

# **Data Breach Response and Identity Protection Services (IPS) SIN 520-20 Ordering Procedure**

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## Introduction

With the increased demand for identity protection services and ever-changing requirements of need by our customer agencies, the General Services Administration's (GSA) Office of Professional Services and Human Capital Categories (PSHC) has redefined Special Item Number (SIN) 520-20 as its official Data Breach Response and Identity Protection Services (IPS) SIN on the Professional Services Schedule (PSS).

Redefining the SIN now allows industry to provide current state-of-the-art identity protection services (identity monitoring and notification of Personally Identifiable Information (PII) and Protected Health Information (PHI), identity theft insurance and identity restoration services, and protection (safeguard) of the confidentiality of PII and PHI) while giving you the ability to meet your individual requirements.

The revised SIN 520-20 allows for a total solution for identity protection services (IPS) and affords the ordering office to tailor their scope for only selective segments of services found under this SIN. For example an ordering office may have a suspected breach, but due to the uncertainty, may only want to seek credit monitoring services that doesn't require call center support, identity restoration, etc. You will now have the ability to obtain specifically what is needed for your immediate situation.

## Resources

Online resources supporting the use of the IPS SIN are available at [Professional Services Schedule \(PSS\)](#)

OMB Memorandum M-16-14: [Category Management Policy 16-2: Providing Comprehensive Identity Protection Services, Identity Monitoring, and Data Breach Response](#) (Issued July 1, 2016)

GSA elibrary website is available on [eLibrary](#).

## Who is this Guide Written for?

This guide describes the ordering process for agency users, highlighting procedures specific to the IPS SIN. It is written for warranted Federal ordering contracting officers (OCOs) considering or intending to use the IPS SIN. The guide addresses contracting issues and concepts unique to the IPS SIN. It does not address general contracting issues or concepts unless necessary for complete understanding. The guide presumes the OCO is familiar with FAR [8.405](#) ordering procedures.

## Roles and Responsibilities

GSA is responsible for the administration and management of the IPS SIN and the Schedule contracts. Among the responsibilities GSA will meet are:

- Monitor and evaluate performance against the IPS SIN requirements
- Review, approve, and incorporate System Security Plan (SSP) changes
- Have exclusive, non-delegable rights to modify the IPS SIN and the Schedule contracts

- Provide advice and guidance to ordering/requiring activities and OCOs regarding procurement-related matters
- Conduct meetings with contractors as necessary

Ordering Activity responsibilities:

- Define task order requirements
- Prepare Statement of Work (SOW)/Performance Work Statement (PWS) for task order

Request for Quote (RFQ)

- Fund requirements
- Apply regulatory and statutory requirements applicable to the ordering agency

## Authorized Users

Any warranted Contracting Officer from [authorized users of the Schedules program](#), within the scope of their delegated procurement authorities, may place orders against the IPS SIN.

## Task Order Terms and Conditions

In the event of any conflict between the Schedule contract and the task order, the terms and conditions of the contractor's Schedule contract shall prevail over the task order.

Ordering activities may add non-conflicting terms and conditions to individual orders, to include specific agency terms and conditions. Additionally, any clauses incorporated at the task order level required for small business set-aside orders shall be applicable to that order even if those clauses have not been incorporated to the Schedule contract.

## General Ordering Procedures

### Step 1 – Acquisition Planning

Orders against MAS contracts and BPAs are not exempt from Acquisition Planning as prescribed in FAR [Part 7](#).

Conduct market research for your requirement in accordance with regulation as you would do with any procurement. As part of sound market research, the Schedule contract terms and conditions, Schedule contract holders, and Schedule contract pricing shall be reviewed.

Important considerations in developing your acquisition plan include:

### **Whether to Issue a Task Order or a Blanket Purchase Agreement (BPA)**

If you are responding to a recent breach, then a task order is the most appropriate. If you are preparing your agency right now in order to respond to a breach that may happen in the future, then a BPA is more appropriate.

### **Pricing**

Subject to FAR and Agency level required consideration criteria, limitations, and/or prohibitions,

you may use the following order types:

- Firm Fixed-Price (FFP)
- Time-and-materials (T&M)
- Labor-Hour (LH)

Any order not issued on an FFP basis must be justified in accordance with FAR [8.404\(h\)\(3\)](#).

Prices at the Schedule contract level have been established at the single unit of issue of “Price Per Month/Per Impacted Individual”. This allows you to make “apples-to-apples” price comparisons between Schedule contractors under the IPS SIN. You still maintain the flexibility to utilize this fixed pricing as a basis to further request fixed prices at the task order level (e.g. “per product redeemed per the agreed-upon coverage period (month, year, etc.)”).

Furthermore, you have the flexibility to order some (“a la carte”) or all (“total solution”) of the services as defined in SIN 520-20.

### **NAICS Code**

The services under the IPS SIN are aligned with the North American Industrial Classification System (NAICS) code of 541990 – All Other Professional, Scientific and Technical Services.

This NAICS code of 541990 that you assign to your task order will not necessarily be the same code assigned to the task order award report in the Federal Procurement Data System – Next Generation (FPDS-NG). This is due to the current FPDS system limitation which defaults all orders to the NAICS code assigned at the Schedule contract level which is shown for each contractor in [eLibrary](#).

### **Task Order Funding and Funding Limitations**

All task orders are subject to any agency funding appropriation limitations.

### **Task Order Duration**

The period of performance for each task order awarded under the IPS SIN shall be specified in the task order by the ordering activity. Orders issued will have their own period of performance. Orders issued prior to but not completed before the Schedule contract expires shall be completed (including any order options exercised) in accordance with the Schedule contract FAR Clause 52.216-22, Indefinite Quantity.

### **Minimum and Maximum Order Limitations**

Each Schedule contract contains FAR Clause 52.216-19, Order Limitations. The minimum order limitation dollar value is \$100.00. The maximum order limitation dollar value is \$1 million. This limitation has no practical effect on Schedule contracts for services as each order is awarded via a RFQ. A contractor who does not wish to perform on an order above the maximum order limitation would simply not quote on that order. Thus, there is no maximum per order limitation under the IPS SIN.

## **Step 2 – Define the Requirements and Develop the RFQ**

The ordering activity shall follow the ordering procedures at FAR [8.405](#) for orders under Federal Supply Schedules.

- a. Develop a SOW in accordance with (IAW) FAR [8.405-2](#) if a SOW is required. The SOW must include a description of the work to be performed, location of work, period of performance, deliverable schedule, applicable performance standards, and any special requirements (e.g., security clearances, travel, etc.).

- b. Ensure the requirements fit within the scope of the IPS SIN.
- c. The ordering activity may include agency specific regulations/terms and conditions in the task order that do not conflict with the Schedule contract.
- d. The ordering activity shall ensure all internal reviews (e.g. legal review) as required by ordering activity policies have been completed.
- e. The ordering activity may utilize the FAR Part 51 deviation for T&M/LH orders (see the [MAS Desk Reference](#) for details on utilizing the FAR Part 51 Deviation).
- f. Use the RFQ form and format normally prescribed and used by your agency for task order RFQs, consistent with FAR [8.405](#).

### **Step 3 – Issue the RFQ**

To ensure fair opportunity, the suggested method for issuing the task order RFQ is to utilize GSA eBuy ([www.ebuy.gsa.gov](http://www.ebuy.gsa.gov)).

### **Step 4 – Evaluate Quotes**

OCOs shall evaluate all responses received based on the methodology stated in the task order RFQ to maintain fairness in the ordering process and mitigate protest risk. Place the order with the Schedule Contractor that represents the best value.

### **Step 5 – Award the Task Order**

Document your task order award in accordance with regulation and local policy. At a minimum, all orders shall include the following information:

- A. Complete shipping and billing addresses
- B. Task order / BPA number
- C. Agency order number
- D. Discount terms (if applicable)
- E. Period of performance
- F. Special item numbers (SINs)
- G. A statement of work (if required)
- H. Number of units (if applicable)
- I. Unit price (if applicable)
- J. Total price of order

Order actions must be reported in FPDS within three (3) days after execution of the action.

### **Step 6 – Administer the Order/Execute the Work/Close-Out the Order**

- a. The ordering activity shall be responsible for administering the resulting task order.
- b. The ordering activity is responsible for ensuring that the contractor's performance on each order is reported in CPARS in accordance with the policies in FAR Subpart 42.15. Follow your agency procedures for preparation, review, and submission of performance reports.

- c. Task order files shall be closed out in accordance with FAR Subpart [4.804-1](#) or, if the task order is administered by another office, [4.804-2](#). The procedures prescribed in FAR Subpart 4.804-5 shall be used except when it is appropriate to use the quick closeout procedures in FAR Subpart [42.708](#).

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