



Human Capital and Training Solutions (HCaTS)

Ordering Guide

GSA Federal Acquisition Service

*This **November 2022 Version** of the HCaTS Ordering Guide sets forth the procedures for issuing task orders against the HCaTS family of contracts to fulfill agency mission requirements for complex, integrated human capital management and training requirements.*



Table of Contents

Who is this Guide Written for?	4
Who Can Use HCaTS?	4
How to Begin Using HCaTS?	4
How to Request DPA Training?	5
Roles and Responsibilities	5
Rights Reserved by the Procuring Contracting Officer	5
What are some of the benefits of using HCaTS?	6
Options for Ordering Under HCaTS	7
Scope of HCaTS	7
Out of Scope Services	8
HCaTS Vehicles/ Pools	9
The Ordering Process	10
Step 1: Acquisition Planning	10
Which HCaTS Vehicle to Use: HCaTS Unrestricted, HCaTS SB, or HCaTS 8(a)?	10
Set-Asides for Socioeconomic Programs under HCaTS SB	11
Special Instructions Regarding Orders Set-Aside for 8(a)	11
Task Order Contract Types	13
Assign a NAICS Code to Each Order	13
Task Order Funding and Funding Limitations	14
Minimum and Maximum Order Limitations	14
Task Order Size Representation	14
Task Order Duration	14
Labor Categories for Task Order Work	15
Ancillary Services and Other Direct Costs	15
Security Clearance Considerations for Classified Orders	16
Labor on Time-and-Materials (T&M) and Labor-Hour (L-H) Task Orders	16
Service Contract Labor Standards (SCLS)	17
FAR Clause 52.204-14, Service Contract Reporting Requirements	17

Rights in Data	17
Contract Access Fee (CAF)	18
Other Significant Planning Considerations	18
HCaTS Tools and Planning Resources	19
Scope Determination:	19
Step 2: Define the Requirements	19
Requirements Development Support Resources	19
Price Estimating and Developing IGCE	19
Developing the Solicitation	20
Clauses and Provisions	21
Evaluation Factors	22
Step 3: Issue the Solicitation	22
Methods of Issuing the Task Order Solicitation	22
Contracts in Dormant Status	23
Step 4: Evaluate Proposals	23
Fair and Reasonable Price Determination	23
Step 5: Award the Task Order	24
Order Award Documentation	24
Provide GSA a Copy of the Task Order Award	24
Public Notice of Awards Not Providing for Fair Opportunity	24
Order Level Protests	24
Ombudsman	25
Reporting Task Order Awards in FPDS-NG	25
Post-Award Survey	25
Step 6: Task Order Administration	26
Reporting Modifications in FPDS-NG	26
Subcontracting and Limitations on Subcontracting	26
Performance Evaluation	26
Step 7: Task Order Closeout	26
HCaTS Tools & Resources	27

Who is this Guide Written for?

This guide is written for warranted Federal Contracting Officers who have been granted a Delegation of Procurement Authority to place orders under HCaTS: “Hereby referred to as “Ordering Contracting Officers” (OCOs). This guide addresses contracting issues and concepts unique to the HCaTS contracts; however, OCOs shall follow FAR regulations and their agency specific policies as well as adhere to the terms of the contract. This ordering guide presumes that OCOs are proficient in their duties, with a working knowledge of all applicable Federal regulations, executive orders, and human capital and agency policies.

Additional information to assist customer agencies in using the HCaTS contracts is available online at gsa.gov/hcats. The HCaTS website includes the following resources:

- HCaTS Master Contracts
- Resource Directory: Task Order Samples, Templates, and Reports
- Pre-Award Scope Review process and request form
- HCaTS Training and Delegation of Procurement Authority (DPA) process and request form
- Lists of Contract Holders by Vehicle and Pool

Who Can Use HCaTS?

The HCaTS contracts may be used by all Federal agencies and other entities as listed in GSA Order, OGP 4800.2I, Eligibility to use GSA Sources of Supply and Services ([link here](#)), as amended.

For purposes of the HCaTS contracts, authorized users are identified as OCOs. Only an authorized user, who is a delegated OCO, may solicit, award, and administer a task order under the HCaTS contracts. In order to qualify as an authorized user, a duly warranted Contracting Officer of the Federal Government, as defined in FAR 2.101, or an official authorized to obligate funds for the agency, in good standing, must have taken the required Delegation of Procurement Authority (DPA) Training and received a Delegation of Procurement Authority (DPA) certificate from the HCaTS PMO.

Contractor employees authorized under [FAR 51.1 Contractor Use of Government Supply Sources](#) to use HCaTS are considered OCOs and are not required to obtain a DPA as their authority is granted to them by a Federal Government Contracting Officer administering an applicable contract (e.g. an [FFRDC](#)).

How to Begin Using HCaTS?

In order to solicit and place a task order under HCaTS, the OCO must first obtain a Delegation of Procurement Authority (DPA) from the HCaTS Contracting Officer. In order to do this, you must:

- Be a warranted Federal Contracting Officer (CO) in good standing
- Apply for and receive DPA training
- After completing DPA training, apply for and receive a DPA certification

How to Request DPA Training?

DPA Training is approximately 60 minutes long and is provided through an online meeting space, in person or through the Defense Acquisition University (DAU.edu) as course number FAC 153- "GSA and HCaTS DPA Training." To request DPA training, visit the "Buyer's Guidance and Resource" page at gsa.gov/hcats and navigate to the [Request a Delegation of Procurement Authority \(DPA\)](#) link . For on-site training, email us at HCaTStraining@gsa.gov.

Roles and Responsibilities

DPAs are issued to individual Contracting Officers, not agencies at large. There is no limit to the number of DPAs that can be issued to Contracting Officers within an Agency. An OCO with a DPA has the authority to solicit, award, administer, and modify task orders against the HCaTS contracts.

The OCO shall comply with the HCaTS master contract terms and conditions, the Ordering Guide, the Federal Acquisition Regulation (FAR), and applicable agency supplements or exceptions, including agency-specific statutes and policies, as well as the additional responsibilities defined in the HCaTS DPA certification.

OCO responsibilities include, but are not limited to:

- Request and receive a DPA prior to soliciting and awarding a task order under HCaTS
- Comply with the terms and conditions of the HCaTS contracts
- Comply with the ordering procedures outlined in FAR 16.505 and other agency specific regulatory supplements
- Comply with Inherently Governmental Functions policy as outlined in FAR 7.503
- Task order scope adherence to HCaTS scope
- Issue task order solicitations under the proper HCaTS vehicle and pool
- Allow a reasonable time for fair opportunity proposal submission
- Certify funds availability and allocate funds for requirements
- Enter task order performance evaluation in the Contractor Performance Assessment Reporting System (CPARS) or alternative past performance assessment reporting system mandated by customer agencies that do not require the use of CPARS
- Resolve any performance issues, disputes, claims or protests at the task order level
- Process disputes, claims, or protests under HCaTS
- Respond to all Freedom of Information Act (FOIA) requests at the task order level
- Close out task orders in a timely manner

Rights Reserved by the Procuring Contracting Officer

The HCaTS CO is the sole and exclusive GSA Government official with actual authority to administer and modify the HCaTS contracts' terms and conditions, monitor contractor performance in the areas of master contract compliance and contract administration, and assist the contractor and the OCO on matters related to the HCaTS contracts' terms and conditions. The OCO for each task order may designate a Contracting Officer's Representative (COR) to perform specific administrative or technical functions. The specific rights and responsibilities of the COR for each task order shall be described in writing, which, upon request, shall be provided to the contractor. A COR has no actual, apparent, or implied authority to bind the Government. OCOs may not transfer the Delegation of Procurement Authority to a non-delegated Contracting Officer.

What are some of the benefits of using HCaTS?

HCaTS is innovative, flexible, and easy to use. Some key benefits of using HCaTS include:

- It allows agencies to award all contract types at the task order level: Fixed-Price, Cost-Reimbursement, Time-and-Materials, and Labor-Hour, including hybrid mixtures of contract types, incentives, and performance-based measures
- No protests for in-scope task orders ≤ \$10 million. OCOs may:
 - Establish a Contract Line Item Number (CLIN) structure tailored to individual task order requirements, including option years and optional CLINs
 - Include ancillary support, such as Other Direct Costs (ODCs), labor, and materials, at the task order level as needed
 - Order: Commercial and non-commercial services, work within CONUS and OCONUS, classified and non-classified services
 - Add order-specific labor categories
 - Determine their own evaluation criteria, method of award, terms and conditions, and/or task order specific provisions and clauses
- Helps agencies achieve small business and socio-economic prime contracting and subcontracting goals
- Small business subcontracting plans have already been incorporated, approved, and are monitored and administered at the master contract level by the HCaTS PMO office for other than small businesses
- As a Best-in-Class vehicle, HCaTS helps increase agencies' Spend Under Management
- Responsibility determinations have already been completed in accordance with FAR *Part 9* for all contract holders at the master contract level
- All required FAR matrix clauses automatically flow down to each task order
- No Equal Employment Opportunity (EEO) compliance is required at the Task Order Level. No Congressional notifications required for each order (unless required by your agency)

- Provides access to templates and sample acquisition documents
- Sharing of lessons-learned and best practices
- FAR 15.3 does not apply

Options for Ordering Under HCaTS

Agencies can use HCaTS in two ways:

1. **Direct-Buy:** Agencies with designated OCOs may issue orders directly against the HCaTS IDIQs. The only requirement is that the OCOs obtain an HCaTS DPA certificate prior to using HCaTS. The buying activity/ OCO is responsible for conducting all acquisition actions, from acquisition planning to task order completion and close out. If you plan to access HCaTS via Direct-Buy, see the section below titled “How to Begin Using HCaTS”.
2. **Assisted Acquisition Service (AAS):** Agencies enter into a Memorandum of Agreement (MOA) with GSA to issue a task order. MOAs can be used for cradle-to-grave services. GSA has specific statutory authority under 40 U.S.C. 501 to purchase supplies and non-personal services on behalf of other agencies. Therefore, the Economy Act does not apply to HCaTS orders.

Additionally, GSA AAS provides custom acquisition, project, and financial management support services to federal agencies. AAS helps you acquire the services you need to advance your mission, guiding you through every stage of the acquisition process. AAS is staffed by Program Officials, Contracting Officers, Project Managers, and other contracting and acquisition professionals who partner with you to support the full spectrum of the acquisition lifecycle, so you can focus less on acquisition management and more on your agency’s core mission activities.

To learn more about AAS or to get started, contact Lawrence Unger, AAS Director, or [complete this form](#).

Scope of HCaTS

HCaTS provides a common architecture and platform across the Federal Government for the acquisition of complex human capital and training requirements. The HCaTS master contracts are intended to provide human capital and training solutions through the effort of bona fide executive, administrative, and professional employees as defined in Part 541 of Title 29, Code of Federal Regulations (CFR).

The HCaTS Unrestricted, Small Business (SB), and 8(a) contracts refer to the master contracts from which the applicable terms, conditions, and clauses flow down to all HCaTS task orders. The scope of services covered under the HCaTS Program span across three Key Service Areas (KSAs):

KSA 1: Customized Training and Development Services

- Training program management support

- Technical and general skills development
- Leadership, management, and supervisory training, development, and support
- Knowledge and competency training
- Career development, management, and coaching

KSA 2: Customized Human Capital Strategy Services

- Human resources strategy and development
- Organizational and position management
- Staff acquisition
- Talent, performance, and compensation management
- Integrated business management
- Change management
- Employee value proposition
- Employee and labor relations
- Separation management

KSA 3: Customized Organizational Performance Improvement

- Performance metrics and improvement
- Strategic planning and alignment
- Facilitation and data analytics
- Business process improvement and reengineering
- Organizational assessment and transformation

Additionally, the scope allows for ancillary services and costs necessary to complete a total solution procurement. Services under the HCaTS Program may be commercial and/or non-commercial, classified or non-classified, and CONUS or OCONUS. All HCaTS Task Orders must be within the scope of one or more of HCaTS' KSAs. Review Section C of the HCaTS master contracts for a complete description of the scope.

Out of Scope Services

The following requirements are prohibited under HCaTS scope:

- Inherently Governmental Functions – See the prohibition at FAR [7.503\(a\)](#) and [Office of Federal Procurement Policy \(OFPP\) Policy Letter 11-01](#)
- Personal services contracts – FAR [37.104\(a\)](#)
- Architectural & Engineering (A&E) Services subject to the Brooks Act and FAR *Part* [36](#) acquisition procedures

- A requirement that primarily uses employees not employed in a bona fide executive, administrative, or professional capacity as defined in [29 CFR Part 541](#) and/or employees primarily employed as laborers or mechanics – FAR [22.401](#)
- Requirements where the primary purpose is the development of information technology as defined by FAR [2.101](#) and the HCaTS master contracts Section C.3.3
- Requirements where the primary purpose is temporary services as defined by FAR [37.112](#) and the HCaTS master contracts Section C.3.4

HCaTS Vehicles/Pools

HCaTS is composed of three IDIQ contract vehicles:

1. HCaTS Unrestricted
2. HCaTS Small Business (HCaTS SB)
3. HCaTS 8(a)

Each of the vehicles consist of two pools, which cover different NAICS codes and small business size standards. All NAICS codes in each pool have the same small business size standard which remains in effect for the duration of the HCaTS contracts' ordering period. Some contractors hold separate contracts in more than one pool and/or vehicle. The current HCaTS pools and NAICS codes, are as follows:

Pool 1

611430, Professional and Management Development Training (Primary NAICS)
 611699, All Other Miscellaneous Schools and Instruction
 624310, Vocational Rehabilitation Services

Pool 2

541611, Administrative Management and General Management Consulting Services
 541612, Human Resources Consulting Services (Primary NAICS)
 541613, Marketing Consulting Services
 541618, Other Management Consulting Services
 611710, Educational Support Services

HCaTS Contractors:

The list of HCaTS contract holders and their socio-economic status under each vehicle and pool is available on:

- GSA eLibrary (gsaelibrary.gsa.gov): Search for “HCaTS”.
- HCaTS Webpages (gsa.gov/hcats): under “Buyers Guidance and Resources”, HCaTS Contractor and Email Distribution List.

The Ordering Process

HCaTS is a multiple-award indefinite delivery, indefinite quantity (MA/IDIQ) contract. When using HCaTS, OCOs must follow FAR [16.5](#) ordering procedures. Additionally, OCOs shall follow FAR [16.3](#) and FAR Parts [30](#) and [31](#) for cost-reimbursement task orders unless an authorized exception applies. Fair opportunity procedures in accordance with FAR [16.505\(b\)\(1\)](#) prescribed for the dollar value of the task order must be used. When the OCO plans to award a task order based on an exception to fair opportunity, applicable justifications and approvals in accordance with FAR [16.505\(b\)\(2\)](#) must be prepared and obtained.

Step 1: Acquisition Planning

Orders against MA/IDIQ contracts, such as HCaTS, are *not* exempt from Acquisition Planning as prescribed in FAR Part [7](#). Conduct market research for your requirement in accordance with regulations as you would do with any procurement. You are encouraged to issue Requests for Information (RFI), draft solicitations, and other documents to HCaTS contract holders as part of your market research efforts.

Generally, OCOs shall follow the ordering procedures in FAR [16.505](#). Unless an authorized exception applies, fair opportunity procedures prescribed for the dollar value of the task order must be used. When the OCO plans to award an order based on an exception to fair opportunity, applicable Justifications and Approvals should be prepared as part of the planning process. Any required notices and postings must also be issued.

Which HCaTS Vehicle to Use: HCaTS Unrestricted, HCaTS SB, or HCaTS 8(a)?

Which HCaTS vehicle you will use depends on the determination made in the acquisition planning process as to whether or not your requirement should be set-aside for small business. Agencies have differing standards, interpretations, and policies regarding set-aside determinations. GSA encourages the practice of considering small business contractors to fill your requirement first. The determination to set-aside a procurement for a small business or not is part of the acquisition planning process and is to be completed prior to contract type selection. The HCaTS PMO expresses no opinion on any agency's decision-making process concerning this issue.

When a small business set-aside is to be accomplished, use HCaTS SB as these contracts are awarded exclusively to small businesses. When a small business set-aside is not accomplished and Full and Open is appropriate, use HCaTS Unrestricted.

- For 100% Small Business Set-Aside or Direct Award -> Must use HCaTS SB
- For WOSB/EDWOSB/VOSB/SDVOSB/HubZone Set-Aside -> Must use HCaTS SB
- For 8(a) Competitive Set-Aside or Direct Award -> Must use HCaTS 8(a)

- For Full and Open Competition or Direct Award to OTSB -> Must use HCaTS Unrestricted

Set-Asides for Socioeconomic Programs under HCaTS SB

HCaTS Small Business (SB) is a total small business set-aside contract. All orders issued under HCaTS SB are automatically considered set-aside for small businesses as only small businesses were awarded an HCaTS SB contract.

Unless the task order solicitation explicitly requires size/socioeconomic recertification at the order level, the OCO shall rely on the size/socioeconomic status shown in the HCaTS Contractor and Email Distribution List found on gsa.gov/hcats under “Buyers Guidance and Resources”. All HCaTS SB Contractors’ size/socioeconomic status remain unchanged for each of their HCaTS SB contracts unless modified by a FAR [52.219-28](#) re-representation or due to a novation, merger, or acquisition IAW the HCaTS master contracts, Section G.3.10.

The OCO has discretionary authority under FAR [19.502-4\(c\)](#) and FAR [16.505\(b\)\(2\)\(F\)](#) to further set-aside orders for any of the small business concerns identified in FAR [19.000\(a\)\(3\)](#) when it is anticipated that quotes will be received from at least two eligible small business concerns for which the order is to be set-aside.

- HUBZone Small Business concerns
- Service-Disabled Veteran-Owned Small Business (SDVOSB) concerns
- *Economically Disadvantaged Women-Owned Small Business (EDWOSB) concerns
- *Women-Owned Small Business (WOSB) concerns

*EDWOSB and WOSB competitive set-asides are subject to specific NAICS industry groups in which EDWOSBs and WOSBs are underrepresented. The eligible NAICS Codes for EDWOSB and WOSB set-asides are subject to change by the SBA. See sba.gov/wosb for the updated list of NAICS Codes to determine HCaTS SB pool NAICS codes’ availability for EDWOSB or WOSB set-asides.

Small businesses retain their small business size status and socio-economic status throughout the full ordering period under HCaTS SB. Accordingly, OCOs should not use SAM to determine the size status applicable to an HCaTS SB vendor. As noted above, for HCaTS SB contractors, OCOs should use the HCaTS Contractor and Email Distribution List found on gsa.gov/hcats under “Buyers Guidance and Resources” in order to determine socioeconomic status. When setting aside orders for socio-economic concerns, the specific small business program eligibility requirements identified in FAR Part [19](#) apply.

Special Instructions Regarding Orders Set-Aside for 8(a)

Ordering activities seeking to satisfy their requirements through either 8(a) competitive or 8(a) sole source (direct) task order awards must use the HCaTS 8(a) vehicle only. OCOs cannot utilize HCaTS SB or HCaTS Unrestricted for this purpose.

Competitive 8(a) Orders

- Follow similar procedures to competing orders under any other HCaTS vehicle and pool.
- HCaTS 8(a) pools were set aside exclusively for 8(a) competition, so if an OCO wishes to utilize a competitive 8(a) set aside task order, they would simply follow the fair opportunity procedures for issuing a solicitation under their selected HCaTS 8(a) pool.
- May compete at any dollar level above the minimum SAT (\$250,000).
- All 8(a) contractors were offered to and accepted by SBA into the 8(a) program under the HCaTS master contracts: SBA Requirement Number TX1565638190Y.
- There is no need to offer the order for SBA acceptance to get 8(a) credit for a competitive order.
- Under the HCaTS 8(a) vehicle, 8(a) small businesses retain their participation in the 8(a) program during the full ordering period for HCaTS 8(a). Accordingly, OCOs should not use SAM or any other system to verify participation in the program.

Sole Source (Direct) 8(a) Orders

Sole source (direct) 8(a) task orders may be issued at the OCO's discretion subject to SBA approval. ***Sole source (direct) 8(a) orders must each be offered to and accepted by SBA before award. In the offer letter to SBA, refer to HCaTS SBA Requirement Number TX1565638190Y.***

- As opposed to competitive 8(a) awards, for sole source (direct) awards, an 8(a) contractor must currently be a participant in the 8(a) program at the time of task order award. The OCO should check a contractor's 8(a) program participation in SAM.gov before considering a sole source (direct) order.
- Contractors who have exited the 8(a) program are ineligible to receive an 8(a) sole source (direct) task order award.
- Follow your agency's partnership agreement for offering a sole source (direct) task order award to SBA: <https://www.sba.gov/document/support--sba-and-agencies-partnership-agreements>.
- In accordance with FAR [19.805-1\(a\)\(2\)](#), the current 8(a) sole source (direct) order limit is \$4.5 million, except for 8(a) concerns owned by an Indian tribe or an Alaska Native Corporation (reference FAR [19.805-1\(b\)\(2\)](#)), which have a sole source (direct) order limit of \$25 million in accordance with FAR [19.808-1](#).
- Department of Defense (DoD) only: DoD may also issue sole source (direct) orders to 8(a) Native Hawaiian Organizations (NHO) (reference 13 CFR [124.506\(b\)\(2\)](#)).
- DFARS [219.808-1](#) increases the sole source (direct) order limit to \$100 million for Indian tribes, Alaska Native Corporation, or NHO 8(a) concerns.

Sole Source (Direct) 8(a) orders to ANC/Tribal Owned/NHO 8(a) concerns

- Notwithstanding that the HCaTS 8(a) MA/IDIQ contracts were awarded competitively, 13 CFR [124.506 \(b\)\(1\) and \(2\)](#) "...if SBA has not accepted the requirement into the 8(a) BD program as a competitive procurement..." only applies to an order level requirement and may not be used as a rationale to prohibit allowing orders to Indian tribe, Alaska Native Corporation, or NHO 8(a)

concerns on a sole source (direct) order basis above the FAR [19.805-1\(a\)\(2\)](#) \$4.5 million threshold.

- An HCaTS 8(a) order requirement that was initially solicited on a competitive basis may not be removed from competition and subsequently awarded to an Indian tribe, Alaska Native Corporation, or NHO 8(a) concerns on a sole source (direct) order basis.

Task Order Contract Types

Subject to FAR and agency level required consideration criteria, limitations, and/or prohibitions, you may use any appropriate contract type(s) including:

- Fixed-Price, all types
- Cost-Reimbursement, all types
- Time-and-Materials
- Labor-Hour
- Hybrid of any of these types

If you elect to use a hybrid of contract types, please use a separate CLIN for the work under each contract type and annotate each CLIN with the associated contract type. This is important for clause implementation.

Assign a NAICS Code to Each Order

The OCO must assign an HCaTS Pool NAICS code to each task order solicitation and award. The size standard applicable to a task order and the appropriate Pool to solicit are determined by the NAICS code selected. The NAICS code assigned should reflect the principal nature of the work required under the task order. All of the NAICS codes in each pool share the same size standard. If the principal purpose of the requirement is for any other NAICS code outside the HCaTS NAICS codes, it is out of scope for HCaTS.

The OCO may use the HCaTS master contract's primary NAICS at the task order level or select a more specific NAICS depending on the requirement. The chart below identifies the HCaTS NAICS codes for each pool with the primary NAICS code for each pool appearing in bold type font:

POOL 1	
NAICS Code	Title
611430	Professional and Management Development Training
611699	All Other Miscellaneous Schools and Instruction
624310	Vocational Rehabilitation Services

POOL 2	
NAICS Code	Title
541611	Administrative Management and General Management Consulting Services
541612	Human Resources Consulting Services
541613	Marketing Consulting Services
541618	Other Management Consulting Services
611710	Educational Support Services

Task Order Funding and Funding Limitations

All task orders must be funded by the ordering/receiving agency with the requirement. Task orders placed under the HCaTS Program may not be used to circumvent conditions and limitations imposed on the use of funds (FAR [16.505\(a\)\(8\)\(ii\)](#)).

Minimum and Maximum Order Limitations

The minimum per-order limitation on HCaTS contracts is at the micro-purchase threshold as defined by FAR [2.101](#). The Government is not obligated to purchase and the contractor is not required to furnish services valued at less than the micro-purchase threshold. The maximum dollar value for all task orders issued under the HCaTS contracts, including all options, if exercised, is \$3.45 billion for Pool 1 and \$2.3 billion for Pool 2 each for the HCaTS Unrestricted and the HCaTS SB + 8(a) vehicles, for a total program ceiling of \$11.5 billion.

Task Order Size Representation

The HCaTS PMO maintains an HCaTS Contractor and Email Distribution List found on gsa.gov/hcats under “Buyers Guidance and Resources” that provides the business size classification and socioeconomic status for each contractor as it pertains to each of their HCaTS contracts.

Task Order Duration

The period of performance for each task order awarded under an HCaTS contract shall be specified in the task order in accordance with FAR [16.505\(c\)](#). Task orders shall be solicited and awarded prior to the expiration of the applicable HCaTS contract’s ordering period and may extend (including option periods)

up to 5-years and 6-months beyond the applicable HCaTS contract’s ordering period (provided that FAR [52.217-8](#) Option to Extend Services is included in the task order). After the HCaTS contracts expire, they will remain active for administration purposes only.

Labor Categories for Task Order Work

The list of HCaTS Labor Categories and Definitions is found in Attachment J.1, HCaTS Standardized Labor Categories. Each Labor Category identifies the specific Standard Occupational Classification (SOC) occupations mapped to that Labor Category.

Except for ancillary labor as defined under Section B.3, when responding to task order solicitations, regardless of contract type, the contractor may be required by the OCO to identify both prime and subcontractor labor using the HCaTS labor categories and corresponding SOC Number that applies. The OCO must specifically state in the task order solicitation if the standardized labor categories in Attachment J.1 apply or do not apply.

The contractor may deviate from the Junior, Journeyman, Senior, and Subject Matter Expert (SME) definitions in Attachment J.1, as long as the contractor clearly identifies and properly prices the deviation(s) in its task order proposals. Additionally, the following qualification substitution chart from the HCaTS contracts Section B.2.1 applies:

Degree	Experience Substitution	Degree and Experience Substitution
Bachelor’s Degree	Six years of relevant work experience	Associate’s Degree plus four years of relevant work experience
Master’s Degree	12 years of relevant work experience	Bachelor’s Degree plus eight years of relevant work experience
Doctorate Degree	20 years of relevant work experience	Bachelor’s Degree plus 16 years or a Master’s Degree plus 12 years of relevant work experience

OCOs shall evaluate any identified deviations from the HCaTS definitions of Junior, Journeyman, Senior, and Subject Matter Expert (SME). As part of that evaluation, the OCO should consider any potential impacts on the agency’s requirements in terms of performance and price and document the rationale for acceptance of any proposed deviation.

Ancillary Services and Other Direct Costs

Ancillary services and other direct costs (ODCs) are those deemed necessary as part of a total integrated solution within the scope of HCaTS for which there is not a labor category specified in Attachment J.1 and/or including ODCs such as travel, materials, equipment, subcontractors, etc. These ancillary support services and costs are considered essential to obtain a total service solution, are allowable costs, and may be included within an individual task order awarded under HCaTS. The contractor should propose and identify each ancillary support service and/or ODC or separately and the OCO should identify each ancillary support service and/or ODC using a separate CLIN in the task order award. Ancillary support and/or ODCs should not make up a predominance of the work or dollar value of a task order. Agencies should follow agency specific policies as well as FAR [16.505](#) and FAR Part [6](#) regarding

competition requirements as it relates to ODCs. If the OCO determines during requirements development that specialized professional labor would be required to support segments of the task order work, the task order solicitation should provide instructions to Offerors how to identify and call attention to the intent to use ancillary professional labor. Proposals should include, at a minimum:

- The proposed labor category title
- Expertise and qualifications required by the specialized labor category
- Duties to be performed by the specialized labor
- Segment of the statement of work that the specialized labor will perform with references to statement of work sections
- An explanation of why the specialized labor is required with a discussion of which HCaTS labor categories in Attachment J.1 were considered and why they were not appropriate or did not fit the task order requirements
- A discussion of the BLS SOC occupations that were examined to determine if the specialized labor could be mapped to a BLS SOC occupation as applicable

This ensures that all Offerors use the same vocabulary and can easily be compared with one another.

Security Clearance Considerations for Classified Orders

The task order solicitation should clearly express all requirements for security clearances, both facility and personnel. All classified handling procedures shall be adhered to at all times.

Labor on Time-and-Materials (T&M) and Labor-Hour (L-H) Task Orders

The Offeror may provide separate and/or blended loaded hourly labor rates for prime contractor labor, each subcontractor, and each division, subsidiary, or affiliate in accordance with the provisions set forth in FAR [52.216-29](#), FAR [52.216-30](#), or FAR [52.216-31](#). The OCO must identify which provision is applicable in the task order solicitation and applicable CLINs. For T&M and L-H task orders (other than sole source), the OCO may require the HCaTS Standardized Labor Categories and their associated rates to be identified in the task order award document. Ancillary subcontract labor shall be proposed and awarded as direct material in accordance with FAR [52.232-7](#), Payments under Time-and-Materials and Labor-Hour Contracts.

For organizations within DoD, when selecting FAR [52.216-29](#), the OCO must also select the appropriate DFARS clause (such as [252.216-7002](#), Alternate A). OCOs shall always follow their agency's internal guidelines including required justifications and/or approvals for use of this contract type.

NOTE for sole source T&M and L-H task orders: In accordance with Sections B.2.5.1 and J.2 of the HCaTS master contracts, for Sole Source T&M/L-H orders the OCO must use the HCaTS Standardized Labor Categories for that order. The pricing associated with the HCaTS Standardized Labor Categories is fully burdened, ceiling rates for T&M/L-H task orders/CLINs placed **ONLY** when utilizing an exception to fair opportunity. Reference FAR [16.505\(b\)\(2\)](#), excluding the exception at FAR [16.505\(b\)\(2\)\(f\)](#) for socioeconomic competition under HCaTS SB, which is an exception for competition, not sole source.

The HCaTS PMO will provide OCOs with contract pricing (fully burdened ceiling labor rates) ONLY for the award of T&M and/or L-H sole source type task orders/CLINs. Please note these rates do not change with the delivery location for exempt (professional) labor categories. Contractors may offer pricing that is at or below the ceiling rates. Those unpublished ceiling rates do not apply to fixed-price, cost-reimbursement, or T&M/L-H task orders or CLINs issued without an exception to fair opportunity, or any hybrid type of task order. For all other types of task orders, pricing for HCaTS is based solely on competition at the task order level within the applicable pool of vendors.

Service Contract Labor Standards (SCLS)

The HCaTS labor categories, identified in the HCaTS master contracts Section J.1, are bona fide executive, administrative, and professional labor that are exempt from the SCLS. To the extent that any labor for services is within the scope of HCaTS and subject to SCLS in accordance with FAR 22.10 and other applicable agency specific regulatory supplements, the OCO must identify such work in the task order solicitation and make a determination as to whether the SCLS wage determinations are to be applied or not.

HCaTS does not include clauses applicable to any SCLS work that is part of a total solution within the scope of HCaTS. The OCO must incorporate the appropriate clauses and provisions in each task order solicitation and subsequent award when the SCLS apply.

FAR Clause 52.204-14, Service Contract Reporting Requirements

The OCO shall insert the clause at [52.204-14](#), Service Contract Reporting Requirements, in solicitations and contracts for services (including construction) that meet or exceed the thresholds at FAR [4.1703](#). This clause is not required for actions entirely funded by DoD, contracts awarded with a generic entity identifier, or in classified solicitations, contracts, or orders.

For task orders subject to the Service Contract Reporting Requirements, contractors must provide information on the Full-Time Equivalent (FTE) employee hours invoiced against the contract by the prime contractor and any subcontractors. In addition, OCOs must follow up with delinquent contractors regarding their obligation to report, and exercise appropriate contractual remedies. In addition, the contracting officer shall make the contractor's failure to comply with the reporting requirements a part of the contractor's performance information under FAR [42.15](#).

Rights in Data

The following Rights in Data Clauses are incorporated into the HCaTS master contracts: FAR Clause [52.227-14](#) Rights in Data—General and FAR Clause [52.227-17](#) Rights in Data—Special Works. The OCO should ensure that the applicable Rights in Data clause(s) is (are) clearly assigned in each task order solicitation and resulting task order. Rights in Data is a highly specialized area and OCOs should seek advice from qualified professionals on these issues to ensure the proper clause is in effect for their task order.

Contract Access Fee (CAF)

The OCO shall include the HCaTS CAF in each task order solicitation and award under a separate and distinct CLIN. One CAF CLIN shall be included for the base year and one for each option period, if applicable. In response to all task order solicitations, regardless of contract type, the contractor shall always propose a CAF rate of 0.75% of the total contract value, including ODCs, travel, material, options, etc.

The CAF is to be included on each invoice as 0.75% of the total invoiced charges. The CAF will be paid by the customer agency to the contractor. The contractor will report and submit (quarterly) the collected CAF to GSA.

NOTES: For task orders awarded before 1 August 2018; the CAF rate remains at 2.00% percent; however, OCOs must change the CAF rate from 2.00% to 0.75% for any option year that is exercised on or after 1 August 2018. If an option to the task order will not be exercised on or after 1 August 2018, the CAF rate remains at 2.00% until completion of the task order.

Other Significant Planning Considerations

Other key considerations to address in developing your acquisition plan and preparing a task order solicitation include:

- Economy Act - does not apply to HCaTS task orders; GSA is specifically authorized by law to purchase supplies or non-personal services on behalf of other agencies. No Economy Act documentation is required unless mandated by your agency's policy.
- Inherently Governmental Functions - FAR [7.503\(e\)](#) stipulates that the agency head or designated requirements official shall provide to the OCO, concurrent with the statement of work, a written determination that none of the functions to be performed are Inherently Governmental.
- Personal Services - FAR [37.104](#) characterizes personal services contracts as an employee-employer relationship between the Government and contractor's personnel. The Government is normally required to obtain its employees by direct hire under competitive appointment or other procedures required by civil service laws. Obtaining personal services by contract, rather by direct hire, circumvents those laws unless Congress has specifically authorized acquisition of the services by contract. Personal services are NOT authorized on HCaTS.
- Performance-based contracting methods are preferred.
- Identify and evaluate potential organizational conflicts of interest (COI).
- Prepare a Quality Assurance Surveillance Plan and identification of performance metrics, as applicable.
- Tailor the Evaluation Factors and Source Selection Methodology as applicable to your requirement.

HCaTS Tools and Planning Resources

HCaTS provides a number of tools and resources found on the HCaTS Buyers Guidance and Resources page, which can be accessed through gsa.gov/hcats. These resources are constantly updated to better assist agencies meet their requirements.

Scope Determination:

If you are not sure whether HCaTS can support your requirement:

The HCaTS PMO offers and strongly encourages OCOs to take advantage of task order pre-solicitation scope reviews. This is a free service provided by GSA to Government agencies and includes an analysis of the Statement of Work, Statement of Objectives, or Performance Work Statement for future tasks along with a scope compatibility determination.

Submit your request through gsa.gov/hcats on the “Buyers Guidance and Resources” page under “[Request a Pre-Award Scope Review](#)” or complete the form in [THIS LINK](#). This review helps ensure that your requirement is within scope of the HCaTS Key Service Areas and is solicited under the appropriate contract vehicle and pool.

You may also issue a Request for Information (RFI) under all of the HCaTS vehicles and pools. An optional HCaTS RFI template is available for download through gsa.gov/hcats on the “Buyers Guidance and Resources” page under “HCaTS Task Order Resources”. The process for issuing an RFI is similar to issuing an RFP; please refer to the “The Ordering Process” section, under “*Step 3: Issue the Solicitation*”.

Additionally, you may review the “HCaTS Contractor Capability Statements” available on gsa.gov/hcats on the “Buyers Guidance and Resources” page under “Research Tools”.

Step 2: Define the Requirements

Requirements Development Support Resources

Agencies have access to a considerable array of support resources during the requirements development phase. As noted above in detail, GSA’s AAS is available to support your agency in task order solicitation, including defining your requirements and developing the solicitation package.

Price Estimating and Developing IGCE

GSA has developed a number of automated pricing tools to assist with developing various programs’ task order IGCEs. They can be found on GSA’s Pricing Central Website (<https://buy.gsa.gov/pricing/>) Below are a few examples:

- **GSA’s Contract-Awarded Labor Category (CALC) Tool:**

The CALC tool helps federal contracting officers and others find awarded prices to use in negotiations for labor contracts. It offers ceiling prices, fully burdened costs, services data, and worldwide rates.

- **GSA’s Independent Government Cost Estimate (IGCE) Tool:**

The IGCE Tool helps federal contracting officers and others build and customize IGCEs by interfacing with the other pricing tools in the Acquisition Gateway, allows users to save their work in progress and export their work into excel spreadsheets.

- **GSA’s CALC Price Estimating Tool (PET):**

The PET assists Federal agencies in developing the labor portion of the independent government cost estimate (IGCE) for task orders. Users can conduct wage comparisons across different occupations, experience and qualifications levels, indirect rate levels, and metropolitan statistical areas. The tool provides users the ability to select pricing in specific geographic locations. Results can be exported in Excel format and include Base plus option pricing.

- **buy.GSA.gov (<https://buy.gsa.gov/>):**

Designed to lower frustration and make it easier for Government agencies to navigate the complete acquisition process and Industry to bring needed supplies and services into the federal market space. Here you can easily find and compare contracts and vendors. Search by NAICS, SIN, or Keywords to compare contracts. You can simply search by typing in keywords. The system will recommend common categories, NAICS, and contract terms. Advanced searching lets you target and filter areas, like SBA Socioeconomic, Subcategories, and Contract Vehicles to tailor your searching experience to your needs.

Developing the Solicitation

Use the solicitation form and format for task orders normally prescribed and used by your agency for task order solicitations, consistent with FAR [16.505](#) procedures.

NOTE: Use of the Uniform Contract Format found in FAR [15.204-1](#) is not required for HCaTS orders. Furthermore, we do not recommend its use for HCaTS task orders as it can lead to confusion between the ordering procedures found in FAR [16.505](#) versus source selection procedures found in FAR [15.3](#), which are not applicable to HCaTS task orders.

In accordance with FAR [16.505\(b\)\(1\)\(ii\)](#) Fair Opportunity, “the contracting officer should keep submission requirements to a minimum.” FAR [16.505\(b\)\(1\)](#) states that the contracting officer must: (A) Develop placement procedures that will provide each awardee a fair opportunity to be considered for each order and reflect the requirement and other aspects of the contracting environment; (B) Not use any method (such as allocation or designation of any preferred awardee) that would not result in a fair consideration being given to all awardees prior to placing each order; (C) Tailor the procedures to each acquisition; (D) Include the procedures in the solicitation and the contract; and (E) Consider price or cost under each order as one of the factors in the selection decision. FAR [16.505\(b\)\(1\)](#) also provides additional Fair Opportunity requirements for different dollar thresholds. Please be sure to reference FAR [16.505](#) during solicitation development.

In addition to the typical content of your solicitation, certain information particular to using HCaTS should be added, emphasized, or highlighted in your solicitation. That information will be discussed and

explained in the succeeding paragraphs. An optional HCaTS Task Order Solicitation Template is available for download through gsa.gov/hcats on the “Buyers Guidance and Resources” page under “HCaTS Task Order Resources”

In addition to the information required by FAR [16.505\(a\)\(7\)](#), all task order solicitations shall provide the following information at a minimum:

- Pool Number Being Solicited
- Applicable NAICS
- SOW/PWS/SOO
- Type of Services (Commercial or Non-Commercial)
- CLIN Structure
- Contract Type(s)
- Evaluation Factors
- Source Selection Methodology
- Period of Performance
- Place of Performance
- Solicitation Questions Due Date
- Proposal Due Date
- Proposal and Submittal Instructions
- Other Pertinent Information (for example: agency specific clauses, optional clauses, etc.)

Clauses and Provisions

The HCaTS master contracts, Section I.1, establish that all applicable and required provisions/clauses set forth in FAR [52.301](#) automatically flow down to all HCaTS task orders, based on their specific contract type (e.g., cost, fixed price etc.), statement of work, competition requirements, commercial or not commercial, and dollar value as of the date the task order solicitation is issued. The OCO must include any FAR clauses in full text that need to be filled in (e.g., FAR [52.217-9](#) applicable to orders with options).

All applicable and required provisions/clauses that automatically flow down to task orders shall remain unchanged throughout the entire period of performance under HCaTS. If future applicable or required provisions/clauses are to the benefit of future task orders solicited under HCaTS, the future applicable or required provision/clause may be updated by FAC No. and effective date under a bilateral modification to the HCaTS contracts.

However, the OCO must identify in the task order solicitation whether FAR Part [12](#) commercial clauses/provisions apply or do not apply. Furthermore, the OCO must include any Optional, and/or Agency-Specific provisions/clauses for each individual task order solicitation and subsequent award.

In accordance with FAR [8.005](#), the OCO shall, “Insert the clause at [52.208-9](#), Contractor Use of Mandatory Sources of Supply and Services, in solicitations and contracts that require a contractor to provide supplies or services for Government use that are on the Procurement List maintained by the Committee for Purchase from People Who Are Blind or Severely Disabled.” For certain task orders where supplies are anticipated to be supplied for use by the Government, the Procurement List

maintained by the Committee for Purchase from People Who Are Blind or Severely Disabled is mandatory source of supply and should be checked to see if these supplies are available from this source.

Evaluation Factors

In accordance with FAR [16.505\(b\)\(1\)\(ii\)](#), the policies in FAR [15.3](#) (Source Selection) DO NOT apply to the MA/IDIQ ordering process. In addition, *“The contracting officer may exercise broad discretion in developing appropriate order placement procedures. The contracting officer should keep submission requirements to a minimum. Contracting officers may use streamlined procedures, including oral presentations.”*

The OCO shall consider price or cost as one of the factors in the selection decision for each order placed under the contract (see FAR 16.505(b), Orders under multiple-award contracts). The criteria should represent the best value. It can be the Lowest Price Technically Acceptable (LPTA), Trade-off or Highest Technically Rated Offeror (HTRO) approach or any other method tailored to the requirement that can distinguish the best value to the government.

Step 3: Issue the Solicitation

Important: An OCO may only solicit a requirement from ONE pool at a time; it is not allowable to solicit the same requirement under two different MA/IDIQs (e.g. issuing a solicitation to HCaTS SB Pool 1 and HCaTS U Pool 1 concurrently, HCaTS SB Pool 1 and HCaTS SB Pool 2 concurrently or HCaTS SB Pool 1 and HCaTS 8(a) Pool 1 concurrently, etc.).

Methods of Issuing the Task Order Solicitation

A Task Order Solicitation under HCaTS may be issued by:

Method #1: Emailing an RFP directly to all contractors* (**preferred method**)

The following Pool Links generate a group email to the official points of contact for all prime contract holders in the respective vehicle and pool. The primary purpose of the Pool Links is for authorized Government officials (OCOs) to issue Requests for Proposals (RFPs), Requests for Information (RFIs), Sources Sought Notices (SSNs), or other Market Research requests as an alternative to using GSA’s eBuy.

Task Order Type	Pool 1 NAICS Codes: 611430, 611699, 624310	Pool 2 NAICS Codes: 541611, 541612, 541613, 541618, 611710
Full and Open:	hcats_unrestricted_pool_1_contractors@gsa.gov	hcats_unrestricted_pool_2_contractors@gsa.gov

Small Business Set-Aside: (WOSB/EDWOSB/HubZone/ VOSB/SDVOSB):	hcats_small_business_pool_1_contractors@gsa.gov	hcats_small_business_pool_2_contractors@gsa.gov
8(a) Small Business Competitive Set-Aside:	hcats_8a_pool_1_contractors@gsa.gov	hcats_8a_pool_2_contractors@gsa.gov

*For any **sole source** type task orders, contact the prospective contractor individually using the contact information from the HCaTS Contractor and Email Distribution List available for download from gsa.gov/hcats under “Buyers Guidance and Resources”.

Method #2: Posting an RFP on GSA’s e-Buy at <https://www.ebuy.gsa.gov/ebuy/>.

The task order RFP must be sent to all contractors within a given pool. In accordance with FAR 16.505(b)(1)(i) Fair Opportunity, *“The contracting officer must provide each awardee a fair opportunity to be considered for each order exceeding the micro-purchase threshold (\$10,000) issued under multiple delivery-order contracts or multiple task-order contracts, except as provided for in (b)(2).”*

For a sole source or direct award, FAR [16.505\(b\)\(1\)](#) applies for the fair opportunity notification requirement.

Contracts in Dormant Status

The HCaTS master contract terms allow GSA to place contractors in a dormant status (e.g, for HCaTS SB or HCaTS 8(a) due to FAR [52.219-28](#) contract level size changes or for other performance reasons) while they develop corrective measures for the HCaTS PMO COs to review and approve.

During dormancy, contractors may continue to work on existing task order awards, but are prohibited from competing for new task order awards. GSA maintains a list of contractors in Dormant Status. Prior to award, OCOs must check the current HCaTS Contractor and Email Distribution List available for download from gsa.gov/hcats under “Buyers Guidance and Resources” to verify the dormant status of a potential awardee.

Step 4: Evaluate Proposals

OCO should evaluate proposals based on the methodology stated in the task order solicitation to maintain fairness in the ordering process and mitigate protest risk. An HCaTS specific features OCOs should consider when evaluating proposals includes:

Fair and Reasonable Price Determination

The OCO is responsible for analyzing order proposals and documenting the price evaluation to include a determination that the final agreed-to price is fair and reasonable. To the maximum extent practicable,

price analysis should be based on competition.

HCaTS Master Contract Pricing/Rates: Except for sole source T&M/L-H orders as detailed in the “Labor on Time-and-Materials (T&M) and Labor-Hour (L-H) Task Orders” section of this ordering guide , there are no contract level ceiling rates applicable to any other type of order. Prices and rates are determined fair and reasonable at the order level in accordance with FAR [16.505\(b\)\(3\)](#)

NOTE: All costs associated with the preparation, presentation, and discussion of the contractor’s proposal in response to a task order solicitation will be at the contractor’s sole and exclusive expense. Vendors shall not seek reimbursement for proposal preparation costs at the task order level.

Step 5: Award the Task Order

Order Award Documentation

Document your task order awards in accordance with regulation and agency specific/local policy.

Provide GSA a Copy of the Task Order Award

Provide an electronic copy of any task order award to the HCaTS CO within 5 days after award. Send via email to hcats@gsa.gov for orders awarded under Unrestricted contracts or sbhcats@gsa.gov for orders awarded under Small Business or 8(a) contracts.

Public Notice of Awards Not Providing for Fair Opportunity

For orders based on an exception to fair opportunity, in accordance with FAR [16.505\(b\)\(2\)\(ii\)\(D\)](#), the OCO must post the required public notice within 14 days after placing the order. If exception (A) (urgent/ unacceptable delay) is used, the public notice must be posted within 30 days after placing the order. This posting requirement includes posting the justification approved for the exception at the Government point of entry: <https://sam.gov/content/home>.

Note the actions excluded from this notice requirement are

- Disclosures that would compromise national security,
- Socioeconomic set-asides under HCaTS SB authorized by FAR [16.505\(b\)\(2\)\(i\)\(F\)](#), and
- Sole source 8(a) orders up to the thresholds detailed in the “Sole Source (Direct) 8(a) Orders” section

Order Level Protests

The OCO is encouraged to contact the HCaTS PMO for any HCaTS related assistance including assistance with disputes, claims, or protests. However, the OCO is responsible for resolving any performance issues, disputes, claims, or protests at the task order level. FAR [16.505\(a\)\(10\)](#) prohibits protests under FAR [33.1](#) in connection with the issuance or proposed issuance of task orders against an MA/IDIQ contract except for:

- a protest on the grounds that the order increases the scope, period of performance, or maximum value of the contract
- a protest on orders valued in excess of \$10 million.

FAR [16.505\(a\)\(10\)\(i\)](#) grants sole authority to GAO only to hear order-level protest (no agency-level protest, etc.). Protests must be filed in accordance with the procedures at [FAR 33.104](#) to the GAO. Notwithstanding DoD, NASA, and the Coast Guard have a minimum protest threshold of \$25M, GAO jurisdiction flows from the agency who owns the MAC no matter which agency funds or issues the order from that MAC. Hence the minimum protest threshold for all orders under HCaTS is \$10M as stated in FAR [16.505\(a\)\(10\)\(i\)\(B\)\(1\)](#). Reference GAO Case [B-413758.2](#), [B-413758.3](#) November 28, 2016, ruling on jurisdictional grounds in regards to a title 10 agency placing an order against an IDIQ awarded by a Title 41 agency.

Ombudsman

The GSA task and delivery order Ombudsman shall review and resolve complaints from contractors concerning all task and delivery order actions made by GSA. Complaints regarding task and delivery order actions of other agencies using GSA contract vehicles shall be directed to the ordering agency's Task-Order and Delivery-Order Ombudsman.

REMINDER: OCOs are required to complete the fill-in information at [52.216.32](#) Task-Order and Delivery-Order Ombudsman (Sept 2019) Alt 1 (d)(2) on all task orders.

For task and delivery orders issued by GSA, contact information for the GSA Ombudsman can be found at <http://www.gsa.gov/ombudsman>.

Reporting Task Order Awards in FPDS-NG

Task order awards shall be reported in the Federal Procurement Data System – Next Generation (FPDS-NG) within 3 days after execution of the action. This requirement also applies to agencies that may not otherwise be required to create FPDS-NG reports (i.e. agencies that do not receive appropriated funds), as the Service Contract Reporting (SCR) link in SAM.gov is activated based on FPDS-NG data.

It is important that each HCaTS task order is reported as an order under the correct HCaTS contract number (Reference IDV), identifying the appropriate NAICS Code and PSC.

It is also important that FPDS-NG accurately reflects the requirements ordered and task order solicitation procedures used to award task orders under HCaTS. To ensure that your agency gets proper credit for your awards, make sure your FPDS-NG reports accurately reflect the appropriate values in all fields related to award data.

Post-Award Survey

Within approximately 90 days after a task order award under HCaTS, the HCaTS PMO will send a survey to the OCO to collect information regarding the OCO's experience with the HCaTS acquisition process and the offers received as well as any suggestions for improvement. This survey is required for HCaTS program transactional data reporting.

Step 6: Task Order Administration

Reporting Modifications in FPDS-NG

All task order modifications involving price or scope changes must be reported in FPDS-NG. This requirement also applies to agencies that may not otherwise be required to create FPDS-NG reports (i.e. agencies that do not receive appropriated funds), as the Service Contract Reporting (SCR) link in SAM.gov is activated based on FPDS-NG data.

Subcontracting and Limitations on Subcontracting

FAR Clause [52.219-14](#), Limitations on Subcontracting (Jan 2017), is incorporated by reference at the MA/IDIQ contract level and will be monitored and enforced by the HCaTS PMO.

FAR Clause [52.219-14](#) is NOT applicable to HCaTS Unrestricted contracts. Any such limitations necessary for task order performance under an Unrestricted contract must be included at the task order level for any HCaTS Unrestricted order.

Performance Evaluation

Each OCO is responsible for ensuring the contractor's performance on each order is reported in CPARS in accordance with the policies in [FAR 42.15](#). Follow your agency's procedures for preparation, review, and submission of performance reports. GSA will consider task order performance information as part of performance evaluations at the IDIQ contract level. Task order performance may also be considered in placing contractors in dormant status.

Step 7: Task Order Closeout

The OCO is responsible for closing out their task order(s). Task order files shall be closed out in accordance with the procedures in FAR [4.804](#).

The procedures prescribed in FAR [4.804-5](#) shall be used for closing out the contract file except when it is appropriate to use the quick-closeout procedure in FAR [42.708](#).

The OCO shall email HCaTS@gsa.gov or SBHCaTS@gsa.gov, as applicable, within 30 days after task order closeout to report that the task order has been closed.

HCaTS Tools & Resources

HCaTS tools have been developed to assist you in effectively and efficiently acquiring complex, customized solutions for your agency's human capital management and training requirements. The website can be accessed at gsa.gov/hcats.

Send your questions regarding the ordering process to hcats@gsa.gov or sbhcats@gsa.gov.

The website contains information and support resources such as:

- The HCaTS Master Contracts
- Attachment J.1, HCaTS Standardized Labor Categories (LCATs)
- Templates: Request for Information (RFI), Task Order Solicitation, Task Order Statements of Work
- Listings of HCaTS contractors that include Key Personnel contact information, physical address, socio-economic and dormancy status
- HCaTS Contractors' Capability Statements
- Pre-Award Scope Review requests
- Current Ordering Guide
- HCaTS Overview Slides
- Link to the Acquisition Gateway
- IGCE and Price Fair and Reasonableness Determination Tools for Labor Rates
- HCaTS Training and Delegation of Procurement Authority (DPA) Requests