
- FO: Fair Opportunity

Key
- Agency
- TCC
- TOA
- Vendor
- GSA
3 Register for access to GSA Tools (FOOG §3.1.2)

3.1 Determine what kind of information and tools you need (EIS Transition Website)

3.2 Register for EMORRIS/TI by visiting the https://emorris.fasbilling.gsa.gov website

3.2a Register for EMORRIS/TI by visiting the https://emorris.fasbilling.gsa.gov website

3.2b To register a new account select “Register Now” from the three buttons

3.2c Enter the required contact information & Agency Hierarchy Code(s) (AHC) you need to access

3.2d Be sure to select “Agency Transition Inventory” to get access to TI data

3.2e Note the comments with the Authorizing Official contact information

3.2f Submit request and respond to any further information requests from the EMORRIS team

3.3 Do you need Transition Inventory (EMORRIS)?

3.3a Register for Conexus by visiting the https://conexus.gsa.gov website

3.3b Agency PIV/CAC?

3.3b1 Click Link and complete form to Request a GSA Conexus Secure Auth. Account

3.3c Review Login Information https://conexus.gsa.gov/get_started/get_started.html

3.3d Follow Instructions to Register PIV/CAC Certificate

3.4 Do you need Ordering, Billing, or EIS Inventory (Conexus)?

3.4a Register for Conexus by visiting the https://conexus.gsa.gov website

3.4b Supply all required information and submit.

3.4c Do you want notification of new updates to EIS information?

3.4d Visit the https://interact.gsa.gov/EIS website

3.4e Under the section “Stay Informed” select “subscribe here”

3.4f Provide your email address and submit

3.5 Do you need to access the EIS Pricer?

3.5x Registration and site TBD

3.6 Do you need access to the contractor BSS (Business Support System)?

3.6x Registration and site TBD

3.7 Do you need something else or have any problems?

3.7a Contact the Helpdesk

3.8 Do you need to access the EIS Contract? (Interact)

3.8y Y

3.8x Registration and site TBD

3.8n N

3.9 Do you need to access the EIS Pricer?

3.9y Y

3.9x Registration and site TBD

3.9n N

End Process

Acronyms:
EIS: Enterprise Infrastructure Solutions
GSA: General Services Administration
FO: Fair Opportunity
TI: Transition Inventory
AHC: Agency Hierarchy Code
PIV: Personal Identity Verification
CAC: Common Access Card
AM: Agency Manager

Key:
Agency
TCC
TOA
Vendor
GSA
4. Compile/Confirm Inventory

4.1 Do you have access to E-MORRIS / Ti data?
   - N
   - Y
     - 4.1b Request/Obtain E-MORRIS access

4.2 Have you obtained AAI data from your Agency Manager?
   - N
   - Y
     - 4.2a Have you taken AAI module 1 training?
       - Y
         - 4.2d Take AAI module 1 training
       - N
         - 4.2b Request/Obtain AAI reports/data from Agency Mgr

4.3 Do you have agency specific technical data, if required?
   - N
   - Y
     - 4.3b Work with Contractor(s) or source to obtain technical data

4.4 Is additional data required?
   - N
   - Y
     - 4.4a Refer to Data Sources

End Process

Data Sources:
- Transition Inventory (TI)
- All Agency Inventory (AAI)
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- Level 3 WITS 3 Portal
- Agency specific TEMs tools
- Agency specific data

Training Sources:
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- QRG TI
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- FOOG

Resources:
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- *TOA Team*
- *National Customer Service Center (NCSC)*
  - *TCC@gsa.gov* or 855-482-4348 (ITaid4U)
- *TCC Task 8 Team*: (eistcc.inventory@gsa.gov)
6. Define Service Requirements

6.1 Define mission and operational environment
6.2 Review existing inventory / requirements in “as-is” state
6.3 Determine “future” requirements
6.4 Determine Transition Strategy (like for like, upgrade, transform)

7. Define Service Groups based on Transition Strategy

7.1 Document Service Groups
7.2 Review Service Groups
7.3 Determine document type (SOW, SOO, PWS)
7.4a Document Service Requirements: SOW, SOO, PWS, created (see 10.0 for detail)
7.4b TOA document Service Requirements: Small

6.4a Agencies document Service Requirements (Large & Medium)
6.4b TOA document Service Requirements (Small)

7.4a Document Service Requirements: SOW, PWS, SOO created (see 10.0 for detail)
7.4b Document Service Requirements: SOW, PWS, SOO created (see 10.0 for detail)

End Process

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- TCC Task 4 and Task 6 Teams
8. Develop Acquisition Strategy (FOOG Section 3.5)

8.1 Estimate Expected Total Cost of Acquisition

8.2 Is acquisition > the Simplified Acquisition Threshold (SAT) of $150k?

8.1a Formal solicitation is required

8.1c.2 Price-only acquisition method can be used to select awardee

8.1b Are all required CLINs fixed priced, on the EIS contracts or in contractor catalogs?

8.2 Is acquisition > the SAT of $150k?

Yes

End Process

No

9. Prepare an Acquisition Plan (FOOG Section 3.5.2)

9.1 Create Acquisition Plan

11. Select Acquisition Method

11.1a Will a decision be based on a technically acceptable proposal with the lowest evaluated price?

Yes

End Process

No

11.1b Will the agency include non-price factors in addition to price to determine best value?

Yes

11.2 Create Solicitation using Low Price Technically Acceptable (LPTA)

No

11.3 Create Solicitation using Best Value Trade Off

9. Prepare an Acquisition Plan

Review FAR 7.1 (Acquisition Plans) for acquisition planning requirements

Review FAR 10 (Market Research) for acquisition planning, market research requirements

11. Select Acquisition Method

Data Sources:
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TOA Assistance Available to Support if IAA signed

10.1 Complete Background Sections for SOW/SOO

10.2 Create Services Section based upon output from Step 7

10.3 Determine SRE Approach

10.4 Complete SRE Section

10.5 Incorporate Service Inventory List using AAI Report

10.6 Finalize Draft Version for IPT Review

10.7 IPT Review of Documented Service Reqs and Service Groups

10.8 Final Documented Service Requirements

End Process

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- AAI Training Module II (ILT conducted by TCC Task 8 Team)
- TCC Task 4 and Task 6 Teams
12.1 Define FO Strategy (Output from Process Step 9)
12.2 Define Requirements for Transition (Output from Process Step 6)
12.3 Develop Schedule for Completing FOs
12.4 Determine Service Groups to be included in this FO (Output from Process 7)
12.5 Map Agency Service Locations to EIS CBSAs
12.6 Create Initial Draft of SOW/SOO
12.6a Review Draft SOW/SOO with IPT
12.7 Create Draft SOW/SOO for Submission to Agency Contracts Group
12.7a Incorporate Feedback from Agency Contracts Group
12.8 Add Agency Specific Clauses
12.9 Add Evaluation Criteria (determined in Process Step 11)
12.10 Final SOW/ SOO Created
12.11 Create Instructions to Offerors
12.12 Create Delivery or Performance Schedule
12.13 Combine into Requirements Package (see 15a.1, 15b.1 and 15c.1 for detail)
End Process

Data Sources:
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- AAI Training Module II (ILT conducted by TCC Task 8 Team)
- TCC Task 4 and Task 6 Teams
Need to get process from EIS PMO once defined

13. GSA Scope Review

13.1 Submit Completed Solicitation to GSA for Scope Review

13.2 GSA Reviews Scope

13.3 In Scope?

13.3a Solicitation Authorized for Release

13.3b Agency Needs to re-work Solicitation to bring it In Scope

End Process
Need to get process from EIS PMO once defined
15a.1 Provide Each Awardee a Fair Opportunity

15a.1.1 Prepare Requirements Package (Output from Process 12 required)

15a.1.1a Prepare Spreadsheet with Rqmnts & Fixed Price CLINs

15a.1.1b Prepare List of Potential Contractors

15a.1.1c Prepare IGCE

15a.1.1d Prepare Funding Documents

15a.1.2 Review EIS Pricer for Fixed Price CLINs

15a.1.2b Review Contractor Websites, Catalogs for Prices

15a.1.3 Create IGCE Document (Summary of Costs, Benefits, Risks, Rewards)

15a.1.4 Requirements Package

15a.2 Conduct Fair Opportunity

15a.2.1 Determine Which Contractor Offers the best ‘Fair and Reasonable’ solution

15a.2.2 Document Findings

15a.2.3 Update Funding Documentation

15a.2.4 Select Contractor

15a.2.5 Award Task Order

End Process

15a.1.5 Information Sufficient for Evaluation?

Y

N

15a.1.5a Revisit IGCE

15a.2 Conduct Fair Opportunity

Key:
- Agency
- TCC
- TOA
- Vendor
- USA
15b. Provide Notice of Intent to Purchase

15b.1 Prepare RFPs / RFQs Package

15b.1a Prepare SOW, SOO or PWS

15b.1.b Prepare ISCE

15b.1.c Prepare Funding Documentation

15b.1.b.1 Review EIS Pricer For Fixed Price CLINs

15b.1.b.2 Review Contractor Websites, Catalogs for Prices

15b.1.3 Create ISCE Document (Summary of Costs, Benefits, Risks, Rewards)

15b.1.4 Requirements Package

15b.1.5 Select Source Selection Board Members

15b.1.6 Determine Evaluation Criteria

15b.1.7 Determine 'Technical Factors'

LPTA or Best Value (Process 11)?

15b.1.7a Determine 'Technical Factors'

15b.1.7b Determine 'Best Value' Factors

15b.1.8 Release Solicitation to all EIS Awardees

15b.2 Upon Receipt of Responses

15b.2.1 Conduct Fair Opportunity

15b.2.1.a Review LPTA Technical Factors From 'Provide Notice'

15b.2.1b Review Best Value Factors From 'Provide Notice'

15b.2.2 Source Selection Board Evaluates Responses

15b.2.3 Score Responses

15b.2.4 Create Scoring Summary / Ranking

15b.2.5 Document Findings

15b.2.6 Update Funding Documentation

15b.2.7 Select Contractor

15b.3 Award Task Order

15b.3.1 Notify Successful and Unsuccessful Offerors

15b.3.2 Are Contract Modifications Necessary? (See Process 14)

15b.3.2a Work with GSA EIS CO to Modify Awardee Contract

Yes / No

15b.3.3 Debrief (as required)

15b.3.4 Award Task Order

End Process
16. Place Service Order(s) Under Task Order

The order must state: “The contractor shall accept service orders from the GSA Conexus application in the Conexus data dictionary format.”

17. Modify Task Order

18. Manage Task Order (Disputes and Terminations)

19. Close-out Task Order

Process Finish