GSA PBS OAM AUTOMATION SOLUTION CENTER
CIW FORM FILLER

Challenge

In response to OIG CAP Audit Report A190085, Manual data entry has indicated many data inaccuracies upon either submission or transmission to GCIMS. As a result, a need was identified to reduce the amount of time spent on handling clerical aspects of the PIV process and data retrieval.

Solution

The CIW Filler Bot will reduce the amount of time spent on the clerical aspects of PIV processes and simultaneously improve data quality by automating the manual process of retrieving and copying the necessary data.

Additionally, unattended BOT will automate the entry of sections 2-6 from EASi BI every 10 minutes during working hours. It will flag any points for review for the RO in the output email.

Benefits

- Less interference with EASi searches
- Less site navigation
- Increased understanding of the CIW and responsibilities
- Reduced delays in requesting clearances and issuing PIV cards to contractor personnel
- Improved data accuracy
- Higher accountability for PIV cards

By The Numbers

3281 — The 5 year average of contracts with PIV Cards is approximately 3,281.

13,000 — Average cumulative time savings is approximately 13,000 hours annually based on 30 min process time.

Let's Continue the Conversation

Joslann Feldpausch
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The U.S. General Services Administration (GSA) is a government leader in robotic process automation and has deployed more than 100 automations across the agency.

The GSA OCFO sponsors the Federal RPA Community of Practice, which aims to increase awareness and knowledge of RPA, while also removing implementation hurdles.

GSA PBS OAM AUTOMATION SOLUTION CENTER
CLARA

Challenge

Each contract close out requires a number of steps including performance reviews, financial reviews, possible actions to correct obligations or make deductions, and then official closeout in the procurement system after all reviews are complete and final payment has been made. The contract file must also be updated to reflect that the appropriate checks have been conducted and that the contract was closed appropriately. The close out process can be extremely time consuming, using manual data entry to conduct most of the process.

Solution

The CLARA Closeout Robotic Assistant offers users four automation pathways for contract closeout support. Users can select from the following:

- Prepare a Contract's Release of Claims
- Conduct a Contract's Financial Review
- Conduct a Contract's Financial Review and close the Contract
- Draft a Contract Deobligation Modification

Benefits

Closeout automation can be used on any Firm Fixed Price Contract
➢ Automation is requested via Google Form
➢ Four automation pathways for selection

- Release of Claims
- Financial Review
- Financial Review & Close Contract
- Prepare Draft Deobligation Modification for Signature

By The Numbers

36k — This automation creates over 36,000 hours of capacity each year.

13k — GSA closes over 13,000 contracts a year.

Let's Continue the Conversation

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CLARA & NORA INTEGRATION

Acquisition Bots CLARA and NORA have joined forces this year to bring a more comprehensive automated solution to the Acquisition Workforce!

NORA is now sending notifications to Contracting Officers for awards that are 45 days past the performance expiration date in EASi and appear financially eligible for closeout.

The email provides a financial review table for the Contracting Officer's review and includes the link to CLARA's closeout request form, so that the request can be submitted.

Here is a sample of what the emails look like!

CLARA/NORA INTEGRATION PHASE I NOTIFICATION SAMPLE RPA EMAIL TEMPLATE

Sample Email Notification:

From: PBS_OAM_RemindersandNotifications@gsa.gov
To: <Contracting Officer Email>
CC: <Contract Specialist Email>, ecf@gsa.gov
Email Subject: <Contract Number> 45 Day Past Expiration Notification

{Body of Email}

<Contract Number>
<Award Title>

<Contractor Name>
<Contractor Address>

GSA

Dear <Contracting Officer>:

This is a notification that <Contract Number> is 45 days past contract expiration. The table below provides a sample of information from CLARA's Financial Review report for your evaluation.

Obligation PDN	Completion Date	EASi Obligated Amount	EASi Received Amount	Pegasys Obligated Amount	Pegasys Received Amount	Pegasys Remaining Balance
<Obligation PDN>	<Completion Date>	<EASi Obligated Amount>	<EASi Received Amount>	<Pegasys Obligated Amount>	<Pegasys Received Amount>	<Pegasys Remaining Balance>

This award is financially eligible for closeout. Please review the report to confirm, then submit a request for closeout to CLARA.

This report is for informational purposes only. No action will be taken unless a request is submitted to CLARA.

****THIS IS A SYSTEM GENERATED EMAIL****

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CODY

CONTRACTOR RESPONSIBILITY & AWARD MEMO PREPARATION

Challenge

Conducting contractor responsibility and offer reviews and awardee selection preparation is currently a manual process involving compiling, organizing and matching vendor information, emails and award information from multiple sources.

Solution

This automation will offer two pathways:

Path 1 of the automation will further automate a GSA contractor responsibility screener to bring in more data from SAM.gov and other websites to form a comprehensive vendor report and summarize all vendor responsibility information in an offer checklist.

Path 2 of the automation will draft a contractor responsibility memo, survey and check Pegasys for an existing vendor ID for the prospective awardee.

Benefits

- More efficient
- Improved data accuracy
- Increased overall workload capacity
- Robust reporting
- Timely handling of transactions

By The Numbers

TBD

Average Transactions

TBD

Increased Capacity or Time Savings

Let's Continue the Conversation

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EMMA

ENTERPRISE MASS MODIFICATION AUTOMATOR

Challenge

Federal acquisition regulations and contractual administrative requirements are subject to change and can necessitate modifying existing contracts to incorporate these changes. Before the automation was developed, it took an acquisition team approximately one hour to perform all of the actions required to complete a single contract modification. It was a laborious effort to execute tens of thousands of modifications, monitor this effort and complete within tight deadlines.

Solution

Using a report of active contracts, Enterprise Mass Modification Automator (EMMA) drafts a contract modification in the contract writing system which includes: generating the modification form, inserting scripted description language, uploading supporting documentation and sending the modification to the contractor representative and GSA acquisition team.

Benefits

The automation completes the contract modification in approximately ten minutes, as opposed to the hour it took to complete prior to automating. The automation also enables superior progress monitoring and helps ensure contract compliance with new regulations and requirements that are time-sensitive. The goal of the automation is to not only reduce human resource time but to also eliminate errors.

By The Numbers

83% The automation reduced per-contract processing from 60 min. down to 10 min. Representing an 83% reduction.

10k PBS issues over 10,000 automated Enterprise Mass Modifications annually

Let's Continue the Conversation

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ECF (Electronic Contract File) ALERT BOT

Challenge

Provide an internal automated daily review of the number of contract documents required in each pre-award procurement tab to improve the overall data quality and process efficiency.

Solution

Automation pulls a report of contracts awarded 5 business days after a new contract is awarded in EASi.

Automation will go into EDMS and scan each pre-award procurement tab for any missing documents based on an estimated quantity for each contract type.

The automation will alert the Contracting Officer of any missing documents.

The automation will utilize an escalating reminder process (giving the CO & CO Supervisor a reminder at 15 business days, then the CO, CO Supervisor and Branch Chief gets the reminder at the 25th business day after award).

Benefits

The overall objective for this automation is to essentially scan each pre-award procurement tab (tabs 1-23) to determine when a document or multiple documents are missing and will send notifications to the contracting team, their supervisor, and branch chief as alerts within a 7 day escalation period after contract award.

By The Numbers

13K The current process takes on average 7 minutes with approximately 13,000 transactions annually

1517 The automation will add an additional capacity of 1,517 hours annually.

Let's Continue the Conversation

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FIXED ASSET

Challenge

The U.S. General Services Administration (GSA) does not currently have a proactive process to prevent EASi failures (processing modifications(MODs) and Receiving Reports) due to Pegasys changes in Fixed Asset Type(from CIPIMP to IMPROVMNT**)**. The current manual reactive process leads to delay in executing MODs or processing receiving reports and could result in potential interests charges due to the failure of prompt invoice payment. Additionally, there is a significant level of manual effort required to update contracts and accounting lines linked to the project which has reached substantial completion.

Solution

GSA implemented a multiphase automation process that is triggered by changes in IRIS Fixed Asset Type as a prompt to prepare a Budget Purchase Request(PR) Modification for contracts that have open balances and draft award mods. This automation will check daily for IRIS/Pegasys updates to fixed asset types and will create the budget PR mod and the award modification for budget analysts and contracting officers approval.

Benefits

This is a critical step in ensuring the Federal government successfully processes EASi changes (processing modifications (MODs) and Receiving Reports) due to Pegasys changes in Fixed Asset Type (from CIPIMP to IMPROVMNT)successfully. This would result in improving the timely handling of vendor invoice payments and a reduction in the number of EASi /Pegasys failed transactions.

By The Numbers

600

On average, the Fixed Asset bot updates 600 unique fixed assets per year.

2,464

This automation has created **2,464 annualized hours** of capacity for **contracting officers.**

Let's Continue the Conversation

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GSA PBS OAM AUTOMATION SOLUTION CENTER
NORA

Challenge

PBS acquisition personnel send out thousands internal and external notifications and reminders annually and the manual effort of this process can be time consuming.

NORA is a new Robotic Process Automation (RPA) that automates sending 9 notifications and reminders, and filing them into your electronic contract file, throughout the acquisition lifecycle. NORA's goal is for you to spend less time manually tracking milestones and writing emails.

Solution

This RPA consists of nine different components that will generate notifications or reminders to various parties. Seven of these components will run automatically without intervention, while the remaining two components will require additional input from the CO.

Benefits

NORA's goal is to spend less time manually tracking milestones and writing/sending emails. This automation ultimately reduces administrative burden for the acquisition community.

By The Numbers

7k — This automation creates approximately 7,000 hours of capacity each year.

30k — GSA sends over 30,000 notifications and reminders a year.

Let's Continue the Conversation

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CPARS Self-Assessment

Contractor self-assessments can save time while allowing contractors the opportunity to make their case about their performance! A contractor actively tracking its performance may have fewer performance issues.

NORA is now sending notifications to contractors alerting them of the option to provide a self-assessment of their performance to the Contracting Officer and/or Contracting Officer's Representative. The notifications are sent 30 days after award and 30 days after contract options for awards meeting or exceeding the CPARS reporting thresholds.

While this contractor performance self-assessment is optional and for informational purposes only, GSA's objective in offering this opportunity is to engage in performance feedback early, ensure collaboration, and foster effective communication. Please read more at Acquisition Alert AA-2021-01.

CPARS CONTRACTOR SELF ASSESSMENT NOTIFICATION RPA EMAIL TEMPLATE

Sample Email Notification:

From: PBS_OAM_RemindersandNotifications@gsa.gov
To: <Contractor POC Email>
CC: <Contracting Officer Email>, <Contract Specialist Email>, <Contracting Officer's Representative Email>, ecf@gsa.gov
Email Subject: <Contract Number> Contractor Performance Self Assessment

{Body of Email}

<Contract Number>
<Award Title>

<Contractor Name>
<Contractor Address>

GSA

Dear <Contractor POC Name>:

GSA invites <Contractor Name> to submit their self-identified ratings and assessments via email for the relevant period of performance to the Contracting Officer and/or Contracting Officer's Representative (COR) by the end of the current Period of Performance for <Contract Number>. The most helpful contractor performance self-assessments include the same information found in Federal Acquisition Regulation (FAR) 42.15 Contractor Performance Information, including schedule, management, subcontracting, and cost control, as applicable.

GSA will review the self-assessment information and consider whether or not to use any or all of the information provided for the official agency evaluation of contractor performance entered in the Contractor Performance Assessment Reporting System (CPARS).

While this contractor performance self-assessment is optional and for informational purposes only, GSA's objective in offering this opportunity is to ensure a collaborative process fostering more effective communication.

Prior to GSA entering the official agency evaluation of contractor performance in CPARS, you are encouraged to collaboratively review performance self-assessments with your government representatives.

Contractors will still have the opportunity to submit comments or additional information per the usual procedures outlined in FAR 42.1503(d).

Should you have any questions, please contact your Contracting Officer, <Contracting Officer Name>, at <Contracting Officer Email>.

****THIS IS A SYSTEM GENERATED EMAIL****

Here is a sample of what the emails look like!

GSA PBS OAM AUTOMATION SOLUTION CENTER

OSDBU FORECAST UPDATE TOOL

Challenge

All planned procurements (except exercise of options) should be input into the GSA Forecast Tool. GSA forecast tool listing managers will either manually input planned opportunities or use the bulk upload functionality. Planned opportunities may be for the current fiscal year or future fiscal year(s).

1) Validate the bulk upload file
2) Update / Maintain the information in an automated way

Solution

Increase the accuracy of GSA Forecast Tool information while eliminating manual data entry and updates. The initial implementation of the automation should be for GSA Forecast Tool listing managers only. If successful, GSA will roll out to external agency forecast tool listing managers.

Benefits

- Eliminates manual data entry and updates.
- Reduces administrative burden to the workforce while promoting compliance.

By The Numbers

3.3k On average, the tool is used 3,340 times per year.

2505 Currently, the tool is used 45 mins per entry and approximately, 2,505 hours annually.

Let's Continue the Conversation

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GSA

ROBOTIC PROCESS AUTOMATION

PIV VALIDATION BOT

Goal

Increase the number of returned PIV cards by automating a more regular verification of active cardholders. The bot aims to reduce PIV Card management effort and enhance Requesting Official (RO) efficiency and policy compliance. This automation estimates to save over 3000 hours in manual effort per year and ensure full policy compliance.

Automation seeks to:

- Verify the Vendor POC and Government RO
- Send the list of cardholders to the Vendor POC and RO to confirm active status.
- File the results of the validation in the electronic contract file.
- Assist in card collection as needed.

How often will this occur?

- PBS and OAS: Every 12 months and within 60 days of a contract's completion
- FAS: Every 6 months on contracts more than 12 months in duration and within 60 days of a contract's completion.

Can I use this any time?

Requesting Officials may also use this upon request. This will satisfy the policy requirement for that period. (i.e. for PBS another validation won't be issued for another 12 months)

What do I need to do?

Just follow the instructions in the email within the requested time frame.

What happens if I do not respond to the validation emails?

Please respond to the automated emails immediately. A reminder will be sent 5 business days after the first email to take action. Follow up emails will be sent and escalated up the Requesting Official's management chain every 5 business days that a response has not been received.

Link to FAQs

[Submit a help ticket or question](#)

Links to PBS, FAS, and OAS policy

[PBS PIV Quick Reference Guide](#)

ROBOTIC PROCESS AUTOMATION

PR (Purchase Request) CLEAN UP TOOL

Goal

Over 2000 Procurement Request (PR) records, from prior fiscal years are in the PBS Electronic Acquisition System Integration (EASi), and are identified as abandoned and/or inconsistent records that should have been canceled. The goal of PR Clean up is to evaluate abandoned PRs in the EASi system, identify candidates to cancel, and then create, route and approve the required amendment.

Automation seeks to:

- Save time: minimally it takes approximately
- 20 minutes for all required parties to complete
- the task of creating, routing and approving (2
- required approvals) to process a Cancel Base
- PR Amendment.
- ● Improve user interface with EASi and
- reporting. Canceled actions are "set to the
- side" and not included in most daily tasks and
- reporting.
- ● Enhance data reliability within the system and
- in reporting.
- ● Be available on demand

How often will this occur?

- Planned for 2x per Fiscal Year (FY)
- ● Initially multiple runs are planned until
- abandoned PRs have been amended up
- to the current FY.

Can I use this any time?

Yes. This bot can also be used on demand.

Resources or Links

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Submit a help ticket or question

PR Clean up Resources

Upcoming RPA Project

GSA PBS OAM AUTOMATION SOLUTION CENTER

DBA PAYROLL VERIFICATION

Challenge

Currently, the website utilizes an automated employment verification service, allowing current and former DOL employees to have employment and salary information easily verified by third parties. THE WORK NUMBER® is a fast, secure service used for mortgage applications, reference checks, loan applications, apartment leases, and anything that requires proof of employment.

Solution

Automation portal would perform the weekly payroll verification process on behalf of the contracting officers. The automation would use an electronic version of the WH-347 that contractors would be responsible for submitting weekly through a WH-347 web application.

Benefits

- The automation would verify the provided labor categories and corresponding wage rates against the prevailing wage in the contract's wage determination ("WD").
- The electronic WH-347 and corresponding WD data can be available for governmentwide use. The automation can also be tailored to perform within the systems of other government agencies for comprehensive verification automation.

By The Numbers

TBD Average Transactions

TBD Capacity or Time Savings

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