Checklist for Coaches

Buyer Contracts Course

Overview

The Buyer Contracts Course provides critical resources that support learners' success both inside the virtual classroom and in their day-to-day work as new Buyers. At the completion of each course module, learners are provided with follow-up activities to conduct independently and with their Coaches. These activities include exploring web resources for Buyers, learning IC/Office-specific practices, and shadowing their Coaches as they work in PRISM. This document provides a checklist to guide Coaches as they work with their learners to absorb and practice the content learned in each module.

MODULE 1: NIH BUSINESS SYSTEM OVERVIEW

- ✓ Confirm Learner reviewed this module's **Learn More** resources, including the NBS Acquisition Portal, Course webpage, Course Glossary, and Acronym Cheat Sheet.

- ✓ Invite Learner to shadow you as you open and tour the PRISM Welcome page.

MODULE 2: INTRODUCTION TO PRISM

- ✓ Confirm Learner reviewed this module's **Learn More** resources, including the NBS Acquisition Portal PRISM NAVs and Web Resources document.

- ✓ Discuss your PRISM preferences and articulate the process to set them relevant to your IC/Office.

- ✓ Provide recommendations for helpful PRISM tips and tools, such as best practices for using QuickLinks, Routing Lists, or any IC/Office-specific procedures.

- ✓ Demonstrate how to navigate your PRISM Inbox.

- ✓ Demonstrate how to create a PRISM routing template (if applicable).

MODULE 3: PRE-AWARD

- ✓ Confirm Learner reviewed this module's **Learn More** resources, including the Pre-Award NAVs on the NBS Acquisition Portal and the HHS Directive for Acquisition Planning.

- ✓ Explain the process for Acquisition Planning in your IC/Office

- ✓ Explain which Pre-Award documents are commonly used in your IC/Office.

- ✓ Discuss how to respond to vendor questions and amend a solicitation.

- ✓ Demonstrate how to launch and navigate FedBizOpps.gov.

- ✓ Explain how DGS supports pre-award activities in your IC/Office (if applicable).

MODULE 4: CREATING A CONTRACT

- ✓ Confirm Learner reviewed this module's **Learn More** resources, including the Contract Creation NAVs on the NBS Acquisition Portal.

- ✓ Share any recommendations on helpful PRISM tools and tips for creating new contracts, such as how you save an in-progress draft of a new contract.

- ✓ Inside your own PRISM profile, demonstrate how to create a new contract.

- ✓ Review common validation error messages your Learner might receive and discuss how to resolve them.

MODULE 5: ADMINISTERING AND MODIFYING CONTRACTS

- ✓ Confirm Learner reviewed this module's **Learn More** resources, including the Modification NAVs on the NBS Acquisition Portal.

- ✓ Explain your best practices for proactively managing deobligations.

- ✓ Demonstrate you use the nVision ACQ47 and Document Mapping Search tools to identify lines that may require deobligation.

- ✓ Discuss less common types of modifications, such as selecting an alternate vendor site.

MODULE 6: CLOSEOUT

- ✓ Confirm Learner reviewed this module's **Learn More** resources, including the Modification NAVs on the NBS Acquisition Portal.

- ✓ Explain your best practices for contract closeout.

- ✓ Inside your own PRISM profile, demonstrate how to conduct contract closeout.

- ✓ Identify with Learner the physical or digital location where completed contracts are stored within your IC/Office.

POST COURSE COMPLETION ACTIVITIES

Ensure your mentee is geared for long-term success by conducting the following suggested post-course activities.

- ✓ Confirm Learner has completed the User Access Form (link is listed on Buyer Contracts Course webpage) used to gain access to PRISM. Remind Learner to attach Final Assessment score of 70% or above when submitting User Access Form.

- ✓ Confirm Learner has access to PRISM and other requisite systems as applicable.

- ✓ Guide Learner in accessing and navigating PRISM for the first time.

- ✓ Work with Learner to customize his/her PRISM profile (Welcome page, Document Search Panel, and Preferences).

- ✓ Shadow Learner in PRISM as (s)he conducts the following activities:

    - o Reviewing messages in the PRISM Inbox and determining what actions are required

    - o Opening and reviewing a requisition

    - o Creating a contract from a requisition

    - o Navigating to a contract's line item information

    - o Creating a modification from the correct version of a contract

    - o Locating the Closeout button

- ✓ Ask Learner: "*What are some of the resources you can access for support or information as a Buyer?*" List any additional resources you recommend related to system, policy, business practice, etc. Recommendations might include:

    - o NBS Acquisition Portal resources (NAVs, Computer-Based Trainings and Simulations, FAQs)

    - o NBS HelpDesk

    - o Virtual Acquisition Office

    - o IC/Office-specific resources (e.g. SOPs, job aids)

Buyer Contracts Course Coach's Checklist
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