Electronic Business Proposal System Help File

Prime Contractor

Table of Contents

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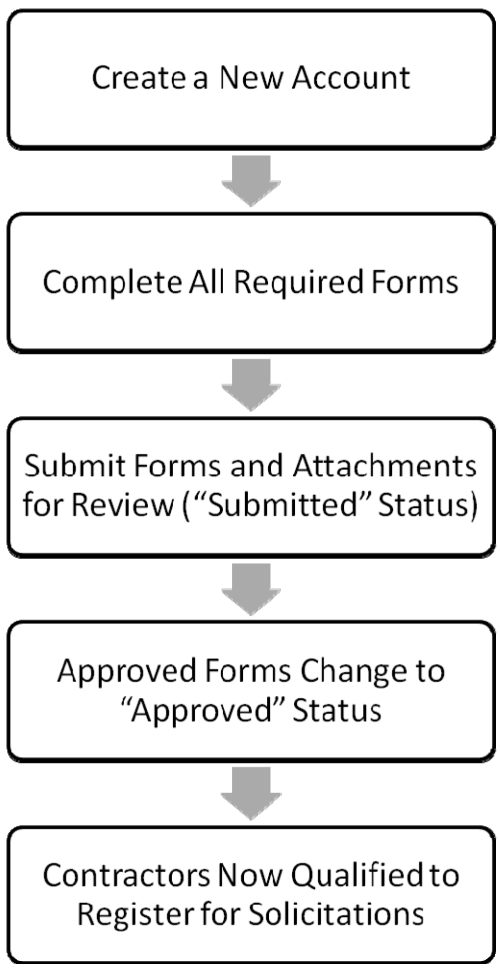
Battelle Memorial Institute operates the Pacific Northwest National Laboratory for the Department of Energy (DOE) under Contract No. DE-AC05-76RL01830. Battelle is committed to providing DOE the best value possible in all of its contract awards, soliciting best-in-class expertise in a competitive market from reliable and responsible contractors and architects, who demonstrate the skill, experience, and qualifications necessary to safely and effectively perform the intended work. To accomplish this, Battelle intends to merge the integrity and character of traditional face-to-face business relationships with the speed and efficiency of today's information technology using the Electronic Business Proposal system (EBS).

Below is a brief overview of the EBS process for Prime Contractors.



Creating a New Account

In order to submit your qualifications, you need to create an account.

Steps

1. Click on the Login link (found on the left side navigation under Account Options).
2. Click on Create a New Account (found under "Not yet registered?"). See Figure 1.

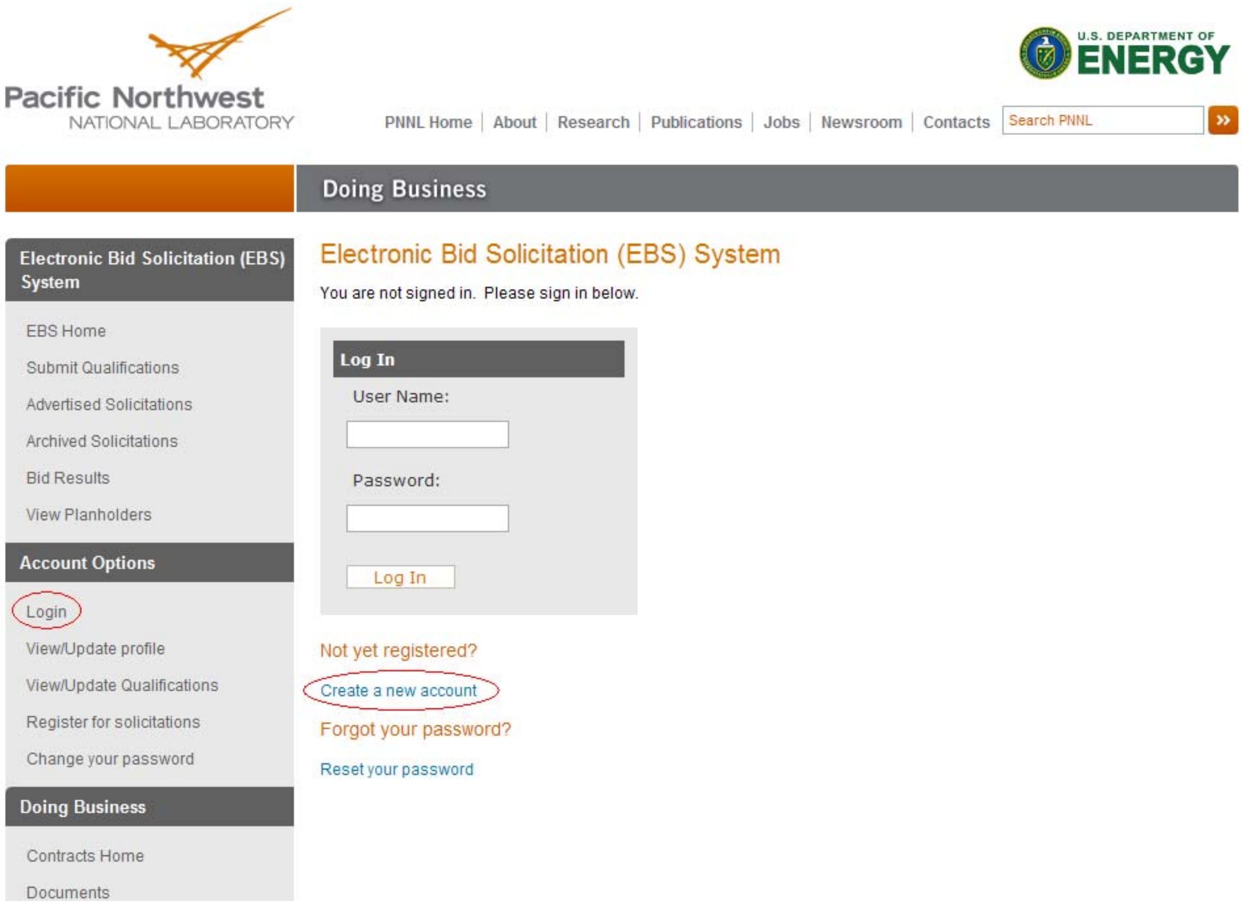


Figure 1. Login screen.

3. Complete the fields requested and click Create User. All fields are required for you to continue. See Figure 2.

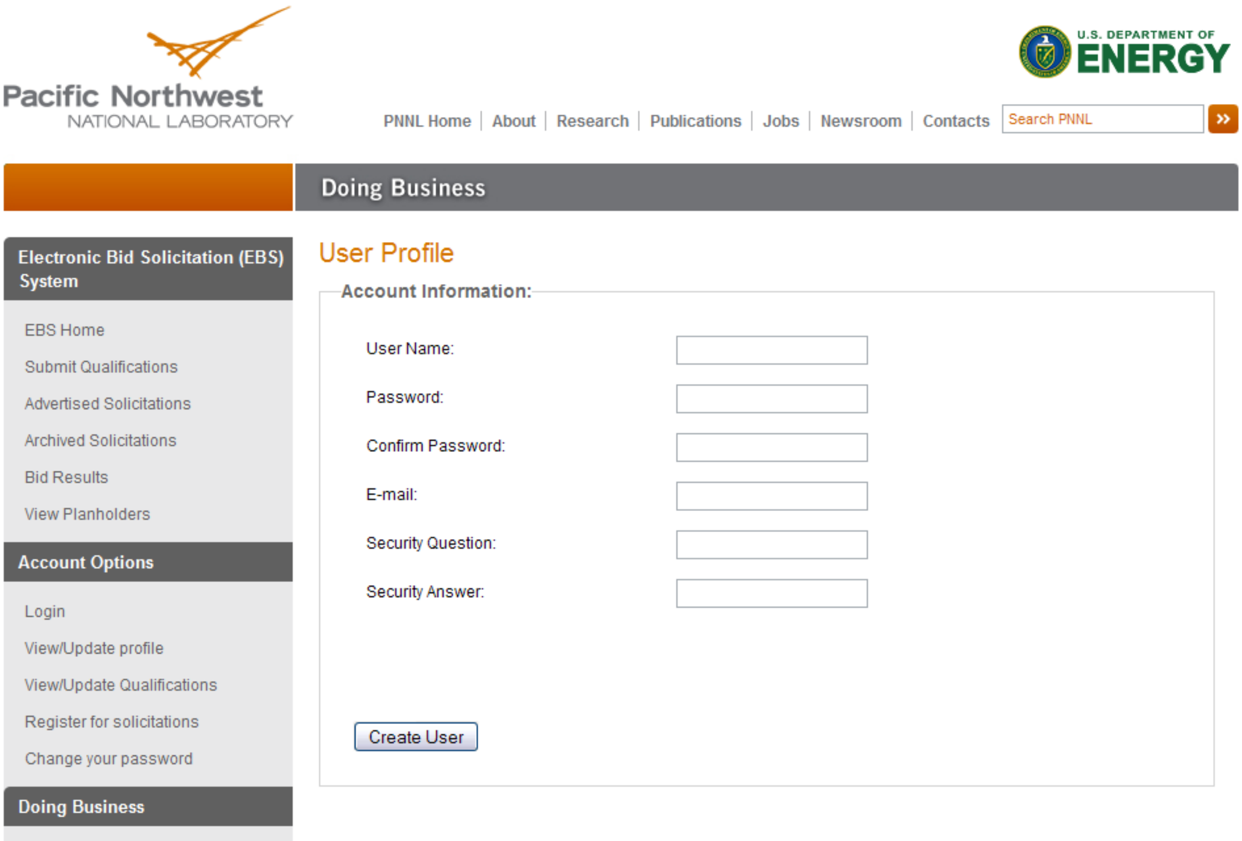
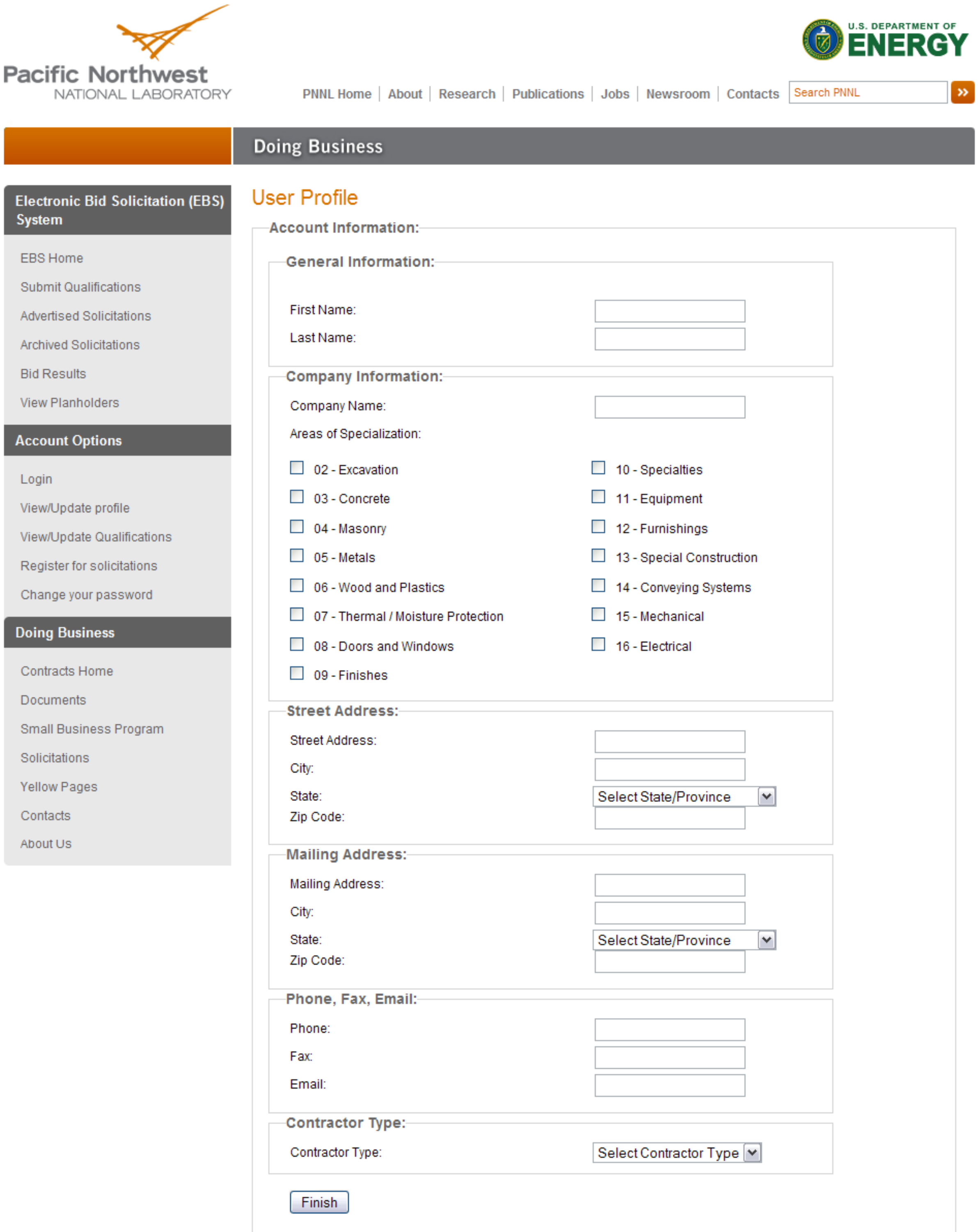


Figure 2. User Profile - screen 1. All fields are required for you to continue.

4. Complete the User Profile page. All fields are required for you to continue. See Figure 3.

NOTE: Changes to your User Profile can be made at any time by clicking on View/Update profile in the left side navigation under Account Options.

TIP: If you do not have an answer to a specific field, you can enter a placeholder and enter details later.



Pacific Northwest NATIONAL LABORATORY

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Doing Business

Electronic Bid Solicitation (EBS) System

- EBS Home
- Submit Qualifications
- Advertised Solicitations
- Archived Solicitations
- Bid Results
- View Planholders

Account Options

- Login
- View/Update profile
- View/Update Qualifications
- Register for solicitations
- Change your password

Doing Business

- Contracts Home
- Documents
- Small Business Program
- Solicitations
- Yellow Pages
- Contacts
- About Us

User Profile

Account Information:

General Information:

First Name:

Last Name:

Company Information:

Company Name:

Areas of Specialization:

- 02 - Excavation
- 03 - Concrete
- 04 - Masonry
- 05 - Metals
- 06 - Wood and Plastics
- 07 - Thermal / Moisture Protection
- 08 - Doors and Windows
- 09 - Finishes
- 10 - Specialties
- 11 - Equipment
- 12 - Furnishings
- 13 - Special Construction
- 14 - Conveying Systems
- 15 - Mechanical
- 16 - Electrical

Street Address:

Street Address:

City:

State: Select State/Province

Zip Code:

Mailing Address:

Mailing Address:

City:

State: Select State/Province

Zip Code:

Phone, Fax, Email:

Phone:

Fax:

Email:

Contractor Type:

Contractor Type: Select Contractor Type

Finish

Figure 3. User Profile – screen 2. All fields are required for you to continue.

Submitting Qualifications

Once an account has been created, you can start completing the forms for submitting your qualifications. You will be required to complete a total of five forms.

Part 1. General Company Profile

1. The first block, General Information, will be auto-completed with the information you entered when creating your account. See Figure 4.

Figure 4. The General Information block is completed with information gathered when you created your account.

2. The second block, Licensing, should be completed with the licenses you hold that are required for you to perform your services. After completing the license information, click Add License. See Figure 5.

NOTE: If you want to list only one license, you *must* click Add License to add it to the table, or your license information will not be saved.

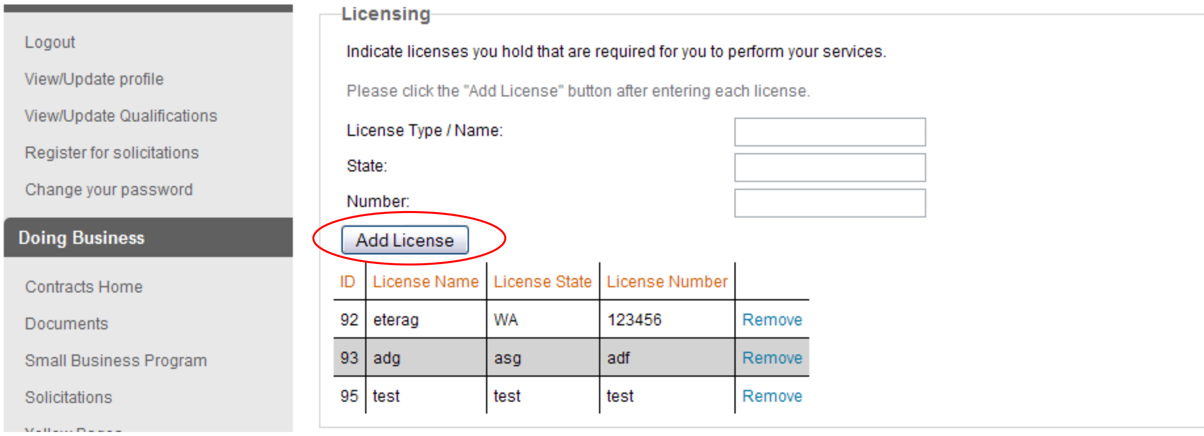


Figure 5. Click Add License to record information about each license entered. Once the license is listed in the table, the information has been captured in the form.

3. Click either Small or Large to indicate your business size.
4. Enter your Industry Classification Codes and Numbers (NAICS, SIC, CAGE, DUNS Number, and DUNS Rating). If you do not know a number, enter a placeholder. See Figure 6.

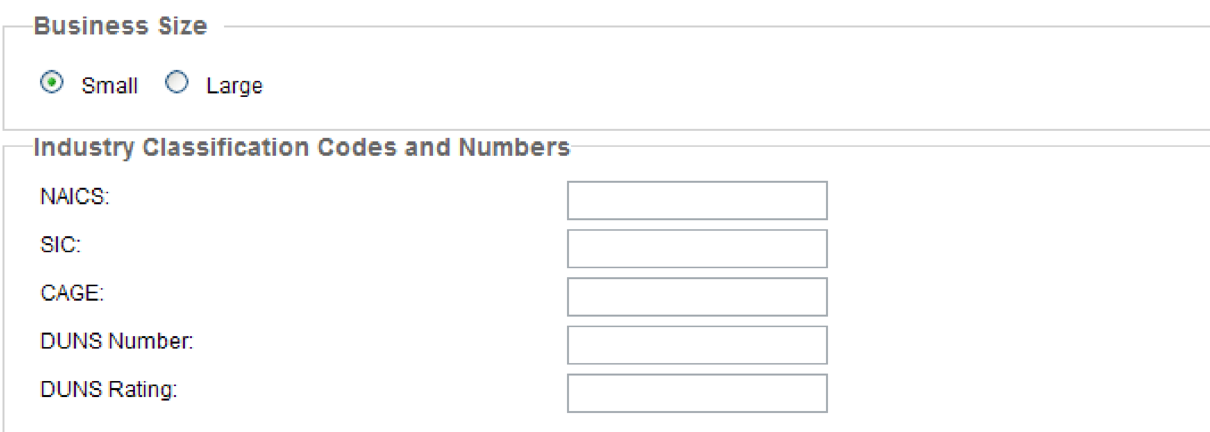


Figure 6. Placeholders can be entered for each of the Industry Classification Codes and Numbers.

5. Enter the requested information for your business operations. *Where dollar values are requested, do not enter a $ sign or comma.* See Figure 7.

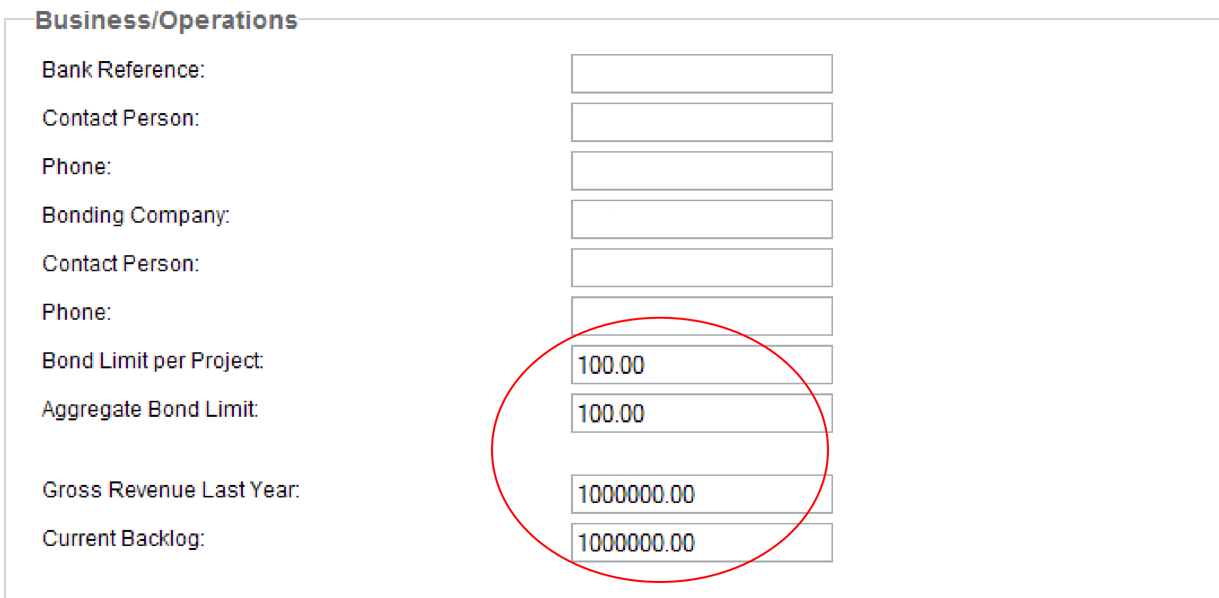


Figure 7. Do not enter a $ sign or a comma when asked to enter monetary information.

6. Answer Yes or No to the next four questions. If you answer Yes to any of the first three questions, a free-text block will appear for you to enter an explanation. See Figure 8.

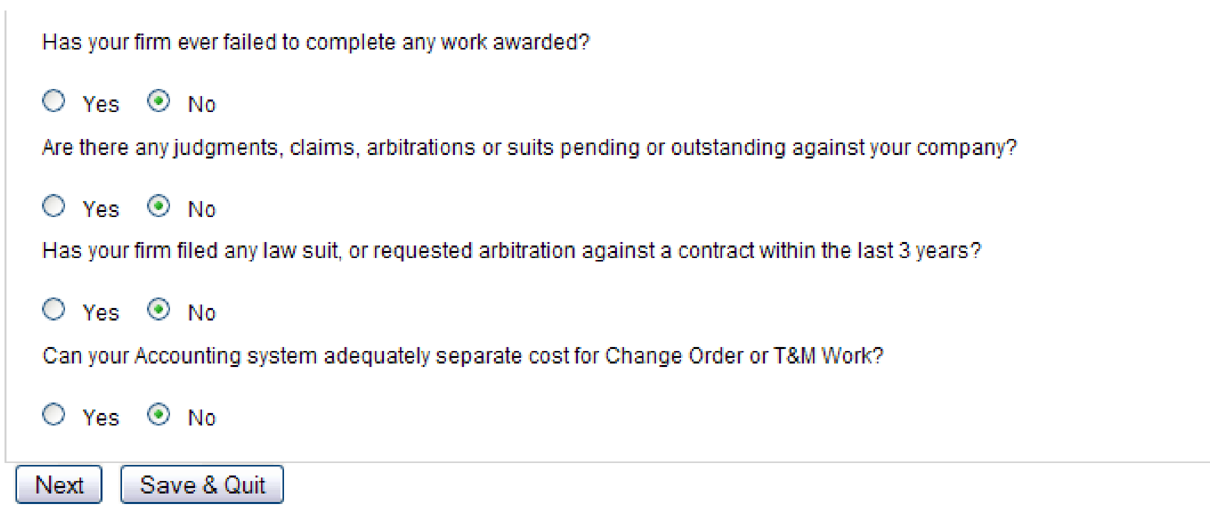


Figure 8. Answering Yes to any of the first three questions will cause a prompt for you to enter a narrative explanation.

7. Once all questions have been answered, click Next to move to the next page. You may also save the form and return to the process later. To do this, click Save & Quit.

NOTE: Each question must be answered in order to save the form. If you missed a question, when you click Save & Quit, an error will be displayed, and a red asterisk will appear next to the question that was unanswered.

NOTE: Leaving in the middle of completing a form will not save data.

TIP: To make changes to the forms, click on Submit Qualifications in the left side navigation. Placeholders may be used; forms are not reviewed until the forms are completed and submitted.

Part 2. ES&H Responsibility

1. Enter your company's Experience Modification Rate or Workman's Compensation Risk Rating, then the average number of employees and the total number of hours worked for the three most recent completed years, including year-to-date numbers for the current year. See Figure 9.

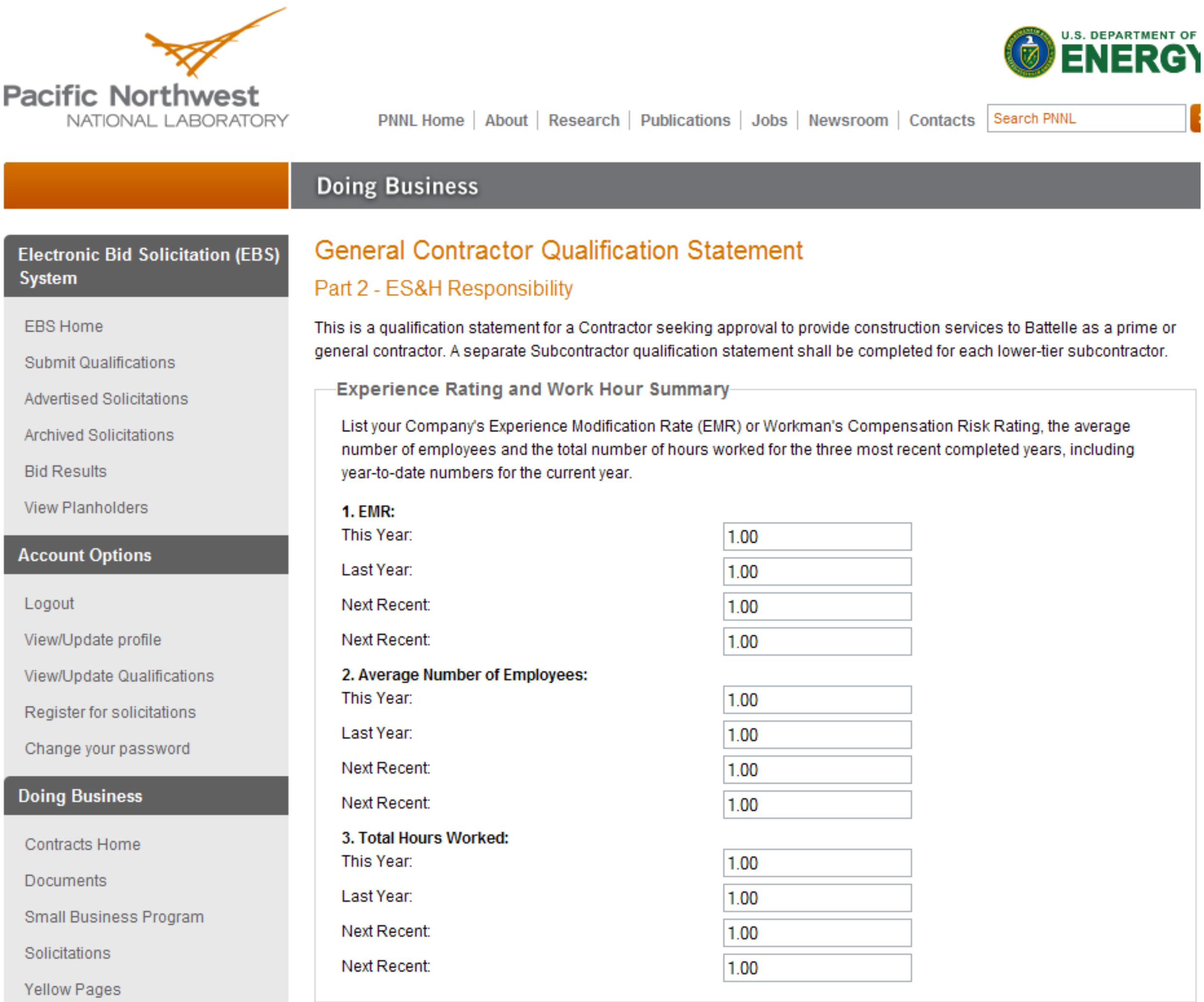
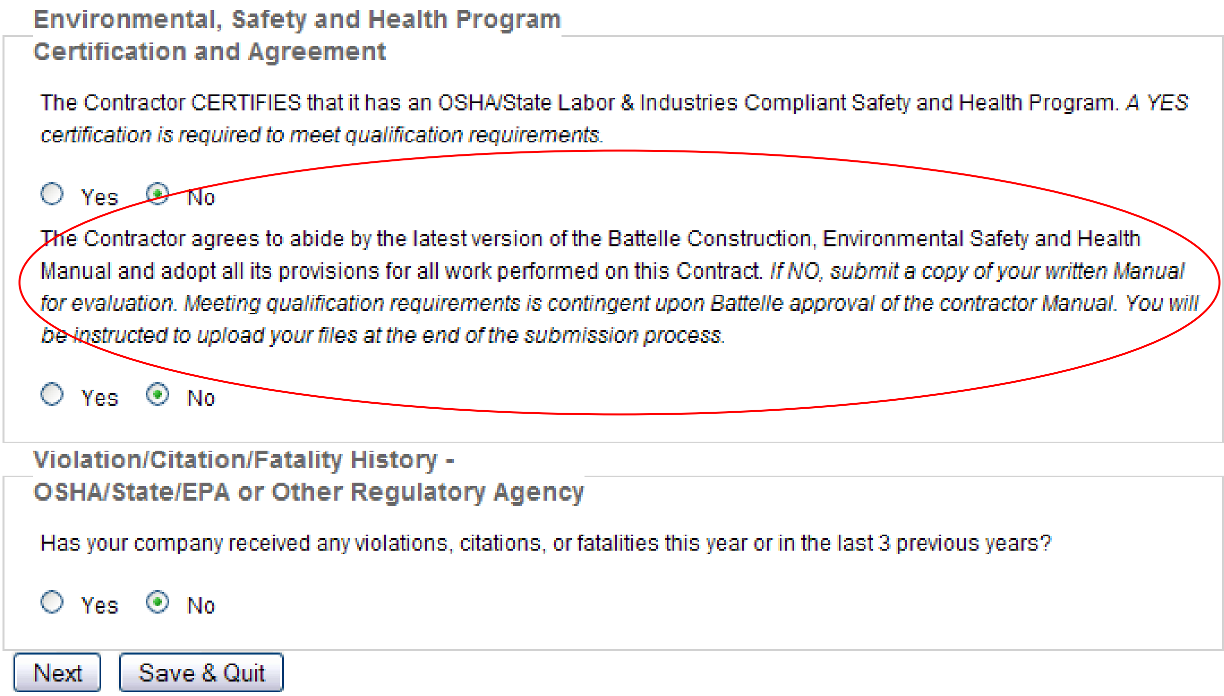


Figure 9. Experience Rating and Work Hour Summary.

2. Answer Yes or No to the next two questions. Answering No to the second question in the Environmental, Safety and Health Program Certification and Agreement block will *not*

immediately require you to upload documentation. You will be prompted to upload this information once all five forms are completed and submitted. See Figure 10.

3. Answer Yes or No indicate any violations, citations, or fatality history. Answering Yes will cause a free-text box to appear for you to enter more information. This information is required. Your form will not be accepted without the information.


Environmental, Safety and Health Program Certification and Agreement

The Contractor CERTIFIES that it has an OSHA/State Labor & Industries Compliant Safety and Health Program. *A YES certification is required to meet qualification requirements.*

Yes No

The Contractor agrees to abide by the latest version of the Battelle Construction, Environmental Safety and Health Manual and adopt all its provisions for all work performed on this Contract. *If NO, submit a copy of your written Manual for evaluation. Meeting qualification requirements is contingent upon Battelle approval of the contractor Manual. You will be instructed to upload your files at the end of the submission process.*

Yes No

Violation/Citation/Fatality History - OSHA/State/EPA or Other Regulatory Agency

Has your company received any violations, citations, or fatalities this year or in the last 3 previous years?

Yes No

Next | Save & Quit

Figure 10. Answering No to the second question shown will not immediately require you to upload documentation. This will be required once you submit all five completed forms.

4. Once all questions have been answered, click Next to move to the next page. You may also save the form and return to the process later. To do this, click Save & Quit.

NOTE: Each question must be answered in order to save the form. If you missed a question, when you click Save & Quit, an error will be displayed, and a red asterisk will appear next to the question that was unanswered.

NOTE: Leaving in the middle of completing a form will not save data.

TIP: To make changes to the forms, click on Submit Qualifications in the left side navigation. Placeholders may be used; forms are not reviewed until the forms are completed and submitted.

Part 3. Past Performance

1. To add projects, enter the information, then click Add Project. See Figure 11.

NOTE: If you want to list only one project, you *must* click Add Project to add it to the table, or your project information will not be saved.

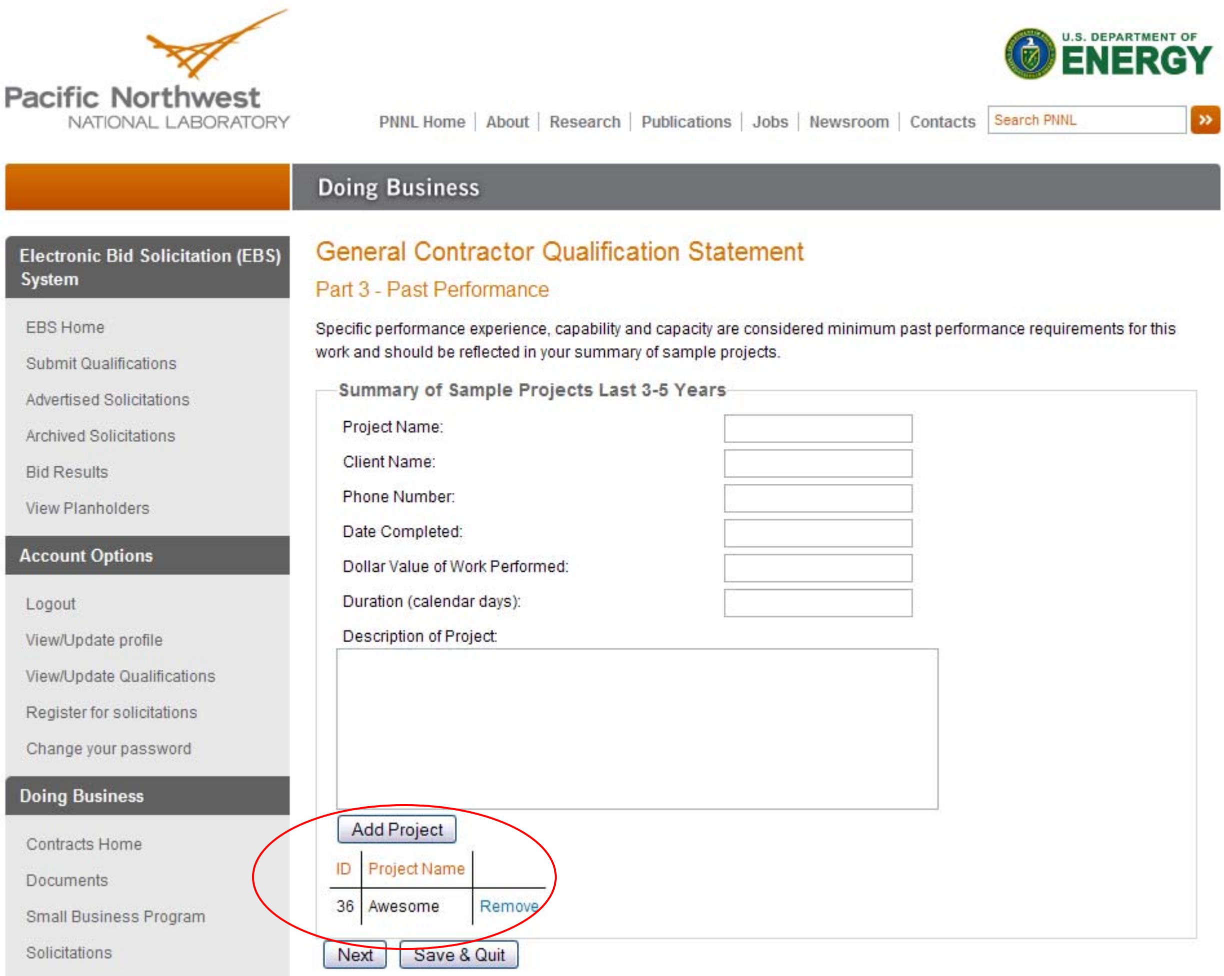


Figure 11. Click Add Project after entering information for each project. Once the project appears in the table, it has been captured in the form.

2. Once all projects have been entered, click Next to move to the next page. You may also save the form and return to the process later. To do this, click Save & Quit.

NOTE: Each question must be answered in order to save the form. If you missed a question, when you click Save & Quit, an error will be displayed, and a red asterisk will appear next to the question that was unanswered.

NOTE: Leaving in the middle of completing a form will not save data.

TIP: To make changes to the forms, click on Submit Qualifications in the left side navigation. Placeholders may be used; forms are not reviewed until the forms are completed and submitted.

Part 4. Quality Assurance

1. Answer Yes or No to each question in the Quality Assurance Program block. Answering Yes to either question will not immediately require you to upload documentation, but you will be prompted to do so once all five forms have been completed and submitted. See Figure 12.

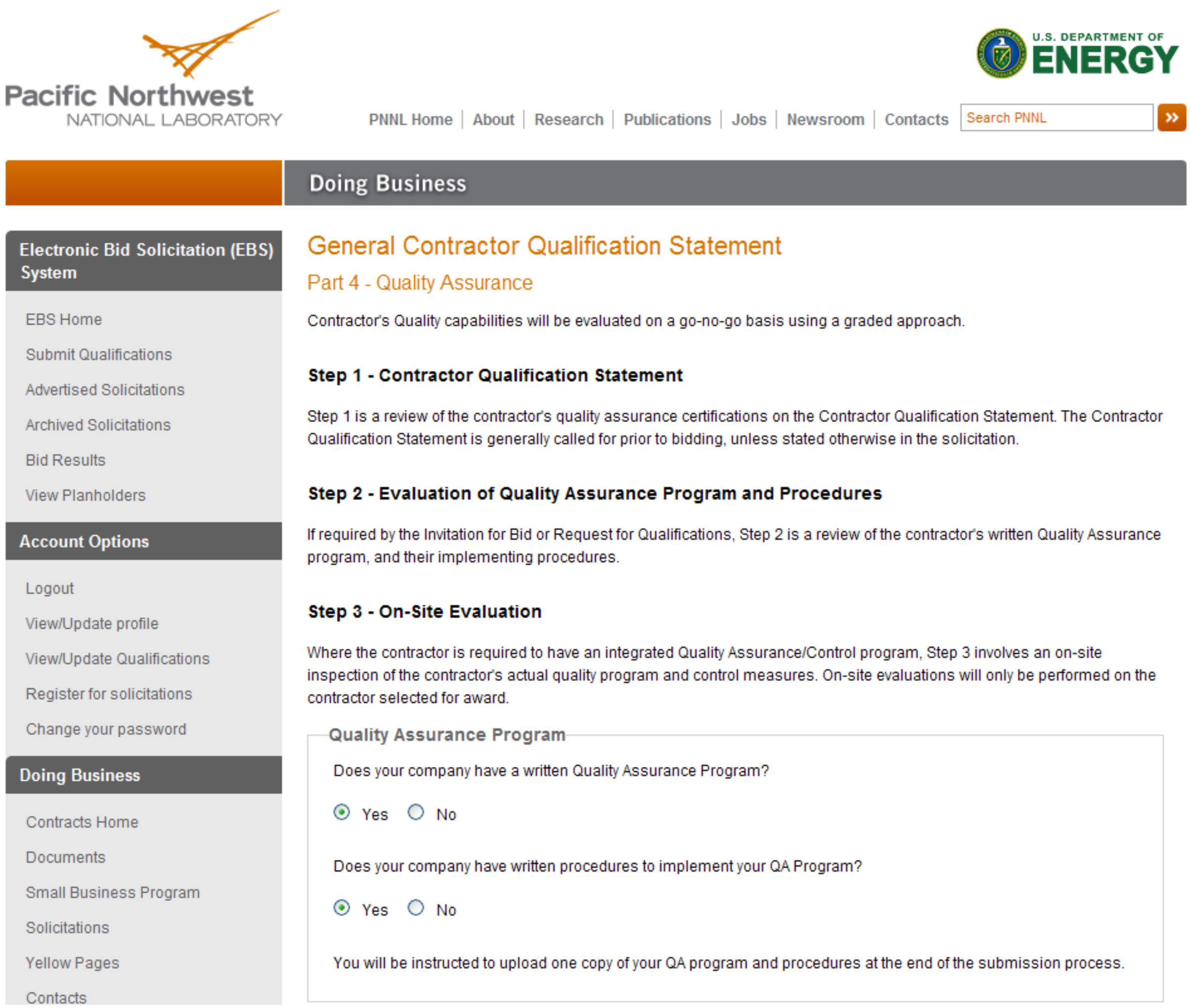
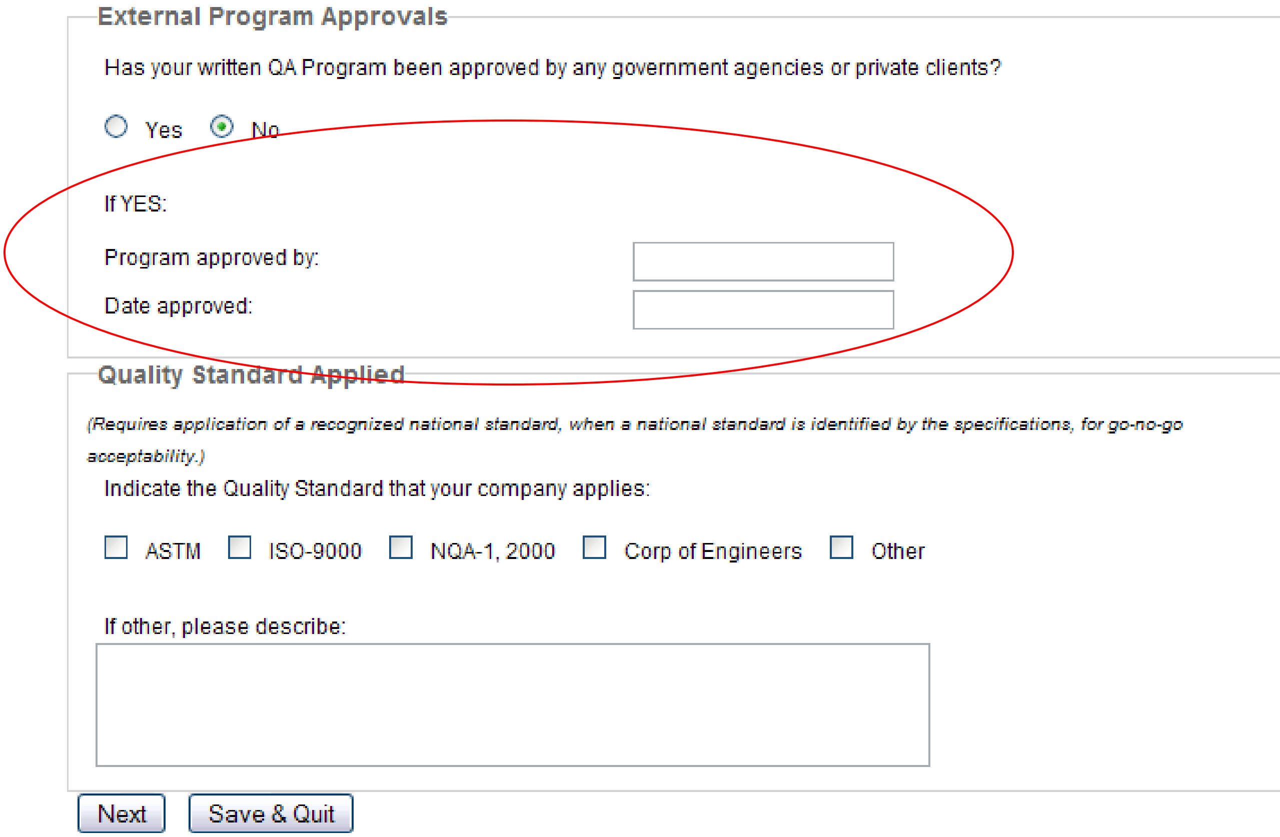


Figure 12. Answering Yes to either question in the Quality Assurance Program block will require you to upload the appropriate documentation once all forms are submitted.

2. If your written QA program has been approved by any government agencies or private clients, you will be required to enter the name of the group that approved the program and the date of approval. See Figure 13.

3. Check all the Quality Standards your company applies. If you check the box for Other, you will be required to enter the name of the standard.


External Program Approvals

Has your written QA Program been approved by any government agencies or private clients?

Yes No

If YES:

Program approved by:

Date approved:

Quality Standard Applied

(Requires application of a recognized national standard, when a national standard is identified by the specifications, for go-no-go acceptability.)

Indicate the Quality Standard that your company applies:

ASTM ISO-9000 NQA-1, 2000 Corp of Engineers Other

If other, please describe:

Next Save & Quit

Figure 13. If your QA program has been approved, enter the name of the approving group and the date of approval.

4. Once all questions have been answered, click Next to move to the next page. You may also save the form and return to the process later. To do this, click Save & Quit.

NOTE: Each question must be answered in order to save the form. If you missed a question, when you click Save & Quit, an error will be displayed, and a red asterisk will appear next to the question that was unanswered.

NOTE: Leaving in the middle of completing a form will not save data.

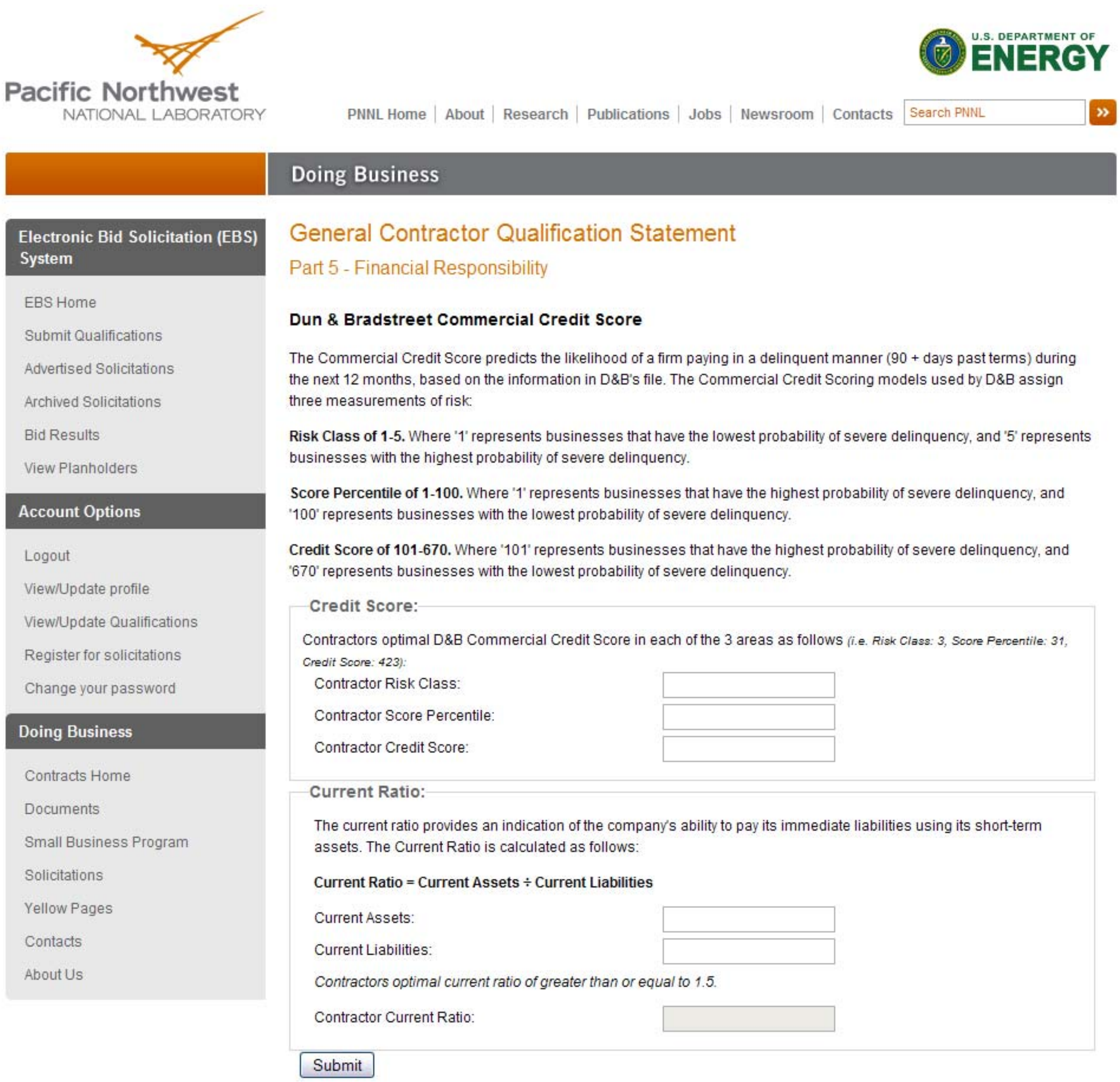
TIP: To make changes to the forms, click on Submit Qualifications in the left side navigation. Placeholders may be used; forms are not reviewed until the forms are completed and submitted.

Part 5. Financial Responsibility

1. Enter your Dun & Bradstreet Commercial Credit Score for the following three categories: Contractor Risk Class; Contractor Score Percentile; and Contractor Credit Score.
2. Enter your Current Ratio. This can be calculated using the following formula: *Current Ratio = Current Assets/Current Liabilities*.

NOTE: This is the *only* form in the package that can be left incomplete. However, please keep in mind that leaving some questions unanswered may delay the approval process.

3. Once this form is complete, you can click Submit, move to another area of the EBS, or close the window. Leaving in the middle of this form *will* save any information you have entered. See Figure 14.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Doing Business

Electronic Bid Solicitation (EBS) System

EBS Home
Submit Qualifications
Advertised Solicitations
Archived Solicitations
Bid Results
View Planholders

Account Options

Logout
View/Update profile
View/Update Qualifications
Register for solicitations
Change your password

Doing Business

Contracts Home
Documents
Small Business Program
Solicitations
Yellow Pages
Contacts
About Us

General Contractor Qualification Statement

Part 5 - Financial Responsibility

Dun & Bradstreet Commercial Credit Score

The Commercial Credit Score predicts the likelihood of a firm paying in a delinquent manner (90 + days past terms) during the next 12 months, based on the information in D&B's file. The Commercial Credit Scoring models used by D&B assign three measurements of risk:

Risk Class of 1-5. Where '1' represents businesses that have the lowest probability of severe delinquency, and '5' represents businesses with the highest probability of severe delinquency.

Score Percentile of 1-100. Where '1' represents businesses that have the highest probability of severe delinquency, and '100' represents businesses with the lowest probability of severe delinquency.

Credit Score of 101-670. Where '101' represents businesses that have the highest probability of severe delinquency, and '670' represents businesses with the lowest probability of severe delinquency.

Credit Score:

Contractors optimal D&B Commercial Credit Score in each of the 3 areas as follows *(i.e. Risk Class: 3, Score Percentile: 31, Credit Score: 423):*

Contractor Risk Class:
Contractor Score Percentile:
Contractor Credit Score:

Current Ratio:

The current ratio provides an indication of the company's ability to pay its immediate liabilities using its short-term assets. The Current Ratio is calculated as follows:

Current Ratio = Current Assets ÷ Current Liabilities

Current Assets:
Current Liabilities:

Contractors optimal current ratio of greater than or equal to 1.5.

Contractor Current Ratio:

Submit

Figure 14. Once this form is complete, you can click Submit, or get out of the process. Leaving in the middle of this page *will* save the information entered.

Uploading Files

Once you have clicked Submit from the Financial Responsibilities form, you are directed to Pacific Northwest National Laboratory's external FTP site to upload any required files. You will be reminded of the documentation you are required to upload at the top of the page. See Figure 15.

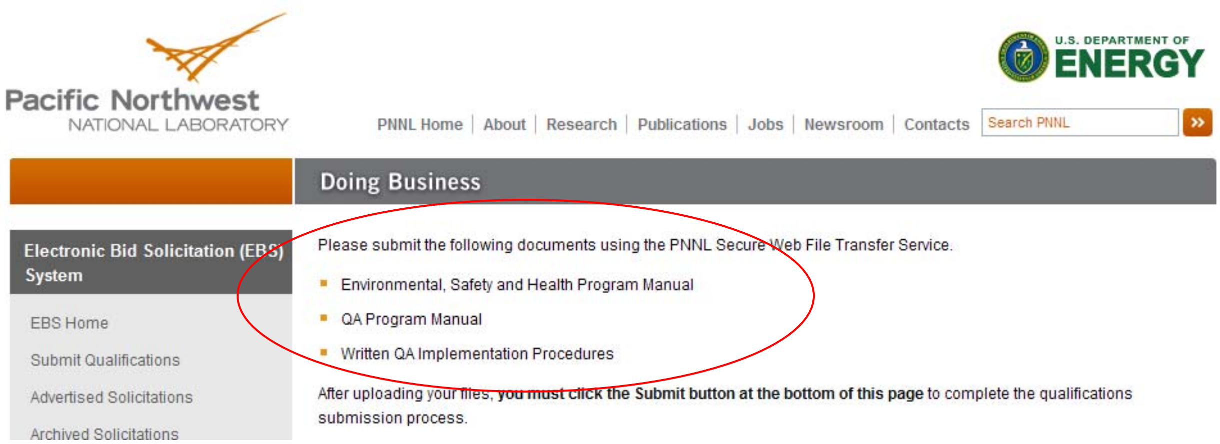

Figure 15. At the top of this page, a list of the files you are required to upload will be displayed.

1. The following fields will be pre-populated once you get to the FTP tool: To; Subject; and Message. Changes can be made to any of the fields. *Do not make any changes to the To field, as this is the address to which your forms and files should be sent.* Click the Next button in the FTP screen. See Figure 16.

NOTE: Clicking Submit instead of Next will submit your forms ***without* the necessary documentation.**

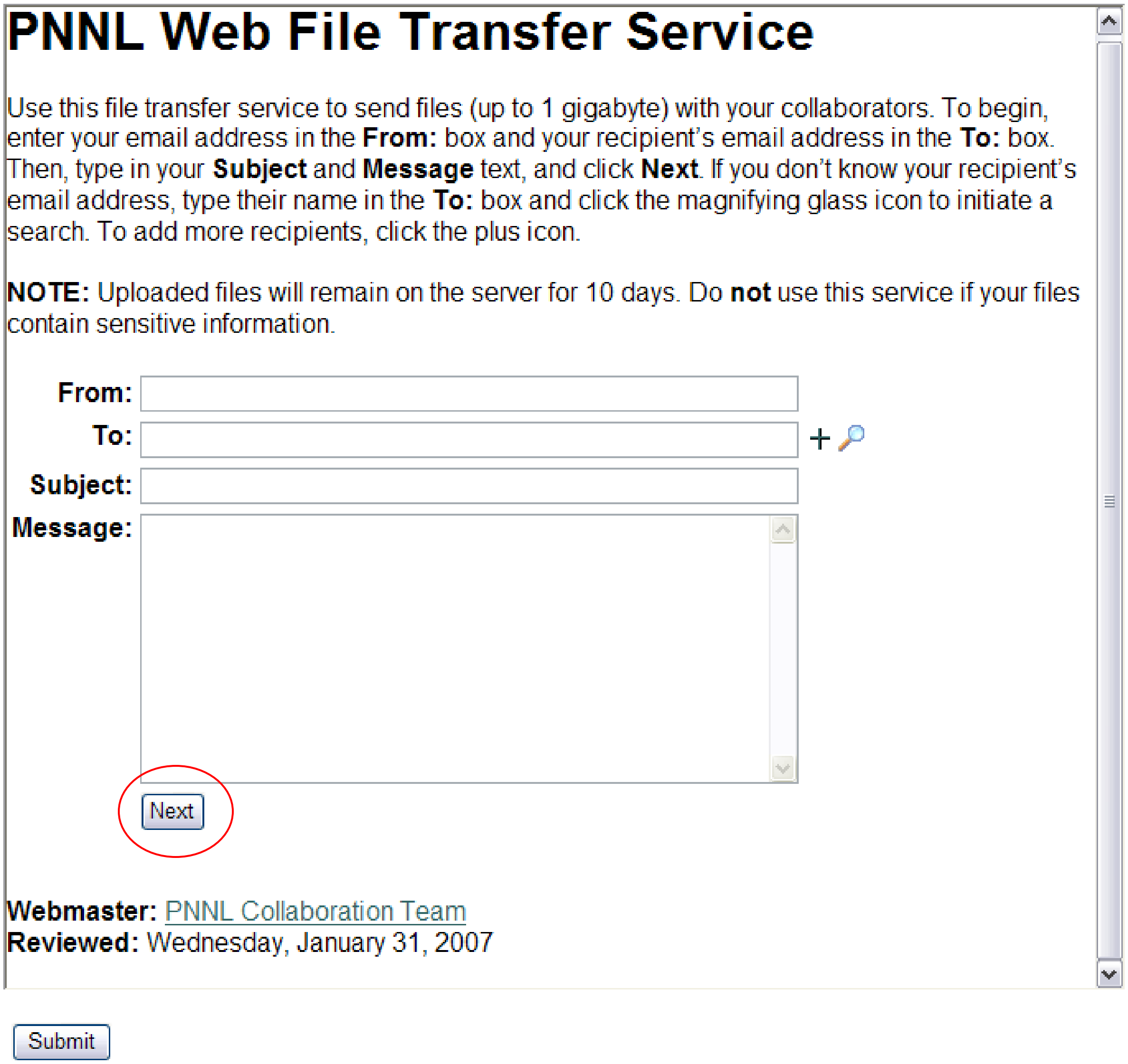

Figure 16. The To, Subject, and Message fields will be pre-populated for you. Click the Next button in the FTP screen.

2. Click on Browse to select the file you want to upload from your computer. Only one file can be selected per line shown. See Figure 17.
3. Once you have selected up to four files, click Start Upload. A window will appear showing the file transfer progress.

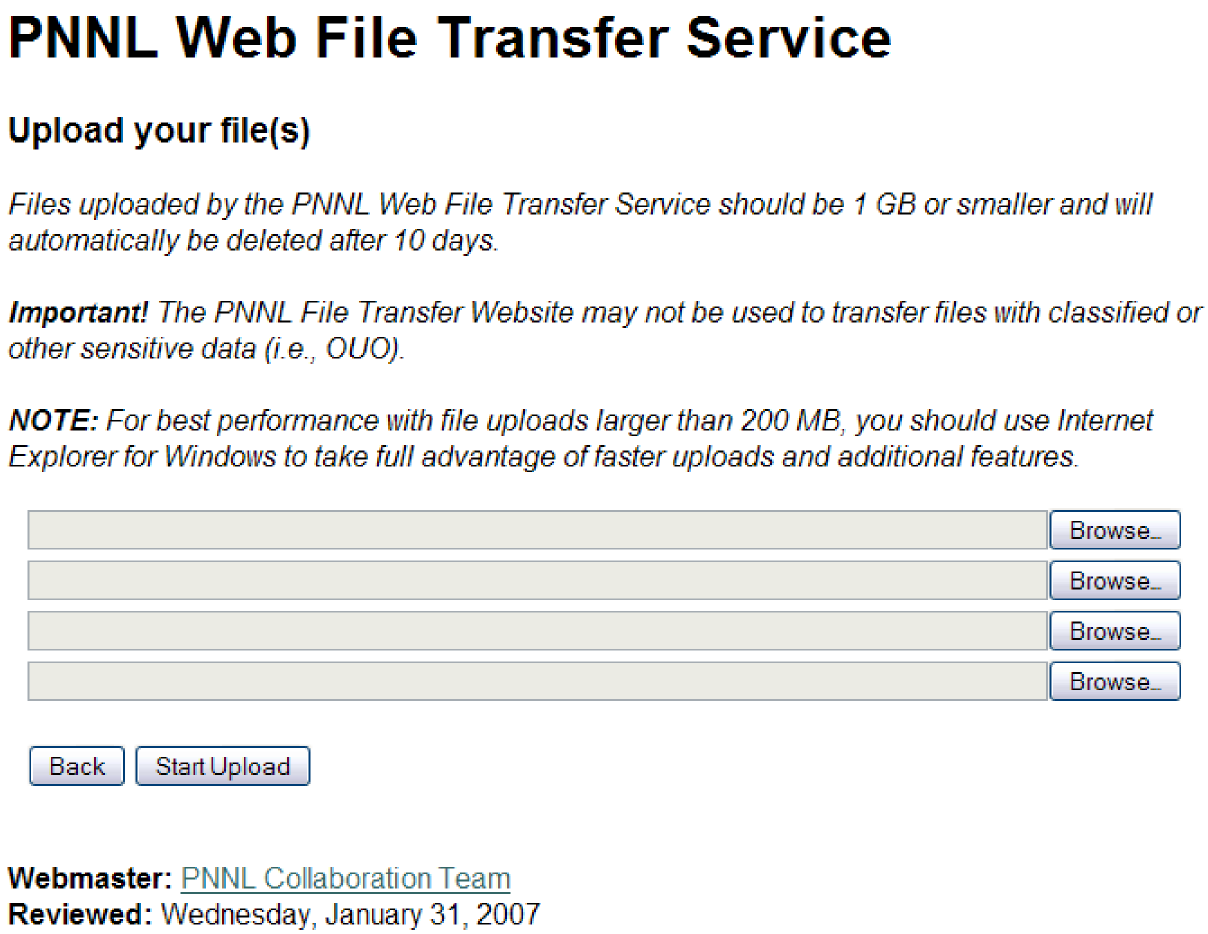

Figure 17. You can upload up to four files. The maximum capacity for uploading files is 1 gigabyte.

4. Once the file transfer is complete, you will see a Thank You note in the FTP screen. ***This is not the final Thank You for submitting your qualifications package.*** See Figure 18.
5. Click Submit (under the FTP screen) to submit the entire qualifications package.

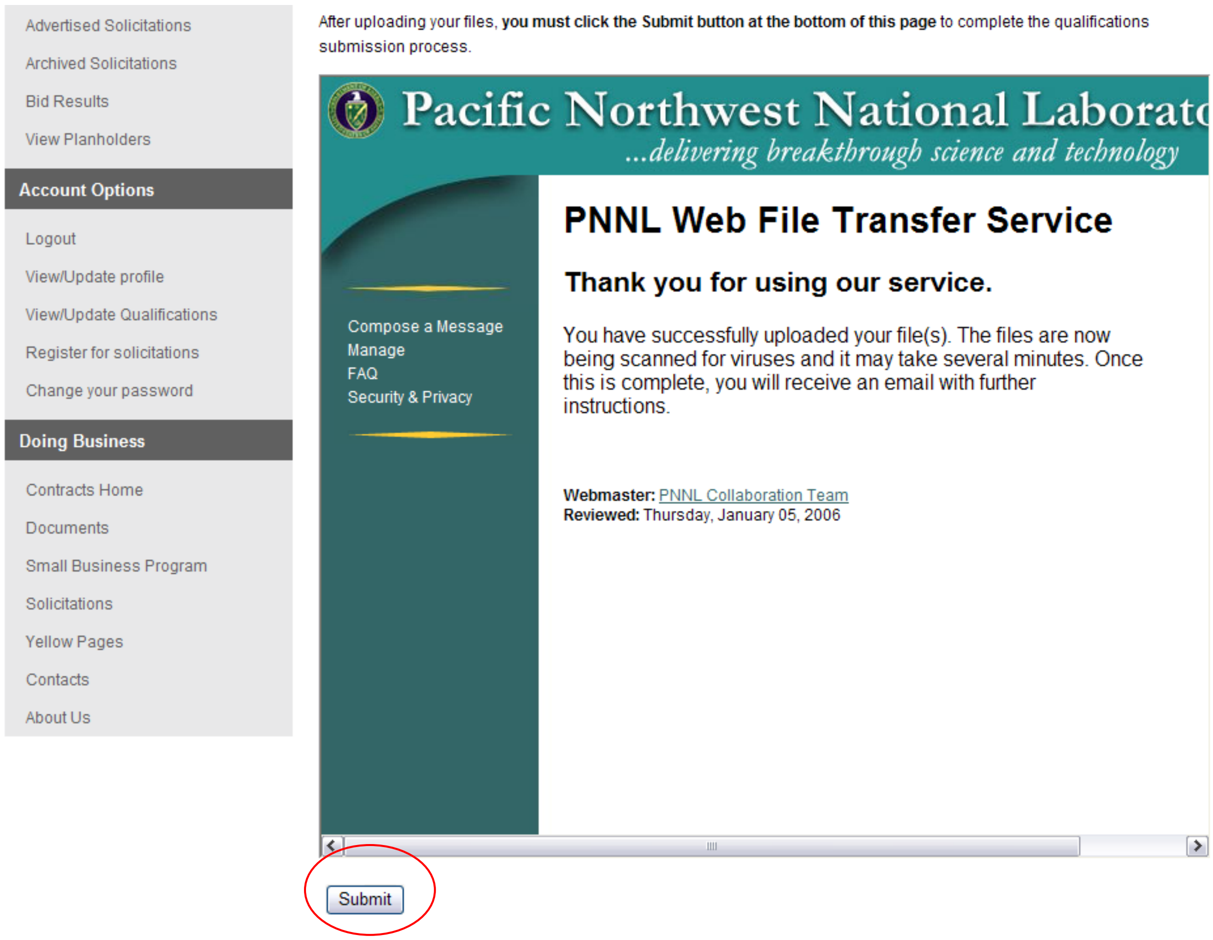

Figure 18. The FTP Thank You note is *not* the final thank you for submitting the files. Once the files are uploaded, click Submit (under the FTP screen).

6. Once you click Submit, you will see the final Thank You message from the EBS indicating the qualifications package has been submitted. See Figure 19. You will also receive an email notification indicating your qualifications package has been successfully received.

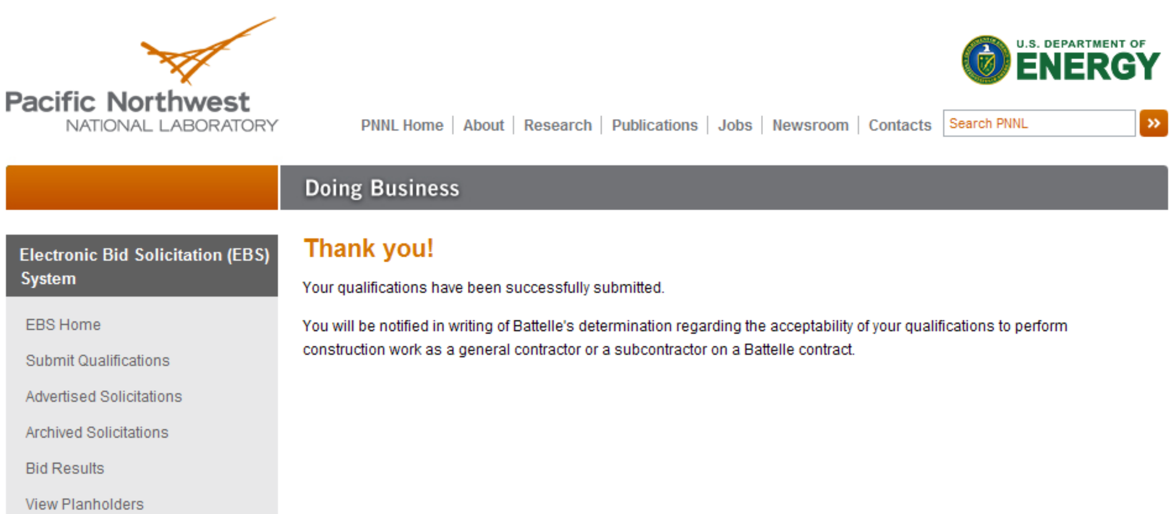

Figure 19. The final Thank You message indicating the qualifications package has been successfully submitted.

Next Steps

Once you submit your qualifications package, you can return to EBS at any time to check if your qualifications have been approved.

Qualifications package approval status can be viewed by clicking on View Planholders in the left side navigation. See Figure 20. Qualifications packages will show either **Submitted** or **Approved**.

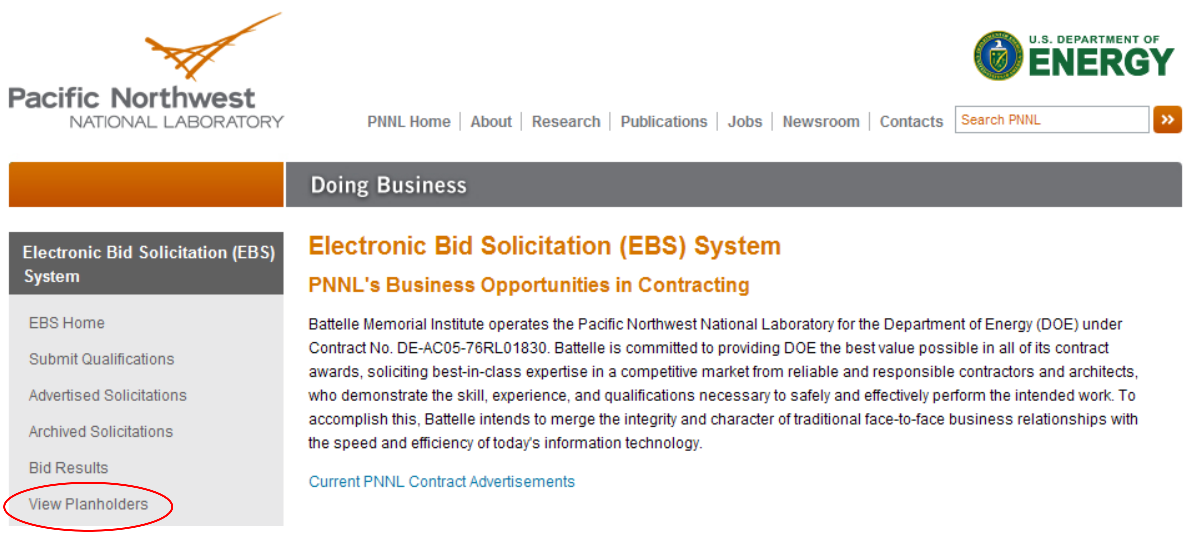

Figure 20. Clicking on View Planholders will allow you to see the status of your qualifications package.

TIP: If your qualifications package shows **Submitted** for an extended period of time, you can contact Kim Anderson at (509) 371-7671 to learn about your qualifications package.

Once your qualifications package is approved, you are prequalified to register for solicitations.