

**electronic Subcontracting Reporting System (eSRS)**  
**Quick Reference Recommendation for**  
**Federal Government Contractors**



**Filing a Summary Subcontract Report (SSR)**  
**for an “Individual” Subcontracting Plan**

**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

**Table of Contents**

**Quick Reference #1:** What is a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan?

**Quick Reference #2:** How is the SSR Data Utilized?

**Quick Reference #4:** What are the eSRS SSR for Plan Type “Individual” Responsibilities of the Contractor?

**Quick Reference #3:** What are the eSRS SSR for Plan Type “Individual” Responsibilities of the Government?

**Quick Reference #5:** What do the Terms “Pending”, “Accept”, “Reopen” and “Reject” Represent?

**Quick Reference #6:** Things to Exclude from the SSR for Plan Type “Individual”

**Quick Reference #7:** How to Access eSRS

**Quick Reference #8:** How to Enter an SSR for “Individual” Subcontracting Plan

**Quick Reference #9:** How to View an Existing SSR for “Individual” Subcontracting Plan that was Submitted to the Government

**Quick Reference #10:** Understanding the SSR Data Fields for “Individual” Subcontracting Plan

**Quick Reference #11:** How do I Correct an SSR Plan Type “Individual” that was Previously Submitted?

**Quick Reference #12:** Who to Contact When in Need of Assistance

**Quick Reference #13:** When is it Recommended for the Government Agency to “Accept” an SSR for Plan Type “Individual”?

**Quick Reference #14:** When is it Recommended for the Government Agency to “Reject” an SSR for Plan Type “Individual”?

**Quick Reference #15:** Can I Delete a Report?

**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

**Introduction:** In the past, Federal Government contractors were required to file their Summary Subcontract Report for “Individual” Subcontracting Plan accomplishments on the standard paper form (SF) 295. The Presidential Management Initiative mandated the development and implementation of an electronic subcontracting process. Thus, the Initial Operating Capability Phase of the electronic Subcontracting Reporting System (eSRS) was implemented in October of 2005. Federal Government contractors are now required to submit their subcontracting accomplishments for Federal Government contracts in the eSRS, with the exception of some Department of Defense (DoD) contracts.

eSRS is a web-based government-wide subcontracting system that allows electronic submission, management (acceptance, revision, rejection), reports and analyses of subcontracting data in a real-time paperless environment. In turn, there is a reduction in errors and processing time and no lost paper work, which leaves more time for increasing subcontracting.

**Quick Reference Objective:** To provide guidance to Federal Government **Contractors** submitting Summary Subcontract Reports (SSR) for “Individual” Subcontracting Plan in eSRS. This document will provide general information only. To receive specific information about the eSRS processes of the federal agency that awarded you the contract, contact your Contracting Officer or the eSRS Agency Coordinator (AC) or Point of Contact (POC). **You can obtain the Agency Coordinator or Point of Contact email address by contacting the Federal Service Desk at [www.FSD.gov](http://www.FSD.gov).**

# **Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan**

## **Quick Reference #1 What is a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan?**

This report collects prime and subcontractors’ subcontract award data for a specific Federal Government agency when a Prime/Subcontractor: (a) holds one or more contracts over the applicable threshold specified in FAR 19.702(a) at any given time during the term of the contract; and (b) is required to report subcontracts awarded to Small Business (SB), Small Disadvantaged Business (SDB), Women-Owned Small Business (WOSB), HUBZone Small Business (HUBZone SB), Veteran-Owned Small Business (VOSB), Service-Disabled Veteran-Owned Small Business (SDVOSB), Alaskan Native Corporations (ANC) and Indian tribes concerns under a subcontracting plan with the Federal Government.

This report also collects subcontract awards for Historically Black Colleges and Universities (HBCUs) and Minority Institutions (MIs), for the Department of Defense (DoD), the National Aeronautics and Space Administration (NASA), and the Coast Guard.

## **Quick Reference #2: How is the SSR Data Utilized??**

This report provides an annual summary of subcontracts awarded by prime and subcontractors for a specific Federal Government agency that required an “Individual” Subcontracting plan for the previous fiscal year. This information is further used for the Small Business Administration’s (SBA) Subcontracting Achievement Report prepared for the President and the Congress. The Small Business Administration’s (SBA) Subcontracting Achievement Report is usually run on March 1 of the current fiscal year, for the prior fiscal year accomplishments. Therefore, it is important for all contractors and federal agencies to ensure the data in the electronic Subcontracting Reporting System (eSRS) is accurately **entered 30 days after the reporting period.**

- Agencies must review and “Accept” receipt of the subcontracting reports data within eSRS. Pending, rejected, revised and reopened subcontracting report data will not be reflected on SBA’s Subcontracting Achievement Report.

# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

## Quick Reference #3: What are the SSR Responsibilities of the Contractors?

- Prime and higher tier large business subcontractors are required to ensure that their lower tier large business subcontractors file their SSRs in eSRS.
- These entries must include all “subcontract” awards (See definition at FAR 19.701) resulting from contracts or subcontracts (regardless of the dollar amount), received from the agency to which this report is submitted.
- Subcontract award data reported in this report shall be limited to awards made to your company’s immediate subcontractors. Your company shall not report subcontract awards made by your subcontractors, except as authorized in special legislation for ANCs and Indian tribes. For more information on the special legislation for ANC and Indian tribes visit <http://www.regulations.gov/search/Regs/home.html#documentDetail?R=0900006480277f33> (See FAC 2005-19).
- Only report actual subcontracting accomplishments, not good faith estimates or goals.
- If a prime contractor/subcontractor is performing work for more than one federal agency, a **separate** report shall be submitted to each federal agency covering only subcontracting accomplishments for that agency’s contracts.
- This report collects subcontracting data not sales data.

## Quick Reference #3: What are the SSR responsibilities of the Contractors? (Continued)

- Reports are required when due, regardless of whether there has been any subcontracting activity for the reporting period
- Submit all SSRs within 30 days of the close of each reporting period.
- Reporting Periods:
  - For Non Department of Defense (DOD), National Aeronautics and Space Administration (NASA) and General Service Administration (GSA) Contracts report Annual submission on the Federal Government’s fiscal year
    - **October 1st thru September 30<sup>th</sup>**

# **Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan**

- For contracts with **DoD, NASA and GSA Multiple Award Schedule Contracts** report semi-annually on the Federal Government’s fiscal year:
  - 1st reporting period **October 1st thru March 31st**
  - 2nd reporting period **October 1st thru September 30th**
  
- For **General Service Administration (GSA) non-Multiple Award Scheduled** Contracts, report quarterly on the Federal Government’s fiscal year
  - 1<sup>st</sup> reporting period **Oct 1-Dec 31**
  - 2<sup>nd</sup> reporting period **Oct 1-March 31**
  - 3<sup>rd</sup> reporting period **Oct 1–Jun 30**
  - 4<sup>th</sup> reporting period **Oct 1–Sept 30**
  
- The report data is reflective of only the **reporting period’s** subcontracting accomplishments.
- Keep a signed copy of the report on file.
- **Per the 13 Code of Federal Regulations (CFR) 121.404 (e) & 121.410 you must have a supporting written size self-certification for every small business you are counting in the small business and socioeconomic section of this report at the time they submit their proposal** except as authorized in special legislation for ANC and Indian tribes visit. For more information on the special legislation for ANC and Indian tribes visit <http://www.regulations.gov/search/Regs/home.html#documentDetail?R=0900006480277f33> (See FAC 2005-19). If you do not have a written size self-certification, you must count these subcontracts in the large business field. **Per 13 CFR 121.411(a)**, a subcontractor must qualify and self-certify as a small business at the time it submits its offer as a small business subcontractor. **Do not retroactively apply small business subcontracting accomplishments.**
- The contractor **shall validate** that this firm is SBA SDB and HUBZone-certified in the SBA Dynamic SB search at [www.sam.gov](http://www.sam.gov), **prior to the award of a contract. Note** that HUBZone is different from some of the State HUB certifications, such as Texas and Virginia.
- Effective October 1, 2015, the Department of Defense (DOD), General Services Administration (GSA), and National Aeronautics Administration (NASA) are issuing [FAR Case 2014-022](#) as a final rule amending the Federal

# **Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan**

Acquisition Regulation (FAR) to implement the inflation adjustment of acquisition-related dollar thresholds.

## **Quick Reference #4: What are the eSRS SSR Plan Type “Individual” Responsibilities of the Government?**

- Federal agencies are responsible for ensuring that Federal Government prime contractors make every attempt to adhere to the approved subcontracting plan and file their reports in a timely manner.
- Further responsibility is to review, accept and/or reject the prime contractors’ and subcontractors’ SSRs in eSRS.
- It is recommended that the Federal Government agency review the subcontract reports submitted within 60 days of the contractor’s submittal
- Effective October 1, 2015, the Department of Defense (DOD), General Services Administration (GSA), and National Aeronautics Administration (NASA) are issuing [FAR Case 2014-022](#) as a final rule amending the Federal Acquisition Regulation (FAR) to implement the inflation adjustment of acquisition-related dollar thresholds.

## **Quick Reference #5: What do the Terms “Pending”, “Accept”, “Reopen” and “Reject” Represent?**

**Pending:** This report has been submitted and is awaiting review to be **“Accepted or Rejected”** by the Federal Government agency that awarded the contract.

**Accept:** This report has been reviewed by the Federal Government agency that awarded the contract, and they have found no known errors, issues, or concerns and do not require any clarification, information, and/or correction and is, therefore, **“Accepting”** receipt of this report’s data.

- Although receipt of the report’s data has been **“Accepted”**, if upon further review, errors, issues, or concerns are found with the report, the Federal Government agency that awarded the contract will **“Reopen or**

## **Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan**

**Reject**” the report to obtain clarification, additional information, and/or correction.

**Reopen:** This report’s data was previously **“Accepted”** by the Federal Government agency that awarded the contract. However, upon further review of the report’s data, the agency found errors, issues, and concerns and requires clarification, additional information, and/or correction. Once the report concerns have been addressed and/or corrected sufficiently by the contractor and resubmitted, the federal agency will **“Accept”** receipt of the report’s data.

**Reject:** This report has been reviewed by the Federal Government agency that awarded the contract, and they have found errors, issues and concerns. The report requires clarification, additional information, and/or correction. Thus, they will not accept receipt of the subcontracting report’s data at this time. Once the report concerns have been addressed and/or corrected sufficiently, the federal agency will **“Accept”** receipt of the report’s data.

**Examples of a “Reject” notification:** The data in your report includes last fiscal year’s subcontracting accomplishments. Please resubmit your report with just the current reporting periods subcontracting accomplishments.

### **Additional “Reopen and Reject” information:**

- An explanation explaining why your report was **“Rejected or Reopened”** will be sent to the email address of the person submitting the report.
- The **“Rejected or Reopened”** report will appear in the **“Alerts”** box of the report submitter.
- Click on the link within the **“Alerts”** box to view the report.
- Resolve the issue brought forth by the Federal Government agency and resubmit the report.

### **Quick Reference # 6: Things to Exclude from the SSR for Plan Type “Individual”**

- Subcontracts performed outside the U.S. or its outlying areas. **NOTE:** The State Department and the Agency for International Development may



# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

require subcontracting plans for contracts awarded domestically, but performed overseas. For additional information, contact the agency directly.

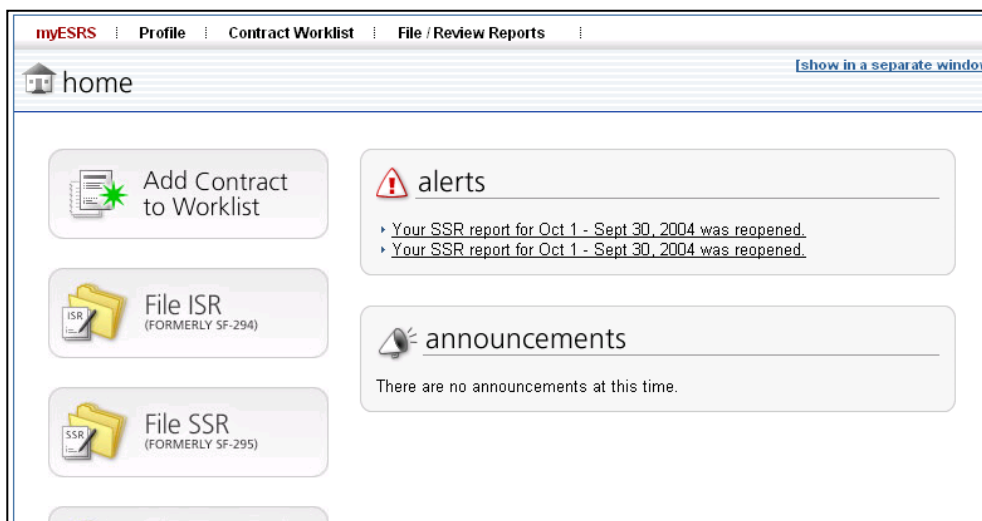
- Purchases from a corporation, company, or subdivision that is an affiliate of the prime/subcontractor

## Quick Reference #7: How to Access eSRS

- Go to [www.esrs.gov](http://www.esrs.gov)
- Click on “**Contractors**”
- Click on the “**Register**” tab
- Complete the registration
- Your user ID and password will be emailed to you confirming your registration
- You must validate your registration by **clicking on the link within the e-mail to activate your eSRS account.**

*The following information referencing Screen 1 thru 3 is the view you will see in eSRS.*

### myESRS Screen




# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

## Quick Reference #8: How to Enter an SSR for “Individual” Subcontracting Plan

- Go to [www.esrs.gov](http://www.esrs.gov)
- Click on **“Contractor”**
- Login to eSRS using your user ID and Password
  
- At the main Screen click on
- Follow the steps in **Quick Reference #10**

## Quick Reference #9: How to View an Existing SSR for an “Individual” Subcontracting Plan that was Submitted to the Government

- At the top of eSRS home page, click on **“File/Review Report”**
- Select **“Summary Contract Reports”** from the drop-down menu
- Select the tab you want: **“Open”, “Pending”, “Closed”, “All”**
- Click on the **“Search Filters”** link
- Choose the report **“Status”**: **“Draft”, “Pending”, “Revised”, “Accepted”, “Rejected”, “Reopened”**
- Select the **“Plan Type” “Individual”** radio button
- You may select an **“Agency”** from the drop-down menu
- You may select the **“Date Created”** from one date to the next by clicking on **“select”** beside each blank. A calendar will appear and you can click on the date
- You may enter any portion of the Federal Government agency name you submitted the report to in **“Keywords”** to narrow your search.
- Click on **“Apply Search”**
- This will display a list of existing SSRs for “Individual” Subcontracting Plan in your worklist based on your status preference
- To select and view a report click on the following icon: 

# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

The screenshot shows the 'myESRS' interface with a breadcrumb trail: Profile > Contract Worklist > File / Review Reports > Custom Reports. The main heading is 'summary subcontract reports' with a '[show in a separate window]' link. On the left, a 'New Report' sidebar contains a 'BACK TO LIST' link and a numbered list: 1 Instructions, 2 Subcontracting Report, 3 Subcontract Awards, 4 Review, and 5 Submit Report. The main content area is titled 'Summary Subcontract Reports' and includes a 'Please Note' section stating that the eSRS contains new fields not on paper forms. Below this is a 'For Prime Contractors' section with a bulleted list: Approved Commercial Subcontracting Plan, Description of Product and Service, NAICS, Email address of the Federal Government Agency Representative responsible for reviewing the report, and Be sure to keep a signed copy of the report on file. There is also a 'Copy Existing Report' section with a note: 'You may copy data from an existing report by selecting a report below.' This is followed by a drop-down menu and 'cancel' and 'continue' buttons.

## Quick Reference #10: Understanding the SSR for “Individual” Subcontracting Plan Data Fields

### 1<sup>st</sup> Screen: Summary Subcontract Reports

#### Data needed to file a report

**Copy Report Feature:** The “Copy Existing Report” feature can only be used if you have previously entered a report in eSRS. **If you are not using the "Copy Existing Report" feature, click “Continue”.**

- This feature will pull general information from a previous report into the new report you are submitting
- Select the report you would like from the drop-down menu.
- The report screen will be displayed partially filled out.

# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

The screenshot shows the eSRS interface for creating a new report. The main content area is titled 'New Report' and contains a form for a 'SUMMARY SUBCONTRACT REPORT'. The form has five steps: 1. Instructions, 2. Subcontracting Report, 3. Subcontract Awards, 4. Review, and 5. Submit Report. The 'Subcontracting Report' step is currently active. The form includes the following fields and options:

- 1. Type of Plan\*:** Radio buttons for 'individual' (selected) and 'commercial'.
- 2. DUNS #\*:** A text input field with an 'Auto-Fill Company Info From Duns' button.
- 3. Corporation, Company or Subdivision Covered\*:**
  - a. Vendor Name\*:** A text input field.
  - b. Vendor Physical Address\*:** A text input field with a 'Street Address\*' label.

At the top of the form, there are buttons for 'Save & Go Back', 'Cancel', 'Save', and 'Save & Continue'. On the right side, a 'Progress' bar shows the status of various report components, with 'Subcontract Report' and 'Type of Plan' marked as incomplete (indicated by a red 'x').

## **2<sup>nd</sup> Screen: Summary Subcontract Report**

### **1. Type of Plan: “Individual” should be selected**

- You are filing the **Summary Subcontract Report for “Individual”** Subcontracting Plan because the federal agency to which you are reporting has approved one or more “Individual” (contract-specific) Subcontracting Plans. If you are unsure of which report to file, review your subcontracting plan or contact your Contracting Officer.

# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

## 2<sup>nd</sup> Screen: Summary Subcontract Report (Continued)

The screenshot shows the 'SUMMARY SUBCONTRACT REPORT' form. On the left, a navigation pane shows steps: 3 Subcontract Awards, 4 Review, and 5 Submit Report. The main form area is titled 'SUMMARY SUBCONTRACT REPORT' and contains the following sections:

- 1. Type of Plan:** Radio buttons for 'individual' (selected) and 'commercial'.
- 2. DUNS #:** Text input field containing '054781240' and a button labeled 'Auto-Fill Company Info From Duns'.
- 3. Corporation, Company or Subdivision Covered:**
  - a. Vendor Name:** Text input field containing 'BAE Systems'.
  - b. Vendor Physical Address:**
    - Street Address:** Text input field containing '1601 Research Blvd.'.
    - City:** Text input field containing 'Rockville'.

On the right side, there is a checklist of fields with status indicators: DUNS # (checked), Vendor Name (checked), Physical Address (checked), Mailing Address (checked), Date Submitted (checked), Contact Information (checked), Reporting Period (checked), Agency to which the report is being submitted (checked), Report Submitted As (checked), Product or Service #1 (checked), Product or Service #2 (checked), and Subcontract Awards (checked). Below the checklist is a 'Tips' section with the text: 'Clicking 'Save' or 'Save and Continue,' will save your report and allow you to leave and continue your report later. Click 'Save and'.

### 2. DUNS#: Enter your DUNS#

- DUNS # is a nine-digit unique identification number issued by Dun & Bradstreet to identify a contractor’s specific establishment’s exact name and address.
- If you click on **“Auto Fill your Company’s info from DUNS”**, your information will be automatically pre-populated from information in the SAM database. Verify that the information that is **“Auto Filled”** by the DUNS# is accurate. Contact FSD at [www.fsd.gov](http://www.fsd.gov), if the information pulled from your DUNS # is incorrect
- If you choose not to use the **“auto fill”** function, you may manually enter your company’s information where appropriate below.

**3. Corporation, Company or Subdivision Covered:** This field indicates the Corporation, Company or Subdivision that is associated with the DUNS number for this contract. The Corporation, Company or Subdivision’s address is pre-filled, based on the DUNS number entered. If this information is incorrect, it should be noted in the **“Remarks”** field of this report and the contracting officer should be notified.

**4. Date Submitted:** This date represents the date that you are submitting

# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

your report

- Click on “**Select**” to view a calendar.
- Click on the month and day you are submitting the report.

**5. Contact Information:** This is the name and contact information for the individual that can be contacted in the event that the agency has questions regarding this report. The system will automatically populate the contractor’s contact name based on registration information. **You must enter your telephone number and email address.**

## **Quick Reference #10: Understanding the SSR for “Individual” Subcontracting Plan Data Fields (Continued)**

### **2<sup>nd</sup> Screen: Summary Subcontract Report (Continued)**

#### **6. Reporting Periods: except for General Service Administration (GSA) non-Multiple Award Scheduled Contracts**

- For Non Department of Defense (DOD), National Aeronautics and Space Administration (NASA) and General Service Administration (GSA) Contracts report Annual submission on the Federal Government’s fiscal year
  - **October 1st thru September 30<sup>th</sup>**
- For contracts with **DoD, NASA and GSA Multiple Award Schedule Contracts** report semi-annually on the Federal Government’s fiscal year:
  - 1st reporting period **October 1st thru March 31st**
  - 2nd reporting period **October 1st thru September 30th**
- For **General Service Administration (GSA) non-Multiple Award Scheduled** Contracts, report quarterly on the Federal Government’s fiscal year
  - 1<sup>st</sup> reporting period **Oct 1-Dec 31**
  - 2<sup>nd</sup> reporting period **Oct 1-March 31**
  - 3rd reporting period **Oct 1–Jun 30**

# Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan

- 4th reporting period Oct 1–Sept 30

## Quick Reference #10: Understanding the SSR for “Individual” Subcontracting Plan data fields (Continued)

### 2<sup>nd</sup> Screen: Summary Subcontract Report (Continued)

The screenshot shows a web form with the following sections:

- 5. Contact Information\*:** Includes a text input field containing "angela" and a "select clear" button above it.
- 6. Reporting Period\*:** Includes radio buttons for "Oct 1 - Mar 31" and "Oct 1 - Sept 30". Below it is a section "a. Year\*:" with a dropdown menu showing "2008".
- 7. Agency to which the report is being submitted\*:** A dropdown menu.
- 8. Report Submitted As\*:** Radio buttons for "prime contractor", "subcontractor", and "both".
- 9. Contractor's Major Products or Service Lines:** Includes a text input field for "a. Product or Service #1\*:" and a label "i. NAICS Code # 1\*:" below it.

**7. Agency to which the report is being submitted:** From the drop down menu, select the agency for which this report is being prepared for/submitted. If you are not sure what agency to select, contact your contracting officer.

**8. Report Submitted As:** Select the appropriate contractor type for which you are submitting this report.

- Click on the button that represents your filing status
  - **Prime contractor:** Select "**Prime Contractor**" if the company submitting this report has only subcontracting plans under prime contracts with the federal government
  - **Subcontractor:** Select "**Subcontractor**" if the large business company submitting this report has only flow-down subcontracting plans (i.e.,

**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

subcontracting plans with other large business contractors).

- **Both:** Select “**Both**” if the large business company submitting this report has subcontracting plans as a prime and subcontractor for the federal agency to which you are submitting this report.

**9. Contractors Major Product or Service Lines:**

- Enter the two major products and/or services, and the NAICS codes for the product/services lines under the approved subcontracting plan that the contractor provides to the agency to which this report is being submitted. This NAICS codes is different from GSA’s “Special Item Number (SIN)”.

**This space left blank intentionally**



**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

	<b>Whole Dollars</b>	<b>Percent</b>
1a. SMALL BUSINESS CONCERNS	<input type="text" value="0"/>	<input type="text" value="0"/>
1c. LARGE BUSINESS CONCERNS	<input type="text" value="10350"/>	<input type="text" value="100.0"/>
<b>1c. TOTAL</b>	<input type="text" value="10350.0"/>	

e

en: **Cumulative Fiscal Year Subcontract Award**

**1a. Small Business (SB) Concerns:** Enter the subcontracting accomplishments awarded to small business in whole dollars for each perspective column, including SBs that are also SDB, WOSB, HUBZone, VOSB, and/or SDVOSB. Also in this section include subcontracts awarded to ANCs and Indian tribes that are not small businesses (For more information on the special legislation for ANC and Indian tribes visit

<http://www.regulations.gov/search/Regs/home.html#documentDetail?R=09>

**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

[00006480277f33](#) (See FAC 2005-19) and that are not certified by the SBA as SDBs only **if you have been designated by the ANC or Indian tribe to receive their SB and SDB credit.** When your company has been designated by an ANC or Indian tribe to receive SB and SDB credit for a subcontract awarded to the ANC or Indian tribe, report only the portion of the total amount of the subcontract that has been designated to your company.

**1b. Large Business (LB) Concerns:** Enter the subcontracting accomplishments awarded to large business in whole dollars for each respective column. Report all subcontracts to large businesses or entities that are "other than small" such as non-profits, educational institutions, etc. **Do not include subcontracts awarded to or designated by a ANCs and Indian tribes that have been reported in the “Small Business Concern” field above.**

**1c. Total:** This field represents the combined total of SB and LB subcontracts. This total will become the denominator for all of the "**Percentage of Total Subcontract Awards**" shown on this report.

**Socioeconomic Categories:** Each of these items is a subcategory of “**Small Business Concerns**” and may not add to match the total in “**Small Business Concern**” due to the following: In some cases the same dollars may be reported in more than one block (i.e., a \$10,000 subcontract to a small business owned by a woman that is certified by SBA as an SDB should be entered on three rows: \$10,000 under “**Small Business**”, \$10,000 “**Small Disadvantaged Business**”, and \$10,000 “**Women-Owned Small Business**”). **However**, be sure the dollars are counted in the “**Small Business Concern**” field only once and not three times (not \$30,000). **Percentages** will be calculated automatically.

**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

**3rd Screen: Cumulative Fiscal Year Subcontract Award**

- 2. SDB Concerns:** Report all subcontracts awarded to SBA-certified SDBs, including SDBs that are also WOSB, HUBZone, VOSB, and SDVOSB. Also include subcontracts awarded to ANCs and Indian Tribes that have not been certified by SBA as SDBs **AND** where you have been designated to receive all, or a portion of, their SDB credit, **report only the portion of the total amount of the subcontract that has been designated to your company.**
- 3. WOSB Concerns:** Report all subcontracts awarded to Women-Owned Small Businesses.
- 4. HBCU/MIs:** (For contracts with DoD, NASA, and Coast Guard): Report all subcontracts with HBCU/MI.
- 5. HUBZone Small Business Concerns:** Report all subcontracts awarded to HUBZone Small Business Concerns (including HUBZones that are also SDB, WOSB, VOSB, and SDVOSB).

**3rd Screen: Cumulative Fiscal Year Subcontract Award (Continued)**

- 6. VOSB Concerns:** Report all subcontracts awarded to VOSBs, including VOSBs that are also SDBs, WOSBs and HUBZones. Any company that is counted as SDVOSB should also be counted in this row as veteran-owned.
- 7. SDVOSB Concerns:** Report all subcontracts awarded to service-disabled veteran-owned SB concerns, including those that are also SDBs, WOSBs, and HUBZones.
- 8. ANCs & Indian Tribes that have not been certified by SBA as SDB:** Report all subcontracts awarded to ANCs and Indian Tribes that are reported in the “SDB” section of this report but have not been certified by SBA as “SDBs”.
- 9. ANCs & Indian Tribes that are not SBs:** Report all subcontracts awarded to ANCs and Indian Tribes that are reported in the “SB” section of this report, but are not small businesses.
- 10. Remarks:** If you entered zero (0) percent in the small business section, enter an explanation as to why. You may also enter explanations and/or comments

**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

you think will be helpful to the Government official who reviews this report. The following is an example of **inappropriate** remark:

“These are Good faith estimates” — this is inappropriate because the information in this report must be actual dollars.

**11. Contractor’s Official Who Administer Subcontracting Program:** Enter the name and contact information (telephone number and email address) for the individual who administers the contractor's Small Business Subcontracting Program.

**12. Certification:** This is a testament that the data being submitted on the report is accurate and that the dollars and percentages reported do not include lower tier subcontracts (except as set forth for ANC and Indian tribes for more information visit

<http://www.regulations.gov/search/Regs/home.html#documentDetail?R=0900006480277f33> (See FAC 2005-19). If you select “**No**” your report will be rejected.

**Quick Reference for Federal Government Contractors submitting a  
Summary Subcontract Report (SSR)  
for “Individual” Subcontracting Plan**

**3rd Screen: Cumulative Fiscal Year Subcontract Award (Continued)**

**13. Chief Executive Officer (CEO):** Enter the full name and title of the CEO for the company submitting this report. Also enter the date the report is signed by the CEO, or the senior-most person of the entity submitting this report (such as the President of a University). No delegation of authority is accepted.

**14. CEO Approval:** This is a self-certification that the individual in the CEO field of this report will sign a paper print-out of this report and that the report will be kept on file. If you select “No” your report will be rejected.

**Administering Info:** Enter the name and contact information for the individual who is responsible for ensuring the contractor's compliance with its subcontracting plan.

**15. Please enter the email address of the Government employee(s) and/or other person(s) to be notified that you have submitted this report:** By listing this email address, a notification will be sent to listed parties advising them that a subcontracting report is in eSRS for their review. The Federal Government agency will not be notified via email unless you enter a notification email address. However, they will see the report when they log into eSRS.

- The awarding agency may have given you an email address for which to submit this report. If so, enter that email address here.
- If the Federal Government agency that awarded you a contract has not provided this information, contact them immediately.

**Quick Reference #11: How do I Correct an SSR Plan Type “Individual” that was Previously Submitted?**

Contact your Federal Government agency and inform them of the error. They will “**Reject**” or “**Reopen**” the report depending on the report status at the time.

- If the report is “**Pending**”, then the report will be “**Rejected**”
- If the report has been “**Accepted**”, then the report will be “**Reopened**”

The report will then be sent back to your eSRS account, so that you can make

# **Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan**

the necessary changes.

## **Quick Reference #12: Who to Contact When in Need of Assistance**

### **Non-technical Questions:**

- Non-technical Questions are policy, processes and procedures related to Subcontracting and Subcontracting Reporting and information related to the contract. These questions will not be handled by the Federal Service Desk (FSD).
- Non-technical Question Examples:
  - Any questions pertaining to subcontracting and subcontracting reporting
  - Any questions pertaining to the data in a subcontracting report you submitted or have the responsibility to review
  - Any question related to the contract or subcontracting plan
  - Any questions related to data within eSRS or eSRS user responsibilities
  - eSRS agency contact information (i.e. Agency Coordinator or Point of Contact) for FOIA request and assistance on items with which the technical help desk cannot assist you
- Using the FSD website at [www.fsd.gov](http://www.fsd.gov), you can submit a non-technical help desk issue by selecting “**Submit a Question**” tab and select “**Policy**”. When you submit the webform, the SBA Procurement Analyst assigned to answer subcontracting questions will respond with an answer.
- If you call the FSD 800 number with a non-technical question, the FSD representative will not be able to answer your question, but will provide you with the email address of the SBA Procurement Analyst assigned to answer subcontracting questions and the eSRS Agency Coordinator and Point of Contact for the agency to which you report.
- You may also contact the contracting officer (CO) of the Federal Government agency that awarded the contract for questions, concerns, or issues pertaining to subcontracting and subcontracting reporting.
- For training and subcontracting policy questions, contact the SBA Commercial Marketing Representative (CMR) for your area/state. You may locate your CMR’s contact information at [http://www.sba.gov/aboutsba/sbaprograms/gcbd/GC\\_PCRD1.html](http://www.sba.gov/aboutsba/sbaprograms/gcbd/GC_PCRD1.html)

# **Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan**

## **Technical Questions:**

- Technical Questions will be handled by FSD. You may submit a technical help desk question by going directly to FSD at [www.fsd.gov](http://www.fsd.gov) and choosing to chat live with a representative, submit a question, search the answer center or call and speak to a representative. You may also reach the FSD website by logging on to eSRS at [www.esrs.gov](http://www.esrs.gov). Click the “**For Help Federal Service Desk**” and you will be forwarded to the FSD website. Remember, FSD will not answer any non-technical or subcontracting/subcontracting reporting questions related to policies, processes and procedures.
- Technical Questions Examples:
  - Questions pertaining to how the system functions (i.e., Do I need a contract number to file an SSR?)
  - Questions pertaining to user functionality (i.e., add a role, registration, contract work list, can’t view report)
  - eSRS agency contact information (i.e., Agency Coordinator or Point of Contact) for FOIA request and assistance on items with which the technical help desk cannot assist you
  - General information on the subcontracting reports being filed (i.e., When is the SSR due?)

## **At the Federal Service Desk ([www.fsd.gov](http://www.fsd.gov)) you can:**

- Obtain a user id and password (not required) by registering at the [www.fsd.gov](http://www.fsd.gov) website. This will allow you to:
  - Keep historical information on your help desk inquiries
  - Check the status of your help desk ticket
- Find information you need by searching several ways in the Answer Center
- Submit a help desk request online
- Give feedback through a customer satisfaction survey
- Chat live with a Customer Service Representative
- Speak to a help desk representative by calling within the U.S. toll free at 1-866-606-8220 or outside the U.S. at 334-206-7828
- Contact FSD at [www.fsd.gov](http://www.fsd.gov), if the information pulled from your DUNS # is incorrect

For all other concerns, contact Integrated Acquisition Environment at [integrated.acquisition@gsa.gov](mailto:integrated.acquisition@gsa.gov).

## **Quick Reference for Federal Government Contractors submitting a Summary Subcontract Report (SSR) for “Individual” Subcontracting Plan**

### **Quick Reference #13: When is it Recommended for the Government Agency to “Accept” an SSR for Plan Type “Individual”?**

- After reviewing the report, the government agency is satisfied with the information provided, your report will be **“Accepted”**.
- If the government agency accepts a report, you will receive an email notification.

### **Quick Reference #14: When is it Recommended for the Government Agency to “Reject” an SSR for Plan Type “Individual”?**

- After reviewing the report, the government agency determines it requires additional information for clarity, and/or the information provided is not accurate or sufficient
- If the government agency rejects a report, you will receive an email notification.
- An explanation for the rejection will be available in the **“Notes”** box on the right side of the screen displaying the Summary Contract Report.
- Once the issues has been corrected by you, the government agency will **“Accept”** the report

### **Quick Reference #15: Can I Delete a Report?**

- Only your draft reports can be deleted
- Click on **“Delete”** by the report you would like to have deleted