

**ATTACHMENT 1**

**U.S. ABILITYONE COMMISSION**

**PERFORMANCE WORK STATEMENT**

**PLIMS 2.0**

# US AbilityOne Commission

## 1. Introduction.

1.1. Scope. The Contractor shall provide all labor, supervision, facilities, materials, and equipment to modernize and develop the next generation of the AbilityOne Commission's Procurement List Information Management System (hereafter referred to as PLIMS 2.0) as delineated in this Performance Work Statement (PWS). The Contractor shall use teamwork and close collaboration with AbilityOne in evaluating and analyzing system requirements and shall be responsible for the, cyber compliant, full life cycle operation of the system to include analysis, iterative system Development Security Operations (DevSecOps) development, acquiring required licensing, pre-deployment system testing, post-deployment system validation/certification, user training, data migration from the current iteration of PLIMS to PLIMS 2.0., and ongoing system maintenance. The system shall be usable and fully functional immediately upon installation, implementation, and full deployment. Final delivery acceptance is defined as a resulting solution (PLIMS 2.0) that is fully installed, tested, implemented, deployed, is functioning to satisfaction and acceptable standards, and is free of any problems, malfunctions, complications, setbacks, and any state of unreadiness.

1.2. Background. The enactment of 41 U.S.C. 8501-8506, Javits-Wagner-O'Day (JWOD) Act, established the Committee for Purchase From People Who Are Blind or Severely Disabled (operating as the AbilityOne Commission). The AbilityOne Commission is the Federal agency responsible for administering the congressionally mandated program, now known as the AbilityOne Program. The mission of the AbilityOne Program is to create employment opportunities for people who are blind or who have significant disabilities. This is accomplished in the manufacture and delivery of products and services to the Federal Government. The AbilityOne Commission executes this mission with the assistance of Central Nonprofit Agencies (CNAs) and Nonprofit Agencies (NPAs). The two designated CNAs are the National Industries for the Blind (NIB) and Source America (SA). NIB and SA are responsible for the management of products and services on the Procurement List (PL) and the associated NPAs. There are approximately 500 Non-profit Agencies (NPAs) that can supply products or provide services that are on the PL. If Federal agencies have a requirement to procure the products or services on the PL, and the designated NPA(s) can provide them when the Government needs them, the Federal agency must procure such products and services from the Commission-designated NPA. Additionally, if a potential new product or service is identified as a possible new product or service addition to the PL, NIB or SA will work closely with the contracting activity to obtain the data needed by the Commission to ensure the product or services can be procured under the AbilityOne Program at a fair market price.

1.3. PURPOSE. PLIMS 2.0. is the primary information and decision-making support system used by AbilityOne to: efficiently and effectively manage the Procurement List of all products and services that are suitable for provision to the Government; interface with all program stakeholders (to include, but not limited DoD, non-DoD Federal, CNA agencies); execute their day-to-day workflow processes and operations. AbilityOne maintains a database of thousands of PL items and services, approximately 500 NPAs, conducts an average 3,000 transactions per year in PLIMS, and oversees \$4 billion of products and services procured annually within PLIMS.

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1.4. Objectives. PLIMS automates the Commission's operational workflow processes, provides an integrated access point for Commission members and program stakeholders, and provides information management services.

The key objectives of PLIMS:

- Improve the efficiency and quality of data exchanged between and among the Commission and the program stakeholders
- Provide decision support for Commission members and staff
- Maintain a high level of data integrity and consistency across the AbilityOne Program
- Improve visibility and transparency of PL Processes
- Maintain data security and data accessibility

PLIMS is a custom programmed, web-based application, utilizing a SQL Server database that is in process of being migrated and hosted within Microsoft Azure Government Compute Cloud (Azure GCC-H). It leverages a Microsoft-based tool suite and additional COTS (commercial off-the-shelf) components. Commission members and staff access PLIMS data through a GUI (graphic user interface), which allows multiple users to access information concurrently. During the PL management process, documents are created, digitally signed, and stored using the PLIMS system. Data from all approved PL packages is stored in the system and accessible via the interface. Users are also able to create and generate reports using this data. NIB and SA currently interface with PLIMS via XML Web Services. Because XML is based on open architecture standards, PLIMS can easily connect with partners such as distributors and CNAs'. When required, submissions made by NIB and SA must be digitally signed. Initial package submissions are acknowledged automatically via PLIMS with XML transactions that update the CNAs' databases. Subsequent updates to package status are also communicated to the CNA by using email instead of automatic updates. PLIMS handles agency transactions in the following functional areas:

- Impact Analysis
- PL transactions with CNAs – additions, deletions, and changes
- PL pricing
- Nonprofit agency qualification, maintenance, and oversight

PLIMS also supports PL management activities, such as:

- Submission to Federal Register
- Commission member voting
- Management of commercial distribution programs

## 2. General Requirements.

2.1. Project Management. The Contractor shall provide all necessary personnel and supervision to deliver technical services in response to the PLIMS 2.0 modernization requirements identified

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in this PWS. The Contractor shall utilize Agile/Scrum methodology for project management and PLIMS 2.0 solution development purposes. The Contractor shall designate a Project Manager/Project Lead responsible for managing the performance of the work. The Project Manager/Project Lead shall be the single point of contact between the Government and Contractor personnel to support the PLIMS 2.0. effort. The identity of the Project Lead shall be designated in writing to the Contracting Officer. The Contractor shall obtain the Contracting Officer's written consent before making any substitution for the Project Lead. In the event of such substitution, the individual proposed to fill the Project Lead shall possess equivalent qualifications to the original individual. The Project Lead shall have the authority to act for the Contractor on all matters relating to the daily operation under this contract.

### 2.1.1. Key Personnel.

The following personnel are considered Key Personnel: Project Manager, Architect, System/Database Administrators and Developers. The Project Manager shall be Project Management Professional (PMP) and Scrum Master certified. All Key Personnel shall submit resumes with relevant experience and relevant professional certifications with proposal for Government review and approval.

The key personnel specified in this contract are considered essential to work performance. At least thirty (30) days prior to the contractor voluntarily diverting any of the specified individuals to other programs or contracts the Contractor shall notify the Contracting Officer and shall submit a justification for the diversion or replacement and a request to replace the individual. The request must identify the proposed replacement individual(s) and fully explain how the replacement's skills, experience, and credentials meet or exceed the requirements of the contract. If the employee of the contractor is terminated for cause or separates from the contractor voluntarily with less than thirty (30) days' notice, the Contractor shall provide the maximum notice practicable under the circumstances. The Contractor shall not divert, replace, or announce any such change to key personnel without the written consent of the Contracting Officer. The contract will be modified to add or delete key personnel as necessary to reflect the agreement of the parties. Award of a contract will constitute the government's approval of the initial proposed key personnel. The Contractor may propose individuals, regardless of labor category, as "key personnel" whenever the individual performs a function(s) that is believed to be critical to successful performance on any segment of this contract. Key Personnel must be assigned for the duration of the contract. All decisions relative to absences of the key personnel shall be submitted to the Contracting Officer's Representative (COR) for informational purposes (i.e., Corporate Travel, reassignments, vacations, and any other extended period of absences).

2.2. Project Management Plan. Within 15 calendar days of contract award, the Contractor shall submit a formal project management plan to AbilityOne for acceptance that delineates the proposed solution (applications and software) to be utilized for PLIMS 2.0., a timeline for execution (to include identifying critical path milestones), assigned resources (skill mix, labor hours, etc.) to critical path tasks, and a detailed description of the critical path tasks to be performed during program/project execution. The Contractor shall use the software development industry standards and industry best practices for providing the products and services required by

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the contract in the absence of specific contract requirements. The software and application utilized, and timeline shall be consistent with the contractor's technical quote submitted in response to the solicitation.

2.3. Period of Performance. The period of performance for the contract is as follows:

Base Year: Includes analysis, PLIMS 2.0 system development (setup/configuration/customization/testing), pre-deployment system testing, data migration, PLIMS 2.0 user training, and PLIMS 2.0 deployment. **Initial development (Initial Operational Capability (IOC)/Proof of Concept) shall occur within the first six (6) calendar months of the performance period. Final deployment (Full Operational Capability (FOC)) shall occur within twelve (12) calendar months of the contract's base period of performance start date.**

Option Years I through IV: Includes ongoing system operation and maintenance (to include cybersecurity compliance, bug fixes, system improvements & etc.), and relevant licensing (SF 1449, Block 20, p.2).

2.4. References and Security Requirements. The system shall have the appropriate security protocols to comply with:

- NIST 800 Publications (as applicable)
- FIPS Pub 199
- NIST Special Publication 800-37
- NIST 800-53 Rev 5
- NIST 800-52 Rev 2
- FIPS 140-32 encryption
- Section 508\* Compliance per FAR 39.2
- WCAG 2.1
- FISMA moderate
- PIV Card login
- Login.gov with 2FA
- Data encryption

*\* GUI 508 Compliance: Meets current industry standards for screen-reader accessibility, Fully accessible text and pdf document generation, Video player 508 Compliance: Mobility impaired – tabbed navigation, Hearing Impaired – Closed and/or open captioning, Vision impaired – Audio description, Support multiple platforms - desktop, laptop, tablet, phone, Support Operating Systems - Windows 7 and up, Support Browsers - IE 11 (current GOVERNMENT DEPARTMENT default), Edge, Firefox, Chrome, Safari, Opera*

2.5. Hours of Operation. All work under this PWS shall be accomplished remotely in coordination with AbilityOne (e.g. Product Manager) and certain stakeholders during the core operating hours of 0800 to 1700 ET (Eastern Time zone) Monday through Friday, except U.S. Federal Holidays.

2.6. Recognized/Observed Federal Holidays: The Contractor is not required to perform services on the holidays listed below unless pre-approved by Contracting Officer:

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Recognized Holidays	
New Year's Day	Labor Day
Martin Luther King Jr.'s Birthday	Columbus Day
President's Day	Veterans Day
Memorial Day	Thanksgiving Day
Juneteenth	Christmas Day
Independence Day	

### 2.7. Travel

2.7.1 Infrequent Travel may be required. All travel will be within the Continental United States (CONUS) in accordance with the Joint-Travel Regulations (JTR).

2.7.2 The Contractor shall ensure that all travel is in accordance with (IAW) the Department of Defense (DOD) Joint Travel Regulation (JTR) and Federal Travel Regulation (FTR), FAR 31.205-46. All travel must be approved by the Contracting Officer (KO) or designated Contracting Officer's Representative (COR) in writing prior to departing on travel. All invoices for travel shall be accompanied by supporting receipts.

### 2.8. Contracting Officer Representative (COR).

The COR will be identified by separate letter with copy to the Contractor. The COR monitors all technical aspects of the contract and assists in contract administration. The letter of designation issued to the COR states the responsibilities and limitations of the COR regarding this contract. The COR is not authorized to change any of the terms and conditions of the resulting contract. A warranted Contracting Officer is the only entity with authorization to negotiate and make changes to this contract.

### 2.9. Quality Control.

The Contractor shall develop, maintain, and execute an approved Quality Control Plan (QCP) to ensure services are satisfactorily performed under this contract. The QCP plan shall define the processes to monitor Contractor performance and ensure compliance with the requirements of this contract and applicable regulations. The Contractor's QCP shall develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services. The Contractor shall electronically submit a comprehensive, written QCP to the COR and the Contracting Officer within 15 calendar days of contract award. The QCP shall be reviewed by the Government before acceptance. After review of the quality control plan, the KO will provide the Contractor with written acceptance or, if the QCP is rejected, any required changes.

### 2.10. Quality Assurance.

The Government will evaluate the Contractor's performance under this contract in accordance

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with the Quality Assurance Surveillance Plan (QASP). The QASP is the method by which the Government will measure Contractor performance in accordance with the performance standards. It defines how the performance standards will be applied, the frequency of surveillance, and the minimum acceptable defect rate(s).

### 2.11. Data Rights.

Except as otherwise provided and except for commercially available and/or COTS software solutions, the Government has unlimited rights to all documents/material produced under this contract. All documents and materials, to include the source code, produced under this contract shall be Government owned and are the property of the Government with all rights and privileges of ownership/copyright belonging exclusively to the Government. These documents and materials may not be used, sold, or published by the Contractor without written permission from the Contracting Officer. All materials supplied to the Government shall be the sole property of the Government and may not be used for any other purpose. This right does not abrogate any other Government rights. Except as otherwise stated in this section, the Government has unlimited rights in accordance with FAR Clause 52.227-14.

### 2.12. Contract Deliverables.

All deliverables described shall be delivered to the Government Points of Contact (POCs).

<b>Deliverable</b>	<b>PWS Reference</b>	<b>Deliverable Due</b>	<b>Point of Contact</b>
Project Management Plan	2.2.	Within 15 calendar days of award of Purchase Order	KO and COR
Quality Control Plan	2.9.	Within 15 calendar days of award of Purchase Order	KO and COR
Pre-deployment system testing	7.0.	60 calendar days prior to scheduled testing start date	KO and COR
PLIMS User Training	9.0.	60 calendar days prior to completion of data migration	KO and COR
PLIMS 2.0 IOC	2.3.	Initial Operational Capability/Proof of Concept within the first six (6) calendar months of the performance period	KO and COR
PLIMS 2.0 FOC	2.3.	Full Operational Capability within twelve (12) calendar months of the contract's base period of performance start date	KO and COR

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Transition Out Plan	11.	Within 30 calendar days of CO notice	KO and COR
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### 3. Government Furnished Property/Contractor Furnished Property.

AbilityOne will provide necessary access to the current PLIMS system. Additionally, AbilityOne will provide GFE laptop computers to access AbilityOne General Support System (GSS) network, PLIMS system and to be utilized for PLIMS 2.0 development purposes. The Contractor shall provide any additional labor, supervision, materials, facilities, licensing and equipment required to develop and maintain PLIMS 2.0 in accordance with this PWS.

The Contractor shall be responsible to maintain a positive control over GFE and for returning all GFE to the Government in the same condition at the conclusion of this contract, less normal wear and tear, and shall repair or replace any lost or damaged GFE, at the Government's discretion. The Contractor shall manage, track and record GFE property in accordance with US AbilityOne Commission policies. The Contractor shall capture and maintain information to include but not limited to nomenclature, quantity, acquisition value, bar tags, model number, serial number, and year of manufacture.

The Contractor shall sign for all GFE via hand receipt.

As stewards of the Government's property the contractor's responsibility extends from the initial acquisition and receipt of property, through stewardship, custody, and use until formally relieved of responsibility in writing by the KO/COR. Government Property will be tracked by contractor employee and recorded within a Government owned online centrally accessible secure web platform in order to produce the Government's required reports, graphs, etc. related to property.

### 4. PLIMS 2.0. System Technical Requirements.

The system features and requirements for PLIMS 2.0 that the Commission will require the new system to comply with:

- The system should be a web-based application compatible with all mobile and OS devices.
- The web-based application shall be compatible and be able to interface with assistive and adaptive technology for people with disabilities. Specifically, technologies for the visually impaired to include the latest version of Job Access with Speech (JAWS). Additionally, the contract shall utilize Voluntary Product Accessibility Template (VPAT) to confirm accessibility compliance.
- The database, servers, and services shall be hosted in a Federal Risk and Authorization Management Program (FedRAMP) Moderate cloud environment approved by the US Federal Government for that purpose, with a separate Authority to Operate (ATO).
- The system is preferred to utilize primarily a SaaS (Software as a Service)-based



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COTS FedRAMP approved solution that is cloud hosted by a provider that will maintain system and cyber continuity and security. While the vendor is encouraged to use SaaS COTS solution, offerors may propose a cost-effective solution that, in their experience and expertise, best meets the requirements of the PWS, which may include a hybrid COTS and government-owned solution.

- The system should have the appropriate security protocols to comply with Section 2.4. References and Security Requirements.
- The site should have Secure Socket Layer (SSL), Transport Layer Security (TLS) and Hyper Text Transfer Protocol Secure (HTTPS) (refer to Section 2.4. References and Security Requirements).
- The system will need to be mobile device friendly and have enhanced useability functions for those with disabilities.
- The system will require robust backup, recovery, and continuity of agency capabilities.
- The system will require searchable archiving of all past records for legal compliance.
- The system will require an e-commerce functionality with inventory tracking and display of items with descriptions and pricing. These will be the approved prices from the Commission.
- The system will require a dashboard functionality with robust reporting for compliance and workflow optimization.
- This system will need to be configurable for ALL of the functional operations identified in PWS paragraph 5 below with only minor programming and custom configuration. This is to keep the new system in an evergreen state so that it will not require periodic rewrites for security of functional operation.

### 5. PLIMS 2.0. Functional Requirements.

The Contractor shall expand the current version of PLIMS to incorporate all the **PLIMS 2.0. Objectives** identified in the PWS subparagraphs below, to include the tailored CNA specific requirements identified in the PWS, Appendix D. The contractor shall use an iterative development process, where functional requirements evolve through collaboration between the Contractor, AbilityOne Commission and other stakeholders as appropriate or as requested by the KO/COR. This collaborative process shall include adaptive planning, evolutionary development, continual improvement/testing, flexible responses to changes in requirements, capacity, and understanding of the problems to be solved.

#### 5.1. Submission Process

Transactions are submitted to PLIMS by NIB and SA to request Procurement List additions, changes, or deletions. PLIMS enables the electronic submission and simultaneous review of the information. It enables automated workflow management, quality analysis, and functional reviews. The automation of the review process reduces errors and deficiencies in the data submitted. However, this is not currently a completely automated system, and requires searching for certain updates and links to packages.

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**PLIMS 2.0. Objective 1: The system will require a fully automated portal with tracking for the intake and updating of packages to reduce rework of the packages.**

### 5.2. Getting Started

#### 5.2.1. Access

PLIMS access is provided via Integrated Active Directory Authentication. A user can access PLIMS using the same user ID and password they use to log in to their AbilityOne computer.

PLIMS is also accessible to computers outside of this intranet using a VPN (Virtual Private Network).

**PLIMS 2.0. Objective 2: The system will require a new type of direct access, with 2 factor authentication that supports PIV cards and Login.gov for user and administrator access.**

##### 5.2.1.1. Main

The left navigation pane contains links to the core Program and Project Management functionality of the application. The available features vary depending on the rights granted by user role.

While navigating in the PLIMS application, this navigation pane remains static, serving as a main menu to provide consistent, available navigation to application features.

When a user selects a function, the appropriate page opens to the right of the navigation bar, or in some cases in a separate window.

**PLIMS 2.0. Objective 3: The system will have a central informational dashboard which will allow the user to view a full landscape of current statuses and working items, with specific links to access each item and view metrics, charts, and reports as required.**

##### 5.2.1.2. Context-Sensitive

Within a particular area of PLIMS, for example while accessing NPA data, context-sensitive links display on the right side of the page in the **Links** area. These links provide access to sets of information relevant to the currently selected NPA, Project, or other entity with which the user is working.

**PLIMS 2.0. Objective 4: Requires an Agile UI/UX interface that allow users to quickly access the information required by the agency. The main page should have a dashboard that allows users to view items and statuses through graphs, metrics, and charts.**

##### 5.2.1.3. Menu Bar

PLIMS also includes a top navigation bar with two menu items: **Home** and **Help**.

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- **Home** returns the user to the **Home** page (**Inbox**) and is available from all pages in the PLIMS application.
- **Help** opens a separate window containing help information for Windows SharePoint Services.

**PLIMS 2.0. Objective 5: Requires a quick access option that allows users to screenshot specific transactions to copy/paste them into the comments/decision screens and package files.**

### 5.2.2. PLIMS UI Conventions

#### 5.2.2.1. Searches

Searching for PLIMS data is typically accomplished by selecting the data element by which to search and then selecting or entering the value (or term) to refine the search. Searches are available from most **Project Data** and **Program Data** pages. The available search types are dependent upon the PLIMS element for which you are searching.**PLIMS 2.0. Objective 6: The system will allow running intelligent searches to extract information from anywhere, and independently from the application elements in which the user is located. Also, the search option will allow users to view if the package under the NPA functionality is a subcontractor to any of the agencies (ex “Is this a NPA Subcontractor to CNA’s? (Yes/No)”)**

**Additionally, incorporate/consolidate Acquisition Support Research Tool (AS-RT) search, Procurement List Product and Services searches and “how to buy products and services” search functionality in to a single public-facing search capability.**

#### 5.2.2.2. Data Tables

PLIMS data is frequently displayed in tables. Each row represents a record, and that record can be selected to display the detailed information. Ten (10) rows of data are displayed per page.

- To sort a table of data, click an underlined column header. Click the same header again to reverse the sort order.
- To select a record and display the related details, click the appropriate value in the **ID** column.
- To display additional rows, click the next page number.

**PLIMS 2.0. Objective 7: The system should have the ability to generate tables, charts, and graphs to understand and better manage the data that is been shown.**

#### 5.2.2.3. Data Validation

Validations are performed during data entry to help preserve the integrity and accuracy of the PLIMS data. General validations are applied to all entered data, while still others are performed in additional situations as designated by agency rules. The specific validations are discussed in

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the relevant sections of this document. General validations include preventing the entry of text in a field where numbers were expected, enforcing proper date formatting, etc.

The data is validated when the user exits the field. A message displays describing the problem, if any and the user can then modify the data and continue.

When a user receives a data validation message, they can then modify the data to meet the system expectations, or cancel, which discards changes to the record until the user is able to modify the data in the proper format.

**PLIMS 2.0. Objective 8: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.2.2.4. Managing PLIMS Data

PLIMS detects a user's identity and applies the rights associated with their user role. Depending on the user's role, they have a varying set of abilities to add, modify, or delete elements in PLIMS. Information on role definitions and administration is available in the *PLIMS System Administration Guide (dated 03/19/2008)*(Available post award).

Throughout PLIMS, data is editable (if allowed by the current user role) from the **Detail** view of any element. **Add**, **Edit**, and **Delete** buttons display at the top of the **Detail** view.

PLIMS enforces data rules that will sometimes prevent data from being changed, added, or deleted. For example, in the case of deletions, a PLIMS element (e.g., a Service Location) may be the parent of another entity (e.g., a Service Type). Rather than allow the deletion of the parent, PLIMS will display an error message.

For additions, PLIMS will occasionally prohibit creation of duplicate "keys." This is rare because *most* PLIMS keys (fields that define unique content in a table column) are not supplied by the user. Service Types and NSN numbers are exceptions, where the user is allowed to (wrongly) enter duplicates. The error is caught and displayed, and no damage occurs.

**PLIMS 2.0. Objective 9: This system functionality shall be replicated in the new system to maintain consistency. This is an area where the new system will require tracking of changes and reporting for compliance.**

### 5.2.2.5. Entering Dates

A pop-up calendar is offered for most PLIMS date fields. This helps minimize data entry errors, and reduces the keystrokes needed for dates. Use of the pop-up calendar is optional; the system also accepts manually entered dates. The format is "MM/DD/YYYY." However, the user need not remember this, as PLIMS will prompt for this consistency.

**PLIMS 2.0. Objective 10: This system functionality shall be replicated in the new system to maintain consistency.**

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### 5.2.3. Attaching and Uploading PLIMS Documents

PLIMS users and organizations — such as CNAs — that submit information to PLIMS may need to include documents or other files such as NPA bylaws, articles of incorporation, and associated transmittal letters as transactions from the CNAs. Other examples are Statements of Work (SOW), pricing proposals, notice letters, or Federal Register documents.

**PLIMS 2.0. Objective 11: The Commission will require the new system to allow for dynamic / ad-hoc upload of documents as required without the submittal of multiple, or single packages, if additional or missing document were not included. Additionally, the system shall allow for document classification/categorization (e.g., CUI, Unclassified, Confidential & etc.) labeling.**

#### 5.2.3.1. Files Section

Throughout PLIMS, many of the elements — such as NPAs, Projects, and others — have a **Files Section** where attachments can be viewed, modified, or uploaded. If files can be associated with an entity a **Files Section** link displays in the context-sensitive navigation pane.

**PLIMS 2.0. Objective 12: The Commission will require that the new system not have a limit to the number of documents that can be uploaded into the system. There is a current limit of 5MB on any file upload, and that will need to be increased. (The rules will be defined by the agency in terms of format and file size). Additionally, the new system shall allow users to download single file attachments, and download the Procurement List Package as entire collection of attachments (e.g., multiple attachments within a single zip file.)**

#### 5.2.3.2. Package Files

In addition to the attachments associated with a PLIMS entity, Packages may also include attachments. These files can be viewed via the **Package Viewer**.

**Package Attachments:** These are the attachments that were embedded in the package XML file that was submitted by the CNA. It is a read-only collection of files; data that is submitted cannot be modified once submitted. Typically, this collection will contain supporting documents, including forms that the NPAs have signed and submitted to the CNA.

**Notice Letters:** This collection of files includes the notices that are generated during the package review process, including Initial Federal Register Notices, Final Federal Register Notices, Vote Letters, and Addition/Administrative Change/Price Change Deletion Notices.

**Package Files:** This is a file collection point to which a user can add or remove files. Package reviewers can upload documents to support the review process.

**Federal Register Attachments:** This collection of files contains documents with comments received during the Federal Register comment period. Users can upload documents to this section.

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**PLIMS 2.0. Objective 13: The Commission will require the new system to include a prompt option to edit a document as required without the need to save the document locally to the user's machine, and then re-upload back into the system. The system should allow users to upload multiple documents at the same time, versus one-by-one. The system will need to keep a log file of all changes (ex. date, time, user Id) for compliance purposes.**

### 5.3. Packages

In PLIMS, the "package" is the lowest level unit. All other PLIMS entities are associated with at least one package. The various package types pre-define what each package can and should contain. These differing types, also prescribe specific workflows that are invoked inside PLIMS as soon a package is received from the CNAs (NIB and SA). (See [Appendix A: Package Types](#) for the complete list.)

Modifications of entities contained in a package generally do not change the actual package submitted. Package data reflects the submission, as it was when it was received. Modifications are then applied to the entities created by previously submitted packages, but the original submission is static.

Addition packages for services and products include the information identified in the former CBSD-1002 form or the former CBSD-1001 form, respectively, as well as that contained on other forms.

The package moves through the workflow (or not), based on approvals or rejections of individual steps defined. These approvals and rejections are based on clarifications, explanations, analysis, and review of the package and the entities that define it. The next section addresses how PLIMS 2.0. is to be structured to perform that review.

#### 5.3.1. Reviewing Packages

There are two methods available to access a PLIMS package to be reviewed. The PLIMS **Task** page displays in a new window. It features a series of clickable tabs at the top. Depending on the type of package you are reviewing, the tabs will vary.

The **Task** page also offers a package summary, and options for different workflow actions, listed as links. The workflow actions and illustration for the package available differentiates this access method from the alternate access method explained below.

Packages can also be accessed using the PLIMS application Search Criteria rather than the **Inbox**.

**PLIMS 2.0. Objective 14: The Commission will require the new system to show the user an overview or high-level view of all of the minimum information required by the Commission's business rules described within AbilityOne Products and Services Manuals (available post award) for the package reviewing process. For example, the overview will show the reviewer that there is price information, compliance information, and capability**

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information in the package. The Commission will require the new system to provide users with the option to click on and open any of the basic information elements in a given package, such that the link takes the user to more detailed information on that item, if required. For example, if the reviewer clicks on an information element such as compliance, or transportation plan, the link should take them to the source documentation for that element. This should all happen in a portal for the complete submission, review, and approval, of the package.

### 5.3.2. Package Tabs

There are multiple tabs on the **Package Viewer**. The tabs displayed depend on the type of package. These examples below are based on a sample package of the workflow type “Add Product Package. (APP)” Navigation of these tabs is essential to package evaluation.

#### 5.3.2.1. General Tab

Use this tab to obtain information about the transaction; for example, the transaction identification number, the PL number, when the transaction was submitted and its status. Using this tab, you can also find contact information for the individual at the CNA for any questions about the package. It is displayed under this tab, as well as the name, date, and title of the CNA representative who is certifying package content.

**PLIMS 2.0. Objective 15: The Commission will require the new system to consolidate all of the information required into items. This will drive an agile process to fill in ad hoc documents properly by assigning required information and optional information to the appropriate fields.**

#### 5.3.2.2. Executive Summary Tab

Use this tab to read about the overall purpose of the package, citing key details as necessary. The summary is expected to be clear, concise, and specific. If the package requires more explanation than what can be contained here, the text may reference package attachments that contain the additional information.

**PLIMS 2.0. Objective 16: The system will allow for updates and edits of all fields as required, depending on the individual user rights. Additionally, the 2,000 character limit will need to be increased based on Government guidance during post-award PLIMS 2.0 solution development phase.**

#### 5.3.2.3. Product Info Tab

Use this tab to get information about the actual product being proposed, such as the project name, product information, applicable waivers, etc.

**PLIMS 2.0. Objective 17: The system will allow for updates and edits of all fields as required, depending on the individual user rights.**

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### 5.3.2.4. Requirement Tab

Use this tab to view the requirement of the Federal agency that the addition to the PL is intended to fulfill. Much of the information on this tab is related to the Impact Analysis for the project.

The information displayed here includes the following:

The **Requirement** field is a percentage value indicating the percent of the agencies requirement that this addition will fulfill.

A further description of the requirement may be given here under the **Requirements Description** field to explain how any remaining percentage of the agency requirement will be fulfilled or provide other details about the requirement.

Also available here is the **Period of Performance** under which the product is currently supplied, or the expected period of performance if this is a new requirement.

The entry for **SBA 8a** is to signify whether the requirement is currently procured by a contractor or organization that is qualified as a small, disadvantaged agency. This is important because the Commission has a voluntary policy regarding its impact determination for requirements that are being fulfilled by 8(a) firms under the 8(a) program. The Commission will only consider adding requirements with 8(a) incumbents when the firm graduates (and the contract is expiring within the year).

Lastly, this tab displays the monthly dollars (the **Value**) generated, or expected to be generated, by the project associated with the requirement.

**PLIMS 2.0. Objective 18: The system will allow for updates and edits of all fields as required, depending on the individual user rights. This function is critical in the new system to ensure compliance of the program.**

### 5.3.2.5. Pricing Tab

Use this tab to review the information about the pricing structure associated with the product(s) or services submitted in this package.

**PLIMS 2.0. Objective 19: The Commission will require that the system include an auto calculate feature for all areas where this option is being utilized to provide results of any particular calculation. Additionally, PLIMS 2.0 system should have a capability to integrate with pricing determination tools to assist in this process.**

### 5.3.2.6. Impact Tab

Use this tab to read impact analysis information related to contractors that will be affected, or potentially affected, by the presence of the product on the procurement list (PL).

**PLIMS 2.0. Objective 20: The Commission will require the new system to allow updates**



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**and edits of all fields as required depending on the individual user rights.**

### 5.3.2.7. Projects Tab and Sub-Tabs

Information on the **Projects** tab shows attributes of the project associated with the product(s) in the package, such as description of the work to be performed by people who are blind or severely disabled, any subcontractors, and the nonprofit agency's capability to fulfill the requirements.

The **Projects** tab of the **Package Viewer** displays detailed data relating to the project's specific information and services and/or products on eight sub-tabs, which are explained and depicted in the following sections. A package can contain multiple projects. Select a project in the Projects list and the sub-tabs are populated with the specific data for that project.

**PLIMS 2.0. Objective 21: The Commission will require the new system to allow all information to be edited or updated and will create a log file which will allow the Leadership to create and generate reports of all prior and existing transactions made in the system.**

#### 5.3.2.7.1. NPA - Nonprofit Agencies Project Sub-Tab

This sub-tab displays information about the point of contact, direct labor work description, and the ability of the nonprofit agency to perform the work. It also identifies the involvement of any subcontractor firms.

**PLIMS 2.0. Objective 22: The Commission will require the new system to show all of the information required by the NPA, and any data changes will be updated automatically in all reports and metrics as a part of the new functionalities.**

#### 5.3.2.7.2. CA – Contracting Activities Project Sub-Tab

This sub-tab displays information about the agency office responsible for contracting for the particular product or service. The page lists the agency's office location, and both its Contracting Officer and Specialist. The Contracting Officer is a key contact for the Commission when reviewing a package for addition to PLIMS; a package cannot be submitted to the Commission without this information. Listing a Contracting Specialist is optional.

**PLIMS 2.0. Objective 23: The Commission will require the new system to allow for updates and edits of all fields as required depending on the individual user rights.**

#### 5.3.2.7.3. RA – Requiring Agency Project Sub-Tab

This sub-tab displays information about the agency that requires the product being requested as an addition to the Procurement List.

**PLIMS 2.0. Objective 24: The Commission will require the new system to allow updates and edits for all fields, including any additions or subtractions of products (or services) from the requirement.**

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### 5.3.2.7.4. Project Dev – Project Development Plan Sub-Tab

This sub-tab displays the planning and preparation steps undertaken by the NPA during development of the project, similar to the Project Development Plan (PDP) which is routinely submitted by NIB for addition packages. The submitter views information such as project Overview, Personnel/Staffing, and Management. These fields show what the CNAs submitted, in a standardized format. (This facilitates subsequent PLIMS system reporting and analysis.)

**PLIMS 2.0. Objective 25: The Commission will require the new system to allow for updates and edits of all fields as required depending on individual user rights. Also, each auto-sized text box should allow the user to enter up to 2,000 characters.**

### 5.3.2.7.5. Est DLH – Estimated Direct Labor Hours Sub-Tab

This sub-tab displays the hours necessary to complete the project. It also lists the date and related details of the project's current or expected compliance with the statutory and regulatory requirements.

**PLIMS 2.0. Objective 26: The Commission will require the new system to allow for updates or edits of all fields including period inputs and allow the system to indicate if any changes were included and approved.**

### 5.3.2.7.6. NPA Relationships Project Sub-Tab

This sub-tab identifies the relationships the proposed NPA has with other entities for the management of a project and project resources. This information is gathered from NPAs using a form.

**PLIMS 2.0. Objective 27: The Commission will require the new system to allow for updates and edits of all fields as required depending on individual user rights. Also, each text box should allow the user to enter up to 2,000 characters.**

### 5.3.2.7.7. NSN Mapping Project Sub-Tab (Product Projects Only)

This sub-tab identifies the NSNs that will be provided through the current project, and the percentage of the total requirement of each NSN that will be fulfilled. These identify the product(s) being added or referenced on the Procurement List. A permanent NSN is the number that the Government uses to order the product.

**PLIMS 2.0. Objective 28: The Commission will require the new system to allow for updates and editing of all fields including period inputs and allow the system to indicate if any changes were included and approved. There needs to be a function to add an NSN to the requirement and tracking in the system.**

## 5.4. View Workflow Actions

Workflows are key feature of the PLIMS system. Workflows facilitate the Commission process

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for reviewing incoming packages and support communication between the reviewers and with the CNAs submitting the packages. Each package has a workflow defined to support the agency process. These workflows can be modified by the system administrator. Workflows can contain two types of review tasks/reviews: Sequential or Parallel

**Sequential:** Sequential tasks depend on the completion of one task to move on to the next. A user assigned to the second review in the workflow cannot perform the review until the user assigned to the first review has completed his/her task.

**Parallel:** Parallel tasks are defined so that multiple reviewers from different user groups can review a task at the same time. A parallel review can be a phase in an otherwise sequential workflow. For example, the second step in the workflow could be a set of three parallel reviews. These cannot be started until the first step is complete; and step three of the sequential process cannot be started until after all of the parallel reviews in step two are complete.

**PLIMS 2.0. Objective 29: The Commission will require the new system to trigger multiple notices/alerts to next approver or individual which is required for the workflow process continue. This process will include reminders of pending approvals by users/groups.**

### 5.4.1. View Package Attachments

To access this functionality, click its link from the **Package Task** page for the selected package. Functionality for viewing, modifying, and uploading these files is consistent with the standard PLIMS processing for attachments.

**PLIMS 2.0. Objective 30: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.4.2. Add Comments

This page enables users to view commentary provided by other package reviewers. Users may also add their own comments. Previously existing comments appear in a list. Like most PLIMS lists, the column headers (**Comment**, **Date**, and **User** in this example) will sort the list when they are clicked.

**PLIMS 2.0. Objective 31: The Commission will require the new system to allow for updates and edits of all fields as required, depending on the individual user rights. Also, each text box should allow the user to enter up to 2,000 characters. Comments should be tracked when added to indicate that there are comments to be reviewed.**

### 5.4.3. Seek Clarification

The **Seek Clarification** feature enables a reviewer to request more information about a package submission from the CNA.

The email **To**, **Subject**, and **Body** fields contain information pre-populated from the current package.

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**To** field contains the email address for the CNA Point of Contact

**Subject** line includes the transaction ID

**Body** includes the PL Number, Package Type, and date the package was submitted

The user can modify the email text prior to sending.

**PLIMS 2.0. Objective 32: The Commission will require the new system to save and upload emails automatically from the Email tool into PLIMS 2.0 as an attachment.**

**PLIMS 2.0. Objective 33: The clarification trigger and email will have the ability to send email and save it into the comments or file as part of documentation require by the general counsel.**

### 5.4.4. Make Recommendation

The **Recommendations** page is the area in which a user can approve, reject, or register comments about a package.

The **Make Recommendation** page enables the reviewer to make decisions about the current workflow steps in the package being processed, and displays comments and decisions entered by other reviewers. For example, the Pricing team approved the document on 10/29/2007 at 3:44 pm. The document continued to be routed through the Commission for the review and recommendation process. Then the document was approved on the same day by the following team's workflow process: Agency Analysis, Impact Analysis, Legal, Compliance, and Agency Management.

If a workflow task is approved or rejected via the **Make Recommendation** link, the task is considered complete and is moved from the user's **Inbox** to their **Outbox**.

The recommendations made here are completed by Commission staff and are different from PLIMS voting conducted by Commission Members. These approvals or rejections always pertain to a single workflow step not the package as a whole.

**PLIMS 2.0. Objective 34: The system should allow the saving and uploading of emails automatically from the Email tool into PLIMS 2.0 as an attachment. This action should be tracked with notifications.**

**PLIMS 2.0. Objective 35: The recommendation will trigger an email which the user will have the ability to send and save into the comments, or file as part of documentation as required by the general counsel.**

### 5.4.5. Review Notice

This feature enables users to review the various notices that are generated during package review and processing. Notices are generated for **Add Packages**, as well as actions such as **Price**

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**Changes and NPA Transfers.** Notices generated by the system include Federal Register Notices, Price Change Notices, Service/Product Addition Notices, and Vote Letters.

The **Notice Letter Tasks** page contains a list of notices generated for the package.

**PLIMS 2.0. Objective 36: The Commission will require the new system to have the ability to generate and prompt Notices by selecting a Yes/No option specifically required by the agency.**

### 5.5. Project Data

Data for projects that are or were at one time managed via PLIMS can be retrieved using the various search features available from the **Project Data** pages in PLIMS. In addition to the **Packages** page, **Project Data** is available via **Product Projects**, **Service Projects**, **Impact**, and Federal Register pages. Each page has a unique set of search criteria. When a package is retrieved, all information associated with the package can be accessed via the **Links** section on the right side of the page.

The PLIMS **Project Data** pages provide PLIMS users with appropriate access rights and the ability to modify project data. This data is stored and managed in the PLIMS system. Projects are not available in PLIMS until the related packages have been approved via the workflow process.

**PLIMS 2.0. Objective 37: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.5.1. Product Projects

**The Product Project – Project Details** page provides the ability to search on criteria including PL Number, Project Number, Transaction ID, Package Type, NPA, and CA(refer to Appendix B for additional details.)

When a search identifies matches, the **Product Projects** page displays a list of results in the **Projects** list. The first item is selected automatically.

- To select a different project from the result set, click the link in the **ID** column for the appropriate package.

The other sections of the page are populated with information related to the selected package.

- **Project Details:** Displays basic information about the project and provides links to the associated NPA and Requiring Agency. With proper access rights, users can edit these fields by clicking Edit to enter **edit** mode.
- **Project Packages:** Displays a list of submitted packages that are associated with the project. Click a package name to display summary details of the package in the next section.

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- **Selected Package Details:** Displays basic summary data about the package selected in the Project Packages section, including package status.

To view other details for the selected package, click a link in the **Links** area on the right side of the page. The following sections describe the information accessible through these links.

**PLIMS 2.0. Objective 38: The system will require an integrated Projects module that allows for the creation and tracking of projects, with reporting.**

### 5.5.1.1. Project Details

A summary of project details displays consistently at the top of the page while navigating project information via the link in the **Links** section.

**PLIMS 2.0. Objective 39: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.1.2. Contacts

The Contacts page displays information on three key individuals associated with the project:

- **NPA Point of Contact:** The key and knowledgeable authority for the specific nonprofit agency with which the project is associated.
- **Contracting Officer:** The legal representative of the contract, who is authorized to obligate the Government's funds.
- **Contracting Specialist:** When applicable, this is a day-to-day contact at the Contracting Activity who has limited authority to communicate on the agency's behalf.

Users with appropriate access rights have access to an edit button that opens the page in edit mode. Information can then be edited and saved by clicking **Update** or discarded by clicking **Cancel**.

**PLIMS 2.0. Objective 40: There should be integration into a standard Lightweight Directory Access Protocol (LDAP)/Active Directory (AD) for the purpose of retrieving the required contact information as a standard input for communications purposes. An example would be O365 Exchange and Outlook/Teams.**

### 5.5.1.3. NSN Mapping (Product Projects Only)

NSN stands for National Stock Number(s). These numbers identify products being added or referenced on the Procurement List (PL).

- A permanent NSN is the number assigned by the Government to be used to order the product.
- A temporary NSN may be created by NIB or SA for new products that have not yet been assigned a permanent NSN.

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Each of the products associated with the Product Project, has an NSN number. This tab identifies the product and the Contracting Activities that have contracted for each product as a part of the project. NSN Mapping identifies the agency that has contracted for a particular NSN.

- To see the complete details of any NSN in the list, click the link in the NSN column for the desired row.  
The resulting page displays details, as well as other existing associations to this NSN. (This duplicates the functionality also available from the main menu: select Products, specify “NSN” as the Search Type, and specify this NSN number as the Search Term.)
- To see complete details of any contracting activity/agency (CA) listed, click the link in the CA column.  
The resulting CA details are also accessible from the main menu: click Agency, specify Name as the Search Type, and enter the agency's name as the Search Term.

**PLIMS 2.0. Objective 41: System will be required to record the percentage of the requirement for each NSN’s or the amount of the item that will be produced. This will need to be tied to the requirements function and an e-commerce function and catalog.**

### 5.5.1.4. Phase In

Phase In information is require depending on agency rules related to the effect of a project on the NPA’s overall or JWOD Ratio. The Compliance Analyst assesses the need for a Phase-In and reviews the related information. The Phase In includes the month-by-month schedule of direct labor ratios for the project and the overall agency.

For each project having a phase-in, the information for the Phase-In periods can be edited by users with appropriate access.

**PLIMS 2.0. Objective 42: The system will require an integrated Projects module that allows for the creation and tracking of projects, with reporting.**

### 5.5.1.5. Distribution Plan

The Product Distribution Plan identifies one or more methods that are used to distribute the product(s) associated with this project. Standard distribution methods (Direct from NPA, Government Stock Program, JWOD.com, etc.) are identified individually as used or not used for the product. If a new or unique method is used, a description may be provided.

Users with appropriate access rights can click the **Edit** button to open the page in edit mode and modify the distribution methods or plan description.

**PLIMS 2.0. Objective 43: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.1.6. Direct Labor

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The Direct Labor information for a project indicates the hours and work the project is expected to generate for persons who are blind or disabled over the course of the project.

When accessing the **Direct Labor** page all packages associated with the current project are listed in the **Project Packages** area.

A summary of the Direct Labor information for the projects in the selected package displays in the **Direct Labor for Product Project** list.

Click the item in the **Package Type** column to view the associated summary.

Select the link in the **Product Project Direct Labor** list row to view details of the Direct Labor values for the project.

The **Direct Labor Details** fields and additional explanatory text fields can be edited by users with appropriate access rights.

**PLIMS 2.0. Objective 44: The system should have an auto calculation option that allows the user to calculate each direct labor value and potential changes to allow for review of the information as required.**

### 5.5.1.7. NPA Relationship(s)

The NPA Relationships tab displays information regarding any interactions or agency relationships the NPA expects to have with other organizations during the course of the project. This includes any organization that will provide assistance in completing the project by leasing equipment, space, etc. to the NPA.

**PLIMS 2.0. Objective 45: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.1.8. Project Development

The Project Development page displays the information regarding the management of the project in the areas such as Staffing, Management, Schedule, Process, Financial considerations, and Quality Assurance. These are text fields that allow entry of descriptions as to how the NPA intends to/is expected to manage the project.

**PLIMS 2.0. Objective 46: The system will require an integrated Projects module that allows for the creation and tracking of projects, with reporting.**

### 5.5.1.9. Project Performance

A nonprofit agency's ability to continue fulfilling a Procurement List requirement depends on its performance in terms of compliance with the Commission's statutory and regulatory regulations (for example, maintaining an appropriate direct labor (DL) ratio). PLIMS is capable of recording and tracking such performance measures, with related data, over time. These are available here, for viewing, additions, editing, and deletions. However, these features will not be used at the



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time of PLIMS deployment in 2008, because the Commission will first seek OMB approval to collect project level data.

When used, multiple project performance specifications may or may not exist, associated with the selected project. Any and all that do are displayed by default when the page is accessed. To view a set of project performance data, click its **Period Begin** field in the list of project performance sets. Associated details of that set appear at the bottom of the page.

**PLIMS 2.0. Objective 47: The system will require an integrated Projects module that allows for the creation and tracking of projects, with reporting. Dashboards and business intelligence will be required for this level of reporting and tracking.**

### 5.5.1.10. Work Location

This page shows the physical location where the work is performed, which may not be the same as the nonprofit agency's headquarters. In addition to standard address fields, a **DUNS Number**, can also be associated with an individual work location. (The *DUNS* Number is a unique 9-digit identifier provided by *Dun & Bradstreet* (D&B), a provider of international and U.S. agency credit information and credit reports.)

**PLIMS 2.0. Objective 48: The system will have the ability to view NPA CAGE codes and DUNS numbers on Notices. Additionally, due to DUNS numbers being obsolete, the system shall be switched from DUNS to System of Award Management (SAM) Unique Entity ID (UEI) and populate information on Notices.**

### 5.5.1.11. Subcontracting

This page displays information on any subcontracting activity associated with the project.

Nonprofit agencies may subcontract a portion of the Procurement List work they have been designated to perform — if they do so in accordance with the Commission's regulations and procedures. The subcontracting arrangements must be disclosed at the time of addition to the Procurement List and must be updated as needed. Where a written agreement is needed, these may be attached to the original package transaction or uploaded by Commission staff to the Files Section of the project (see Attaching and Uploading PLIMS Documents (available post award)). Commission staff will encourage CNAs to explain the competitive process in the Subcontracting Description. Subcontracting in this context is addressed in the Commission's regulations and further defined in Operations Memorandum #21.

**PLIMS 2.0. Objective 49: The system should allow the user to view and edit if a subcontractor is an NPA subcontractor to a CNA.**

### 5.5.1.12. Signing Information

This page displays the signing data for each package associated with the selected project. Signing information originates from the users of the CNA systems at the time of their submission to PLIMS. It is not editable.

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The page displays all packages associated with the current project. The first project in the list is automatically selected and its associated information populates the **Signing Information** section. Each package has signing specifications.

**PLIMS 2.0. Objective 50: The system should have the ability to sign documentation using the appropriate application which complies with Ability One requirements and needs. This allows information to be kept up to date and accurate for the Commission.**

### 5.5.1.13. Impact Analysis Requests

All products and services submitted for Addition to the PL are associated with at least one Request for Impact Analysis. Even if the CNA is reporting that there will be no impact because there is no current contractor, the Commission staff still reviews and makes an initial determination.

Multiple impact analysis reports may be associated with a single product, each for a different contractor.

The information displayed in association with an Impact Analysis Request is as follows:

- **RID Number:** Requests for Impact Analysis (Currently called Requests for Impact Determination or RIDs) are received electronically as transmissions from the CNA systems. A RID Number is generated by PLIMS when the request is approved by Commission Staff. This number is then used by the CNA when submitting Add Packages for the related product or service.
- **Submitted date:** The date the Impact Analysis Request was submitted
- **Status:** The possible statuses are
  - ***Severe Impact*** – The analysis is complete, and the Commission has determined that the procurement of this product/service by the NPA *will* have a severe impact on the current supplier/contractor.
  - ***Not Severe Impact*** – The analysis is complete, and the Commission has determined that the procurement of this product/service by the NPA *will not* have a severe impact on the current supplier/contractor.
  - ***In Progress*** – The analysis is currently under way. No decision regarding impact has yet been determined.
- **Contractor:** The name of the contractor to which the RID analysis pertains.
- **Contract Impact, Cumulative Impact, and Aggregate Impact:**  
These numbers enable Commission Staff to evaluate the impact on a contractor in terms of dollars of lost sales.

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Impact percentages (and contractor sales information) are not transmitted back to the CNAs; they are considered sensitive commercial information.

**PLIMS 2.0. Objective 51: This level of analysis and determination will require a robust tracking and reporting module that is tied into a content management system with a Configuration Management Database (CMDB).**

### 5.5.1.14. PL View

The items associated with this project that are currently on the PL are displayed on this page along with the producing Nonprofit Agency, and the Contracting involved with each NSN. The list contains only items from the project that are currently active on the Procurement List.

**PLIMS 2.0. Objective 52: The system needs to have the ability to reflect those items that are replacement/addition items.**

### 5.5.1.15. Files Section

To see the collection of files associated with a specific package, access the **Files Section** of that package via the link in the **Links** section on the right side of the page.

**PLIMS 2.0. Objective 53: This system functionality shall be replicated in the new system to maintain consistency.**

## 5.5.2. Service Projects

The **Service Project – Project Details** page provides the ability to search on a variety of criteria including PL Number, Project Number, Service Location, Service Type, and more. Except for the additional search types, the Product Projects for services, in both functionality and appearance, is the same requirements as delineated in PWS paragraph 5.5.1 (refer to Appendix B for additional details.)

Another difference from the Product Project Details page is the inclusion of the **Service Location**, and **Service Staffing** links in the **Links** section at the top right. These links are available only for service projects.

**PLIMS 2.0. Objective 54: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.1. Project Details

This page is identical to its counterpart for **Product Projects**. It is depicted and explained under that heading.

**PLIMS 2.0. Objective 55: This system functionality shall be replicated in the new system to maintain consistency.**

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### 5.5.2.2. Contacts

This page is identical to its counterpart for **Product Projects**. It is depicted and explained under that heading.

**PLIMS 2.0. Objective 56: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.3. Phase In

This page it is identical to its counterpart for **Product Projects**, in both functionality and appearance.

**PLIMS 2.0. Objective 57: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.4. Pricing Information

PLIMS receives certification of a recommended price, or price change, and Follow-On Year (FOY) agreement(s) from the appropriate CA. Information on the service pricing is displayed on the **Pricing Info** page. Services are priced by Service Location.

This page provides the capability to review the history of price changes for a given Service Project, at any of its locations, and for consecutive follow-on years. This data is received via direct transmission from the NPAs and can also be entered or modified Commission Staff with appropriate access rights. Follow-On pricing information is provided in segments based on start and end dates.

Service Pricing Information includes:

- Identification of the service project
- Identification of the unit - if any

For the base period:

- Unit price - if any
- Annual price
- Base period of performance

For the follow-on years:

- The sequential follow-on year number
- That year's start and end dates
- The follow-on annualized prices for each year

Follow-on *annualized* prices, for one or more follow-on years of a service project, are provided in the bottom section.

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**PLIMS 2.0. Objective 58: Pricing will require an inventory system with content management and a CMDB for tracking this information. This will then standardize the process for reuse.**

### 5.5.2.5. Direct Labor

This page is identical to its counterpart for **Product Projects**. It is depicted and explained under that heading.

**PLIMS 2.0. Objective 59: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.6. NPA Relationship

This page is identical to its counterpart for **Product Projects**. It is depicted and explained under that heading.

**PLIMS 2.0. Objective 60: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.7. Project Development

This page is identical to its counterpart for **Product Projects**. It is depicted and explained under that heading.

**PLIMS 2.0. Objective 61: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.8. Project Performance

This page is identical to its counterpart for **Product Projects**. It is depicted and explained under that heading.

**PLIMS 2.0. Objective 62: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.9. Service Location

This page enables users to add, edit, and delete data pertaining to both the physical location where service work is performed, and to the types of services performed at that location. A service project can have multiple work locations, and a location can have multiple service types performed at that location. Editing of Service Types is accessed from the Main Menu. This is because edits to Service Types impact all projects with which they are associated.

**PLIMS 2.0. Objective 63: This system functionality shall be replicated in the new system to maintain consistency.**

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### 5.5.2.10. Service Staffing

This page enables users to view, add, edit, and delete details pertaining to discreet jobs associated with a service project. All service projects can have multiple Staffing Positions. This page applies only to Service Projects.

Each employment position originates with a particular PLIMS Package. Since a Service Project can have multiple packages, each package is available for selection in the top section of this page.

**PLIMS 2.0. Objective 64: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.11. Subcontracting

This functionality is similar or identical to that explained in the previous section, for product-based projects.

**PLIMS 2.0. Objective 65: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.12. Signing Information

This functionality is similar or identical to that explained in the previous section, for product-based projects.

**PLIMS 2.0. Objective 66: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.13. Impact Analysis Requests

This functionality is similar or identical to that explained in the previous section, for product-based projects.

**PLIMS 2.0. Objective 67: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.2.14. PL View

This functionality is similar or identical to that explained in the previous section, for product-based projects.

**PLIMS 2.0. Objective 68: This system functionality shall be replicated in the new system to maintain consistency.**

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### 5.5.2.15. Files Section

This functionality is consistent with standard PLIMS files attachments handling.

**PLIMS 2.0. Objective 69: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.3. Impact

PLIMS supports receipt of electronic submission of RIDs (Requests for Impact Determination) from a CNA. The RID request contains information identifying the project, the scope of the project, the contracting activity and contracting officer, CA point of contact information, the contract value and period of performance, prior or current contractors, Commission.

**PLIMS 2.0. Objective 70: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.5.3.1. Impact Analysis

Once an RID is received and the package approved, Commission Staff conduct the analysis. The Impact section of the PLIMS application provides the capability for authorized Commission Staff to update the status of the RID submission and add notes concerning the status of the impact analysis. Staff may query the status of an impact analysis. PLIMS tracks all RID transactions, RID updates received, and all RIDs rejected.

**PLIMS 2.0. Objective 71: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.5.3.2. Impact Package Viewer

When accessed via the **Impacts Analysis** page, the **Package Viewer** includes tabs, designed for displaying the data submitted in the Impact Analysis package. This is very similar to the view used to review a package, but it does not launch in a separate window or allow the user to make recommendations or conduct workflow tasks.

**PLIMS 2.0. Objective 72: This system functionality shall be replicated in the new system to maintain consistency.**

##### 5.5.3.2.1. Proposed Product Tab

This tab is available for Impact Requests for Products only. The tab displays the actual product(s), that are being considered for potential addition to the PL. The products are identified by NSN number.

**PLIMS 2.0. Objective 73: This system functionality shall be replicated in the new system to maintain consistency.**

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### 5.5.3.2.2. Commercial Source Tab

The Commercial Source tab displays information in the way the product or service was previously procured. A package for Impact Analysis is always associated with information on the manner (if any) in which the product or service is currently purchased from a commercial source.

The Impact identifies whether the product/service is currently being purchased or has recently been purchased.

**PLIMS 2.0. Objective 74: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.3.2.3. Contractors

An Impact Analysis package involves one or more contractors. Use the **Contractors** drop-down list to select any contractor associated with this impact analysis package. The name, address, and point of contact details display for the selected Contractor.

Contractors involved in this impact assessment are broken into groups **Current** and **Recent**.

**PLIMS 2.0. Objective 75: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.3.3. Commercial Source

A package for Impact Analysis is always associated with the purchase of the impacting product or service from a commercial source.

This page also offers access to **Impact Letter Details**. These letters are generated in response to the need to contact a Contractor of the potential of a product or service being added to the PL.

Each letter is associated with a contractor.

- If more than one contractor is listed, click the **Company** link to view letters associated with that contractor.

**PLIMS 2.0. Objective 76: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.3.4. Associated Additions

The associated additions page displays a list of all Add packages associated with the current Impact.

To view a package, click the Package ID link.

The system opens a separate window and displays the package details in the Package Viewer.

The Package Summary page displays the full details of the selected package.

To return to this page after viewing any package's details: click your browser's Back button.



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**PLIMS 2.0. Objective 77: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.3.5. Contracting Activity

This page displays contracting activity details for each contractor associated with the Impact Analysis.

- To see a CA's details, click the **Select** link for the appropriate CA. The details are retrieved and displayed in the Details section.
- To see the contractor's official "Contracting Officer" and "Contract Specialist," and other details, click the **Package Viewer** link in the **Links** section at top right of this page, and select the **CA** tab.

**PLIMS 2.0. Objective 78: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.3.6. Requiring Agency

The Requiring Agency is an agency that has a requirement for the product or service under consideration. The information gathered is the same as CA.

**PLIMS 2.0. Objective 79: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.3.7. Files Section

An impact analysis package, like other packages, may include attachments.

**PLIMS 2.0. Objective 80: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.5.4. Federal Register

In addition to processing packages for PL Additions, Deletions, Price Changes, Non-Price, Changes, and Commission Voting, PLIMS generates information for submission to the Federal Register.

Procurement List addition and deletion activities are published in the Federal Register when the addition or deletion is under consideration, as well as when it is approved.

The Federal Register module creates initial and final Federal Register Notices, as well as triggers Federal Register Review workflows.

When the workflow reaches the Approved status, the notice is ready to be submitted to the Federal Register.

**PLIMS 2.0. Objective 81: This system functionality shall be replicated in the new system to**

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**maintain consistency.**

### 5.6. Program Data

#### 5.6.1. Product

An NSN number, or any part of a product name or description, can be used to retrieve a product in PLIMS. This is a useful way to obtain PLIMS information associated with products, including package ID, contractors, etc. when only the product name or description is known.

**PLIMS 2.0. Objective 82: Product related data will require a requirements tracking system with content management, pricing, and tracking.**

##### 5.6.1.1. Product Details

If multiple products are retrieved from the search, click the **NSN** number to see the details of that product.

**PLIMS 2.0. Objective 83: This system functionality shall be replicated in the new system to maintain consistency.**

##### 5.6.1.2. Product Pricing

All price change history of the currently selected NSN, (active and historical prices) is available from this page. A single NSN can have multiple Price Categories. Each NSN/Price Category combination has its own pricing history.

**PLIMS 2.0. Objective 84: This system functionality shall be replicated in the new system to maintain consistency.**

##### 5.6.1.3. Product Projects

This page lists all projects associated with the product. Projects associated with the currently selected product are accessible by clicking the **Project No.** link. The user can also jump directly to any nonprofit agency (NPA) associated with the selected product by clicking the **NPA** link.

**PLIMS 2.0. Objective 85: This system functionality shall be replicated in the new system to maintain consistency.**

##### 5.6.1.4. Product Taxonomy

PLIMS provides a mechanism to manage product classifications, or "taxonomy," and share them with the CNAs. From this page, a product's current classification and categorization can be established, viewed, or edited.

The **Product LOB** is the highest in PLIMS' taxonomy of products. A product LOB can contain one or more product families.

Each **Product Family** can contain one or more product groups.

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Each NSN can be associated with zero or one **Product Group**.

**PLIMS 2.0. Objective 86: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.2. Service

The **Service** page allows users to search for services using all or part of the short description or long description of a service type or by project number. Other information about services is access via the **Links** area.

**PLIMS 2.0. Objective 87: Service data is similar to product related data and will require a requirements tracking system with content management, pricing, and tracking.**

#### 5.6.2.1. Service Details

The search returns a list of all service types matching the designated criteria. **Service Types** are associated with a service group,

Deletion of any service type carries the prerequisite of removing it from all other PLIMS entities with which it is associated (e.g., its Service Project) prior to deletion.

**PLIMS 2.0. Objective 88: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.2.2. Service Projects

The **Service Projects** page displays a list of all projects associated with the selected service type. Projects associated with the selected service type are accessible via this page. Similarly, PLIMS can jump from here directly to any nonprofit agency (NPA) associated with the selected service type by clicking on the link in the **NPA** column. This same PLIMS data is available from the main menu via **Project Data**.

**PLIMS 2.0. Objective 89: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.2.3. Service Locations

The Service Locations page displays all of the service locations at which the currently selected service type has been performed.

**PLIMS 2.0. Objective 90: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.2.4. Service Taxonomy

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Services are categorized and classified with into Groups and Types with one or more Types being associated with a Group. Service Type is PLIMS' most granular level definition of a service. Modifications performed on a service type here affect all Projects with which that service type is associated (through its Service Location).

**PLIMS 2.0. Objective 91: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.3. NPA

All NPA's Services are accessible and able to be modified from this page. If any part of an agencies name is known, this can be used to retrieve the filtered list of NPAs containing that name. Other available search types are NPA ID, State, and Qualification Status.

**PLIMS 2.0. Objective 92: The system should have the ability to update NPA Summary items into a centralized repository with a CMDB for all changes/edits.**

#### 5.6.3.1. NPA Details

To view the details of any NPA, click the link in the **ID** column. All the pages accessed via the **Links** at top right will apply to the selected NPA. Changes made here – due to the relationship of NPAs to many other entities – will be reflected anywhere the agency is referenced.

**PLIMS 2.0. Objective 93: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.3.2. Products on PL

A single NPA may be associated with multiple products, possibly for multiple projects associated with multiple package submissions. The **Products on PL** page provides a single view of all products for the NPA.

**PLIMS 2.0. Objective 94: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.3.3. Services on PL

A single NPA may be associated with multiple services on the PL. These may have originated from multiple packages and involve multiple projects. The **Services on PL** page provides a single view of all Services for the NPA.

**PLIMS 2.0. Objective 95: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.3.4. Projects

The selected NPA may be associated with multiple projects, from multiple packages. All the

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projects are listed on this page.

**PLIMS 2.0. Objective 96: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.3.5. Packages

The selected NPA may be associated with multiple packages in various stages of the submission and review process. All these packages are listed on this page.

**PLIMS 2.0. Objective 97: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.3.6. Phase In

All Phase In data associated with the selected NPA is assembled here for inspection. Phase Ins may have been provided for the NPA for multiple projects across multiple packages.

**PLIMS 2.0. Objective 98: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.3.7. Compliance Visit

There may be zero, one, or multiple compliance visits associated with an NPA. These are they were logged or received via a Compliance Visit Report Package.

**PLIMS 2.0. Objective 99: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.3.8. NPA Reports

There may be zero, one, or multiple NPA reports associated with an NPA. These are listed in the order they were logged or received in a package (via an NPA Report Data Package).

This list is not sortable. Agency rule validations are not applied to data entered here. Consequently, data entry caution is needed: for example, if an OSHA report and Form 990 are flagged as being attached, be sure to attach those documents via the **Files Section**.

**PLIMS 2.0. Objective 100: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.3.9. Files Section

Attachments associated with the selected NPA may be viewed, modified, or deleted using this page. The standard PLIMS handling of file attachments applies.

**PLIMS 2.0. Objective 101: This system functionality shall be replicated in the new system**

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to maintain consistency.

### 5.6.4. Agency

Agencies in PLIMS are generally the buyer of products and services on the PL. The agencies can be the Requiring and/or the Contracting Activity for a particular project. Individual agencies are linked to submission packages, projects, contractors, and projects. This page enables view and modification of the PLIMS agency data.

Changes to any agency's data from this page displays in all other PLIMS entities (i.e., Projects, and Packages) with which that agency is associated.

Modifications performed here do not disrupt the original Package data. Only Agency Codes are provided in packages and the Contracting Officer and Specialist are associated with the individual project, they are not modified here, so package data is unaffected by the change. The code provided in the package is used to display the agency name and this core data are displayed when reviewing the package.

**PLIMS 2.0. Objective 102: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.4.1. Agency Details

To select an agency, click the link in the **ID** field in its row. Its details display in the Agency Summary section.

Users with appropriate access rights can also add, edit, or delete an Agency.

An Agency cannot be deleted if it has associations with active projects or packages.

**PLIMS 2.0. Objective 103: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.4.2. Products on the PL

An agency may be linked to any number of products that are registered on the PL. While these may have originated from multiple projects and packages, if the product is procured by the currently selected agency, it is shown here.

Products details are not accessible from this page. Note either the **Name** or **NSN** number and navigate from the main menu to **Program Data** → Product to access more information on an individual product.

**PLIMS 2.0. Objective 104: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.4.3. Services on the PL

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An agency may be linked to any number of services that are registered on the PL. While these may have originated from multiple projects and packages, if the service is procured by the currently selected agency, it displays here.

Service details are not accessible from this page. Note the **Short Description** value and navigate from the main menu to **Program Data** → **Product** to access more information on an individual product.

**PLIMS 2.0. Objective 105: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.4.4. Projects

The currently selected agency may be logged as either the CA or RA on multiple projects. All projects with which the Agency is associated display on this page.

**PLIMS 2.0. Objective 106: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.4.5. Files

Use this page to upload, edit, or delete attachments associated with the agency. The page is consistent with normal PLIMS attachments functionality.

**PLIMS 2.0. Objective 107: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.5. Contractors

Multiple PLIMS contractors may be included in multiple packages and may be associated with multiple projects and agencies. Any Contractor in PLIMS can be viewed on this page. After selecting a contractor, details, associated package additions, Impact Letters, and contractor-specific attachments are also available. You can search for Contractors by Name or by State.

**PLIMS 2.0. Objective 108: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.5.1. Contractor Details

When the search returns results, they display in a table with the first item selected and its information populating the **Details** area.

**PLIMS 2.0. Objective 109: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.6.5.2. Associated Additions

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Multiple packages may be associated with the selected contractor. Irrespective of the type of package, or when it was processed, all packages associated with the selected contractor are available for viewing or modification via this page.

**PLIMS 2.0. Objective 110: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.5.3. Impact Letters

Multiple impact letters may be associated with the selected contractor. Irrespective of the project and package involved, or when they were processed, all Impact Letters associated with the currently selected contractor are available for inspection here.

This list does not include edit features, and the list is not sortable. These letters originate from an Impact Analysis Request package. They are auto-generated, using a template plus the data from the package.

**PLIMS 2.0. Objective 111: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.5.4. Files Section

Use this page to upload, edit, or delete attachments associated with the contractor. The page is consistent with normal PLIMS attachments functionality.

**PLIMS 2.0. Objective 112: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.6.6. Distributors

Distributors distribute a set of products on the PL. Distributors are not hooked to any other entities in PLIMS.

All distributors logged in PLIMS are available to view, edit, or delete from this page. Distributors can be searched by full or partial Name or by State.

**PLIMS 2.0. Objective 113: Distributors will be listed in both the contacts system and the inventory system so that they can be cross referenced against products and services they distribute.**

#### 5.6.6.1. NSNs by Distributor

Once a Distributor is selected, this page displays all NSNs currently associated with that distributor and enables adding or deleting from that set. The selected distributor can be associated with multiple NSNs.

**PLIMS 2.0. Objective 114: This system functionality shall be replicated in the new system**

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to maintain consistency.

### 5.6.6.2. Files Section

Use this page to upload, edit, or delete attachments associated with the currently selected distributor. The page is consistent with normal PLIMS attachments functionality.

**PLIMS 2.0. Objective 115: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.7. Pricing

The PLIMS system support management of various elements necessary for tracking and assigning product and service prices for items on the PL.

**PLIMS 2.0. Objective 116: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.7.1. PPIC Pricing

The Federal Government's Bureau of Labor Statistics creates and distributes the "Producer Price Index" PPI on a monthly basis. PLIMS uses the same categories and codes in its PPIC Pricing module as those standardized by the BLS. This helps the Commission perform their research and analysis of candidates for the PL.

Changes over time to the PPI Index are reflected in PLIMS' PPIC Pricing module, as existing and proposed pricing groups are processed.

The PPIC Pricing page enables PLIMS users to calculate new PPIC prices and activate them for a set of prices based on date a PC period. The **Calculate** button generates the new prices and the **Rollover** button activates the new pricing structure.

**Objective 117: The Commission will require the new system to calculate all pricing by Day, Week, Month and Ad-hoc and provide relevant PPIC reports.**

#### 5.7.2. NAICS

The North American Industry Classification System (NAICS) is used in PLIMS as part of the PPIC Pricing process. A descriptive list of all NAICS codes is accessible from the **NAICS Codes** page.

When Service Taxonomy is being established an **NAICS** field on the **Service Taxonomy** page is manually populated. Although that field is not validated against this list, it is based on it.

Use this **NAICS** page to look up what to enter at the **Service Taxonomy** page.

Updated NAICS information is available from their website:

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<http://www.census.gov/epcd/www/naics.html>

**PLIMS 2.0. Objective 118: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.7.2.1. NAICS Code

By default, all NAICS codes and their descriptions display when the page displays. If the *exact* NAICS code is supplied, the individual record can be retrieved using the **NAICS Code** search type. Deletion of an NAICS code automatically removes all Index entries associated with the code. Index entries may be deleted separately, without deleting the NAICS code.

**PLIMS 2.0. Objective 119: A system will be required to import the current list of NAICS codes and associate them with services in the inventory system.**

### 5.7.2.2. NAICS Index

Multiple index values may be associated with any given NAICS code. This page is available to view, edit, add new values, or delete these entries.

Search Types (by Period or by NAICS code) are the same as for NAICS Codes.

Note that the Period refers to the **NAICS Date**, listed as just **Date**.

**Record Date** is when the index entry was added or edited in PLIMS.

To select any Index entry in the list, click the **NAICS Code** in its row.

To edit an Index Value, click the **Edit** button, change the index value, and click **Update**.

## 5.8. Purchase Exceptions

In the course of the Commission's processing and evaluations, and those of the Agencies, Contractors and NPAs, discrepancies, anomalies, and inconsistencies may arise. PLIMS handles these in this module.

The Product and Service classifications, as defined for the product's or service's new or continuing presence on the PL, determine which of the two exception pages below are used. The identifiers used in these pages help link the exception to the other PLIMS entities involved.

### 5.8.1. Product Purchase Exceptions

To search products for Product Exceptions, the available search types are **Name**, **Description**, or **NSN Number**. Any part of the search term can be used to find the product.

**PLIMS 2.0. Objective 120: The Commission will require the new system functionality to allow searching by term without constraining the search to a specific type. This will allow**

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**the user flexibility to find purchase exceptions more openly using keywords.**

### 5.8.2. Service Purchase Exceptions

Service Purchase Exceptions work the same way as Product Exceptions, described in the preceding section. The main difference is the search available for accessing the service with which the exception is associated. Instead of just **NSN**, **Name**, and **Description**, this page offers all of the service-related search types. The other difference is the **Package Viewer** link, which depicts the *Service*-based package.

**PLIMS 2.0. Objective 121: The Commission will require the new system functionality to allow searching by term without constraining the search to a specific type. This will allow the user flexibility to find purchase exceptions more openly using keywords.**

### 5.9. Reports

PLIMS reports provide the ability to generate views of information on Projects, Pricing, Agencies NPAs, Contractors, and other PLIMS entities. In addition to a set of pre-defined reports, PLIMS offers Ad-Hoc reporting capabilities so that you can generate results based on user-defined filtering criteria, and also define the information displayed in the report. Reports are accessed by selecting the **Standard** or **Ad Hoc** link under the **Reports** heading in the left navigation pane of PLIMS.

**PLIMS 2.0. Objective 122: The Commission will require the new system to generate on demand reports using specific data to generate compliance audits, approvals, and evaluations as needed.**

#### 5.9.1. Standard Reports

PLIMS' standard reports are grouped into two categories: Program Oversight Reports and Pricing Reports. All of the standard reports share a basic set of functionalities. These common features are described in the following sections.

**PLIMS 2.0. Objective 123: The Commission will require the new system to generate on demand reports using specific data to generate compliance audits and approvals and evaluations as needed.**

##### 5.9.1.1. Report Selection

To select a report, click the appropriate link in the list. Some reports generate immediately upon selection using predefined parameters. In this case, skip to step 4. Other reports require that the user select criteria prior to report generation. If a report requires user selection of criteria, the system displays the criteria.

**PLIMS 2.0. Objective 124: The Commission will require the new system to have an option within the home page dashboard to generate reports and view generated reports created by users/groups.**

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### 5.9.1.2. Report Navigations and Report Preferences

When the report displays, a formatting toolbar is available. This toolbar provides (left to right):

No.	Feature	Description
1	Page Navigation	Provides navigation for multi-page reports. Click the arrows to move from page to page.
2	Page Size	Allows the user to select the display size of the page. Selections include Whole Page and percentages such as 75%.
3	Text Search	Searches for user defined text within the search results and highlights any matches. Enter text and click <b>Find</b> . Use next to move through the matches.
4	Export Options	Provides the user with the ability to export the report results to files in a number of different formats including XML, CSV, TIFF, PDF, and XLS. Select the format to enable the <b>Export</b> link.
5	Print	Allows the user to print the report to a local or network printer.
6	Toolbar Control	Allows the user to hide or unhide the report criteria toolbar. Click to hide or click again to display the toolbar.

### Export Capability

When an export format is selected in the toolbar, the **Export** link becomes active. If the application that corresponds to the selected format (e.g., Adobe, MS Excel, MS Word) resides on the workstation, any standard PLIMS report will open using the **Open** button.

**PLIMS 2.0. Objective 125: The Commission will require the new system to be able to export and save directly into the comments section or email specific reports using multiple formats define by the agency.**

### 5.9.1.3. Committe Member Votes

The Commission Member Votes report displays information on how each Commission Member voted on the packages submitted during a user selected Fiscal Year.

**PLIMS 2.0. Objective 126: The Commission will require the new system to allow the Commission members to vote through a mobile application prompt by selecting one of two options (Yes/No). Once the vote is cast by each member a graphical representation prompt will be sent to each voter to report the status.**

### 5.9.1.4. Comparison of FY Addition Actions

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The *Comparison of FY Addition Actions* report provides a comparison of the key measures of addition actions for a user selected Fiscal Year. Information is calculated for each month of the year for each CNA (SA and NIB) and as a Total.

**PLIMS 2.0. Objective 127: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.5. Compiled Visit Information

The *Compiled Compliance Visits Report* summarizes the visits paid to NPAs by SA, NIB, and the Commission for each year beginning with 1993. It identifies the number of visits conducted the percentage of the visits that identified compliance or non-compliance and identifies the total number of incidents of Non-Compliance for the areas rated during the visits. There are no user selected criteria for this report.

**PLIMS 2.0. Objective 128: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.6. Compliance Visit Response Due

This report lists all the Compliance Visits that have been completed and for which a response has not been received, meaning no Response Received Date has been recorded for the visit. There are no user selected criteria for this report.

**PLIMS 2.0. Objective 129: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.7. Daily Tracking Report

The *Daily Tracking Report* provides information on the daily activities performed for pending Addition and Deletion packages and indicates their location in the review process. There are no user selected criteria for this report.

**PLIMS 2.0. Objective 130: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.8. FY Visits Complete

The *FY Visits Complete* report displays information on the Compliance Visits conducted during a user selected Fiscal Year by SA, NIB, the Commission, or all depending on the user selection. Information includes the individual who performed the visit, the date of the visit, and the overall result of the visit (e.g., Overall Compliance = yes or no).

**PLIMS 2.0. Objective 131: This system functionality shall be replicated in the new system to maintain consistency.**

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### 5.9.1.9. NSN Listing

All PLIMS NSNs are listed in this report along with the full description and status information. The data is sorted by NSN. There are no user selected criteria for this report.

**PLIMS 2.0. Objective 132: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.10. Current Product Prices

The *Current Product Prices Report* displays pricing information for all NSN/Price Category combinations. The data is sorted by NSN. There are no user selected criteria for this report.

**PLIMS 2.0. Objective 133: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.11. Expirint Product Prices

The *Expiring Product Prices Report* displays a list of all NSNs with Pricing that is set to expire during a user selected date range. The user must designate the **Start** and **End Date** of the range.

**PLIMS 2.0. Objective 134: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.12. Product Effective Dates by PC Mechanism

The *Product Effective Dates* report displays a list of NSNs with an Effective (Start) Date within a user selected date range and which use a specified **Price Change Mechanism**. The user must select a **Start** and **End Date** for the range and a **Price Mechanism** of PPIC, EPA, Negotiated or Other.

**PLIMS 2.0. Objective 135: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.13. Product Price History

The *Product Price History Report* retrieves the pricing history for a user specified NSN, for all Price Categories for the NSN. The user must enter a full, valid NSN to get results.

**PLIMS 2.0. Objective 136: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.1.14. Proposed PPIC

The *Proposed PPIC Price Report* generates a list of the new prices, calculated, and proposed by the Commission based on standard PPIC calculations. The report is generated for NIB products, SA products or all depending on the user selection. This report is generated and distributed for

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review prior to the “rollover” of PPIC pricing.

**PLIMS 2.0. Objective 137: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.9.2. Adhoc Reports

*Ad Hoc* reports are generated using Microsoft SQL Server 2014 **Report Builder**.

After the user clicks the **Ad Hoc Reports** link, **Report Builder** opens and enables the user to select a data source and a report format.

When the data source is selected and the user clicks **OK**, the system opens the **Design Report** page.

From here the user can drag and drop PLIMS entities and fields on to the report page.

**PLIMS 20. Objective 139: The Commission will require the new system to generate on demand reports using specific data to generate compliance audits and approvals and evaluations as needed.** 5.10. Admin

All admin functionalities are performed from these pages. The details of each admin module below are explained on these sections.

**PLIMS 2.0. Objective 140: This system functionality shall be replicated in the new system to maintain consistency.**

### 5.10.1. CNA User Management

The CNA Users are the individuals that the Commission has approved to be the submitters of packages to PLIMS. “Normal” PLIMS users are the Commission employees. This section does not pertain to them. The normal users are managed by a different process that uses domain-based security.

The term "Active" in a user's details means they can submit packages. “Inactive” users can’t submit packages.

"Valid Start" and end dates in the details refer to the valid period that the certificate can be used to sign packages. The PLIMS web service can be configured to use these dates as qualifying criteria, or to ignore them.

**PLIMS 2.0. Objective 141: User and admin management will be through an approved LDAP such as Active Directory and incorporate PIV card and Login.gov for validation of users.**

### 5.10.2. Status Messages

Use this page to monitor the state of the package — based on communications sent from PLIMS.

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These messages originate in PLIMS and inform the CNA system(s) about package transactions sent to PLIMS.

Different Message Types identify the message in terms of the PLIMS processing that originated the message, and often the PLIMS entity (e.g., package, product, Service Type, and NSN) about which the message pertains. Below is the list of status update messages:

**Transaction Status Message:** sent when the status of a transaction changes.

**Project Status Message:** sent when the status of a project changes.

**NSN Status Message:** sent when the status of an NSN changes.

**NPA Status Message:** sent when the status of an NPA changes.

The presence of a Submission Log entry for a Status Message means that PLIMS has attempted to transmit the status message to the CNA system(s).

“Pending” means it has not been sent yet.

“Processed” means it has been sent, though that is not a guarantee that the CNA system has successfully processed it.

The Transaction Status and Comment fields inform the user of the state of the package. Typically, these data errors need to be corrected by the CNAs — by making updates to the package which can then be resubmitted.

**PLIMS 2.0. Objective 142:** The system will allow user to create custom statuses up to a maximum amount determined by the AbilityOne Commission (Approve, Pending, Suspended, other). The system will also need the ability to allow the user to generate graph/chart metrics to track each status.

### 5.10.3. Assign Task

Tasks are pre-configured, according to their package type, for assignment to specific users and user groups. With the requisite rights (admin users only), these can be re-configured at this page.

To select a currently assigned user or group whose task(s) are to be reassigned, use the **Currently Assigned** drop-down list.

All tasks belonging to the selected user or group then display in the **User Tasks** area. Both lists are a combination of PLIMS workflow groups and PLIMS Users. (PLIMS user management is document in the *System Administrators Guide*.)

**PLIMS 2.0. Objective 143:** The system will have a task as part of the assignment requirements and a Primary/Secondary User/Group to allow streamlined approval process. This should be tied to the project management module.



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### 5.10.4. Voting Admin

#### 5.10.4.1. Manage Vote

Vote letters are published to the voting portal via this page. The voting admin users may enter a vote for a Commission member. Vote letters are generated through the addition and/or deletion workflows.

During these workflows, the vote letters are edited, reviewed, and ultimately approved. After approval, the vote letters are published to the voting portal.

The PL Number search applies wildcards automatically, so you can enter only a partial PL Number to retrieve results.

To select a letter from the search results, click the **ID** link in its row. Details of that letter then display in the **Vote Letter Details** section.

To edit the Vote Letter details, click the **Edit** button. This button is not accessible for "Closed" votes.

A vote letter must be published.

Another Commission member can vote on behalf of a Commission member.

To see who is eligible to vote, but has not done so, look for a blank in the **Suitability Vote** column of the **Commission Members' Vote Summary**.

A vote must be closed.

**Note:** A vote can be closed before any votes have been made.

To add or delete individuals to the collection of users entitled to vote, click **Vote User Management** at the Main Menu, near bottom left.

Processing at that page determines who displays in the **Commission Members Vote Summary** box at this page, where the actual voting takes place via the **Edit** button.

**PLIMS 2.0. Objective 144: The voting process is instrumental to the function of the AbilityOne Commission, so a polling and voting system will have to be incorporated into the new system and it will need to access all item, service, and pricing details.**

#### 5.10.4.2. Vote User Management

Final approval or rejection of PL additions and/or deletions is known as PLIMS "Commission Member Voting." It is available to a small subset of PLIMS users, identified as Commission Members. Those users are defined and managed from this page.

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When a user is part of this set, and has a status of "Confirmed," PLIMS allows the user to vote via the Voting Portal. This means the user gains access to the Voting Portal.

Users can have access to the voting portal on a read-only basis by being confirmed users, but not being identified as Commission Members. These are Commission Member Staffers. They support the Commission member and have read only access to the voting portal but can use the vote discussion feature.

### 5.11. Voting Support

This module provides a read-only summary view into the votes and enables Commission staffers to initiate or participate in discussion threads about PLIMS votes.

**PLIMS 2.0. Objective 145: This system functionality shall be replicated in the new system to maintain consistency.**

#### 5.11.1. Voting Summary

This page provides a listing of past and current votes on PL additions and deletions.

The available **Search Types** are "PL Number" and "Voting Letter Status." The standard search navigation applies.

To see the summary of any vote, click the link in the **ID** column for the vote letter.

To view the vote letter associated with the voting, click the vote letter's **ID** in the **Vote Letter Details**.

A new browser window is launched to open the letter.

**PLIMS 2.0. Objective 146: The summary of a vote will need to be tracked in the approval and legal processes, as well as inventory and pricing, so it will be a core system function.**

### 5.12. Vote Discussion

This page supports the voting process by allowing the Commission members to post questions, receive answers, and read and post comments. Entire threads of discussion can be initiated, tracked, and *resolved* using this page. Comments are listed chronologically from top down.

To add a new topic, or add a comment to an existing topic, use the **Add New Topic** and **Add Comment** to this topic links.

A dialog box will prompt for input.

To save the comment and return to the discussion page, click the **Submit** link.  
The comment displays with the topic.

**PLIMS 2.0. Objective 147: This system functionality shall be replicated in the new system to maintain consistency.**

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### **5.13. System Documentation**

**PLIMS 2.0 Objective 148: The Contractor shall develop PLIMS 2.0 solution system documentation, capturing installation and configuration requirements, standard operating procedures (SOPs) and instructions, for Operation & Maintenance (O&M) purposes. Additionally, provide relevant artifacts/documentation for Authority to Operate (ATO) re-certification purposes.**

### **5.14. New Package Types**

**PLIMS 2.0 Objective 149: The Contractor shall add and integrate the following new Packages Types and Workflows within the new system:**

- a) Project Ratio Change - NPAs need to deviate from the previously approved project ratio, this needs a transaction to seek and approve the requested change.**
- b) Surge Protection - NPA requirements experience an unexpected change in the requirement, supplies, and/or worksite, this needs a transaction to seek and approve the request.**

## **6. Licenses.**

As part of the PLIMS 2.0 solution, the Contractor shall provide all relevant software/subscription concurrent licenses for a maximum of 100 users for Production and relevant Test environments. Licenses will be used across all global locations where AbilityOne appropriate stakeholders are located.

6.1. The contractor shall provide software licensing specific to the software. As part of the licensing the contractor shall:

6.1.1. Provide software that includes all custom configured modules and seats to access the software.

6.1.2. Under the terms of the licensing agreement, the contractor shall guarantee that the software is always utilizing the latest release that has been tested before delivery to the Government.

6.1.3. Maintain the latest software release and ensure analytical tool (provided as part of PLIMS 2.0 solution) is compatible with the most current technology advancements.

6.1.4. Ensure each release offers the latest features that will extend the capability and usability of analytical tool in the end user's operational environment.

## **7. Pre-deployment System Testing.**

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Sixty (60) calendar days prior to scheduled testing start date, the Contractor shall provide AbilityOne with a test plan for acceptance that delineates a process for formal testing of the system prior to final acceptance and deployment. The plan shall ensure all products are thoroughly tested prior to delivery to the government. The Contractor shall support the Government to identify and correct product testing issues identified throughout the testing process and prior to AbilityOne final acceptance of PLIMS 2.0.

7.1. The Contractor shall conduct tests (e.g. unit, functional, system, interoperability, regression, security, and performance) of software throughout the development lifecycle using industry best practices.

7.2. The Contractor shall develop and deliver testing materials in a format that allows the Government to reproduce the testing procedures and results within their own development environment.

7.3. The Contractor shall conduct testing related to non-functional requirements, including load, performance, and installation testing.

7.4. The Contractor shall correct and repair software defects identified throughout the testing process (including unit, system, functional, security, performance, and load testing).

7.5. The Contractor shall conduct inspections and provide analysis of testing results as directed.

7.6. The Contractor shall include the user/customer as part of the tests as required.

7.7. The Contractor shall collect systems and application performance and load data as part of testing process.

7.8. The testing process shall ensure that all existing data residing in the current version of PLIMS is protected and not compromised in any way.

### **8. Data Migration.**

Once PLIMS 2.0. is fully installed, tested, implemented, deployed and satisfactorily functioning to the technical standards and requirements specified within this PWS, and is free of any problems, malfunctions, complications, setbacks, and any state of unreadiness, prior to final acceptance and deployment, the Contractor shall ensure that all data currently residing in the current PLIMS is successfully migrated to PLIMS 2.0.

### **9. Training.**

Sixty (60) calendar days prior to completion of data migration, the Contractor shall start providing AbilityOne and all required appropriate stakeholders with PLIMS 2.0 user training on the new PLIMS 2.0. system. The training shall be conducted virtually with AbilityOne and required appropriate stakeholders. In addition, the Contractor shall develop a user manual and training materials that AbilityOne can utilize in future training requirements to new employees and stakeholders. The user manual and training materials shall be of sufficient detail to be able

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to provide training to new personnel on a recurring basis to ensure competence with PLIMS 2.0.

### **10. System Maintenance.**

The Contractor shall provide continuous assistance in identification and correction of programming deficiencies, programming modifications based on regulatory requirements and/or modifications, data elements needed to enhance and produce forms and reports, and/or changes to improve functional operations of the PLIMS 2.0 system or data display screens. The contractor shall:

10.1. Provide software maintenance central to the modification of the software solution after delivery to correct faults, to improve performance, and to upgrade the software with each new release. Ensure that the software is the latest release and that it has been tested before delivery to the Government.

10.2. Maintain and support the integrity of the software solution and ensure that it can run effectively via the cloud architecture.

10.3. Ensure each release offers the latest features that will extend the capability and usability of analytical tool in the end users' operational environment.

10.4. Manage user permissions and roles within the software platform.

10.5. The contractor shall test system software upgrades, resolve technical problems, and participate in software testing, evaluation, and integration of new forms and reports into the software platform.

10.6. Provide support within 2 hours of initial notification of an urgent system issue and resolve the issue within 4 hours of initial notification. For non-urgent system issues, provide support within 24 hours and resolve the issue within 48 hours.

10.7. Provide an electronic ticketing system to manage software concerns and adjudicate resolution to resolve issues. The Contracting Officer's Representative (COR) will be copied on all ticketed software issues.

### **11. Transition Out Plan.**

The Contractor shall develop and provide to the Government all documentation which the Government has deemed necessary to maintain program continuity in the event of a contract transition. All documentation related to the operations and maintenance of the PLIMS 2.0 system will be maintained on the AbilityOne General Support System (GSS) network in a location designated by the PLIMS 2.0 Product Manager. Programmatic and technical documentation will not be developed, stored, or maintained on non-Government equipment and/or networks.

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The Contractor shall prepare and participate in an Exit Meeting with the Government POCs and COR. The purpose of the meeting is to provide the Government with an out brief of the status of the activities described in the PWS. The contractor, in coordination with the Government, shall develop an exit strategy.

## APPENDIX A PACKAGE TYPES

This Package Type Code	Identifies this Package Type and corresponding Workflow
<b>ASP</b>	Add Service Package (PLIMS 2.0: The system will update hours as part of the transactions)
<b>AP</b>	Add Product – Line Extension / Concurrent Buy
<b>APC</b>	Add Product CA (Contracting Activity)
<b>APN</b>	Add Product Nonprofit Agency
<b>APP</b>	Add Product Package
<b>ASPR</b>	Add Service Project (PLIMS 2.0: The system will update hours as part of the transactions)
<b>AST</b>	Add Service Type (PLIMS 2.0: The system will update hours as part of the transactions)
<b>BSP</b>	Bundle Service Package
<b>CNN</b>	Change NSN Number
<b>CPC</b>	Change Product CA
<b>CPN</b>	Change Product Nonprofit Agency
<b>CSC</b>	Change Service CA
<b>CSL</b>	Change Service Location
<b>CSN</b>	Change Service Nonprofit Agency
<b>CST</b>	Change Service Type
<b>CU</b>	CA Information Update
<b>CVR</b>	Compliance Visit Report
<b>DC</b>	Delete CA

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<b>DM</b>	Delete Master
<b>DN</b>	Delete Nonprofit Agency
<b>DPP</b>	Delete Product From Project
<b>DPPL</b>	Delete Product From PL
<b>DSP</b>	Delete Service From PL
<b>DSPL</b>	Delete Service From Project
<b>IAR</b>	Impact Analysis Request
<b>NM</b>	NSN Maintenance
<b>NPAM</b>	NPA Master
<b>NU</b>	NPA Information Update
<b>PIR</b>	Phase In Report
<b>PC</b>	Price Change Request
<b>PM</b>	Product Master
<b>PPE</b>	Product Purchase Exception
<b>SM</b>	Service Master
<b>SPE</b>	Service Purchase Exception
<b>TPL</b>	Transfer PL
<b>UM</b>	User Management
<b>UP</b>	Update Product



## APPENDIX B – DEFINITIONS

Term	Meaning
<b>AbilityOne Program</b>	This is the name of the procurement program enabled by the Javits-Wagner-O'Day Act and administered by the Commission. The name was established in Nov. 2006 to replace the use of the "JWOD" acronym as an umbrella program name.
<b>Audits</b>	In most cases, because of the fixed price nature of most AbilityOne contracts, there will seldom be a need for a Contracting Officer to request an audit. If a Contracting Officer believes that there is a reason for an audit, they should coordinate the audit with the Commission staff. During any resulting audit, Commission staff will meet with the auditors as necessary to insure that they understand the AbilityOne Program and the differences between commercial companies and nonprofit agencies.
<b>Base Price</b>	The initial Fair Market Price for the product or service in the base year of a contract with multiple follow-on or option years. Each time the Commission makes a FMP determination, a Base Price is established except in cases of contract modifications. If the Contracting Activity determines to its contract performance period is one year (i.e., one period only), a Base Price with no Follow-On Years (periods) is established every year (period) and each base price should be submitted to the Commission for approval. Section 9 provides guidance on the formats and information that must be provided to the Commission for review and establishment of the Base Year as the FMP
<b>CA</b>	Contracting Activity means any element of an entity of the Government that has responsibility for identifying and/or procuring Government requirements for products or services. Components of a contracting activity, such as a contracting office and an ordering office, are incorporated in this definition, which includes all offices within the definitions of "procurement activity," "contracting activity," "contracting office," and "contract administration office" contained in the Federal Acquisition Regulation, 48 CFR 2.101. (41 CFR 51-1.3.)
<b>CICA</b>	Competition in Contracting Act FAR Part 6 exempts AbilityOne contracts from the competition requirements of the CICA. (See FAR 6.302-5) This exemption applies only to products and services on the Procurement List.

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<b>Competition in Contracting Act (CICA)</b>	The 1984 law that amended the Armed Services Procurement Act and the Federal Property and Administrative Services Act of 1949 to, among other things, enhance competition in Federal contracting by requiring a justification for most procurements in which full and open competition would not be obtained. Procurements under the AbilityOne Program are exempt from the competition and justification requirements of CICA. (FAR 6.302-5(b)(2), (c)(2)(ii)).
<b>Cost and Pricing Data</b>	In accordance with FAR 15.403-1(c)(2) contracting officers are prohibited from requiring certified cost and pricing data from nonprofit agencies under the AbilityOne Program because the prices are set by law or regulation.
<b>Cost Principles</b>	If the negotiation process is based on cost analysis or cost realism analysis, as appropriate, OMB Circular A-122, Cost Principles for Non-Profit Organizations, will apply. Direct and indirect costs are allowable only if they are reasonable, allocable, not prohibited by OMB Circular A-122, and consistent with applicable accounting practices and standards. For a copy of the circular, go to <a href="http://www.whitehouse.gov/omb/circulars/a122/a122.html">http://www.whitehouse.gov/omb/circulars/a122/a122.html</a>
<b>CNA</b>	A Central Nonprofit Agency is a not-for-profit corporation operated in the interest of people who are blind or have other severe disabilities, and designated by the Commission to facilitate the distribution (by direct allocation, subcontract, or any other means) of government orders for products and services on the Procurement List. The distribution of the government orders is among Non-Profit Agencies employing persons who are blind or have other severe disabilities. These agencies provide information require by the Commission to implement the AbilityOne Program, and to otherwise assist the Commission in administering these regulations as set forth herein by the Commission. (41 CFR 51-1.3)
<b>CNA Fee</b>	Central Nonprofit Agency Fee. NIB and SA are not government entities and receive no appropriations from the Federal Government. Instead, they receive a percentage of revenue generated by sales of AbilityOne products and services. This percentage, known as the CNA Fee, is paid to NIB or SA by the Nonprofit Agency. Annually, the Commission reviews NIB's and SA's budgets, plans and accomplishments and establishes the fee limit for each CNA's fee. Current CNA fee ceiling(s) and Federal and Nonprofit agency guidance can be found in the Commission's Administrative Memorandum Number 11 – CNA Fee, found on the Commission's web site at <a href="http://www.jwod.gov/jwod/library/policy.html">http://www.jwod.gov/jwod/library/policy.html</a>
<b>CO or KO</b>	Contracting Officer. This is a Federal Government employee who has been granted authority by their Contracting Activity to negotiate and obligate government funds for products and services as the agency determines necessary to meet their mission.
<b>CRP</b>	Community Rehabilitation Programs, also known as Nonprofit Agency
<b>DUNS</b>	Unique 9 digit identifier provided by Dun & Bradstreet (D&B), a provider of international and US agency credit information and credit reports.

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<b>Fixed Price Contracts</b>	AbilityOne contracts are generally fixed price contracts subject to the Commission's authority to change prices as market conditions warrant. Contracting activities interested in using other than fixed price contracts must make the type of contract to be used part of the negotiations. During the contract performance period, there should not be an adjustment in contract price, other than the agreed upon rules for pricing Follow-On Years, without a concurrent change in contract requirements. Negotiated Follow-On Year agreements should be incorporated into contract documents.
<b>FMP</b>	Fair Market Price is the price that the Commission has set and approved for each product or service on its Procurement List, and the price that the Government is required to pay when purchasing the product or service from the designated NPA.
<b>FOY</b>	<p>Follow-On Year is the term used instead of contract option year. As long as the requirement exists, the Contracting Activity is required to continue purchasing the service from the Nonprofit Agency designated by the Commission unless and until the Commission directs otherwise. The Commission may direct the transfer of the service to another Nonprofit Agency.</p> <p>If the Contracting Activity determines the contract length will be longer than one period, any period(s) beyond Period One is (are) considered Follow-On Years (periods or options). It is essential that an agreement be reached on clear and comprehensive rules for Follow-On Year Pricing. Any technique acceptable to the Contracting Activity and the Nonprofit Agency (as advised by SA or NIB), consistent with the Commission's pricing procedures, may be used. The approved Follow-On Year agreement must be incorporated into the final contract once the FMP has been established by the Commission. Other than changing the contract's scope of requirements, the following are some alternative methods for determining Follow-On Year Prices (not limited to the following):</p> <p>SPF-1 Price Proposal including signatures for certifications</p> <p>SPF-2 Price Proposal - Follow-On Year Agreement</p> <p>SPF-3 Price Breakdown</p> <p>SPF-4 Staffing Breakdown</p> <p>Operations Memo #19</p>
<b>G&amp;A</b>	General and Administrative Expense is allowed management, financial and other expense which is incurred by or allocated to a agency unit and which is for the general management and administration of the agency as a whole.
<b>GAAP</b>	Generally Accepted Accounting Practices

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<b>Impasse</b>	Impasse is the term used to describe when a price issue, controversy or disagreement occurs and either the Contracting Activity or the Nonprofit Agency is unable to proceed with a contract action. The "JWOD Price and Price-Related Impasse and Disputes Resolution Procedure" (published separately by the Commission in Operations Memorandum Number 19, ( <a href="http://www.jwod.gov/jwod/library/policy.html">http://www.jwod.gov/jwod/library/policy.html</a> ) is used to resolve price and price-related disagreements. Impasse may occur only during price change actions to an existing product or service on the Procurement List.
<b>Incentive Contracts</b>	It is permissible to use fixed-price incentive contracts (FAR 16.403) and fixed-price contracts with award fees (FAR 16.404) for contracts awarded under the AbilityOne Program when the Contracting Officer makes the determination it is in the Government's best interest to do so and all FAR requirements for such contracts are met.
<b>Information Other than Cost or Pricing Data</b>	In accordance with FAR 15.403-1(b) contracting officers may request information other than cost and pricing data to support price reasonableness
<b>JWOD</b>	The Javits-Wagner-O'Day Act (41 U.S.C. 46-48c) is the law under which the Program operates; "JWOD" has been used to describe the Program and is often used as an adjective (e.g., a JWOD contract). The Commission has changed the program name from JWOD to the AbilityOne Program. Use of the name AbilityOne is transitioning and replacing JWOD as the program name. The two terms are used synonymously.
<b>LOB</b>	Line of Business is the specified product or services provided by particular NPAs.
<b>Market Price</b>	Market prices are current prices that are established in the course of ordinary trade between buyers and sellers, free to bargain and that can be substantiated from sources independent of the offeror.
<b>Mistakes</b>	Mistakes discovered by the Nonprofit Agency prior to the determination of the Fair Market Price can be corrected and a revised recommendation submitted. Contracting Officers discovering an apparent mistake should bring the mistake to the attention of NIB or SA and the Nonprofit Agency. Mistakes identified by either party after determination of the Fair Market Price or award should be corrected using sound agency techniques and judgments. If a mistake cannot be resolved, the impasse process will be used to reach a resolution.
<b>Market Research</b>	Market research is a process to collect, organize, maintain, analyze and present data for maximizing the capabilities, technology and competitive forces of the marketplace to meet an organization's need for supplies or services. See FAR Part 10 for detailed definition and procedures.
<b>Negotiation</b>	A flexible process that includes the receipt of a proposal from an offeror, and permits bargaining. Bargaining in the sense of discussion, persuasion, alteration of initial assumptions and positions and give and take may apply to price, schedule, technical requirements and other terms of the proposed contract. See FAR Part 15 for information on contract negotiation.

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<b>Net Proceed(s)</b>	Used in OMB Circular A-122, Cost Principles for Nonprofit Organizations, as part of the definition of a nonprofit agency that "uses its net proceeds (revenues less expenses) to maintain; improve; and/or expand its operations."
<b>NIB</b>	The National Industries for the Blind is the CNA designated by the Commission to assist in creating employment opportunities for people who are blind. NIB is not a Government Agency. For more information about NIB, go to <a href="http://www.nib.org">http://www.nib.org</a> .
<b>SA</b>	The National Industries Severely Handicapped organization is the CNA designated by the Commission to assist in creating employment opportunities for people with severe disabilities. SA is not a Government Agency. (SA is not an acronym.) For more information about SA, go to <a href="http://www.SA.org">http://www.SA.org</a> .
<b>NPA</b>	Nonprofit Agency is the term used to describe the state and local agencies employing people who are NIB-associated agencies or SA-associated agencies. Nonprofit Agencies are also referred to as Community Rehabilitation Programs.
<b>NSN</b>	National Stock Number(s). These identify products being added or referenced on the procurement list (PL). A permanent NSN is the number which the Government uses to order the product.
<b>Overhead or Overhead Costs</b>	Allowable indirect costs that are incurred for the benefit of more than one project or cost objective (e.g., facility costs), and are charged to more than one project or cost objective. Overhead costs are accumulated by logical cost groupings and generally accepted accounting practices and distributed based on benefits accruing to the several cost objectives.
<b>PL</b>	Procurement List is the list of services and products, awarded under the AbilityOne Program as "mandatory source" acquisitions. Services are added to the Procurement List by the Commission and are listed by type and location. Procurement List (PL) Number is the term used to identify a potential or actual Procurement List product(s) or service(s) addition also known as Action Number, JPID number or Request number.  To view the Procurement List, go to  <a href="http://www.abilityone.gov/jwod/p_and_s/p_and_s.htm">http://www.abilityone.gov/jwod/p_and_s/p_and_s.htm</a>
<b>PLIMS</b>	Procurement List Information Management System is the name of the information management system used by the Commission, to collect electronic submissions from the CNAs for proposed additions, deletions, and changes to the procurement list, including prices.
<b>PLIMS Project</b>	<b>The Product Project</b> – Project Details page provides the ability to search on criteria including PL Number, Project Number, Transaction ID, Package Type, NPA, and CA. Within Product Project, NPA is distinct/unique for each Product List number.  <b>The Service Project</b> – Project Details page provides the ability to search on a variety of criteria including PL Number, Project Number, Service Location, Service Type, and more. The Service Project key consists of the PL Number, the NPA and the Contracting Activity. Within Service Project, NPA and CA are distinct/unique for each Product List number.

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<b>PPIC</b>	PPIC is a new acronym replacing APC, and referring to the annual price change process based on producer price index (PPI) codes and, in rare instances, industry wage (IW) codes.
<b>Pre-Award Survey</b>	During the addition of a new service to the Procurement List the contracting activity will be given the opportunity to conduct a pre-award survey (also called a site visit) of the nonprofit agency. The survey dates must be coordinated with NIB or SA to allow for personnel from NIB or SA to be present during the survey.
<b>Price Negotiations</b>	Price negotiations should be conducted in a manner consistent with FAR 15.405.
<b>Project Number</b>	The term used to identify specific services on the PL by the type of service, Contracting Activity and Nonprofit Agency authorized to provide that service at a specific location.
<b>Recommended FMP</b>	FMP or Recommended FMP is the term used for the "fair market price" the CNA has recommended to the Commission for services and products under the AbilityOne Program based on negotiations between the designated NPA and CA.
<b>SBA</b>	The U.S. Small Agency Administration (SBA) was created in 1953 as an independent agency of the Federal Government to aid, counsel, assist and protect the interests of small agency concerns, to preserve free competitive enterprise and to maintain and strengthen the overall economy of the United States. Through an extensive network of field offices and partnerships with public and private organizations, SBA delivers its services to people throughout the United States, Puerto Rico, the U. S. Virgin Islands and Guam.
<b>SPF</b>	Service Pricing <b>Formats</b> All Commission service pricing formats have multiple uses. These formats may be used by Nonprofit Agencies and NIB/SA for submitting proposals to Contracting Activities and must be used for providing information require underpricing form PR-3 to the Commission.
<b>Sub - contracting</b>	Defined by the Commission as any acquisition from another source of materials or services require by the nonprofit agency(ies) to provide a Procurement List product or service allocated under the AbilityOne Program. For guidance under the AbilityOne Program refer to the Commission Operations Memorandum 21, "Guidance on Nonprofit Agency Establishment of Subcontract Relationships for Current or Potential JWOD Work."

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<b>Worker Productivity</b>	The purpose of the AbilityOne Program is to provide employment for persons who are blind or severely disabled. In accordance with provisions of the Service Contract Act and the Fair Labor Standards Act, employers may pay a sub-minimum (commensurate) wage to workers who are blind or with severe disabilities if they have a special certificate from the Department of Labor. When paying the sub-minimum wage, the full Health and Welfare benefit must be paid in accordance with the Department of Labor Wage Determination or Collective Bargaining Agreement if applicable regardless of worker productivity. The additional Health and Welfare benefits may result in an additional, allocable, and allowable cost to the Nonprofit Agency. Contracting Activities may not restrict Nonprofit Agencies from using a less than fully productive workforce to reduce the negotiated Fair Market Price recommendation.
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## APPENDIX C ACRONYMS AND ABBREVIATIONS

Acronym	Definition
AD	Active Directory
BOA	Basic Ordering Agreement
CA	Contracting Activity
CBA	Collective Bargaining Agreements
CFR	Code of Federal Regulations
CNA	Central Nonprofit Agency
CO or KO	Contracting Officer
CNA	Central Nonprofit Agencies
CMDB	Configuration Management Database
DevSecOps	Development Security Operations
DLH / DL	Direct Labor Hours
DOL	Department of Labor
FAR	Federal Acquisition Regulation
FOY	Follow on year (agreement).
FMP	Fair Market Price
IW	Industry Wage
JPID	JWOD Program Information Database
JWOD	Javits-Wagner-O'Day Act .
LDAP	Lightweight Directory Access Protocol
NAICS	North American Industry Classification System
NIB	National Industries for the Blind
SA	Not an acronym
NPA	Nonprofit Agency
NSN	National Stock Number(s).
PL	Product List
PPIC	Annual price change process based on producer price index (PPI) codes.
PLIMS	Procurement List Information Management System
SCA	Service Contract Act. An SCA wage determination is an element in PLIMS' "Service Change Request" transaction, to update an existing price on the PL.
SOW	Performance Statement of Work
WD	Wage Decision from the U.S. Department of Labor



## **APPENDIX D - CENTRAL NONPROFIT AGENCIES (CNAs) REQUIREMENTS**

CNAs are critical stakeholders in allowing AbilityOne to execute their mission, therefore, it is essential that their specific/tailored requirements be incorporated into PLIMS 2.0. The Contractor, in executing the PLIMS 2.0. Objectives delineated in PWS paragraph 5, shall ensure that PLIMS 2.0. Objectives are customized to address the CNA requirements identified below.

- **Access Management**
  - Ability to leverage multiple CNA roles when granting access to the new CNA Portal (e.g., Edit/Submit Role, Admin Role, Read Only Role). This will allow individuals who do not necessarily submit/manage data on the PL, but rather just need access to dashboards or the PLIMS data in a read only format.
  - Automate delegation of authority for FMP and for the ability to submit updates/changes to the PLIMS.
  - Prompt user prior to any system generated timeout.
- **Accessibility**
  - CNA Portal should be WCAG 2.1 complaint.
  - Should be browser agnostic.
- **Chain of Custody / Book of Records**
  - System-based functionality to support electronic signatures for acknowledgements and certifications for all program stakeholders (NPA, Federal Customer, CNA).
  - Elimination of paper forms and attachments for EDLH, SPF, PCC and other signed documents.
  - Ability to automatically generate these documents (where appropriate) from data within the system such as the ability to pull historic information from past packages/submissions into PCC with current pricing info.
  - Provide real-time electronic signature capabilities and auto populate any signature dates from signed forms, where appropriate.
  - Rejections/requests for clarifications should contain rejection reason(s) within the package.
  - The system should generate an email message to the user(s) associated with the package submission.
  - Allow multiple, concurrent actions on the same PL number.

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- To support audit, oversight, and management functions, a robust reporting capability is required. Reports should be easily configurable by the user.
- Data Calculations / Data Validation
  - Include auto calculations and totals for pricing fields, where appropriate (e.g. FOB Origin + Freight = FOB Destination; Total for Price Breakdown)
  - Provide system-based validation of PL Manual Requirements for required data fields to help identify potential technical issues/errors prior to submission.
  - Automated prompts for missing/incorrect information that would prevent a transaction from submission until the issue is addressed. Intent is to ensure that submissions occur with no technical errors to assist Commission Staff with review via automation.
  - The system should provide an interface to complete the compilation of, and review of packages.
  - Eliminate the file upload size limit.
  - Include a robust mistake proofing/error correction capability.
  - The system should ensure that all required fields are populated.
  - The system should ensure that all values are of the proper data type.
  - The system should immediately return a status message indicating the success or failure of the validation.
  - When verifying package contents, navigate directly to actual error with explanation of error.
  - User must be able to save and validate work.
  - Validation error checking against rules established in policies and procedures in manuals.
  - When marking products as active or inactive, restrict A list items to inactive code X and B list item to inactive code Y.
- Data Integration
  - Ability to seed updates/additions to the PL/PLIMS with data from the CNAs primary agency system(s) (e.g., Add Package Information).
  - Ability to seed updates to the PL/PLIMS with data from currently within PLIMS. In other words, provide a CNA the ability, where appropriate (e.g., administrative actions), to make a "Pending Update" copy of the data currently in PLIMS.
  - Allow the CNA to overwrite/update what is being revised and commit the changes back to PLIMS through the Commission's review/approval processes. The

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Commission should have a clear systematic indication of what was updated and what was not updated.

- System will allow NIB systems source integration with PLIMS.
- True mapping of fields
- Manually entered information should enforce certain formats (masks)
- Data Requirements
  - Ability to see allocation rules of projects split between CNAs. (e.g., Source America has X% of TGR while NIB may have Y% of TGR).
  - Ability to see allocation rules of projects split between NPAs. (e.g., NPA 1 has X% of TGR while NPA 2 has Y% of TGR).
  - List the Total Government Requirement (TGR) per NSN.
  - Add List Type as a required field when completing a Request for Impact Determination. Currently we state the required list type in the Executive Summary.
  - Ability to see which NSNs are on co-brand agreement, and expiration date of the co-brand agreement.
  - Increase the character limits for file names, file descriptions, and key data fields (e.g., PDP, Work Description). If there are limits, show these limits to system users and directly prevent exceeding these limits.
  - Keep fields names consistent across the platform and in alignment with all PL Manuals.
  - Include additional PL statuses for products on the PL: Current, Expired, Active, Inactive, Purchase Exception, Unique Exception, 10-Day Pricing Exception
  - Eliminate duplicative fields within Estimated DLH tab/Phase-In.
  - Ability to upload 10-day exception and unique exception data via the system.
- Data Visibility
  - Ability for CNA to view the PLIMS data directly in the PLIMS application in real time in the same hierarchical structure in which the data is maintained.
  - Visible data should include what is required/needed for a CNA and not just what might be publicly viewable via abilityone.gov.
  - The system should automatically post commission requests for clarification such as compliance report and correction actions, and rejection notices.
  - Compliance report and corrective action response should be linked.
  - Commission notices should be attachable to packages.
  - Commission notices should be sent back vs. email notifications.

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- Commission system should communicate bidirectionally with the CNA's system.
- Comments should be automatically attributed to user and timestamped.
- The system should provide an interface to retrieve and view the contents of the archive.
- General
  - Build the system to allow all package types (i.e., updates/changes) to be completed in one transaction/submission for projects with the same PL Number.
  - The CNA should have the ability to indicate each action being performed, provide the required data and submit the change to the Commission for review and approval.
  - The Commission should be able to clearly distinguish which actions are being performed and see just to data elements included in and required for that particular action(s) in order to review/approve as appropriate.
  - The layout for various updates/submissions should contain just the data required for or related to the particular action(s) being performed.
  - Include true administrative type transactions that allow CNAs to exclude or include PDP, Capability Description, or pricing fields when necessary. In other words, provide the ability to administratively update just the data fields or group of fields on the PL that are changing and not any data fields that are not changing.

For example:

    - a. Administrative NPA name change - transaction/submission would only require NPA name related fields and no additional fields.
    - b. Administrative Bundle Transaction - transaction would only require fields to change PL #, Project #, or if needed, pricing fields, and not require irrelevant fields such as PDP fields, Capability Description, etc.
  - Provide a direct link to past transactions/submissions to easily see past prices (current and expired), documents, etc. in one place.
  - Also provide a link to related PL data directly from within PLIMS.
  - Provide an ability to view historical changes to the PL over time with robust search capabilities.
  - When completing a bundle, show all projects being bundled on one view instead of just one project at a time.
  - Change the structure of the bundle transaction where the number of new projects (post bundle) is in no way dependent on the number of current projects (pre bundle). The current bundle functionality requires one new project for every one old project. Sometimes an expansion requires more new projects than old projects due to government restructuring.
- Guidance Workflow

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- Send administrative action and bundle action guidance requests through the system.
- Send admin action approvals back through system to CNAs prior to completing the formal update/submission, where appropriate.
- The system should automatically post commission requests for clarification such as compliance reports and correction actions, and rejection notices.
- Compliance report and corrective action response should be linked.
- Commission notices uploadable to packages
- Commission notices should be sent back vs. email notifications.
- Commission system talks back to NIB system.
- New Features
  - External AbilityOne Program stake-holder interface and/or portal for NPA's input for Phase-in Plans and Phase-in Schedules. Functionality to include pop-up guidance and prompts for phase-in's and EDLH forms.
  - When mouse hovers over a data field a balloon opens showing the field's definition.
  - Spell Check built within the system.
- Reporting/Tracking
  - Automated Reports and Tracking functionality - CNA access to transaction statuses within the process to include estimated completion dates.
  - Option to enable push notifications and/or email alerts by update/submission once a transaction moves to the next stage/step.
  - Report functionality to show number and types of transactions/submissions "in Queue" and statuses of process.
  - Synchronized and automated tracking of key metrics and information in alignment with the CNA Cooperative Agreement Requirements in the QASP (Accuracy of PL Submissions, Average PL Add timelines, Service Pricing status (expired versus current), countdown to 10-day submission date after CNA signs the SPF).
  - Creation of a single program-based dashboard with real time information to eliminate manual data calculations for QASP performance. Ability to drill down on the metrics to clearly determine what is included in a particular metric.
  - Provide reporting functionality to see activity for a specified time period (e.g., last 30 day) on the PL.
  - Automated tracking/reporting for all Commission Notices for any/all transaction types.
  - Report functionality to search and access a notice for future transactions or to be able to email to customer/NPA upon request after the notice has been released.

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- Print functionality for proposed and historical transactions/submissions to allow for PDF copies for CNA book of record of all information in the transaction. Include the list of attachments.
- The system should archive each package signed and sent to PLIMS.
- Other Important Features
  - Separate transaction for replacement items. Staff needs to be able to see the relationship of the replacement NSNs (new NSNs being added to the PL) to the ones they are replacing (current NSNs on the PL). Currently, there is only one (1) transaction (Add Product – Line Extension) to add either additional NSNs or replacement products. These two actions, however, are two separate things. In a transaction for replacement products, the product(s) being replaced (meaning the products already on the PL) would be identified in the transaction, by NSN. There does not need to be a one-to-one correlation between NSNs being replaced versus those being added. The transaction should mimic an Add Product – Line Extension but by including the NSN to be replaced, we will have a record of the NSNs being replaced that can be searched. The NSNs being replaced should also appear in the Notice.
  - Increase field limits in PDP, Work Description, and Capability to 2,000 characters.
  - Need Field to identify co-branded products.
  - Need Field to record the percentage of the requirement for each NSNs or amount of the item that will be produced.
  - Need ability to place projects in suspended status (unique exceptions)
  - Need ability to upload multiple documents simultaneously to any transaction or anywhere in PLIMS.
  - Need ability to have Seek Clarification emails automatically upload to the transaction.
  - Need ability to save emails directly from Outlook.
  - Need functionality to “screen shot” an entire transaction at the click of a button.
  - Need ability or transaction to update project hours in PLIMS.
  - Need **YES/NO** selection for whether or not to issue a Notice.
  - Need field for NPA CAGE Code
  - Need fields to designate color and size for products by NSN.
  - Need to allow an Add Product – Concurrent Buy (AP-CB) transaction to change the List designation.
  - Need a separate field for full addition package to record the actual effective date.
  - Need larger displays to read PDP fields. The fields are limited in how much one can see causing individuals to have to scroll through the information in the field. Want to be able to see more, or all the information in each field without having to scroll.
  - Need update NPA Summary info without a transaction.

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- In addition packages under the NPA tab, under subcontracting, need additional fields added regarding whether or not the NPA is a subcontractor to a CNA, another NPA, or a commercial company.
  - Is this NPA a Subcontractor to CNA? YES/NO
  - Is this NPA a Subcontractor to another NPA? YES/NO
  - If yes, identify NPA that is Prime \_\_\_\_\_
  - Is this NPA a Subcontractor to a commercial firm? YES/NO
  - If yes, identify socio-economic statuses
- Need capability to upload general reference documents within PLIMS 2.0.
- Need ability to send transactions to the CNAs.