Mock Task Order Request for Proposal #6:
Business Process Outsourcing
Professional Services RFP – BPO Services

CAPITALIZED TERMS USED BUT NOT DEFINED IN THIS TORP HAVE THE MEANING SET FORTH IN PROFESSIONAL SERVICES CONTRACT # USAC-20-015 (THE “CONTRACT”). AND THIS TORP IS ISSUED PURSUANT TO AND UNDER THE TERMS AND CONDITIONS SET FORTH IN THE CONTRACT.

I. TASK ORDER TYPE

USAC intends to award a single task order for the BPO Services service category, under the Contract. The pricing of the Task Order is based on time and materials (T&M).

II. PURPOSE

USAC is seeking a single contractor (“Contractor”) to provide BPO services for the National Verifier. The NV Solution must produce accurate eligibility determinations, while also maintaining quick and user-friendly processes for the external stakeholders of the federal Lifeline program. USAC has strong relationships with key relevant external stakeholders, expertise in Lifeline program requirements and best practices, and a strong IT division that built and continues to manage the current Lifeline systems environment. USAC is also currently working with a Systems Integrator to develop and build the technical solution underlying the National Verifier.

The NV Solution is envisioned to interface with federal and state databases that house participation information on the qualifying programs. The NV Solution will automate eligibility determinations as often as possible, with the remainder of determinations made through manual review of eligibility documentation provided by the applicant. The BPO Contractor will provide human capital to support the functions of the National Verifier and will be expected to work closely with all internal and external stakeholders to implement the required processes.

More specifically, USAC expects Contractor to perform the following functions:

- **Mail and form processing**: Process all incoming mail-related services, including digitizing incoming mail and inputting it into the National Verifier.
- **Customer outreach**: Handle all outgoing consumer contacts, which will be completed through mail, email, text, and robocall.
- **Customer support**: Provide general customer support, including support for the annual recertification process, which can be completed through interactive voice response (IVR), mail, web portal, or with a live agent. This includes support already provided by two existing call centers.
- **Manual review**: Provide manual eligibility verification of applicant-provided eligibility and identity documentation, to include applications, dispute resolutions, transfers, and migrations.

III. BACKGROUND
Through its administration of the USF programs on behalf of the FCC, USAC works to promote the availability of quality services at just, reasonable and affordable rates and to increase access to advanced telecommunications services throughout the nation. Specifically, the USF programs provide funding for the expansion of telecommunications and broadband access to rural communities and health care facilities, schools and libraries across the country, and low income households. Through program administration, auditing, and outreach, USAC works with contributors, service providers, and program beneficiaries to achieve the program goals articulated by the FCC for each of these programs.

IV. PURPOSE OF THE TORP

USAC’s transformation stems from several FCC Modernization mandates, an ambitious Corporate Strategy, along with other critical projects. These initiatives are complex, have significant enterprise-wide interdependencies, and require thoughtful and deliberate approaches to project planning and implementation.

Currently, USAC’s 11 divisions/departments have their own respective approach for managing projects. The different approaches hamper USAC’s ability to create a consolidated view of the activities and insight into the major interdependencies between functions and initiatives. In addition, each division has different levels of maturity with regard to project management processes and capacity which makes this an enterprise-wide activity.

USAC has an opportunity to implement a project management capacity in the Strategy Division to support the divisions/departments in meeting their objectives.

V. TASK ORDER PERIOD OF PERFORMANCE

The period of performance for the Task Order is twelve months (the “Term”). The Task Order shall expire at the end of the Term unless extended, in writing, by USAC.

VI. PLACE OF PERFORMANCE

Contractors shall perform Task Orders at either its own facilities or at USAC Headquarters. Occasional meetings may be conducted at USAC’s Headquarters or at the FCC offices located at 445 12th Street SW, Washington, DC 20554. USAC shall provide appropriate office space and appropriate access to its computer network for duties performed at USAC Headquarters, if necessary. Contractors will be required to complete USAC’s Visitor Form, USAC Visitor Form and wear a badge while on USAC premises.

VII. TASK ORDER PROCESS

Attachment 1 Pricing. Fixed labor-hour rates for T&M must be fully burdened and include all wages, overhead, general and administrative expenses, taxes and profit, and individual laptop
equipment and office software for each category of labor. Services for the T&M CLINS shall be performed on a T&M basis using the labor categories and fixed hourly rates set forth in Attachment

A. **Task Order Ceiling Price.** Each Task Order issued under the Contract will include a ceiling price (the “Task Order Ceiling Price”). USAC will not be obligated to pay Contractor any amount in excess of the Task Order Ceiling Price, and Contractor shall not be obligated to continue performance if to do so would exceed the Task Order Ceiling Price, unless and until USAC notifies Contractor in writing that the Task Order Ceiling Price has been increased and specifies in the notice a revised ceiling price that shall apply to the Task Order.

B. **Steps for each Task Order**

1. **Issuance of Task Orders.** USAC will issue Task Orders in accordance with the procedures set forth below. As specified in each Task Order issued under the Contract, Contractor shall provide experienced personnel who are capable of performing the tasks described in, and who meet the qualifications listed under, the Key Personnel set forth below.

2. **Work Schedule.** Unless otherwise specified in a Task Order, Contractor personnel assigned to a Task Order shall maintain a work schedule consistent with USAC normal business hours and work practices. Contractor personnel are expected to comply with all of USAC’s rules pertaining to conduct in the workplace. Any change in Contractor personnel must be approved, in writing, by the USAC Procurement department and reflected in the Task Order. Contractor personnel are not employees of USAC.

3. **Invoicing and Reporting Instructions.** Each Task Order will outline the invoicing and reporting instructions required specifically for that project.

4. **Task Order Proposals.** Contractor shall perform the following steps which are necessary for the Task Order award. Contractor shall submit one proposal in response to each TORP. See Attachment 1, Mock TORP. Each Contractor proposal in response to a TORP must include the following information:

   a. **Basic Information.** A cover page which includes:
      1. The name of Contractor’s organization;
      2. Offeror’s contact name;
      3. Offeror’s contact information (address, telephone number, email address, website address);
      4. Offeror’s DUNS number;
      5. The date of submission;
      6. A statement verifying the proposal is valid for a period of 120 days; and
      7. The signature of a duly authorized Offeror representative.

   b. **Production Schedule.** A detailed and comprehensive production schedule that includes a proposed schedule and approach for managing and providing the Services and Deliverables required by the TORP. Contractor should also outline any deviations from the TORP.
c. **Pricing.** A total hourly breakdown of each Contractor proposed staff.

d. **Ceiling Price.** A proposed Task Order ceiling price for the TORP, as well as a justification.

C. **Task Order Proposal Review.** USAC will review Contractor’s proposal to this TORP, provide feedback if any adjustments or negotiations are required, and subsequently award the Task Order.

### VIII. SCOPE OF SERVICES AND DELIVERABLES

The primary responsibilities and requirements of Contractor are identified below.

A. Contractor and its agents, staff and employees working on the USAC account shall be located within the United States.

B. Contractor shall operate its contact center in accordance with all federal and state laws and regulations, to include compliance with any accessibility-related requirements (e.g., 508 compliance) and with 18 U.S. Code § 2511 and other similar state wiretapping laws (e.g., for recording customer support calls).

C. Contractor shall provide a turn-key, full service operation to include, but not limited to: facilities, equipment (including telephone instruments, related lines, and cable), telephone service, software, circuits, staff, training, setup, testing, and reporting. Contractor shall be responsible for the installation of the required cable and wire at any of its facilities.

D. Contractor shall forecast demand and keep strong workforce management principles to maintain adequate staffing and meet performance standards described in this RFP.

E. Contractor shall maintain an up-to-date log of acceptable eligibility documents for all states, based on external research, state stakeholder engagement as necessary, and past history of accepted documents, to be approved by USAC. A list of approved documents and examples are provided in [Attachment 7](#). USAC reserves the right to revise this list at any time.

F. Contractor shall provide live agent contact center and manual review services from 9 am – 9 pm ET, Monday – Sunday ("Business Hours").

G. Contractor shall provide any automated contact center services (e.g., IVR, digital self-serve) on a 24/7/365 basis.

H. Contractor shall staff a problem reporting toll-free number during business hours to accept trouble reports for Tier 1 technical support from USAC. For escalation purposes, a supervisor shall also be always available during business hours.

I. Contractor shall be responsible for all work performed by its subcontractors.

J. Contractor shall work collaboratively with both USAC and the Systems Integrator building the technical system to provide input to the design of workflows, portals, customer relationship management interfaces (CRM) and any technical component directly impacting the efficiency of the BPO services.

K. Contractor shall provide the following customer support for consumers, Service Providers, states, and other external stakeholders, including but not limited to:
   a. Conducting inbound and outbound live operator services.
b. Communicating service or product information, including responses to inquiries and questions about the Lifeline program, and other support as appropriate based on a consumer-centric model for information and assistance.

c. Supporting utilization of various technologies provided by USAC, including but not limited to:
   i. The web portal
   ii. Websites of the program; and of qualifying state, federal, and tribal programs
   iii. Other resources and data source that provide relevant information to consumers

d. Providing callers with contacts or coordinating with other contact center representatives (i.e., USAC, state, federal, service provider, or tribal representatives) to resolve unforeseen issues across all use cases (e.g., confirming that a dated or uncommon document is valid for eligibility).

e. Assisting with reset / recovery of consumer or Service Provider information, including:
   i. Secret questions authentication information
   ii. Application numbers
   iii. Password resets for Service Providers and any other approved third parties with log-in access rights

f. Drafting scripted information for use by contact center agents to be approved by the FCC and USAC.

g. Responding to requests for information, escalating to USAC representatives as agreed upon with USAC.

h. Entering consumer data into the portals and databases.

i. Employing common contact center technologies, such as:
   i. Automatic Call Distributor (ACD)
   ii. Interactive Voice Response (IVR)
   iii. Call recording software

L. Contractor shall provide the following outreach services, including but not limited to:

a. Conducting outreach to customers as required by USAC (e.g., when customers must complete annual recertification), including:
   i. Outbound robocalls
   ii. Outbound text messages / Short Message Service (SMS) messages
   iii. Outbound automatic emails
   iv. Outbound postal mail, including: printing, enveloping, stamping, sorting, and sending mail

M. Contractor shall provide the following mail and form processing, including but not limited to:

a. Processing and digitizing all incoming Lifeline-related mail, including:
   i. Scanning of provided supplementary documentation (e.g., copies of identity documents, copies of eligibility documents)
   ii. Use of Optical Character Recognition (OCR) to transfer documents into digital form

N. Contractor shall provide manual review services, including but not limited to:

a. Conducting manual document review of submitted materials:
i. Reviewing applicant-submitted identity documentation (e.g., drivers license, passport) to verify applicant identity.

ii. Reviewing applicant-submitted address documentation (e.g., drivers license, utility bill, IEH form) to verify applicant household address.

iii. Reviewing applicant-submitted eligibility documentation (e.g., Supplemental Nutrition Assistance Program (SNAP) card, Medicaid card) to verify applicant eligibility for Lifeline.

iv. Reviewing tribal identification, address, and eligibility documentation, when enhanced tribal subsidy requested.

b. Conducting dispute resolution processes:
   i. Reviewing consumer disputes pursuant to applicable laws and regulations, mostly entailing review of extra documentation, similar to those for manual document review.
   ii. Referring any issues to USAC staff as directed by USAC (e.g., complex duplicate resolutions).

c. Manually verifying whether applicant information is listed in state eligibility databases (e.g., Medicaid, SNAP, or state Human Services Agency) to determine Lifeline eligibility.
   i. Accessing state's online database portal, entering applicant information into state database lookup, viewing and recording eligibility decision.

d. Conducting verifications of third-party manual application reviews:
   i. Defining a method to randomly sample third parties.
   ii. Determining if application outcome from third-party verifier is accurate based on Contractor review.
   iii. Reporting results of verification process to USAC.

e. Proactively reporting unusual trends or concerns (including potentially fraudulent behavior) to USAC

O. Contract shall ensure that the following are reported to USAC and priced as follows:
   a. For customer support: the number of contacts with customers, broken out by channel (e.g., IVR, phone, email, and webchat or other additional channels proposed).
   b. For outreach services: the number of outreach attempts, broken out by channel (e.g., robocall, text, email, mail, and other additional channels proposed).
   c. For mail and form processing services: the number of pages digitized into the system.
   d. For manual review services: the number of reviews processed. An individual review (for the purposes of billing) will often be just one of the review processes described in section 3.1.14, but could incorporate more than one of the processes as part of a single finalized manual review.

P. Contractor shall provide the above services in support of the NV across all use cases, including, but not limited to those described in the Plan. The majority of service provided is expected to be focused on the following use cases:
   a. Consumer application / eligibility verification
   b. Application status check
   c. Annual recertification
   d. Benefit transfer
e. Reporting
f. Dispute resolution

Q. Contractor shall interact with a variety of existing USAC services, systems, and interfaces, including:

a. NLAD (and associated systems)
   i. TPIV
   ii. AMS verification
   iii. Duplicate checking services (e.g., duplicate address, duplicate subscriber)

b. LED (and associated systems)
   i. Port freeze verification services
   ii. Subscriber age check service (e.g., Subscriber under 18)
   iii. Tribal support verification service
   iv. Application status check services
   v. Resolution status services
   vi. Self-certification (recertification) yearly status
   vii. Geocoding service
   viii. Audit-related services

R. Additional capabilities Contractor will provide shall be indicated in Attachment 3, Contractor Capabilities Template.

VOLUME EXPECTATIONS AND STATISTICAL INFORMATION
The solution is a greenfield design that will launch for the first time at the end of 2020. Because of this, consumer behavior is uncertain and USAC plans to learn more about volume expectations during the initial launch of the program. The table below represents USAC’s projected demand across services throughout the initial years of the program.

High-end Forecasted Volumes per Service, in Thousands

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- Forecasted volumes determined by current application, transfer, and subscriber numbers and reflects enrollment trends over the past five years that we expect to continue moving forward.
- Spikes in volume are due to a one-time migration and re-verification of existing subscribers.
- Service volumes estimated by anticipated demand for service from each use case.
- Note: all volumes and expected timelines are projections only and USAC has the right to revise assumptions at its sole discretion (e.g., based on any new information USAC may become aware of) and without requiring a change order from Contractor.

SYSTEM TECHNICAL, SECURITY, AND PRIVACY REQUIREMENTS
Systems and processes shall be approved by USAC Security Team and shall comply with FISMA, 44 U.S.C. section 3541, et seq., the Privacy Act of 1974 (5 U.S.C. § 552a), and NIST SP 800-53 Rev. 4, including Appendix J, NIST privacy controls.
1. Data and documentation collected will include sensitive PII, including name, address, date of birth and the last four digits of the social security number.

2. PII shall be protected in accordance with all federal and USAC requirements, including, but not limited to, Office of Management and Budget (OMB) Circular No. A-130, OMB Memoranda M-06-16 and guidance from the NIST, including NIST SP 800-53 Rev. 4 (Security and Privacy controls for Federal Information Systems and Organizations) and NIST SP 800-122 (Guide to Protecting the Confidentiality of Personally Identifiable Information).

3. Cloud-based services shall be certified by the Federal Risk and Authorization Management Program ("FedRAMP") for use at a MODERATE risk. USAC reserves the right to inspect the Authority to Operate (ATO) notice for services certified by the FedRAMP Joint Accreditation Board (JAB) or the complete package of documents for those with agency accreditations.

4. All privacy and/or security-related incidents including, but not limited to, the disclosure of PII, shall be tracked in accordance with policy standards as outlined in the Incident Response (IR) controls documented in NIST SP 800-53 Rev. 4 and NIST SP 800-61 and consistent with the requirements of OMB Memoranda M-17-12. The Incident Response Plan (IRP) shall include reporting to USAC’s Director of Privacy and to USAC’s Chief Information Security Officer within one hour of any breach or suspected breach of PII.

1. Vendor shall write, review, and update an assessment of applicable FISMA and NIST SP 800-53 Rev. 4 (Security and Privacy Controls for Federal Information Systems and Organizations) controls, to ensure adherence to NIST, FISMA, FCC, and other industry-accepted standards.

2. Contractor shall coordinate with USAC’s IT security team and selected third party to conduct vulnerability assessment (to include scanning) and penetration tests of the system. Contractor shall ensure that proper access is provided, and proper protocols and processes are followed.

3. Contractor shall submit to Independent Verification and Validation (IV&V), if system (e.g., CRM software) has not previously passed standard IV&V, for major changes performed at the direction of USAC up to a cap to be specified in the contract.
   - The system, to include Contractor's CRM (if Contractor chooses to use its own CRM platform), shall be independently verified and validated prior to being moved into production.
   - Major changes to the system as defined by NIST 800-37 Rev. 1 (which includes changes in throughput, changes in environment, changes in hardware and software, changes in workflow) will need to be followed by an IV&V. USAC will cover the reasonable costs of the IV&V.
   - Contractor shall cooperate with USAC to permit continuous monitoring according to NIST 800-37.

4. Contractor shall address vulnerabilities in accordance with NIST vulnerability management controls. Contractor shall address vulnerabilities in the applicable timeframes set forth in such policies. In the event that Contractor cannot meet the applicable timeframe, Contractor shall provide USAC a plan of action and develop milestones to address such vulnerabilities promptly, and shall prioritize remediation based on the risks implicated by such vulnerabilities.
5. Contractor’s systems shall meet the following specifications
   • Any new, simple development requests should be taken up and completed within a week (e.g., new fields in data entry, role access changes).
   • Any new, larger development requests should have an implementation plan prepared within a week of request, e.g., service change.
   • Secure API services accessible to USAC internal systems are required to be exposed for all critical functionalities of the BPO.
   • The systems must have the ability to make rest service calls to NLAD / NV systems at any point between their workflows.
   • The test environment must be available, and it must be able to be used by the NLAD/NV testing environments.
   • The system must flexibly support development of authorization-specific and/or role-specific workflows.
   • The system must have the capability to track back on the history of any case as well as an audit log (e.g., when a ticket was opened / closed, who it was assigned to, who changed / closed it).
   • The system must have a status service for USAC to check its availability.
   • The system must have the option to accept bulk processing of approval / denial of tickets from the program.

6. Contractor shall provide documentation and proof of accreditation to demonstrate compliance with the foregoing subsections.

B. INCIDENT MANAGEMENT
The primary troubleshooting responsibilities and requirements of Contractor are identified below.

   • Contractor shall notify USAC of any Priority 1 (P1) Incident within two (2) hours, provide status updates every one (1) hour, develop a workaround to address a P1 Incident within twenty-four (24) hours, and work continuously on a P1 Incident until resolved.
   • Respond to a Priority 2 (P2) Incident within four (4) hours, provide status updates every four (4) hours, and develop a workaround to address a P2 Incident within forty-eight (48) hours.
   • Respond to a Priority 3 (P3) Incident within twenty-four (24) hours, provide status updates every business day, and develop a workaround within seven (7) calendar days. Any problems related to system functionality (e.g., hardware, phone lines, data) which are not under Contractor’s control must be reported to USAC immediately (via phone and e-mail) upon detection.
   • USAC will determine if an incident has been resolved, for all P1, P2, and P3 incidents.
   • Contractor shall notify USAC two (2) calendar weeks in advance, confirmed by email, of any planned service outage that may affect service to USAC. Scheduled maintenances should adhere to USAC maintenance schedules.
   • Any critical changes to the workflow should be extensively tested and validated in a test environment before being released to the production environment, in collaboration with USAC.
   • Contractor shall provide troubleshooting and connectivity issue resolution between the contact center and database systems.
• Contractor shall provide general troubleshooting of the call module in the areas of contact center user accounts and call reports both of which are key functionality of the call module.
• Contractor will develop and implement a disaster recovery plan (‘‘DRP’’), subject to USAC’s approval, and periodically update and test the operability of the DRP during every 12-month period that the DRP is fully operational.

IX. KEY PERSONNEL & LABOR CATEGORIES

A list, by name, of all Key Personnel, along with the labor category they will fill. For each Key Personnel, Contractor shall provide a biography that includes his/her educational background, skill-set, job and related experience, a list of specific efforts he/she has supported, and references. Contractor shall provide a Relationship Manager (‘‘RM’’) who shall ensure the completion and delivery of the Task Order and serve as a single point of contact for the day-to-day management of the Task Order.

All pricing information for the TORP shall be based on Contractor’s Attachment 1: Bid Sheet to the Contract.

X. INVOICES

Where to Submit Invoices. Contractor shall submit invoices through the USAC Coupa Supplier Portal (‘‘CSP’’) method or via the Supplier Actionable Notification (‘‘SAN’’) method. The CSP method will require Contractor to register and create an account for the CSP. An invitation link to the CSP may be obtained by emailing CoupaHelp@usac.org. The SAN method will require Contractor to invoice USAC directly from the purchase order (‘‘PO’’) sent by USAC via email. For the SAN method, the USAC email will contain a notification with action buttons which will allow Contractor to create an invoice, add a comment, and acknowledge the receipt of the PO. For assistance on all Coupa related billing questions, Contractor may email CoupaHelp@usac.org. For assistance on all non-Coupa related billing questions, Contractor may email accounting@usac.org.

Invoice Submittal Date. Contractor may submit invoices for payment upon completion and USAC’s acceptance of all of the work associated with a Contract or, if the period of performance of a Contract exceeds sixty (60) days, once every thirty (30) days, with the submission of the first invoice no earlier than thirty (30) days after issuance of the Contract.

Content of Periodic Invoices. If periodic invoices are submitted for a Contract, each invoice shall include only Services that have been completed and Deliverables that have been accepted as of the date of invoice submission and that have not been billed in a prior invoice.

XI. COMMUNICATION

Contractor shall be reasonably available and accessible via email or telephone during USAC’s normal business hours, which are Monday through Friday (9:00AM-6:00PM ET). When
necessary, communication may be made outside of these hours to ensure the progress of the Contract is not impeded.

XII. MEETINGS

During performance of the Task Order, Contractor personnel shall communicate on a regular basis with USAC staff, and, as requested by USAC’s PM, or CA, attend status meetings with USAC staff to discuss project status and progress, impediments, and audit findings. Status meetings will be held by either teleconference or in person. Status reports may be used as the basis of the status meeting discussions.

XIII. TRAVEL

Contractor staff may be required to travel to USAC to perform Services under the Task Order. Contractors may invoice for up to 10% of the total Task Order value in travel expenses, provided Contractor complies with the terms and conditions of the USAC travel policies. All Contractor travel costs should be included in the Contractor’s proposed Task Order Ceiling Price.

XIV. TASK ORDER PROPOSAL SUBMISSION INSTRUCTIONS

Contractor response to this TORP shall be no longer than eight (8) Pages. All responses, to this TORP, are due no later than 11:00 AM ET, March 12, 2020. Responses received after this date and time or that do not follow the Task Order submission instructions, may not be considered for review.

Responses should be prepared simply and economically, and provide a straightforward and concise explanation of the information requested. Emphasis should be on completeness and clarity. Please submit one (1) electronic copy (PDF) of your response to Becca Wray at rfp@usac.org. All submissions must include “Response to Task Order #6 – BPO” in the subject line. Please note: all electronic submissions must be limited to a maximum size of 25 GB.