



# THE OLAO ACQUISITION NEWSLETTER

HOME PAGE: <http://www.olao.od.nih.gov/>

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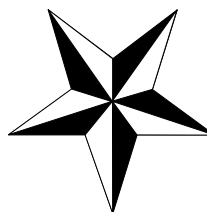
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## HIGHLIGHT(S)

## OF THE MONTH



## DELPRO NOTES AND SIMPLIFIED ACQUISITION NEWS

## BUY ACCESSIBLE WIZARD

## ASSISTS WITH 508 COMPLIANCE

On August 11, 2005 The Office of Management and Budget (OMB) issued information on the "Buying Accessible Electronic and Information Technology and Complying with Section 508 of the Rehabilitation Act"

Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d) requires federal agencies to ensure that their electronic and information technology (EIT) allows employees and members of the public with disabilities to have access to and use of government information and data. Implementation of this important legislation requires a coordinated effort among federal agencies. The purpose of this letter is to reiterate the importance of this requirement and to identify the information and resources available to your agencies as you continue your efforts to make government accessible to all citizens.

Whenever an agency procures, maintains, develops, or uses EIT, it must follow the Federal Acquisition Regulation requirements for implementing section 508, include the appropriate provisions of the Access Board's standards for accessibility in solicitations for EIT, and evaluate proposed solutions for conformance with the applicable standards. The General Services Administration (GSA), as part of its statutory responsibility to provide technical assistance for section 508 implementation, has developed the '**Buy Accessible Wizard**' to guide requiring officials and acquisition professionals in their efforts to comply with the requirements of section 508 and ensure that our government is accessible to all citizens.

The Wizard can assist the information technology and acquisition communities in determining if section 508 applies to an EIT acquisition, identifying which specific standards apply to the products or services being acquired, developing solicitation language, initiating market research, and documenting the acquisition to ensure compliance. Additionally, the Wizard provides assistance to government purchase cardholders to ensure that micropurchases, which are no longer exempt from the section 508 requirements, include the appropriate accessibility considerations. The Wizard, which was recently awarded an authority to operate after completing a thorough certification and accreditation process, is available for use by all federal agencies and is designed to be installed within an agency's own environment. The Wizard is available at [www.buyaccessible.gov](http://www.buyaccessible.gov).

GSA provides additional information on [www.section508.gov](http://www.section508.gov) including best practices, free training on various 508-related subjects, such as micropurchase training, frequently asked questions, and other information that agencies will find useful. The Access Board, which developed the accessibility standards, provides further information and training on [www.access-board.gov](http://www.access-board.gov). Making the federal government accessible will require continued coordination among agencies, the Chief Acquisition Officers Council, the Chief

Information Officers Council, and our industry partners.

We look forward to working with you to meet the needs of all citizens. Please contact Terry Weaver, Director, Information Technology Accessibility and Workforce Division at GSA on (202) 501-4906 for more information regarding the Wizard and other section 508 resources. Please contact Lesley Field at the Office of Federal Procurement Policy on (202) 395-4761 for other information on 508. As always you may call the Delpro or PC Help line with questions specific to NIH purchases.

### LEVEL I PACKAGES FOR OCTOBER

The next Level I Certification Board will meet either the third or fourth week in October 2005. Please submit your Level I Packages early to your IC Level 1 Coordinator so that your IC Coordinator can send your package to Annette Romanesk, 6011 Executive Blvd., Room 547H by October 10th, 2005.

#### **List of IC Coordinators**

Linda Adams	NHGR
Loretta Barnes	NHLBI
Charles E. Baron	OD
Ginger Betson	NIDCR
Antoinette Bridges	NIEHS
Laurie Bullman	OD/ORS
Marilyn Cuzzolina	CSR
Dave Daubert	NIDA
Ana Ferreira	NINR
Denise Fioravante	NIA
Debbie Freaner	NINDS
Valery Gheen	NCCAM
Gail Grosman	NIGMS
Kathleen Hargett	NCI
Sandra Hemp	NIAMS
Marsha Hennings	NIAMS
Crystal James	NIGMS

Pamela Klein	NIMH
Chris Leyes	NINDS
Ruth Maraio	NICHD
Anita Miles	CIT
Rosie Owens	NIAID
Pat Parks	NIAAA
Milke Philippi	NHGR
Tony Pirrone	NIA
Melissa Richardson	OD/ORF
Karen Riggs	NLM
Ruby Robinson	NEI
Leah Ingram Stroud	NCRR
Sonya Thomas	FIC
Stephanie Trice	OPC
Debbie Whittington	NIDDK

## NIH BUSINESS SYSTEM (NBS) TOWN HALL MEETING

### EVENT:

There will be an NIH BUSINESS SYSTEM (NBS) TOWN HALL MEETING on Monday, October 31, 2005 from 8:00 AM until 12:00 Noon in the Natcher Auditorium. This is a multimedia communication event including presentations and system demonstrations for administrative and scientific staff to increase awareness and understanding of the NBS. Come learn how the NBS supports scientific research through business solutions. Come learn what the NBS is all about!

### AGENDA:

The agenda begins with a Plenary Session and a discussion of scientific and administrative management perspectives including speakers from NIH management, NBS management and Business Owners.

The agenda concludes with a series of concurrent sessions of system demonstrations

in the following functional areas: Acquisition/Supply (Procurement, Prism & Oracle Systems); Property (Sunflower System) and Finance (Oracle System).

### REGISTRATION:

Information about registration will be provided via email closer to the date of the event. Sign language interpreters will be provided. Individuals with disabilities who need reasonable accommodation to participate in this conference should contact Ms. Leslie Linden in the NBS Project Office on (301) 451-0004 or via email: [lindenl@mail.nih.gov](mailto:lindenl@mail.nih.gov).

### **Acquisition NBS Update**

From Jim Marx and Dorann Penney

There is never enough time. We all tell each other that, but somehow we seem to make it happen.

The Acquisition Team from the NBS wants to thank all of the Acceptance Team members who did make it happen by participating in the recent NBS Demos and "Hands-On" sessions. The Acceptance Team dedicated time and energy to gain the NBS experience needed to perform future testing functions. We appreciate all the valuable questions and suggestions we received, and we look forward to working with the teams more in future testing.

We are sorry we cannot have each one of you on these teams, however you will receive in-depth training prior to the actual deployment of the acquisition system. To give you a sneak preview, our Change Management Team has put together a wonderful tool utilizing Macromedia's Captivate software package. Please follow the link below to the Communications and Training Portal and explore the different areas in Purchasing with the new NBS system:

<https://my.nih.gov/portal/server.pt?space=CommunityPage&control=SetCommunity&CommunityID=653>

## **PURCHASE CARD NEWS**

### **Convenience Checks and the IRS 1099 form**

The Convenience check is a form of payment used in place of the US Bank VISA purchase card for two types of transactions solely. One time payment for Professional Service Orders (PSO) when the professional is not yet registered for Electronic Funds Transfer (EFT) and patient related services such blood draws, bone marrow aspiration or any procedure relating to health care patients. Convenience checks will only be issued to offices which participate in the aforementioned categories. Usage of the convenience check for purposes other than those previously mentioned will result in VISA card suspension and further disciplinary action.

The Internal Revenue Service (IRS) requires the reporting of payments of \$600.00 or more in a calendar year received by a person that are not an employee of that business. The reporting mechanism is known as Form 1099-MISC. The reporting of 1099 information is vital and mandatory. The National Institutes of Health has used another document to capture the same information as the 1099 form. This document is known throughout NIH as the In-Lieu Of form.

The In Lieu Of form is germane to NIH and is not readily recognized by all Health and Human Service agencies however the IRS accepts this or any form that reports the required information. It is the responsibility of the issuer of a payment exceeding \$600.00 for professional services or patient related care services such as blood draws to report this information to The Office of Financial Management (OFM). In the past there was some confusion on exactly how this information was to be reported to OFM as they are responsible for reporting this information to the IRS.

The current solution to the reporting problem is found in utilizing an electronic log. The ADB, Data Warehouse or Intramall logs will automatically report the recipient's 1099 information. Cardholders with convenience checks are strongly encouraged to use one of

the aforementioned electronic logs. Cardholders with convenience checks that use a paper log must track and submit all of the required 1099 information for the entire year to OFM. This information must then be submitted to Mr. John Slovikosky of OFM no later than close of business December 30, 2005. Cardholders utilizing an electronic log who may experience problems may contact the NIH help desk (301) 496-4537. Additional clarification may be submitted to Creditcard@od.nih.gov.

### **PC FAQ's**

The Frequently Asked Question section is featured on the OLAO website.

#### **A cardholder has accepted a position in another institute. Will that cardholder be able to use that same purchase card?**

No. Cardholders leaving their institute where their current card was issued must surrender that card to their Card Approving Official. The cardholder would then reapply for a new purchase card with the new institute.

#### **What if the cardholder relocates to another office in that same institute?**

The card holder would then retain that same account but would probably have a new Card Approving Official.

#### **What happens when a card holder leaves NIH ?**

When the cardholder leaves NIH they must surrender the card to their Card Approving Official(CAO). The CAO destroy's the card. The CAO notifies the Purchase Card office. The card holder transfers all outstanding orders and accompanying documentation to their CAO for future reconciliation by that CAO. When CAOs have prior knowledge of a cardholders intent to leave the cardholder should cease using the purchase card.

**I'm a Card Approving Official and one of my cardholders suddenly resigned their position. What happens to the outstanding orders?**

The Card Approving Official for that cardholder is responsible for reconciliation of those outstanding orders.

**The vendor in which I need to purchase my product from will only accept my order thru Pay Pal or some other third party billing group. I understand that using Third Party billing groups are unauthorized but I need this product for my work and this is the only source available. What may I do?**

You may contact John Best [BestJ@od.nih.gov](mailto:BestJ@od.nih.gov) via email requesting a waiver for your particular situation. The request will be forwarded to the Agency Program Coordinator (APC) for evaluation. Waivers are not automatic and all efforts should be exhausted before submitting a request to the APC .

**Where may I find the Tax Exempt number for NIH ?**

The tax exempt number for the National Institutes of Health as recognized by the state of Maryland is 52-0858115. Tax exempt letters for each state may be found at [Http://www.gsa.gov](http://www.gsa.gov). The letters primarily address purchases made with the government charge card. Merchants are instructed to determine tax exemption by the sixth digit on the visa card. Depending on the what the sixth digit on the visa card is "0", "6", "7" for example, the card is billed

directly to the federal government which precludes sales tax.

**A merchant has applied a surcharge to my account for using the government Visa card. What should I do ?**

A merchant may not add any surcharge to transactions under any circumstance. Cardholder's should closely monitor their accounts to ensure no extra fees were charged for using their government visa card. Discounts for using the government visa are allowed. Cardholders should immediately report any surcharges or fees for using the government visa card to US Bank. The customer service number for US Bank is on the back of each government visa card.

**Will I receive credit for purchase card training courses taken under Health and Human Services?**

No. Courses taken outside of the NIH training center will not be given credit toward obtaining a government visa card or Card Approving Official designation. NIH purchase card training must be taken at NIH under course number 2636 "Purchase Card Training. There are no exceptions to this rule.

**Where can I find a purchase card dispute form?**

<http://forms.cit.nih.gov/FM.html>

Go to Procurement & NIH Services. Look for IMDISPUT.FP3 under IMPAC forms.

## **REMINDERS!!!!!!!!!!**

### **PC Online Training**

Purchase Card holders are required take the Online Purchase Card Refresher Course every two years. Email notifications are sent out to cardholders reminding them to take the training. The email is designed with a link to the training site which only the cardholder whom received the email notification may access. Cardholders whom have not taken this mandatory training still have an opportunity to do so.

### **Green Purchasing Deadline**

The required Green Purchasing training deadline is December 31st. All 1102's 1105's purchase card holders and approving officials must complete this training by the end of the year. Staff that have not documented their completion of this training will have their warrant, certification, and purchasing authority revoked. The training is available online at <http://oamp.od.nih.gov/Division/acp/GreenPurchasing/GreenPurchasingVideoTraining.asp>

Watching this video meets the requirement for Green Purchasing training needed to retain your Purchase Card authority or to continue serving as a Card Approving Official. Training must be completed by the end of this calendar year, and refresher training is required every two years. Watching the video may be done in a small group forum also. Single or group viewing will only be credited by sending email notification from the viewers supervisor to John Best ,for purchase cardholders and Carl Henn for all other designations. Both names are listed in the global.

### **The following BPAs have recently been established:**

- #62338 – Government Scientific Source – for chemicals, media, laboratory supplies and equipment
- #62341 – Thomson Researchsoft – for reference manager software
- #62274 – Glass & Plastics Labware – for Kimble glassware
- #62638 – Leica Microsystems – for laboratory supplies and equipment
- #62314 – Matreya Inc – for biological materials
- #62286 – Unique Personnel – for temporary administrative and clerical services
- #62444 – AnilLytics Inc – for laboratory testing services
- #62483 – BioSource International – for chemicals, blood products and media
- #62420 – Peake/Delancey Printers – for printing services
- #62511 – Phenix Research Products – for laboratory supplies and equipment
- #62468 – Research Diagnostics – for chemicals and blood products
- #62732 – Shamrock Scientific – for specialty tags, bags and labels
- #61440 – Total MRO – for medical supplies
- #61452 – Better Engineering Mfg – for cleaning systems
- #61464 – Lucigen Corporation – for biological materials
- #61488 – Lanier Worldwide – for IT hardware, scanners, printers
- #61476 – RCW Communication Design – for graphic arts services

**The following BPAs have recently been discontinued:**

- #52487 – Bellco Glass Inc
- #60263 – Enterprise Press
- #44012 – Government Scientific Source
- #46520 – ISI Researchsoft Associates Inc
- #46256 – Jouan Inc
- #45707 – Kimble Glass
- #47200 – Leica Inc
- #54411 – Matreya Inc
- #60290 – Medstaff Inc
- #46923 – Thermo Forma
- #46480 – Unique Personnel
- #52960 – Vashaw Scientific Inc
- #56016 – Adaptive Science Tools
- #41230 – AniLytics Inc
- #44260 – BioSource International
- #47966 – M&W Distribution Co
- #56055 – Peake Printers
- #45328 – Phenix Research Products
- #60406 – Printec Solutions
- #53925 – Q-Biogene
- #54917 – Red River Computer Co
- #45367 – Research Diagnostics
- #45382 – Shamrock Scientific Specialty
- #61491 – Motir Services Inc

**The following BPAs have recently been reestablished:**

- #56276 – Image Systems – for microscopes, bulbs and accessories
- #60681 – Infotech Associates – for IT hardware and software
- #52633 – New Brunswick Scientific – for glassware and laboratory equipment

## AVAILABLE TRAINING AND SEMINARS

Training Dates for FY06 are currently unavailable until October 2005. If you would like to be informed when sessions are identified you may provide your name under the specific class, under courses at <http://learningsource.od.nih.gov>.

**2635**

### **Purchase Card Processing System**

The Purchase Card Log can be generated electronically through the ADB. This half-day course introduces electronic Purchase Logs and the reconciliation process with hands-on exercises in the ADB. Students will create and reconcile an electronic Purchase Log in the ADB.

This training is for current NIH Purchase Card holders who wish to create and reconcile electronic purchase logs using the ADB.

Course Date	Time	Location	Cost	Cancellation Deadline

**2607**

### **Simplified Acquisitions Refresher for AOs (2 classes each day)**

This class will focus on changes and updates to Simplified Acquisition procedures, purchasing mechanisms, the ordering process, and the role and responsibilities of the Approving Official. The Delegated Acquisition (DELPRO) Reference Guide will be used. The audience is Administrative Officers/Approving Officials who have successfully completed the mandatory 4 day Delegated Acquisition Training course more than 2 years ago and feel they could benefit from an update course specifically designed to emphasize Approving Official's responsibilities.

Course Date	Time	Location	Cost	Cancellation Deadline



**Training Dates are currently unavailable until October 2005.**

**2636**

**Mandatory Purchase Card Training**

This course introduces the NIH Purchase Card, Purchase Logs and reconciliation process. Students will learn cardholder and card approving official responsibilities, uses and limitations of the purchase card, ordering procedures, implementation and maintenance of Purchase Logs, and the reconciliation process. As part of the reconciliation process, the proper use of the ADB Purchase Card will be explained. The class consists of lecture and hands-on exercises with the ADB Purchase Log and reconciliation process.

This course is mandatory for all NIH employees who wish to become Purchase Card Approving Officials or Cardholders. It is also recommended as refresher training for current cardholders or card approving officials.

For more information, or to register, please contact the Human Resource Development Division on 496-6211 or visit the website: <http://learningsource.od.nih.gov/>

Course Date	Time	Location	Cost	Cancellation Deadline

**Mandatory DELPRO Procurement Training**

The Delegated Acquisition Training Program and advanced acquisition seminars listed below are mandatory for Purchasing Agents, Approving Officials, Ordering Officials, and Procurement Officials with DELPRO authority. Failure to complete these seminars may result in loss of authority for DELPRO purchasing. The following courses will be available for enrollment in FY2005.

**2609**

**Federal Supply Schedules**

Key Topics:

- Learning the GSA’s role in the Federal Supply Schedule program
- Identifying the differences between single-award and multiple-award schedules
- Identifying differences between multiple-award and government-wide agency contracts (GWAC’s)
- Obtaining, using, and ordering from Federal Supply Schedules
- Determining best values on Federal Supply Schedule orders

Course Date	Time	Location	Cost	Cancellation Deadline

**No classes scheduled**

## 2610

### Consolidated Purchasing Through Contracts

#### Key Topics:

- Identifying, defining, and comparing consolidated purchasing mechanisms
- Learning when and how to use the NIH Indefinite Delivery Contract Guide
- Identifying the benefits of the National Institutes of Health Information Technology Acquisition Assessment Center (NITAAC)
- Learning the function and importance of the statement of work
- Developing and reviewing the statement of work

Course Date	Time	Location	Cost	Cancellation Deadline

**No classes scheduled**

## 2611

### Buying from Businesses on the Open Market

#### Key Topics

- Defining the terms small business, small disadvantaged business, and women-owned business
- Learning about set-aside programs and other socioeconomic considerations
- Locating small businesses
- Preparing necessary justification for open market buys
- Identifying competition requirements for simplified acquisitions
- Evaluating and documenting requirements for simplified acquisitions exceeding \$2,500

Course Date	Time	Location	Cost	Cancellation Deadline

**No classes scheduled**

**Training Dates are currently unavailable until October 2005.**

## 2617

### Price Reasonableness in Simplified Acquisitions

#### Key Topics

- Learning FAR and HHSAR regulations and NIH guidance on price reasonableness.
- Learning the requirements and methods for determining fair and reasonable price for orders less than \$2,500
- Learning the requirements and methods for determining fair and reasonable price for order in excess of \$2,500
- Identifying methods used to determine price reasonableness
- Using acceptable methods for determining price reasonableness for travel costs on professional service orders.

Course Date	Time	Location	Cost	Cancellation Deadline

## 2612

### Professional Service Orders

#### Key Topics

- Identifying and becoming familiar with the applicable regulations and NIH policy and guidance on PSOs.
- Identifying and understanding the limitations as well as the allowable services and applicable requirements in determining the appropriate PSO mechanism (e.g. Honorarium verses Fee for Service).
- Understanding and evaluating the required three line item format.
- Understanding and developing appropriate statements of work (SOW).
- Understanding the documentation requirements for PSOs above and below the \$2,500 micro-purchase threshold.

Course Date	Time	Location	Cost	Cancellation Deadline

**Training Dates are currently unavailable until October 2005.**

## 2603

## Delegated Acquisition Training Program

This class includes segments on processing FSS best value determinations, on open market requirements at various thresholds, and on each of the DELPRO mechanisms. Information is presented in a clear, logical and practical format. Included are exercises and a “hands-on” segment in which students actually access the ADB.

Course Date	Time	Location	Cost	Cancellation Deadline

NOTE: Although a cancellation deadline date may have passed, you may still submit a registration form through NIHITS in case an opening occurs. For further information, please contact the Human Resource Development Division on 496-6211 or visit the website: <http://learningsource.od.nih.gov>

## ***THE OLAO ACQUISITION NEWSLETTER***

We encourage the ICs to send us any articles they may have related to acquisition so that we can include your articles in future newsletters.

The OLAO Acquisition Newsletter is published by the Acquisition Services & Review Branch, Office of Logistics and Acquisition Operations (OLAO), OA, OD. This issue and prior issues are available through the OLAO homepage: <http://www.nih.gov/od/olao/oa>

OLAO invites your comments and suggestions for future articles. Please address all correspondence to the co-editors, Annette Romanesk, [RomanesA@od.nih.gov](mailto:RomanesA@od.nih.gov), John Best, [BestJ@od.nih.gov](mailto:BestJ@od.nih.gov), Milton Nicholas, [NicholasM@od.nih.gov](mailto:NicholasM@od.nih.gov) or Courtney Carter, [CarterC@od.nih.gov](mailto:CarterC@od.nih.gov). If you have any questions or comments regarding the information, policy and/or procedures published in this issue, you may contact

Annette Romanesk at the e-mail address above. Future issues, contact the DELPRO Helpline on 496-0400 and you will be referred to the appropriate area.