

Helpful Tips

SUMMARY SUBCONTRACT REPORTS (SSR) FOR INDIVIDUAL PLANS

I. SUBCONTRACTING REPORT (General Information):

1. **Type of Plan:** Make sure that proper plan is marked (Individual) (not “Commercial”).
2. **DUNS:** Verify that DUNS # is same one used in contract
3. **Corporation, Company or Subdivision Covered:** Make sure that Vendor Name and Address match with SAM and what was used in contract.
4. **Date Submitted:** Self Explanatory
5. **Contact Information:** Self Explanatory
6. **Reporting Period:** Should insert the month (October) and the appropriate year.
7. **Agency to which the report is being submitted:** On the drop down menu mark “Department of Defense”. An SSR must be submitted to each federal agency covering only that federal agency's total contracts subcontracting data for the specific reporting period (Oct-Sept).
8. **Report Submitted As:** Should always be prime contractor (Commercial item contracts do not require subcontractors to report)
9. **Contractor's Major Products or Service Lines:** This reflects the description of the two major products and/or services, and the NAICS codes for the product/services lines under the approved subcontracting plan that the contractor provides to the agency for which this report is being submitted to. You may use the same NAICS indicated on the contract, or NAICS they have in SAM, or a table of all the NAICS matched to Small Business Size Standards can be found at the following web link: <http://www.sba.gov/content/table-small-business-size-standards>.

II. CUMULATIVE CONTRACTOR FISCAL YEAR SUBCONTRACT AWARDS:

- 1a. **Small Business Concerns:** SSR is to include the total amount of SB subcontracting dollars to include all subcontracting activity on all contracts, regardless of whether or not a particular contract contains a subcontracting plan (i.e. Small Orders).
- 1b. **Large Business Concerns:** Same as above (1a) except include the total amount of LB subcontracting dollars.
- 1c. **Total:** Total Subcontracting dollars will automatically calculate.

Note for 2-9 below: The total amount will not equal to 100% of subcontracting dollars because of companies that can be counted as both SB and other types of drilled down SB types.

2. **SDB:** Self Explanatory
3. **WOSB:** Self Explanatory
4. **HBCU/MI:** Self Explanatory
5. **HUBZone:** Self Explanatory
6. **Veteran Owned Small Business Concerns (VOSB):** Self Explanatory
7. **Service Disabled Veteran Owned Small (SDVOSB):** Self Explanatory
8. **Alaska Native Corporations (ANC) and Tribes that have not been certified by the SBA as SDB:** Self Explanatory
9. **Alaska Native Corporations (ANC) and Tribes that are not small businesses:** Self Explanatory
10. This is where contractor can explain why they have not met their goals and other pertinent comments. Recommend looking at this carefully because this may be used in Past Performance evaluation. If you entered (0) zero in the small business section of this report or failed to meet the dollar or percentage goals in the Subcontracting Plan, use this section to explain the reason for any shortfalls and your future plan of action. You may also enter explanations and/or comments you think will be helpful to the Government official who will review this report.
11. **Contractor Official Who Administers Subcontracting Program:** Self Explanatory
12. **Certification:** Self Explanatory
13. **CEO:** Self Explanatory
14. **CEO Approval:** CEO certifies that he will sign a hard copy and file it with his records.
15. **E-mail Address:** This will ensure that the addressees get an e-mail that the report has been submitted. If an e-mail address is not included, it is not a show stopper since the AC, PCO, and CO can view what has been submitted. They just will not receive an alert.

Helpful Tips

INDIVIDUAL SUBCONTRACTING REPORTS (ISR) FOR INDIVIDUAL PLANS

I. SUBCONTRACTING REPORT FOR INDIVIDUAL CONTRACTS (General Information):

1. **DUNS:** Verify that DUNS # is same one used in contract
2. **VERIFY DATA:** If the data provided on this step from FPDS is correct, please choose "Yes". Otherwise, choose "No" and contact your contracting officer to correct the problem.
3. **Corporation, Company or Subdivision Covered:** Make sure that Vendor Name and Address matches with SAM and what was used in contract.
4. **Agency Awarding Contract:** Make sure this lists "Defense Commissary Agency". If not, check with the Contracting Officer.
5. **Contracting Office Agency Id:** Automatically filled. Should read "97AZ".
6. **Contracting Office Agency Name:** Automatically filled. Should read "Defense Commissary Agency".
7. **Contracting Office ID:** Automatically filled. Should be HDEC02 through HDEC08 or HQC007.
8. **Contracting Office Name:** Automatically filled. Should read "Defense Commissary Agency".
9. **Prime Contract Number:** List contract number with no hyphens (i.e. HDEC0208DXXXX).
10. **Product Service Code:** This is the FSC or PSC (4 digit) (i.e. 8999 or S203 etc..). It may be found at the addendum to FAR 52.212-4 in the contract. If not, contact the Contracting Officer for this information.
11. **Current Contract Value:** Achievements on the ISR are to be reported on a cumulative basis since the inception of the contract. (Example: If you have are in the 2nd year of a contract with a base (\$2M) and 2 option periods (\$2M each). In the 2nd year you will report a cumulative amount of \$4M (base and option period 1).
12. Is your contract administered by an office other than the Contracting Office that awarded your contract? If so, select the office indicated by the assignment letter signed by the contracting officer. Otherwise select the correct Contracting Officer Identified in the contract.
13. **POC:** Self Explanatory

II. INDIVIDUAL SUBCONTRACT REPORT FOR INDIVIDUAL CONTRACTS (CONT'D)

1. **Contact Information:** Self Explanatory
2. **Reporting Period from inception of Contract through:** Mark either March 31 or September 30 as appropriate. Also include the calendar year for which the report was submitted.
3. **Type of Report:** Mark "Regular" for everything unless the contract is completed and contractor is submitting a "Final" report.
4. **Agency Awarding Contract:** Self Populates
5. **Report Submitted as:** Enter "Prime". Note: Commercial item contracts do not require subcontractors to report.

III. SUBCONTRACT AWARDS

1. **Mark whether indirect or direct costs are included.** Only include indirect cost if it was included in your subcontracting plan for the specific contract and it applies only to the subcontracting work being performed.

Note for 2a thru 2c below: Current Subcontracting Goals and Actual Goals Achievement are to be inserted here. eSRS will only calculate the percentage on the achievement side, not the goal columns (left side of chart). This is by intent, because they want the contractor to copy the goals from the subcontracting plan exactly as they appear in the plan.

- 2a. **Small Business Concerns:** SSR is to include the total amount of SB subcontracting dollars to include all subcontracting activity on all contracts, regardless of whether or not a particular contract contains a subcontracting plan (i.e. Small Orders). 2b. **Large Business:** Same as above (1a) except include the total amount of LB subcontracting dollars. 2c. **Total:** Total Subcontracting dollars will automatically calculate.

Note for 3-10 below: The total amount will not equal to 100% of subcontracting dollars because of companies that can be counted as both SB and other types of drilled down SB types.

3. **SDB:** Self Explanatory
4. **WOSB:** Self Explanatory
5. **HBCU/MI:** Self Explanatory
6. **HUBZone:** Self Explanatory
7. **Veteran Owned Small Business Concerns (VOSB):** Self Explanatory
8. **Service Disabled Veteran Owned Small (SDVOSB):** Self Explanatory
9. **Alaska Native Corporations (ANC) and Tribes that have not been certified by the SBA as SDB:** Self Explanatory
10. **Alaska Native Corporations (ANC) and Tribes that are not small businesses:** Self Explanatory
11. **Which Method do you use to collect subcontracting data for this report?** Mark either “Commitment Basis” or “Payment Basis”. “Commitment Basis” means that you capture the transaction when you execute the subcontract award document. “Payment Basis” means that you capture it when you pay the invoice.
12. **Certification.** Self-explanatory. Certify that data being submitted on the report is accurate and that the dollars and percentages reported do not include lower tier subcontracts.
13. This is where contractor can explain why they have not met their goals and other pertinent comments. Recommend looking at this carefully because this may be used in Past Performance evaluation. If you entered (0) zero in the small business section of this report or failed to meet the dollar or percentage goals in the Commercial Subcontracting Plan, use this section to explain the reason for any shortfalls and your future plan of action. You may also enter explanations and/or comments you think will be helpful to the Government official who reviews this report.
14. **Contractor Official: 14a thru 14c.** Self Explanatory
15. **E-mail Address:** This will ensure that addressees get an e-mail that the report has been submitted. If e-mail address is not included it is not a show stopper since the AC, PCO, and CO can view what has been submitted. They just will not receive an alert.