

electronic Report Deliverable Submission for Office of Acquisitions



*User Guide for PT,
CS & COR*

April 2018

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eRDS – Electronic Report Deliverable Submission

Program Technician
Contracting Officer Representative
Contract Specialist



NIH National Institutes of Health
Turning Discovery Into Health

Overview

The electronic Report Deliverable Submission (eRDS)

The electronic Report Deliverable Submission (eRDS) system is a secure system for the electronic submission, capture, tracking and review of Contract deliverables. eRDS was developed for the purpose of streamlining Contract deliverable submission and review processes, preparing for the eventual elimination of paper submissions, and reducing costs associated with storage of large paper files.

eRDS consists of two systems: External System (used by Vendors) and Internal System (used by Office of Acquisitions)

1. External System : Allows **Vendors** to easily submit Contract deliverables. Vendors are requested to access the external system for self-registering and submitting Contract deliverables.
2. Internal System: Allows Office of Acquistios staff (**Program Technicians, Contracting Officers Representative, and Contract Specialists/Officer**) to track, review and accept Contract deliverables.

User Roles in External eRDS System

electronic Report Deliverable Submission (eRDS) system

- **Vendor Admin (VA):** the “lead” Vendor account; can create and assign VS to their Contracts, as well as submit deliverables themselves. The VA is assigned to the Contract by the Contract Specialist (CS).
- **Vendor Submitter (VS):** created by the VA to submit deliverables for their Contracts.

User Roles in Internal eRDS System

eRDS has three Internal roles

- **Program Technician (PT):** the first reviewer of Vendor submissions; they confirm the package contains all the required documents of the Contract at the particular interval. The PT is assigned to the Contract by a Contract Specialist (CS).
- **Contracting Officer Representative (COR):** the second reviewer of Vendor submissions; they review the validity of package content, accept or reject the content, and record their findings in the COR Inspection of Deliverable Report. The COR is assigned to the Contract by a Contract Specialist (CS).
- **Contract Specialist (CS):** the third and last reviewer of Vendor submissions, they review the COR Inspection of Deliverable Report and complete the submission package review with a final acceptance or rejection notification to the Vendor.
CS is also responsible for administrative duties:
 - ✓ Assigns a PT and COR (internal roles), and the VA (external role) to the Contract.
- CS may also complete the initial PT review themselves, and then transfer the deliverables to a COR.

Assign Users to Contracts

Contract Specialist (CS) is responsible for assigning a VA (external User who submits the deliverables) to a Contract. In addition, CS is responsible for assigning a PT, and COR to the Contract.

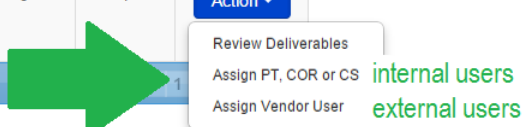
Assign Vendor Admin:

1. Go to eRDS: <https://ecps-internal.nih.gov/>
2. Click on eRDS Login. Log in using your **NIH Username** and **Password**
3. The User will be presented with the “**My Contract Deliverables**” page.
4. Click on the **Action > Assign Vendor User** for an applicable Contract.

My Contract Deliverables

Contract Title	Contract Specialist	Last Submitted [ET]	Submission Count	Forwarded to COR	COR Accepted	COR Rejected	CS Accepted	CS Rejected	Action
HHSN272201000047C Targeted Clinical Trials to Redu Antimicrobial Resistance	Mr Bijan Mansoury	4/10/2015 5:09:2 PM	29	12	11	0	9	1	Action ▼

Showing 1 to 1 of 1 entries



5. Enter full or partial first and last name of a Vendor Admin into the First and Last Name fields and click on the Search button.

Assign Vendor User

Contract : HHSN272201000047C
Title : Targeted Clinical Trials to Reduce Risk of Antimicrobial Resistance
Contract Start Date: 9/24/2010 12:00:00 AM
Contract End Date: 3/31/2016 12:00:00 AM
Vendor: PITTSBURGH UNIV
Your role on this contract: **Contract Specialist/Officer** ← your role on contract

There are 29 submissions for this contract

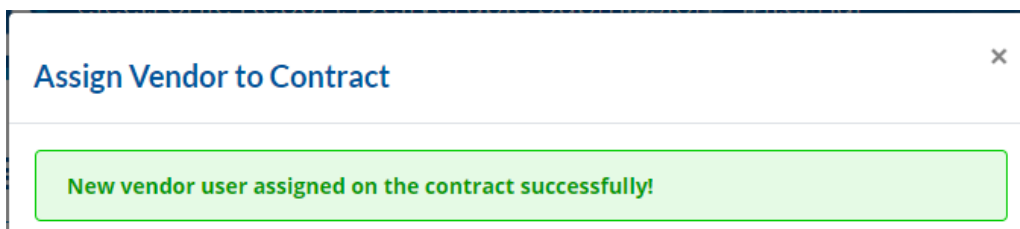
Find Staff:

First Name: Last Name: (from eRA Commons or NIH External Active Directory)

Vendor staff assigned on contract:

Show 10 entries

5. From the results pop-up, select an account, click on **Action > Assign as Vendor Admin**.
6. A message confirming the successful role assignment will be displayed on the Assign Vendor to Contract page.



7. The Vendor Staff list will be updated accordingly. “Submissions by this User” column will indicate the number of submissions performed by the Vendor Admin. CS can only delete Vendor Admins who have not submitted any deliverables, thus, the number in the “Submissions by this User” column is “0”.

Vendor staff assigned on contract:

Show 10 entries Search: _____

Login Name	Name	Email	Phone	Fax	Role	Submissions by this user	Action
LeCi	Le, Cindy (NIHEXT)	lecindy78@gmail.com			Vendor Admin	0	Remove
JacobR	Reuben1, Jacob	rmolle@gmail.com	202-285-9304		Vendor Admin	5	

Showing 1 to 6 of 6 entries First Previous 1 Next Last

Vendors can be removed before they submit deliverables.....

.....but not after

Assign CS, COR, or PT

8. To add an internal User, choose **Action > Assign PT, COR, or CS.**
9. Repeat steps 6 and 7.

Accessing eRDS

- Internal Users access a site labelled ***Electronic Proposal and Deliverable Submission (ePDS)*** with their NIH account.
- It serves as the internal site for Contract proposals (eCPS) and Contract deliverables (eRDS) submissions.
Note: The Vendor site (<https://erds.niaid.nih.gov>) is actually labelled "eRDS" which they access using their OTP account. Instructions for Vendors can be found on the Vendor site and in a separate User document.

Direct website

Internal Site: <https://ecps-internal.nih.gov/>

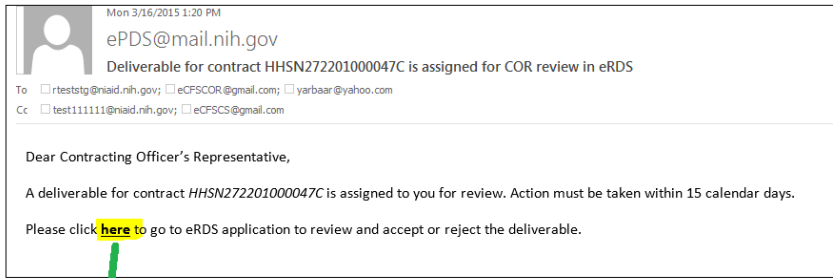
1. The PT, COR, or CS will need to select "eRDS Login" in order to login into eRDS Internal site:



2. The Users will land on the "My Contract Deliverables" page.

Through a notification link

- Internal Users (PT, COR, CS) can also connect to eRDS through links embedded in the email notifications received when assigned a Contract role or a deliverable review task
- A link from a pending deliverable review task will take you directly to the Contracts Deliverable review page after login:



Contract Deliverables

Contract : HHSN272201000047C
 Title : Targeted Clinical Trials to Redu
 Contract Start Date: 9/24/2010 12:00:00 AM
 Contract End Date: 3/31/2016 12:00:00 AM
 Vendor: PITTSBURGH UNIV
 Your role on this contract: COR

Procurement Technician

The Procurement Technician (PT) Review Process:

Note: Contract Specialist is responsible for assigning a Procurement Technician (PT) to a Contract.

1. If PT is assigned to a Contract, PT will receive an email notification when Vendor submits a deliverable. CS is copied on this email.
2. PT can log into the application either by clicking on the eRDS link in the email or by entering the site address directly in the browser <https://ecps-internal.nih.gov/>.
3. Click on Action -> Review Deliverables. The Contract Deliverables page will display the following elements:
 - Contract Summary;
 - the user's role for this Contract (eRDS allows one User to have different roles in different Contracts);
 - filters;
 - submission data: title, submission date, deliverable status.

Contract Deliverables

Contract : HHSN272201000047C
 Title : Targeted Clinical Trials to Reduce Risk of Antimicrobial Resistance
 Contract Start Date: 9/24/2010 12:00:00 AM
 Contract End Date: 3/31/2016 12:00:00 AM
 Vendor: PITTSBURGH UNIV
 Your role on this contract: Procurement Technician

Contract Summary

Role Confirmation

Default filter: Active Accepted All There are 3 submissions with the selected status.

Title	Vendor Submission Date	Deliverable Status
resubmit23322	Submitted: Feb 25, 2015 EST	Status: Submitted to PT
JobTestDeliverable	Submitted: Feb 16, 2015 EST	Status: CS Accepted
10v5 Monthly AOM Progress Report	Submitted: Jan 29, 2015 EST	Status: CS Accepted

4. Open a deliverable with the status of *Submitted to PT* by clicking the field.
5. Review the Vendor Specified Information and Submitted Files as appropriate.

Last day to complete PT,
COR, and CS Reviews

resubmit23322
Submitted: Feb 25, 2015 EST
Status: Submitted to PT

Deadline Information: If no action is taken by Mar 25, 2015, the deliverable will be automatically accepted.

Vendor Name: PITTSBURGH UNIV Reuben1, Jacob	Contact Phone: 202-285-9304 Contact Email: rmolle@gmail.com
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Vendor Specified Information

Deliverable Type: IT Security Plan (IT-SP) ← Review

Time Frame: N\A

Vendor Submitted Files:

File Name
firefiretestKKKK - Redact.pdf ← Review

5a. FOR USE BY NIAID IC ONLY

Select the *Merlin Deliverable Type* that matches the submitted files. “go to MERLIN” button will take the User to Merlin.

Select Merlin Deliverable Type

Monthly Progress Report [Due: May 15, 2006]

go to MERLIN

6. Enter Comments if any applicable (optional filed).

Comments

↶ ↷ Paragraph **B** *I* A

Auto approved after 30 days from submission

7 WORDS

Show Comments History

7. Select Forward to COR (Forward to COR) to complete the PT review

8. PT will return to the Contract Deliverables page and see a green confirmation message, and an updated status of *“Forwarded to COR”*.

confirmation message

Forwarded to COR process completed successfully.

Contract Deliverables

Contract : HHSN272201000047C
Title : Targeted Clinical Trials to Reduce Risk of Antimicrobial Resistance
Contract Start Date: 9/24/2010 12:00:00 AM
Contract End Date: 3/31/2016 12:00:00 AM
Vendor: PITTSBURGH UNIV
Your role on this contract: Procurement Technician

Active Accepted All There are 3 submissions with the selected status.

Status changed to Forwarded to COR

resubmit23322 Submitted: Feb 25, 2015 EST	Status: Forwarded to COR
JobTestDeliverable Submitted: Feb 16, 2015 EST	Status: COR Accepted
10v5 Monthly AOM Progress Report Submitted: Jan 29, 2015 EST	Status: CS Accepted

Back

9. The submission now goes to the COR for review.

Note: CS can take this action on behalf of PT and forward the deliverables to COR.

Notifications to PT: (To see more on notifications go to [eRDS Notifications](#) section)

1. First notification to PT goes out on Vendor submission of deliverable. Contract Specialist is copied on this email.
2. PT has 3 calendar days to work on the deliverable and forward to COR.
3. Second Notification to PT is goes out after 3 days of no action taken on a deliverable. Contract Specialist is copied on this email.
4. Third Notification (Final Notification) goes out to PT after 5 days of no action taken on a deliverable. Contract Specialist and OA Admin staff are copied on this email.

IMPORTANT: The ***Deadline*** date for auto approval is 30 Calendar days from the Vendor submission date. If CS review is not completed within 30 calendar days, the deliverable will be automatically approved.

Contracting Office Representative

The Contracting Office Representative (COR) Review Process

Note: Contract Specialist is responsible for assigning a Contracting Office Representative (COR) to a Contract.

1. COR receives an email notification that when PT forwards the deliverable to COR for review.

2. COR can log into the application either by clicking on the eRDS link in the email or by entering the site address directly in the browser <https://ecps-internal.nih.gov/>.
3. Click on Action -> Review Deliverables. The Contract Deliverables page will display the following elements:
 - Contract Summary;
 - the user's role for this Contract (eRDS allows one User to have different roles in different Contracts);
 - filters;
 - submission data: title, submission date, deliverable status.

Contract Deliverables

Contract : HHSN272201000047C
 Title : Targeted Clinical Trials to Reduce Risk of Antimicrobial Resistance
 Contract Start Date: 9/24/2010 12:00:00 AM
 Contract End Date: 3/31/2016 12:00:00 AM
 Vendor: PITTSBURGH UNIV
 Your role on this contract: COR

Contract Summary

Role Confirmation

Default filter: Active Accepted All There are 3 submissions with the selected status.

Title	Vendor Submission Date	Deliverable Status
resubmit23322 Submitted: Feb 25, 2015 EST		Status: Submitted to PT
JobTestDeliverable Submitted: Feb 16, 2015 EST		Status: Forwarded to COR
10v5 Monthly AOM Progress Report Submitted: Jan 29, 2015 EST		Status: CS Accepted

4. To open deliverable with a status of *Forwarded to COR*, click on the field.
5. Review the Vendor Specified Information as appropriate.
6. Mouse click on the Vendor Submitted Files to open.

last day to complete PT, COR, and CS reviews

JobTestDeliverable
Submitted: Feb 16, 2015 EST
Status: Forwarded to COR

Deadline Information: If no action is taken by Mar 16, 2015, the deliverable will be automatically accepted.

Vendor Name: PITTSBURGH UNIV
Reuben1, Jacob
Contact Phone: 202-285-9304
Contact Email: rmolle@gmail.com

Vendor Specified Information
Deliverable Type: Final Transition Plan
Time Frame: N\A

Vendor Submitted Files:

File Name
firefiretest - Addedup.pdf
firefiretest - replace.pdf
firefiretest (03-09-2015 02_54_40).pdf

COR Acceptance and Rejection Document:
Comments will be part of the **COR Inspection of Deliverable Report (IOD)** if the COR or CS rejects the submission

Your comments
Note: Comments entered here will be part of the system generated pdf that will be available to the vendor once CS approves/rejects deliverables.

[Show Comments History](#) select to show the date name, and text of comment history for this submission

[Accept and Forward to CS](#) [Reject and Forward to CS](#) Comments are required if COR rejects

7. Click on the “*Show Comments History*” to read comments left by the PT.

8. Enter COR comments in the *Your Comments* field

*Note: COR is required to leave comments if rejecting the submission. Please remember that entered comments will be part of the **COR Inspection of Deliverable Report** available to the Vendor.*

9. Complete the review by selecting [Accept and Forward to CS](#) (Accept and Forward to CS) button to accept the submission or [Reject and Forward to CS](#) (Reject and Forward to CS) button to reject the submission.

confirmation message will say Approval or Rejection

COR Approval process completed successfully.

Contract Deliverables

Contract : HHSN272201000047C
Title : Targeted Clinical Trials to Reduce Risk of Antimicrobial Resistance
Contract Start Date: 9/24/2010 12:00:00 AM
Contract End Date: 3/31/2016 12:00:00 AM
Vendor: PITTSBURGH UNIV
Your role on this contract: COR

Active Accepted All There are 3 submissions with the selected status.

Status changed to COR Accepted or COR Rejected

resubmit23322 Submitted: Feb 25, 2015 EST	Status: Submitted to PT
JobTestDeliverable Submitted: Feb 16, 2015 EST	Status: COR Accepted
10v5 Monthly AOM Progress Report Submitted: Jan 29, 2015 EST	Status: CS Accepted

[Back](#)

10. COR will see a green confirmation message and an updated status for the deliverable: “COR Accepted” or “COR Rejected”.

11. It now goes to the CS for the 3rd and final review.

Notifications to COR: (To see more on notifications go to [eRDS Notifications](#) section)

12. First notification is sent to COR when once PT forwards the deliverable for COR review in eRDS Application. CS is copied on this email. COR has 15 days to review and Accept/Reject the deliverable and forward to CS.
13. Second notification is sent to COR after 20 days of no action on the deliverable by COR. CS is copied on this email.
14. Third notification (Final notification) is sent to COR after 26 days of no action on the deliverable by COR. CS is copied on this email.

IMPORTANT: The Deadline date for auto approval is 30 Calendar days from the Vendor’s submission date. If CS review is not completed within 30 calendar days, the deliverable will be automatically approved.

Contract Specialist

The Contract Specialist (CS) Review Process

1. CS receives an email notification that when COR has Accepted or Rejected the submission.
2. CS can log into the application either by clicking on the eRDS link in the email or by entering the site address directly in the browser <https://ecps-internal.nih.gov/>.
3. Click on Action -> Review Deliverables. The Contract Deliverables page will display the following elements:
 - Contract Summary;
 - the user’s role for this Contract (eRDS allows one User to have different roles in different Contracts);
 - filters;

- submission data: title, submission date, deliverable status.

Contract Deliverables

Contract : HHSN272201000047C
 Title : Targeted Clinical Trials to Reduce Risk of Antimicrobial Resistance
 Contract Start Date: 9/24/2010 12:00:00 AM
 Contract End Date: 3/31/2016 12:00:00 AM
 Vendor: PITTSBURGH UNIV
 Your role on this contract: Contract Specialist/Officer

[Contract Summary](#)

[Role Confirmation](#)

Default filter

Active Accepted All There are 3 submissions with the selected status.

Title	Vendor Submission Date	Deliverable Status
JobTestDeliverable Submitted: Feb 16, 2015 EST		Status: COR Accepted
10v5 Monthly AOM Progress Report Submitted: Jan 29, 2015 EST		Status: CS Accepted
resubmit23322 Submitted: Feb 25, 2015 EST		Status: COR Rejected

4. To open deliverable with a status of *COR Accepted* or *COR Rejected*, mouse-click the field.
5. Review the Vendor Specified Information as appropriate..
6. Mouse click on the Vendor Submitted Files to open.

4a. FOR USE BY NIAID IC ONLY

The Files in Repository column indicates the files availability in the EDRMS repository.

- A nightly system process will send the files to EDRMS after the CS Accepts the submission.
- After acceptance, it can take up to 24 hours for them to appear.
- Rejected files are not sent to EDRMS

last day to complete PT, COR, and CS reviews

JobTestDeliverable
Submitted: Feb 16, 2015 EST
Status: COR Accepted

Deadline Information: If no action is taken by **Mar 25, 2015**, the deliverable will be automatically accepted.

Vendor Name: PITTSBURGH UNIV
Reuben1, Jacob

Contact Phone: 202-285-9304
Contact Email: rmolle@gmail.com

Vendor Specified Information

Deliverable Type: Final Transition Plan
Time Frame: N/A

Files sent to EDRMS after CS completes review

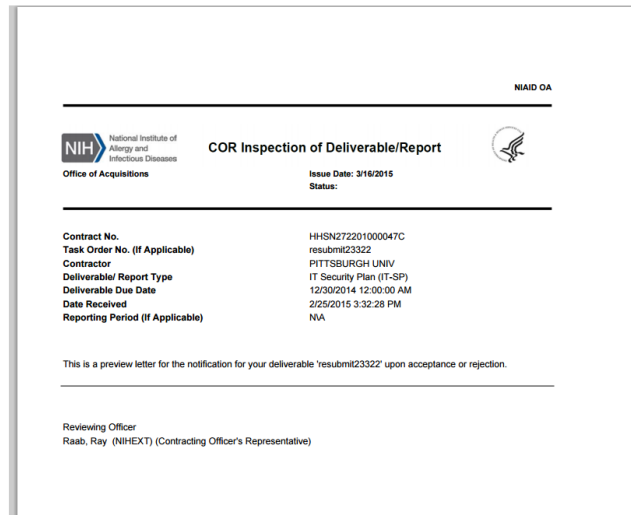
Vendor Submitted Files:

File Name	Files in Repository
firefiretest - Addedup.pdf	No
firefiretest - replace.pdf	No
firefiretest (03-09-2015 02_54_40).pdf	No

← Review

COR Acceptance and Rejection Document:

7. Check *Show Comments History* to read comments left by the PT and COR. If COR has provided comments, it will appear in the comments box.
8. Review current COR comments in the *Your Comments* field, and edit them as appropriate.
9. Select the *Preview COR Inspection Report* link to see the IOD report in the PDF format with displays the appropriate comments.



COR Inspection of Deliverable - PDF

Note: Please remember that in case of a rejection, entered comments will be part of the **COR Inspection of Deliverable Report available to the Vendor.**

10. Complete the review by selecting **Accept** (Accept) button to accept the submission or **Reject** (Reject) button to reject the submission.

Select Merlin Deliverable Type: Annual Progress Report [Due: Oct 15, 2012] go to MERLIN

Your comments
Note: Comments entered here will be part of the system generated pdf that will be available to the vendor once CS approves/rejects deliverables.
 test 1
 (comments required if rejected)

Show Comments History

Preview COR inspection report
 COR_Rejection_Approval_Preview.pdf

Accept Reject

NOTE: If CS Accepts, the comments will not be on the IOD pdf sent to the Vendor
 If CS Rejects, comments will be on the IOD pdf report as displayed in the preview

COR Inspection of Deliverable (IOD) report

11. CS will return to the Contract Deliverables page and see a green confirmation message and an updated status of *CS Accepted* or *CS Rejected*.

Accepted or Rejected

CS Approval process completed successfully.

Contract Deliverables

Contract: HHSN272201000047C
 Title: Targeted Clinical Trials to Reduce Risk of Antimicrobial Resistance
 Contract Start Date: 9/24/2010 12:00:00 AM
 Contract End Date: 3/31/2016 12:00:00 AM
 Vendor: PITTSBURGH UNIV
 Your role on this contract: Contract Specialist/Officer (You are also an admin on the site)

Change to Accepted or All to see completed entry

Active Accepted All Filter There are 2 submissions with the selected status.

resubmit23322 Submitted: Feb 25, 2015 EST	Status: COR Rejected
10v5 Monthly AOM Progress Report Submitted: Jan 29, 2015 EST	Status: CS Accepted

Back

12. The submission review cycle is now complete, and the Vendor Contact (VC) receives a notification from eRDS indicating submission acceptance or rejection. In both situations, the notification contains a link to the Vendor's eRDS *My Submission History* page, where they will re-submit as the Contract agreement stipulates

Notifications to CS (To see more on notifications go to [eRDS Notifications](#) section)

1. Contract Specialist is copied on the Notification to PT when vendor submits deliverable.
2. Contract Specialist is copied on Second Notification to PT which goes out after 3 days of no action taken on a deliverable.

3. Contract Specialist is copied on Final Notification that goes out to PT after 5 days of no action taken on a deliverable.
4. Contract Specialist is copied on the First Notification is sent to COR when once PT fowrads the deliverable for COR review in eRDS Applictaion.
5. Contract Specialist is copied on the Second Notification is sent to COR after 20 days of no action on the deliverable by COR.
6. Contract Specialist is copied on the Final notification that is sent to COR after 26 days of no action on the deliverable by COR.
7. Notification is sent to CS when once COR forwads the deliverable for CS review in eRDS Applictaion. CS needs to take action(Accept/Reject) deliverable before 30 calender days from the Vendor submission date.

IMPORTANT: The Deadline date for auto approval is 30 Calender days from the Vendor's submission date. If CS review is not completed within 30 calender days, the deliverable will be automaitically approved.

eRDS Notifications

eRDS/ePDS uses email notifications to keep Users aware of deliverable actions and deadlines

- An acceptable submission response and turnaround time is currently set to 30 calendar days. After 30 days, submissions are automatically accepted regardless of any administrative or content issues discovered later.
- The 30 day “clock” starts when the Vendor formally submits a deliverable and stops with CS approval or rejection of the deliverable.
- As reminders, eRDS/ePDS sends email notifications for two conditions:
 - After a User (Vendor or internal) completes a submission task
 - After specific time elapses between complete and incomplete submission tasks

Notification Schedule

Green notifications are normal and occur for every submission

Yellow notifications indicate a potential slip in the approval process

Red notifications are critical and indicate a high chance of approval process failure

Seq.	Event	Recipient	Copied	Schedule
1	Assignment to Contract	VC/VS		Contract assignment date
2	Submitted to PT	PT	CS	Submission date
3	Submitted to PT + 3 days of no action	PT	CS	Submission date + 3 days
4	Submitted to PT + 5 days no action	PT	CS, Admin	Submission date + 5 days
5	Forwarded to COR	COR	CS, alt COR	
8	COR Accepted/Rejected	CS		
6	Forwarded to COR + 15 days of no action	COR	CS, alt COR	Submission date + 20 days
7	Forwarded to COR + 20 days of no action	COR	CS, alt COR	Submission date + 25 days

9	Auto Accept	CS, COR		Submission date + 30 days
10	CS Accepted/Rejected	VC/VS	CS	CS Accepted/Rejected date
11	Auto Accept	CS, COR		Submission date + 30 days

- The *ideal* evaluation process – consisting of **green** notifications only – would be:
 - PT completes their review before the end of the 3rd day from submission, then:
 - COR before the end of the 20th day from submission, last:
 - CS before the 30th day from submission.
- This cross-functional flowchart provides a more detailed illustration of the notification schedule conditions:

eRDS Internal (ePDS) notification sequence

