Electronic Subcontracting Reporting System (ESRS) Contractor Guide 1.2

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1. Log-In to ESRS

1.1 Existing Users

- I. Point your browser to https://www.esrs.gov/contractor/
- II. Login to ESRS by typing your e-mail address and password under the "returning contractors: login"
- III. Click "Login"

1.2 New Users

- IV. Point your browser to https://www.esrs.gov/contractor/
- V. Click "Register" (Continued below screenshot)

Contractor Login Screen https://esrs-test.symplicity.com - eSRS Test - Microsoft Internet Explorer _ D × <u>File Edit View Favorites Tools H</u>elp 🔇 Back 🔹 🕥 👻 😰 🏠 🔎 Search 👷 Favorites 🛛 😥 🔹 📲 🚽 🖵 🚉 🎉 🦄 Links 🙆 Customize Links 💰 Free Hotmail 🙆 Windows » - 🆈 🕈 Integrated Acquisition Environment Electronic Subcontracting Reporting System Thursday, September 1, 2005 | 10:06 am ଢ contractor login 🛄 gistration 눱 returning contractors: login 🛅 new contractors: register Register for a new account Email: Register 🕨 Password: Login 🕨 🔑 Change Password Not a contractor user? Click he V. III. 🙆 Done 🔒 🥝 Internet

- VI. Note, throughout the system the red asterisk (*) designates that the field is required.
- VII. Enter your DUNS Identification Number.
- VIII. Click Next)

- IX. Some data may already be populated from CCR. Please complete all fields on the form.
- X. Click on the **Submit** button.
- XI. You will now be placed at the "Registration Step 2 of 2" page. An e-mail will be sent to the account that you specified on the previous step. Please follow the directions in the e-mail and confirm your account.
- XII. After you have confirmed your registration, return to the login page.
- XIII. Enter your e-mail address and password and click Login .

2. myESRS

After successfully logging in to ESRS, you will see a screen similar to the "myESRS Screenshot" below.

2.1 myESRS Page Features

- I. The Navigation bar at the top of the screen allows you to move through the system. Additionally, this bar is available on every screen throughout the system. For more information, please read "Section 2.2 Navigation Bar" for more information.
- II. The "Alerts" section will show messages that require your attention.
- III. Announcements are created by ESRS administrators.
- IV. The buttons on the left hand side of the screen allow you to quickly create a new ISR, SSR, or link a contract to your account. Please see the corresponding sections of this manual for more information.

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myESRS Screenshot

2.2 Navigation Bar Overview

myESRS Profile Contract Worklist File Individual Subcontract Reports File Summary Subcontract Reports

Profile:

The profile page allows you to edit your account and contact information. Please turn to "Section 3, Profile" of this manual for more information.

Contract Worklist:

The Contract worklist allows you to view all contracts that have been linked to your account. Please turn to "Section 4, Contract Worklist" of this manual for more information.

File Individual Subcontract Reports:

The Individual Subcontract Reports area allows you to add and review ISR's. Please turn to "Section 5, Individual Subcontract Reports" of this manual for more information.

File Summary Subcontract Reports:

The Summary Subcontract Reports area allows you to add and review SSR's. Please turn to "Section 6, Summary Subcontract Reports" of this manual for more information.

3. Profile

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- I. Click on "Profile" on the navigation bar.
- II. You can review your core contact information on this screen.
- III. To edit your information, simply click the
- Edit button.
- IV. After editing the information, click on the **Submit** button.
- V. To change your password, click on the "Account" tab near the top of the page.
- VI. You may enter your new password here. Click "Save Password" when done.

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Fullname: John Doe	Completion Status
Email: brentfranks@gmail.com	Personal Information
Phone: 703-351-0200	× Title ✓ Fullname
Supervisor Name: John Supervisor	✓ Email
Supervisor Email: bfranks@symplicity.com	✓ Phone
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	✓ Supervisor Email Contractor
Contractor Information	✓ DUNS #
Contractor:	✓ Legal Business Name
	→ Doing Business As (DBA)

4. Contract Worklist

4.1 View Existing

- I. Click on "Contract Worklist" on the navigation bar.
- II. A screen similar to the "Contract List Screenshot" below will appear.
- III. You may sort the list of contracts. This is accomplished by clicking on the text next to any down arrow (*) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
- IV. To view the details of an existing contract, click on the **Q** View Icon beside the contract, or click on the Contract Number.
- V. You are now able to review more information regarding the contract. If you wish

to edit the information, click on the button.

VI. You can also enter reports or view-lower tier reports. Click on the tabs beside the "Contract Details" tab to toggle between the views. (Note: for more information regarding adding reports, please see the

corresponding section of this manual)

VII. After entering "Edit Mode" click the "Save" button to save your changes.

Contract List Screenshot

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4.2 Add New

There are two different methods to add a new contract to your account. The first method allows you to easily add a new contract from the "myESRS" homepage. Simply click on the "Add Contract to Worklist" button (shown to right) or follow the method below.



- I. Click on "Contract Worklist" on the navigation bar.
- II. To add a new contract to your worklist, click on the Add New Contract To Worklist button.
- III. Enter the Contract #.
- IV. Click Submit >
- V. Select whether your organization is a "Prime" or "Subcontractor".
- VI. If choosing "Sub", please enter the information required and click
- VII. You will now be directed to the "contract details" page for the contract you just added. To return to the Contract Worklist, click on the Section Within the system (note: do not click your browser's back button).

Contract De	etails
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Submit Individual Subcontract Report 🕨 Edit	Contract Details
Contract Information	Contract Number: 00001199405BAC0191RW00134 Top Level Agency: ENERGY, DEPARTMENT OF (8900)
Dollar Value: 0.00	
Submit Individual Subcontract Report 🕨 Edit	
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5. Individual Subcontract Reports

5.1 View Existing

- I. Click on "File Individual Subcontract Reports" on the navigation bar.
- II. You will be directed to a screen similar to the "Individual Subcontract Reports Screenshot" below.
- III. The status for each report is displayed in the status column. Notice on the bottom of the page, a legend appears:

Draft: You began working on a report, however did not complete it and/or submit it for approval.

Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.

Revised: The report has been revised by a government official.

Accepted: A government official has accepted your report.

Rejected: A government official has rejected your report.

- IV. To view the details of a submitted report, click on the 🖓 View Icon beside the report.
- V. If the report has been rejected, you may click on the "Rejection Notes" tab to view the reason why the report has been rejected.
- VI. To return to the report list, click the "Cancel" button at any time.

Individual Subcontract Reports Listing

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5.2 File New Individual Subcontract Report

There are two different methods to file a new Individual Subcontract Report. The first method allows you to easily file a new Individual Subcontract Report from the "myESRS" homepage. Simply click on the "File ISR" (formerly SF 294)" button (shown to right) or follow the method below.



- I. Click on "File Individual Subcontract Reports" on the navigation bar.
- II. To file a new report, click on the **Add New** button.
- III. You will be taken to the Instructions page similar to the screenshot below. Please take time to read the instructions.
- IV. Click on the **Continue** when ready.
- V. Select a contract from the drop down box or manually enter the contract number. Click Continue.
- VI. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive* **(**)help *button beside the fields for more information*)
- VII. On step 8, click the Submit button to send the report.
- VIII. You may now return to view existing reports (Section 5.1, p. 10) to view the status of the report you just entered.
 - IX. In order to completely submit the report, you must click "Submit" on step 8 (Designated on the left hand side of the screen) of the report submission process.

Note: On step 6 of the report submission process, you **must** fill out either the "Percentage of Total Subcontract Awards" OR "Percentage of Total Contract Value" field for Part 3. SMALL DISADVANTAGED BUSINESS (SDB) CONCERNS.

Instructions

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4 Subcontracting Report	O NAICS	
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6 Subcontract Awards	o Product and Service Codes o NAICS	
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6. Summary Subcontract Reports

6.1 View Existing

- I. Click on "File Summary Subcontract Reports" on the navigation bar.
- II. You will be directed to a screen similar to the "Summary Subcontract Reports Screenshot" below.
- III. The status for each report is displayed in the status column. Notice on the bottom of the page, a legend appears:

Draft: You began working on a report, however did not complete it and/or submit it for approval.

Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.

Revised: The report has been revised by a government official.

Accepted: A government official has accepted your report.

Rejected: A government official has rejected your report.

- IV. To view the details of a submitted report, click on the 🖓 View Icon beside the report.
- V. If the report has been rejected, you may click on the "Rejection Notes" tab to view the reason why the report has been rejected.
- VI. To return to the report list, click the "Cancel" button at any time.

Individual Subcontract Reports Listing

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6.2 File New Summary Subcontract Report

There are two different methods to file a new Summary Subcontract Report. The first method allows you to easily file a new SSR from the "myESRS" homepage. Simply click on the "File SSR" (formerly SF 295) button (shown to right) or follow the method below.



- X. Click on "File Summary Subcontract Reports" on the navigation bar.
- XI. To file a new report, click on the **Add New** button.
- XII. You will be taken to the instructions page similar to the screenshot below. Please take time to read the instructions.
- XIII. Click on the **continue** when ready.
- XIV. Select a contract from the drop down box or manually enter the contract number. Click Continue.
- XV. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive* **(**) help button beside the fields for more information)
- XVI. On step 5, click the Submit button to send the report.
- XVII. You may now return to view existing reports (Section 6.1, p. 12) to view the status of the report you just entered.

Instructions

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7. Individual Subcontract Reports

Filing reports as a subcontractor allows the next higher tier contractor to see your filing. In order to correctly file a report as a "sub", first select the type of report you wish to file.

For a general overview of filing a New Individual Subcontract Report, please see **Section 5.2** (p. 11) of this manual.

For a general overview of filing a New Individual Subcontract Report, please see **Section 6.2** (p. 13) of this manual.

- I. Once you have begun filing your report (ISR or SSR) enter the contract number of the contract for which you wish to file.
- II. Once you have entered the contract number, click Submit.
- III. As a Subcontractor for this contract, you will now be forced to file as a "Sub". Notice that the selection "Prime" is unavailable.
- IV. Enter the DUNS# and e-mail address of the next available tier contractor.
- V. Enter the amount.
- VI. Click Submit.
- VII. You may now progress through the report submission process clicking "Save and Continue" after you have completed each step.
- VIII. In order to completely submit the report, you must click "Submit" on step 8 (Designated on the left hand side of the screen) of the report submission process.