Electronic Business Proposal System Help File
Subcontractor
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Overview

Battelle Memorial Institute operates the Pacific Northwest National Laboratory for the Department of Energy (DOE) under Contract No. DE-AC05-76RL01830. Battelle is committed to providing DOE the best value possible in all of its contract awards, soliciting best-in-class expertise in a competitive market from reliable and responsible contractors and architects, who demonstrate the skill, experience, and qualifications necessary to safely and effectively perform the intended work. To accomplish this, Battelle intends to merge the integrity and character of traditional face-to-face business relationships with the speed and efficiency of today’s information technology using the Electronic Business Proposal system (EBS).

Below is a brief overview of the EBS process for Subcontractors.

- Create a New Account
- Complete All Required Forms
- Submit Forms and Attachments for Review (“Submitted” Status)
- Approved Forms Change to “Approved” Status
- Contractors Now Qualified to Register for Solicitations
Creating a New Account

In order to submit your qualifications, you need to create an account.

Steps

1. Click on the Login link (found on the left side navigation under Account Options).
2. Click on Create a New Account (found under “Not yet registered?”). See Figure 1.

Figure 1. Login screen.
3. Complete the fields requested and click Create User. All fields are required for you to continue. See Figure 2.

![User Profile - screen 1](image)

**Figure 2. User Profile - screen 1. All fields are required for you to continue.**

4. Complete the User Profile page. All fields are required for you to continue. See Figure 3.

- **NOTE:** Changes to your User Profile can be made at any time by clicking on View/Update profile in the left side navigation under Account Options.

- **TIP:** If you do not have an answer to a specific field, you can enter a placeholder and enter details later.
Figure 3. User Profile – screen 2. All fields are required for you to continue.
Submitting Qualifications

Once an account has been created, you can start completing the forms for submitting your qualifications. You will be required to complete a total of three forms.

Part 1. General Company Profile

1. The first block, General Information, will be auto-completed with the information you entered when creating your account. See Figure 4.

![Figure 4. The General Information block is completed with information gathered when you created your account.](image)

2. The second block, Licensing, should be completed with the licenses you hold that are required for you to perform your services. After completing the license information, click Add License. See Figure 5.

   **NOTE:** If you want to list only one license, you *must* click Add License to add it to the table, or your license information will not be saved.
Figure 5. Click Add License to record information about each license entered. Once the license is listed in the table, the information has been captured in the form.

3. Click either Small or Large to indicate your business size.
4. Enter your Industry Classification Codes and Numbers (NAICS). If you do not know a number, enter a placeholder. See Figure 6.

![Image of the form with license details and options for business size and industry classification codes]

**Figure 6.** Placeholders can be entered for the Industry Classification Codes and Numbers.
5. Enter the requested information for your business operations. *Where dollar values are requested, do not enter a $ sign or comma.* See Figure 7.

<table>
<thead>
<tr>
<th>Business/Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Revenue Last Year:</td>
</tr>
<tr>
<td>Current Backlog:</td>
</tr>
</tbody>
</table>

**Figure 7.** Do not enter a $ sign or a comma when asked to enter monetary information.

6. Answer Yes or No to the next four questions. If you answer Yes to any of the questions, a free-text block will appear for you to enter an explanation. See Figure 8.

<table>
<thead>
<tr>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has your firm ever failed to complete any work awarded?</td>
</tr>
<tr>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Are there any judgments, claims, arbitrations or suits pending or outstanding against your company?</td>
</tr>
<tr>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Please provide a narrative explanation:</td>
</tr>
<tr>
<td>Has your firm filed any law suit, or requested arbitration against a contract within the last 3 years?</td>
</tr>
<tr>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Can your Accounting system adequately separate cost for Change Order or T&amp;M Work?</td>
</tr>
<tr>
<td>Yes ☐ No ☐</td>
</tr>
</tbody>
</table>

**Figure 8.** Answering Yes to any of the four questions will cause a prompt for you to enter a narrative explanation.

7. Complete the Quality Assurance section by answering Yes or No to having a written Quality Assurance Plan or working under an approved General Contractor’s QA Plan. See Figure 9.
Figure 9. Answer Yes or No to complete the Quality Assurance section.

8. Once all questions have been answered, click Next to move to the next page. You may also save the form and return to the process later. To do this, click Save & Quit.

NOTE: Each question must be answered in order to save the form. If you missed a question, when you click Save & Quit, an error will be displayed, and a red asterisk will appear next to the question that was unanswered.

NOTE: Leaving in the middle of completing a form will not save data.

TIP: To make changes to the forms, click on Submit Qualifications in the left side navigation. Placeholders may be used; forms are not reviewed until the forms are completed and submitted.

Part 2. ES&H Responsibility

1. Enter your company’s Experience Modification Rate or Workman’s Compensation Risk Rating, then the average number of employees and the total number of hours worked for the three most recent completed years, including year-to-date numbers for the current year. See Figure 10.
Part 2 - ES&H Responsibility

This is a qualification statement for a Contractor seeking approval to provide construction services to Battelle as a prime or general contractor. A separate Subcontractor qualification statement shall be completed for each lower-tier subcontractor.

Experience Rating and Work Hour Summary
List your Company’s Experience Modification Rate (EMR) or Workman’s Compensation Risk Rating, the average number of employees and the total number of hours worked for the three most recent completed years, including year-to-date numbers for the current year. Contractors must have a minimum EMR of 1.0 in the company’s most current EMR statement, or an EMR less than 1.0 on a three year rolling average, whichever is lower.

1. EMR:
   - This Year: 790.00
   - Last Year: 790.00
   - Next Recent: 790.00
   - Next Recent: 790.00

2. Average Number of Employees:
   - This Year: 790.00
   - Last Year: 790.00
   - Next Recent: 790.00
   - Next Recent: 790.00

3. Total Hours Worked:
   - This Year: 790.00
   - Last Year: 790.00
   - Next Recent: 790.00
   - Next Recent: 790.00

Figure 10. Experience Rating and Work Hour Summary.

2. Answer Yes or No to the next two questions. Answering No to the second question in the Environmental, Safety and Health Program Certification and Agreement block will not immediately require you to upload documentation. You will be prompted to upload this information once all three forms are completed and submitted. See Figure 11.

3. Answer Yes or No indicate any violations, citations, or fatality history. Answering Yes will cause a free-text box to appear for you to enter more information. This information is required. Your form will not be accepted without the information.

4. Enter your subcontractor incidence rate, BLS incidence rate, and NAICS code.
Figure 11. Answering No to the second question shown will not immediately require you to upload documentation. This will be required once you submit all three completed forms.

5. Once all questions have been answered, click Next to move to the next page. You may also save the form and return to the process later. To do this, click Save & Quit.

**NOTE:** Each question must be answered in order to save the form. If you missed a question, when you click Save & Quit, an error will be displayed, and a red asterisk will appear next to the question that was unanswered.

**NOTE:** Leaving in the middle of completing a form will not save data.

**TIP:** To make changes to the forms, click on Submit Qualifications in the left side navigation. Placeholders may be used; forms are not reviewed until the forms are completed and submitted.
Part 3. Past Performance

1. To add projects, enter the information, then click Add Project. See Figure 12.

   **NOTE:** If you want to list only one project, you must click Add Project to add it to the table, or your project information will not be saved.

![Figure 12. Click Add Project after entering information for each project. Once the project appears in the table, it has been captured in the form.](image)

2. Once all projects have been entered, click Next to move to the next page. You may also save the form and return to the process later. To do this, click Save & Quit.

   **NOTE:** Each question must be answered in order to save the form. If you missed a question, when you click Save & Quit, an error will be displayed, and a red asterisk will appear next to the question that was unanswered.

   **NOTE:** Leaving in the middle of completing a form will not save data.
**TIP:** To make changes to the forms, click on Submit Qualifications in the left side navigation. Placeholders may be used; forms are not reviewed until the forms are completed and submitted.

### Uploading Files

Once you have clicked Submit from the Past Performance form, you are directed to Pacific Northwest National Laboratory’s external FTP site to upload any required files. You will be reminded of the documentation you are required to upload at the top of the page. See Figure 13.

![Pacific Northwest National Laboratory](image)

**Figure 13.** At the top of this page, a list of the files you are required to upload will be displayed.

1. The following fields will be pre-populated once you get to the FTP tool: To; Subject; and Message. Changes can be made to any of the fields. **Do not make any changes to the To field, as this is the address to which your forms and files should be sent.** Click the Next button in the FTP screen. See Figure 14.

**NOTE:** Clicking Submit instead of Next will submit your forms **without the necessary documentation.**
Figure 14. The To, Subject, and Message fields will be pre-populated for you. Click the Next button in the FTP screen.

2. Click on Browse to select the file you want to upload from your computer. Only one file can be selected per line shown. See Figure 15.
3. Once you have selected up to four files, click Start Upload. A window will appear showing the file transfer progress.
PNNL Web File Transfer Service

Upload your file(s)

Files uploaded by the PNNL Web File Transfer Service should be 1 GB or smaller and will automatically be deleted after 10 days.

Important! The PNNL File Transfer Website may not be used to transfer files with classified or other sensitive data (i.e., OUC).

NOTE: For best performance with file uploads larger than 200 MB, you should use Internet Explorer for Windows to take full advantage of faster uploads and additional features.

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Figure 15. You can upload up to four files. The maximum capacity for uploading files is 1 gigabyte.

4. Once the file transfer is complete, you will see a Thank You note in the FTP screen. This is not the final Thank You for submitting your qualifications package. See Figure 16.
5. Click Submit (under the FTP screen) to submit the entire qualifications package.
Figure 16. The FTP Thank You note is not the final thank you for submitting the files. Once the files are uploaded, click Submit (under the FTP screen).

6. Once you click Submit, you will see the final Thank You message from the EBS indicating the qualifications package has been submitted. See Figure 17. You will also receive an email notification indicating your qualifications package has been successfully received.

Figure 17. The final Thank You message indicating the qualifications package has been successfully submitted.
**Next Steps**

Once you submit your qualifications package, you can return to EBS at any time to check if your qualifications have been approved.

Qualifications package approval status can be viewed by clicking on View Planholders in the left side navigation. See Figure 18. Qualifications packages will show either **Submitted** or **Approved**.

![Pacific Northwest National Laboratory Logo]

**Figure 18.** Clicking on View Planholders will allow you to see the status of your qualifications package.

💡 **TIP:** If your qualifications package shows **Submitted** for an extended period of time, you can contact Kim Anderson at (509) 371-7671 to learn about your qualifications package.

Once your qualifications package is approved, you are prequalified to register for solicitations.