Welcome!

The program will begin at 1:00 PM ET.

Enable closed captioning by selecting the "Live Transcription" box in Zoom.



The slides and a recording of this forum will available on our blog after the event.

Subscribe to our blog for updates: buy.gsa.gov/interact/community/47/

For frequently asked questions, please go to: <u>SAM.gov/content/help</u>

Thank you!



U.S. General Services Administration

Smart CX Turning Principle into Practice with FSRS Modernization

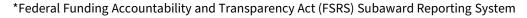
Memi Whitehead Acting Assistant Commissioner Integrated Award Environment (IAE)

December 17, 2024



Purpose

Share IAE's work to date in **understanding** our customers and **using** that knowledge to **drive** improved Customer Experience (CX) using the FSRS* modernization as our example.

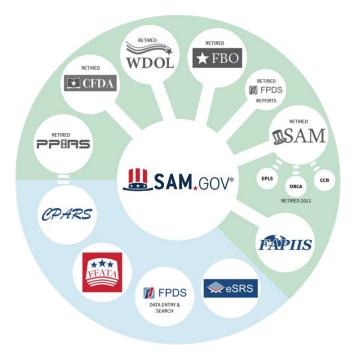


Agenda

- 1. About IAE
- 2. Smart CX in Principle
- 3. Smart CX in Practice
- 4. CX Benefits: SAM.gov Subaward Reporting
- 5. Preparing for FSRS Transition

About IAE

IAE Systems



IAE (the Integrated Award Environment) is the office that manages SAM.gov and other federal contract and grant systems. These systems provide critical data and tools to manage more than \$1.6T in federal awards each year.

- **SAM.gov**, where contractors, grantees, and federal agencies connect to critical federal award data.
- **Contractor Performance Assessment Reporting System (CPARS)**, where the government shares report card data on work contractors have done for use across the federal government
- Electronic Subcontracting Reporting System (eSRS.gov), where contractors report on whether they met their goals for making subcontracts to small and disadvantaged businesses
- Federal Procurement Data System (FPDS.gov), where data about unclassified contracts above a certain dollar amount is available to not only federal agencies, but also to the public
- **FFATA Subaward Reporting System (FSRS.gov)**, where contractors and grantees report data about money from their awards they pass on to others through subawards

IAE Stakeholder Map

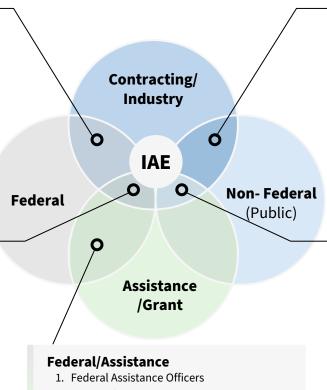
Stakeholder groups and categories

Federal/Award contracting

- 1. Congressional Staff
- 2. Federal Compliance Administrators
- 3. Federal Contracting Officers
- 4. Federal Compliance Oversight
- 5. Federal Contract Leadership
- 6. Procurement Committee for E-gov (PCE)
- 7. Senior Procurement Executives (SPE)
- 8. Office of Small & Disadvantaged Business Utilization (OSDBU)
- 9. Regulatory Councils

Federal/Awards assistance grants or contracting

- 1. Award Committee for E-Gov (ACE)
- 2. Change Control Board (CCB)
- 3. GSA Leadership
- 4. Technical Interface Community (TIC)
- 5. Chief Financial Officers Council (CFOC)
- 6. Council on Federal Financial Assistance (COFFA)
- 7. Congress
- 8. Government Accountability Office (GAO)
- 9. Office of Inspector General (OIG)
- 10.Office of Management and Budget (OMB)
- 11. Exclusions Officials



2. Financial Assistance Associations

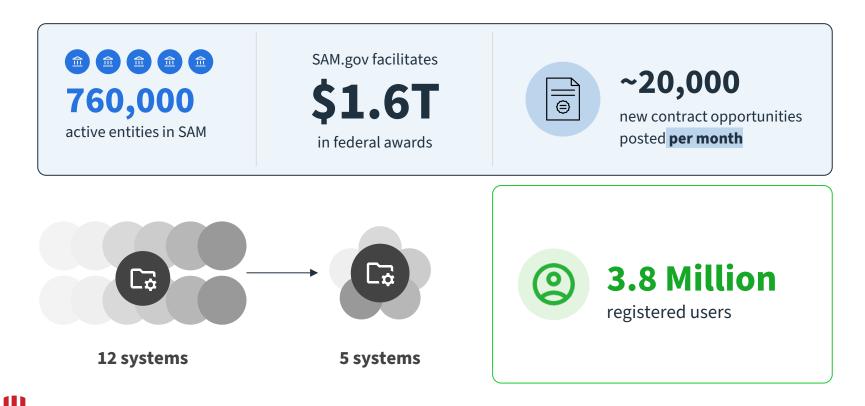
Non-Federal/Contracting

- 1. Foreign Entities
- 2. Large Businesses
- 3. Small Businesses
- 4. Tribal Entities
- 5. Industry Associations
- 6. APEX Accelerators (fmr PTACs)
- 7. Chambers of Commerce

Non-Federal / Assistance grants and contracting

- 1. Hospitals
- 2. Non-profits
- 3. State Governments
- 4. Local Governments
- 5. Tribal Governments
- 6. Territorial Governments
- 7. Universities
- 8. Open Government Groups
- 9. Media / press
- 10.Watchdog groups
- 11.General Public

IAE Scope and Impact

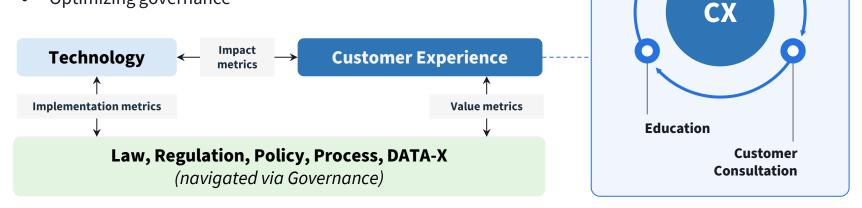


Smart CX in Principle

Smart CX is Our Framework

Program Management

- Aligning strategy, technical architecture, action, acquisition, and resources to deliver efficient and effective results
- Optimizing governance



"ACE in the hole"

CX Strategic initiative

Analytics

Smart CX Supports Our Customers

- Adopt a shared services approach across the federal awards lifecycle
- Leverage data analytics and research to inform our FY25 CX priorities with a CX strategy that includes education, outreach, technology and business process improvements
- Routinely incorporate CX data into all phases of our technical lifecycle
- Measure customer satisfaction and improvement in a meaningful way



Why Focus on CX?

- Improves our understanding of the individual challenges of our wide variety of users
- Makes it easier for customers to comply with regulations
- Uses existing data to save users time
- Helps us build systems that meet user needs
- Reduces our need to make changes later

Good CX makes good cents!



Smart CX in Practice



CX Drives Modernization

We are incrementally consolidating our systems into a single platform at SAM.gov and continually modernizing the site.

Overall, modernization is about:

- **Reducing barriers** for doing business with the government
- Increasing transparency into federal spending
- Increasing **accountability** in the award process
- Reducing reporting burden
- Increasing data quality and integrity

Listening to Our Customers

- In the past 18 months, we conducted 5 studies with hundreds of FSRS users
- We reviewed **help desk tickets** to understand common challenges
- We worked with federal agency representatives to understand and incorporate their concerns and requests
- **Our testing site is open** for users to try the new system
- We set up a **dedicated address for feedback** and questions

Who we talked to

- Federal employees
- Small business
- Large businesses
- APEX Accelerators
- State governments
- And more

How we listened



Our Customers Told Us

- Bulk upload is **unreliable**
- FSRS lacks clear support to key legislative and regulatory requirements
 - Confusion over expanded financial assistance subaward reporting from the 2020 changes to 2 CFR 170
- Widespread confusion on how often a subaward report needs to be submitted leading to duplicate submissions
- Manual subaward report **deletion process** is frustrating
- Using the current **work list** is confusing
 - Especially frustrating if users are unavailable

"We're having an issue with too many errors coming back after bulk submissions. The generated errors take hours and sometimes days to resolve. If there is a faster way resolve bulk errors in the new system, that would be helpful."

"The system is slow and sometimes I have to try several times before a report uploads."

"The current lag time between the time of submission into FSRS and visibility on USASpending.gov is too long... That lends itself to data ... inadvertently being submitted in duplication."

"...reporting revised amounts for subawards is advised to be done by reopening the original subaward report, revising the amount, and resubmitting. I don't believe this can be done as a batch currently."

"Having the ability to delete reports without engaging the FSD would be extremely helpful."

SAM.gov Shared Service Approach to Subaward Reporting









Take advantage of data already in SAM.gov

Use SAM.gov role management

Use improved security features at SAM.gov

Use SAM.gov Workspace

Meets user needs efficiently

- System checks to validate subaward reports
- Increase federal funding transparency



Coming Changes

- Where: SAM.gov will be the new home for subaward reporting (targeted go-live window Spring 2025).
- **How:** You will make individual subaward reports in an improved user interface on SAM.gov or using a new bulk option (an API).
- Who: You and anyone on your team can get a role and permissions in SAM.gov to make subaward reports.
 - This means you can share reporting responsibilities if you want to.
 - We will help existing FSRS.gov users get roles in SAM.gov.



What Is Not Changing

- Regulation: No regulations are changing. The same subaward reporting rules and deadlines are in force.
- **Reporting options:** You can still make subaward reports either through the user interface or via a bulk option.
- **Public access:** The public can still access subaward information on USASpending.gov.

CX Benefits SAM.gov Subaward Reporting

What are the benefits?

Bringing subaward reporting to SAM.gov offers prime contractors and awardees a better user experience, improved security, and better data integrity in their reporting to the U.S. federal government.

When subawards are in SAM.gov, you can:

- Manage reporting for all your entities from one SAM.gov account
- ✓ Share reporting responsibilities across your team
- ✓ Use data in SAM.gov to reduce reporting burden
- ✓ Get warnings of potential issues with reports, reducing errors and duplicate reporting
- Comply with federal regulation more easily
- ✓ Search and view reports more easily

What to Look for



Workspaces Have Changed For Easier Navigation!

- Financial assistance subawards are in the assistance workspace
- Subcontracts are in the acquisition workspace



Improved Search and Transparency!

- Financial assistance subawards and assistance listings are searchable in assistance domain
- Subcontracts and contract opportunities are searchable in the acquisition domain
- Subaward reports are publicly searchable



Improved Data Entry!

- User experience supports reporting against all types of federal financial assistance (2 CFR 170)
- Leverage existing login and role management
- Shared workspace across an entity's users with roles
- Each subaward report is now submitted as an independent transaction instead of forced into a monthly grouping structure to reduce user confusion and duplicate reporting

Improved Data Quality!

• New/revised validation rules and soft warnings to address legacy FSRS data reporting issues



What's New: Uniform and Shared Workspace

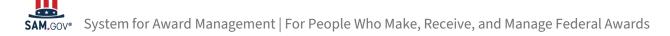
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40 Total Contract Awards See All	ate a subaward report, enter a Contrac ווס)	Subawa	L86 otal rd Reports e All

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What's New: Simplified User Workspace

Role-based → Users no longer need to manually add prime awards to their Workspace!

SAM ,G	OV°		🗹 Req	uests _ Notifications 88 Workspace →	Sign Ou
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What's New: Search Federal Assistance Subaward Reports

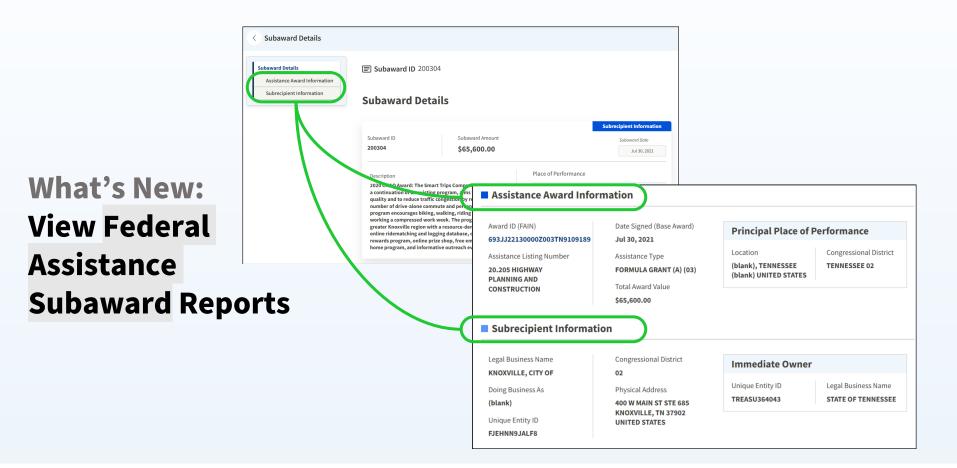
Home Search

Filter By

Search alongside other assistance domains

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	For more information on how to use our keyword search, visit our	Showing 1 - 25 of 3,311,619 results		0,	Prime Assistance
	help guide 🛛	COUNCIL ON DOMESTIC VIOL Subaward ID: 2020-JG-B01-6674	ENCE INC	Assista	Award ID (FAIN)
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	program ×				Enter Code or Name
	Subrecipient 🗸	KNOXVILLE, CITY OF Subaward ID: 200304		Assist	Date
	Subaward 🗸				Date Submitted
	Prime Recipient 🗸	Subrecipient	Prime Assistance		Anytime
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What's New: Search Federal Subcontract Reports

Home Search

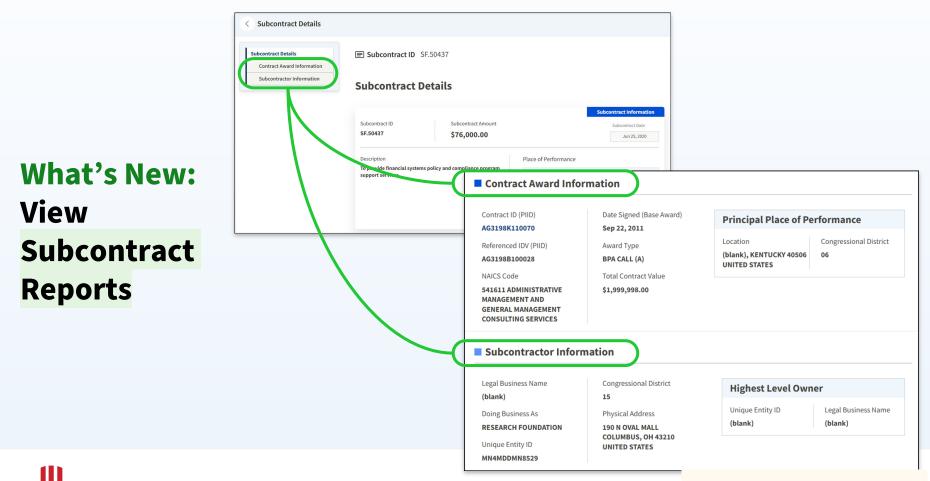
Filter By

Keywor

help guid

Search alongside other contract domains

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	Subcontract	~	Subcontractor	Prime Contract		Date Submitted
	Prime Contractor	~	UNIVERSITY OF ILLINOIS	Contract ID(PIID):	Total Contract Value:	
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What's New: Simplified Data Entry User Experience

< New Report							
Overview							
Create Your Report		Prime Contract					
Prime Contract		Enter the contract ID (PIID) of the pri	ime contract for this report				
Subcontractor	0	Contract ID (PIID)					
Subcontract Details	0	140P2123F0138	× •	1			
Place of Performance	0	Referenced IDV (PIID)					
Review	0	140P2119A0008	× 🗸	Ĩ			
		Remove Referenced IDV (PIID)					
		CONTRACT AWARD					
		Contract Details					
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		Show More					

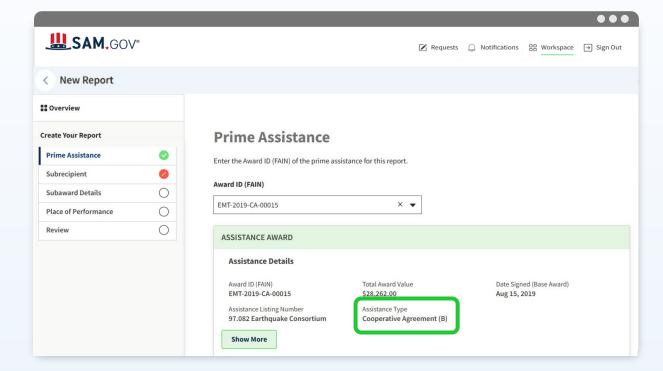
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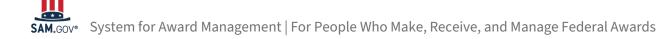
What's New: Simplified Reporting Structure

SAM,GOV*			🗹 Requests	Ontifications	BB Workspace	→ Sign Out
< New Report						
: Overview						
Create Your Report		Subcontract Details				
Prime Contract	0	Enter the details about the subcontract.				
Subcontractor	0					
Subcontract Details	0	Subcontract ID Enter a name or number for your organization to identify				
Place of Performance	0	the subcontract internally.				
Review	0					
		Subcontract Amount Enter the total amount you obligated to the subcontractor whon you signed the contract.				
		× Cancel	o: Scroonsha	ts from test	Previous	Next >

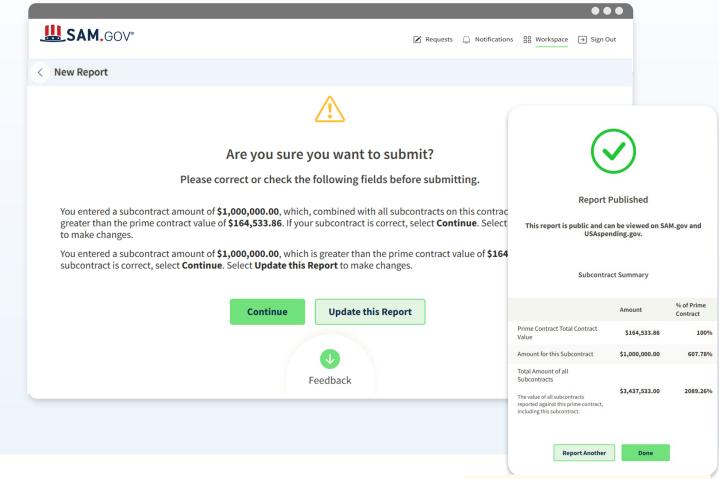
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What's New: Financial Assistance Type Clearly Identified





What's New: Soft Warnings to Improve Data Quality



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What's New: **Easy System Path to** Generate Congressional District

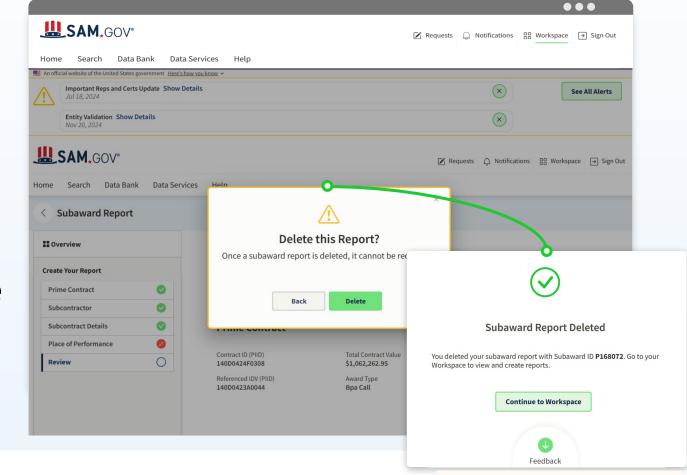
Plus, improved security by no longer storing or displaying the Place of Performance ZIP+4 extension in the report.

SAM.GOV*	
< New Report	
# Overview	
Create Your Report	Place of Performance
Prime Contract	Enter the primary location or office where the subcontractor performs work.
Subcontractor	
Subcontract Details	Subcontractor Place of Performance is:
Place of Performance	The prime contractor's place of performance The prime contractor's physical address
Review	The subcontractor's physical address
	Another Location Country
	UNITED STATES × 🔻
	ZIP Code +4 (Optional)
	20121 × 5301 × Search
	You are required to report the congressional district for place of performance. Adding +4 helps us find the congressional district. We do not store your ZIP +4.
	City State / Territory Centreville Virginia
	Congressional District Virginia 11

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Note: Screenshots from test environment. Minor changes expected prior to production deployment.

What's New: Improved User Experience by Automating Ability to Delete Reports



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Preparing for FSRS Transition

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Key Transition Dates

Transitio Overview Video	1 0	Search, Workpace, & Data Entry Workshop	Bulk Reporting Workshop	Role migration tool launches	Bulk Reporting Workshop	Search, Workpace, & Data Entry Workshop	Bulk Reporting Workshop		SAM.gov Subaward Reporting 101 Webinar
Early Jai	n Jan 15	Jan 22	Jan 29	Jan 31	Feb 12	Feb 19	Feb 26		Mar 12
0		•	•	•	•	•	•		•
December	January				February				March
							•		
Dec 30	Jar	ו 17	Jan 27	Jan 31	Feb 14		Feb 24	Feb 28	Mar 14
User Testing Round 2	•	pen elp ion	User Testing Round 3	Open Help Session	Open Help Session		User Testing Round 4	Open Help Session	Open Help Session

Subaward reporting capabilities in FSRS.gov will be offline for some period of time (several days) prior to the change and before the new subaward reporting capabilities are stood up in SAM.gov.

Stay tuned to SAM.gov Interact blog for more information when available.

SAM,GOV®

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Stay up to date!

Visit our blog at https://buy.gsa.gov/interact/community/47/ and select the Join button. If you are a current FSRS.gov user, watch your inbox for emails for important reminders and training opportunities.

We want to hear from you!

- → Email us at <u>subawardreporting@gsa.gov</u> with your feedback and questions about the retirement of FSRS.gov and the launch of SAM.gov subaward reporting.
- → <u>Volunteer</u> to help us test the system prior to launch.
- → Attend our training workshops. Video training and recorded sessions will also be made available.
- → For questions about any of the other IAE systems, contact SAM.gov's helpdesk at FSD.gov.

Testing and Training Opportunities

Sign up to be a tester!

Please consider volunteering to help us test SAM.gov Subaward Reporting **before** Go Live!



SAM.gov Subaward Reporting Training SAM.gov Subaward Reporting Workshop: Bulk Reporting Training Workshop: Coming Jan 29, 2025 **Roles and Permissions** Soon! Feb 12, 2025 Jan 15, 2025 Feb 26, 2025 SAM.gov Subaward Reporting Training **SAM.gov Subaward Reporting** Workshop: 101 **Data Entry, Workspace and Search** (Live Training Webinar) Jan 22, 2025 March 12, 2025 Feb 19, 2025

Open Help Sessions will be hosted every other Friday between January 17, 2025 through March 14, 2025. Sessions are open to anyone who needs help preparing for this change. <u>Sign up for Help Sessions As Needed.</u>



U.S. General Services Administration

Questions?