

HHS Government User Guide for Subcontracting Plan Reviews

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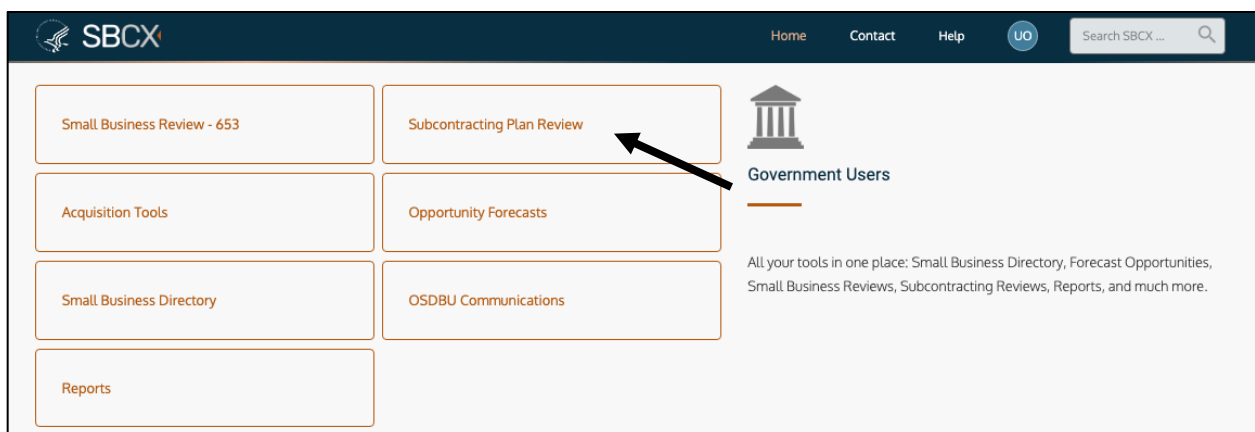
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Introduction

SBCX allows you to complete the Subcontracting Plan Review process from start to finish with one or more offerors and reviewers.

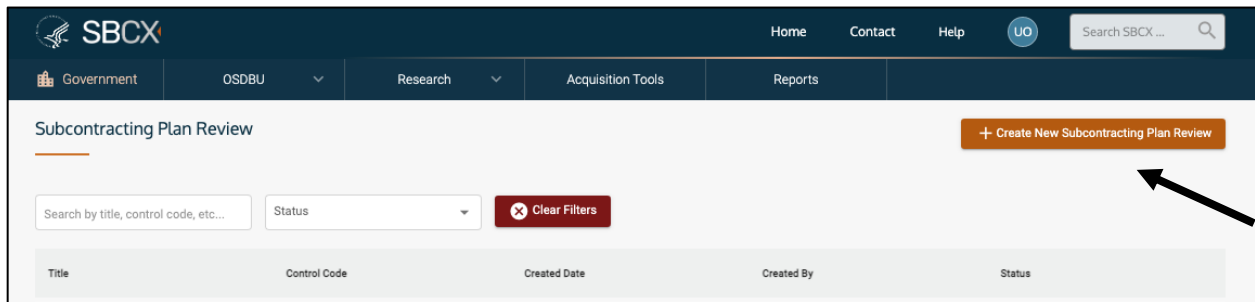
Navigation

Access Subcontracting Plan Reviews from the Government User section of SBCX. Users can create Subcontracting plans and evaluate them when assigned to the Subcontracting Plan Review.



Creating a Subcontracting Plan Request

Use the Create New Subcontracting Plan Review button to create the Summary for a Subcontracting Plan review.



The SBCX Subcontracting Plan is created in four steps.

1. **Search** for a 653 Control Code or Create a Subcontracting Plan without it.
2. **Project Information** requires identifying information.
3. **Proposal Details** requires the Submission deadline for the subcontracting plans. SBCX enforces the deadline and sends a notification when the evaluation process can begin.
4. **Complete** the summary to invite offerors to submit plans or get a link to include in your solicitation documents.

If you do not know which offerors you would like to invite to submit Subcontracting Plans, the following information may be helpful.

- **Save** keeps the Subcontracting Plan in the *Started* status
- **Copy Link** to save the Subcontracting Plan link to your clipboard.
- **Complete and Return to Subcontracting Plans** publishes the link. Offerors can only respond when the status is *Ready for Offerors*.

Invitations to Offerors

Two questions will lead to the invitation option.

1. **Multiple Awards.** Choose the Yes or No option that applies.
2. **Do you know which Offerors you would like to invite to submit Subcontracting Plans?** Choose “Yes” to send invitations to offerors.

New Subcontracting Plan

Control Code: Not Provided

Search Project Information Proposal Details Complete

This Subcontracting Plan is ready for invitation!

Invite Offeror(s) Complete and Invite Later

- **Save** keeps the Subcontracting Plan in the *Started* status
- **Complete and Invite Later** places the Subcontracting Plan in the *Ready for Invitation* status. This means that you are waiting to invite offerors.
- **Invite Offeror(s)** to go to the Invitation page. Click + Invite Offeror. Once an Offeror is invited, the status becomes *Sent to Offeror*.

The Offeror Invitation process is four steps.

1. **Search** for the Offeror's organization by UEI and Cage code if applicable.
2. **Confirm** the Offeror's organization is found or try again.
3. **Proposal Details** allows only those on the invitation to respond to the request. A notification email will go to the Prime POC and an additional POC if needed.
4. **Review** and **Send** the invitation to the Offeror(s). Saving for later places the invitation in a *Created* Status.

[Invite List](#)

✓ Search Organization
✓ Confirm Organization
✓ Proposal Details
4 Review and Send

Organization Information

Organization	Apex Logic, Inc
UEI	N1FXKRFNDN37
CAGE Code	1UTX9
Address	170 S. Virginia St., Ste 203 Reno NV, 89501
Prime POC Email Address	business.user@test.com
Additional POC Email Address	Not Provided

Proposal Details

Performance Periods	Period Name	Start Date	End Date	Proposed Amount
	Base Period	01/01/2023	12/31/2023	\$750,000.00
Total:				\$750,000.00
Option to Extend (FAR 52.217-8)	N/A			
Proposed Total Contract Value	\$750,000.00			

Back
Save For Later
Send Invite

Communications

Use the company link in the Subcontracting plan to monitor Offeror progress. Use the **Notes** tab to communicate with the parties involved in the review. The Contracting Officer may request a clarification and return the subcontracting plan for revision before the deadline occurs.

Evaluation

When the Subcontracting Plan is in Evaluation status, the offerors plans are ready for review. Use the Organization link view the Subcontracting Plans ready for review.

1. **Subcontracting Goal Data:** SBCX provides calculations for your review and flags amounts above or below the agency goals. There is also space for comments for any items that are unacceptable.
2. **Requirements:** This step applies to Individual and Master Plan evaluations. Verify whether the Offeror's answers are acceptable or unacceptable.
3. **Determination:** Answer the question(s) to complete the evaluation.
4. **Signature and Submission:** Identify the next reviewer (if applicable) in the process and confirm the evaluation by saving and submitting the evaluation. The Subcontracting Plan Review process involves three approvers.
 1. Evaluation CO
 2. Evaluation SBS
 3. Evaluation SBA

OPDIV Training Demo

CO Evaluation SBS Evaluation SBA Evaluation

Plan Review

✓ Goal Data ✓ Requirements ✓ Determination 4 Signature

This Subcontracting Plan Review was submitted by:

UserOpdiv2CO2, Opdiv2co2
Contracting Officer
opdiv2.co2@usdop.gov
(202) 111 - 2222

Select the SBS you would like to review this plan*

- Please Select -

Previous Save and Submit

A PDF version of each approver’s evaluation is available when the information is in Read-Only status.

The screenshot displays the SBCX web application interface. At the top, there is a navigation bar with the SBCX logo, a search bar, and links for Home, Contact, Help, and a user profile icon (UO). Below the navigation bar, a breadcrumb trail shows: Government > OSDDBU > Research > Acquisition Tools > Reports.

The main content area is titled "OPDIV Training Demo" and features a progress bar with three segments: "CO Evaluation" (completed), "SBS Evaluation" (in progress), and "SBA Evaluation" (pending). Below the progress bar, a "Plan Review" section contains a warning message: "This subcontracting plan review cannot be modified at this time." and a "Print Subcontracting Plan" button.

The "SUBCONTRACTING PLAN - Apex Logic, Inc" section provides the following details:

A Subcontracting Plan is required if the estimated cost of the contract may exceed **\$750,000 (\$1,500,000 for construction)** Small businesses are excluded. The following outline meets the minimum requirements of section 8(d) of the Small Business Act, as amended, and implemented by the Federal Acquisition Regulations (FAR) Subpart 19.7. The U.S. Department of Health and Human Services (HHS), Office of Small and Disadvantaged Business Utilization (OSDBU) recommends that offerors use the following format to submit proposed Individual Subcontracting Plans. It is not intended to replace any existing Corporate/Commercial Plan that is more extensive. Questions should be forwarded to the Contracting Officer and/or Small Business Subcontracting Program Manager.

Offeror Information	
Organization Apex Logic, Inc NIFXKRFNDN37 1UTX9 170 S. Virginia St., Ste 203 Reno NV, 89501	POC Email business.user@test.com Additional POC Email Not Provided

Project Information		Evaluation
Subcontracting Dollars \$500,000.00	Plan Type INDIVIDUAL	
Total dollars planned to be subcontracted to ALL SMALL BUSINESS concerns \$125,000.00 25.00%		Review Acceptable
Total dollars planned to be subcontracted to ALL BUSINESS concerns \$500,000.00 100.00%		Review Acceptable

If you still need technical help, [contact us](mailto:client.support@apexlogic.com) at client.support@apexlogic.com.