PREFACE

The GH Pro contract was awarded to two companies – Dexis Consulting Group (Dexis) serves as the prime contractor and The QED Group, LLC (QED) is the subcontractor. Each assignment is designated for one of the two companies. This means that the designated company issues all agreements and makes all payments for that assignment. Because each company has its own policies and procedures for issuing agreements and making payments, this handbook will indicate where procedures differ by company.

Who we are

The Global Health Program Cycle Improvement Project (GH Pro) is an $84.2 million five-year contract that is available to the Bureau for Global Health (GH) offices, regional and other bureaus, and field missions of the U.S. Agency for International Development (USAID) to provide program and project evaluation, technical assistance (TA), program and research management, and mission and logistical support in child survival, maternal and child health (MCH), infectious diseases, malaria, and Tuberculosis (TB), nutrition, neglected tropical diseases, emerging pandemic threats, environmental health, food security water, sanitation and hygiene, family planning, population and reproductive health, HIV/AIDS, other sexually transmitted infections, health-sector reform, and cross-cutting health issues including youth, gender, social and behavior change communications (SBCC), quality of care, costing and health economics, monitoring and evaluation, supply chain management, organization development and capacity strengthening, information and communications technology (ICT), knowledge management, health policy, and health systems strengthening.
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ROADMAP

This Project Manager’s Assignment Handbook is designed to serve as a primary reference for GH Pro Project staff. It is organized to follow the project’s assignment life cycle and assist staff with managing an assignment at each major stage in the process: Planning, Implementation, and Close-out.

**Planning**
- Covers the planning phase (scope of work review, estimating costs, and obtaining client approval)
- Recruiting consultants, daily rate determinations, drafting contracts and subscontracts, finalizing calendars, making logistical arrangements, briefing consultants for the assignment, and backstopping implementation

**Implementation**
- GH Pro staff responsibilities while work is underway on an assignment. This includes monitoring the fieldwork, financial management, and preparation and finalization of deliverables

**Close-out**
- Preparing assignments for close-out after all deliverables are submitted and approved.

The first section of this handbook will detail a list of action steps and the responsible staff member according to the project management life cycle. The list is followed by a detailed description of each step. A series of reference documents complete with links to each of the files can be found in Annex B. At the end of each section is a list of relevant forms and other resources.

Assignment management steps are arranged in approximate chronological order, but depending on circumstances, the order may shift, or some steps may occur simultaneously.
I. ORGANIZATIONAL STRUCTURE

Roles and responsibilities

Senior Management Team

The **Senior Management Team** serves as the primary resource for the Program Management Office (PMO) to troubleshoot problems, provide advice on technical issues, provide quality assurance and technical backstopping on deliverables, and fulfill the contract’s reporting requirements. The Senior Management Team is the primary liaison with the Contracting Officer Representative (COR)/Assistant Contracting Officer Representative (ACOR).

- The **Project Director** supervises all project staff and ensures smooth operation of the project. The Director’s primary responsibility is the overall leadership and management of the project and serving as the primary liaison with Dendis’ corporate office and with USAID. The Director’s role in assignments includes initial planning, problem-solving, and managing the Technical Directive Memo (TDM) process and oversight of the PMO.
• The **Deputy Director/Evaluation Advisor** provides technical leadership to the project, advising clients on evaluation methodology, reviewing scopes of work and reports, and working with consultants to resolve technical questions. The Deputy Director is the project’s liaison with The QED Group.

• The **Deputy Director/Operations Manager** provides leadership on issues related project operations, oversight, and direction for GH Pro day-to-day assignment management and program management.

*Program Management Office*

The **Program Management Office** is the backbone of GH Pro. The role of the PMO is to ensure good governance, transparency, reusability, and support on deliverables to all project activities and assignments. Together, the PMO serves as the central point for lessons learned, best practices, project institutional knowledge, and reporting.

• **Program Managers** (PMs) – including Senior PMs – are designated as the primary points of contact for the management of both assignments and consultants. S/he performs a project’s critical functions to ensure the smooth planning, timely implementation, and efficient close-out of assignments. The PM is responsible for many of the assignment steps outlined in detail in this handbook.

• **Associate Program Managers** (APMs) are designated as the primary points of contact for the management of Mission Support and Technical Assistance assignments and consultants. S/he performs a number of critical functions to ensure the smooth planning, timely implementation, and efficient close-out of assignments. The APM may team with a PM to manage more complex assignments, such as evaluation or assessments. The APM is responsible for many of the assignment steps outlined in detail in this handbook.

• **Project Assistants** (PAs) assist with the day-to-day operations of keeping the project running smoothly by working with all project staff on activities such as obtaining consultant visas and security clearances, arranging meeting logistics, performing administrative/office duties, developing information materials, and assisting with assignment planning, logistics, and closeout.

• **Interns** assist project staff by providing additional, ad hoc administrative support, note-taking, assisting with assignment preparation, planning, logistics, and reporting functions.
Finance and Administration

The Finance and Administration (F&A) team provides GH Pro with support in operations, budgeting, finance, and procurement and contract administration. The F&A team provides financial analysis, training, and support to the PMO on project financial management.

- The **Senior F&A Manager** is responsible for all financial systems/operations of the project and is the liaison between the project staff and both (Dexis/QED) corporate accounting offices.

- The **Senior Finance and Contracts Specialist** is responsible for maintaining the contract’s budget and funds tracking and pipeline reporting process, and provides senior-level financial management and contracts administration support to the GH Pro team and Dexis FAC.

- **F&A Officers** (including Senior Finance & Administration Officer (FAO) and Associates are together responsible for the review, oversight, and processing of payment requests to corporate accounting offices. The Senior F&A Officer provides cost estimate (CE) review and amendment support to Program Managers.

Technical Staff

- The **Recruiter** conducts and manages GH Pro project international consultant recruiting, including building and managing consultant rosters; cultivating consultant relationships; managing the GH Pro recruiting online database; and coordinating with Program Managers and Project Assistants during all phases of consultant recruitment.

- The **Communications Manager** is responsible for coordinating and facilitating the development, writing, design, production, monitoring, and evaluation of all GH Pro project documents, print materials, and presentations, and plays a key role in determining the best way to improve GH Pro report product quality.

Home Office Backstops

- **Contract Managers** at Dexis and QED Corporate offices provide review, backstop, and approval for all consultant agreements and subcontract partnerships. S/he is responsible for communicating corporate policies, procurement procedures, and approval requirements.
II. ASSIGNMENT PLANNING

Project Planning, the first of the three Project Management steps, consists of receiving and negotiating the scope of work (SOW) and then completing the necessary tasks – including developing the timeline, recruiting team members, developing a cost estimate – to prepare the Technical Directive Memo (TDM), which officially launches the project and brings us to the Implementation stage.

A. Scope of Work

Receipt of SOW

USAID clients initiate a request GH Pro services by sending a scope of work to the project COR (XXXX XXXX) or the Alt-COR (XXXX XXXXX). The COR/Alt-COR reviews the SOW to confirm that the activity fits the scope of the GH Pro contract, and then sends it to the GH Pro Director.

Setup

The first critical communication in the project cycle is GH Pro’s receipt of the SOW from USAID. Once the GH Pro Director receives the SOW from the COR, she will give the assignment a Technical Directive (TD) number and designate a company (Dexis or QED), based on sub-contractual mandated percentage requirements.

The Director sets up the electronic folder for that assignment on Egnyte under Z:\Shared\GH PRO\Assignments and labeled with the TD number and name and an extension “(Q)” for QED, if appropriate. Every assignment file will contain the following sub-folders:
• **Background Docs**: All relevant materials and documents received from the USAID client.

• **Cost Estimate**: All drafts versions of cost estimates.

• **Deliverables**: Drafts and all final versions of all deliverables and reports.

• **Important Correspondence**:
  
  o Emails related to the particular requirements for the assignment.

  o Notes from meetings or phone conversations, such as the launch call and in-brief.

  o Client approvals (changes to Scope of Work, deliverables, staff changes, travel, etc.).

  o Anything that is critical to understanding “what happened” and the decision-making process during all steps of the assignment.

• **Rating Forms**: Surveys for evaluating the overall performance of the assignment. Surveys are sent to the USAID client and consultants during close-out using SurveyMonkey.

• **Recruitment**: Recruitment tracker, candidate CVs, and 1420 and Conflict of Interest (COI) forms.

• **SOW**: Original and final SOW as well as all mods or changes to the SOW.

• **Technical Directive Memo**: Original TDM (Scope of Work, Cost Estimate, timeline, CVs, and completed COIs for each consultant), all amendments, and cost estimate(s).
• **Team Members:** Individual personnel files containing required recruitment and onboarding forms, consulting agreements, travel arrangements, and financial information for all team members.

• **Timeline:** Draft, working, and final versions of the assignment timeline.

**SOW Review**

Based on the type of assignment – Program and Project Evaluation, Mission Support, Technical Assistance, Global Health Program and Research Management, or Meetings Logistical Support – and complexity of the scope, the Management Team will choose one of the following approaches for SOW review and will designate staff to be involved:

- **Technical review:** The Director, Deputy (for all Evaluation SOWs), and designated Program Manager will review and provide the initial written feedback to the requesting client. The first review will primarily focus on issues such as methodology and team composition. During the revision, refinement, and finalization of the SOW, the designated Program Manager will be copied on all communications between GH Pro and the client.

- **Abbreviated review:** For staffing or other less complex assignments, an abbreviated review process, involving the Program Manager, a member of the Management Team, and any other appropriate staff, will be conducted, focusing primarily on ensuring GH Pro has all logistical information needed to begin the assignment planning process.

**SOW Negotiations**

The GH Pro PM and the client will discuss and share feedback on the draft SOW until they have reached agreement. The PM should review the following before the SOW is considered final:

- **Deliverables:** What are the deliverables, and what are USAID’s expectations for each?
  - **Report Deliverables:**
    - Maximum page length, if any. Note: Evaluation SOWs discuss evaluation requirements specifically.
    - Whether the report will be publicly available or limited internal distribution (LID) only for procurement-sensitive information.
Number of printed copies or CDs needed, if any.

Branding: Any requirements beyond standard USAID branding, co-branding or partner branding should be stated in the SOW.

Translation: Will any of the tools or reports require translation into a local language for the stakeholders? Common language options include French, Spanish, and Portuguese.

Review schedule: How many days will each reviewer have to provide comments? How many days will the consultant(s) have to address comments? How many days will the client have for review and written feedback? How many reviews and revisions are anticipated? Who will approve the final deliverables?

- In addition to reports, deliverables may also include: Team Planning Meetings, desk review, weekly reports or check-ins with USAID/GH Pro, cost analysis, in/exit briefings, or other presentations.

- USAID participation: What level of participation does the client anticipate during periods of field work or data collection?

- Background documents: Key documents for the GH Pro consultant(s) to review as he or she begins work on the assignment.

- Stakeholder lists: List of key informants with whom the USAID client would like the GH Pro consultant(s) to speak.

- Site visit locations: The priority sites for data collection are typically identified by the USAID client and listed in the SOW.

- Whether country buy-in has been secured: This is necessary for global, HQ-based evaluations that include country visits.

B. Getting to TDM

During the planning phase, PMs will prepare all the documents required for the TDM: Team member selection, timelines, and finalized cost estimates. This phase ends with USAID’s approval of the TDM Package, and the establishment of an approved activity.
**Timeline Development**

The timeline – a calendarization of the life of each assignment – is a critical piece of the assignment plan. The Program Manager will develop the timeline and discuss it with the client in conjunction with the negotiation of the SOW. The timeline informs the period of performance of the entire activity, the SOW deliverables, details any holidays or blackout dates for clients or consultants, and identifies the tasks that need to be done as well as details the number of days teams are expected to spend on each task, so that resources can be allocated accordingly by GH Pro, the team, and the clients. Some key information on the timeline includes (but is not limited to):

- TD Start/End
- Launch call
- Anticipated travel
- Team Planning Meeting (TPM)
- Data collection
- Presentations to client and/or stakeholders
- Time afforded for reporting/writing/editing/revising
- Deliverable review
- Allowance activation (Post Diff/Danger Pay)
- Key client response dates

There are many different tools available to PMs for developing timelines, including Smartsheet, Outlook, Word, Excel, and Google; PMs are free to use the tool that delivers their preferred look and feel or required level of client collaboration, as long as the timeline sufficiently communicates the required information to the client.

**Recruitment**

The Program Manager oversees the recruitment of all consultants hired for GH Pro assignments. The steps in the recruitment process are:

1. **Develop a recruitment SOW**

This consists of two to three brief paragraphs, which will provide an overview of the assignment itself. It should include:
Assignment Summary: Include the purpose of the assignment, the proposed dates, location, number of team members, and any other essential information.

Individual position summary: Include the title, qualifications required, proposed level of effort, and if available, a specific description of the individual’s role in the overall team composition.

Location: Be sure to notify potential consultants of the location of the assignment, and countries to be visited, if known.

2. Identify Candidates

There are two methods for finding and selecting suitable consultants for GH Pro assignments:

Client Identified: Some clients may choose to identify the individual(s) they wish to perform the technical assistance in advance of GH Pro receiving the SOW. PMs should ensure that the consultant is available for the time period of the activity and ensure that all required documentation is received. Pre-identified candidates must undergo the same verification and daily rate negotiation process as those who are independently identified by GH Pro.

GH Pro Identified: Options for GH Pro to identify candidates may include:

- Jobscience – Searching GH Pro’s internal database of consultants. It includes a repository of CVs and skills to aid in searching.
- GH Pro Recruitment Trackers – Reviewing Recruitment Trackers from previous and related assignments may produce a list of potential candidates who are already connected to the GH Pro network for the new assignment.
- Social media – GH Pro may post the job ad in online evaluation groups, on LinkedIn, Devex, USAID Alumni Group, etc.
- Post SOWs – PMs may post positions on the GH Pro website, which is linked to Jobscience (see above).
- Local newspapers – For countries where multiple positions may need to be filled, PMs may run an advertisement in a local newspaper seeking qualified applicants.
- Referrals and suggestions – If a preferred candidate is not available for the assignment that a PM is recruiting for, the candidate may be willing to make a referral from their own network of a candidate
who would be qualified to fill the role. Additionally, GH Pro Senior Management or PMs may assist in the recruitment process by identifying previous successful candidates.

3. **Contact prospective candidates**

The GH Pro Recruitment Tracker is the repository of information for PMs to keep track of their recruitment outreach efforts by assignment. The PM is responsible for making sure that it is regularly updated based on each contact made to a potential candidate, information received about interest in and availability for the assignment, and status of candidates over the course of the assignment recruitment.

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<tr>
<td>Evaluation Specialist</td>
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<td>Team Leader/HSS Spec</td>
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4. **Maintain Recruitment Files**

When drafting the initial email to a consultant, be sure to use GH Pro’s email inquiry template as a starting point. Be sure to keep track of all documents received from interested candidates in the dedicated recruitment tracker for the assignment. The documents required from an interested candidate include:

- Current Resume
- Signed 1420 Biodata Form
- GH Pro Release Form
- Conflict of Interest (COI) Form
- Questions for Evaluation Specialists (if considered for Eval Specialist Role)

Project Assistants are available to assist PMs and APMs with initial outreach, salary verification, and upkeep of the recruitment tracker.

5. **Anti-Terror Verification (ATV) and Reference Checks**
All U.S. Government (USG) contracts are required to verify that contractors, vendors, personnel, and subcontractors are not excluded from receiving USG funding. To do so, GH Pro uses Visual Compliance.

PMs are responsible for documenting the anti-terror verification process and that necessary reference checks are completed prior to any consultant being proposed to a client. ATVs must be on file for each shortlisted consultant and must be completed by assignment – a previous ATV cannot be reused. When completing the ATV, the search terms must include the consultant’s name and address. See below for a sample ATV check with Visual Compliance:

Insert the consultant’s Name and basic contact information. The more information the better.

What PMs should be looking for is a “zero” search result.

PM PRO TIP:
PROJECT ASSISTANTS ARE AVAILABLE TO ASSIST WITH REFERENCE CHECKS AND CONDUCTING ANTI-TERROR VERIFICATION CHECKS.
Take a screen shot of the findings, as shown above, and insert into the ATV form. Save the ATV form to the consultant’s folder. When the biodata form is ready to be finalized, include the ATV findings on the biodata.

6. **Submit Candidate Shortlist**

Once the PM has confirmed the availability of qualified and available candidates, s/he should send a shortlist of candidates – with CVs attached – to the client for feedback. Please include a note about any scheduling conflicts, holidays, or blackout dates and explain potential conflicts of interest when sharing the candidate shortlist with the USAID client for consideration.

7. **Notify Selected/Rejected Candidates**

Once the client selects their preferred candidate(s) consultants, the PM should notify consultants by email whether or not they were selected. A sample email is located here. Encourage consultants who were not selected for the assignment to keep their information current in the consultant database so the project may continue to consider them for potential future opportunities and be sure to thank them for their interest in the specific assignment.

8. **Rate Verification and Negotiation**

GH Pro uses USAID’s 1420 biographical data form (also known as the “biodata”) to determine consultant daily rates. All salary and consultant daily rates input on the biodata form must be reviewed, confirmed, and validated with the consultant. GH Pro Program Managers should make every effort to verify previous rate history in writing or through fully executed documents such as a contract, pay stub of W-2. PMs and APMs may reference the GH Pro Guidelines and Standards for Establishing Daily Rates to guide the daily rate verification and negotiation process.
As of January 2017, the current USAID maximum daily rate is $661.92 per day. The [United States Office of Personnel Management (OPM) salary guidance](https://www.opm.gov) may be found on the OPM webpage. GH Pro adheres to USAID’s Contractor Salary Threshold (CST), formerly known as “maximum daily rate.” Under the GH Pro contract mechanism, daily rates may not exceed USAID’s CST.

All daily rate offers must be approved by the GH Pro Deputy Manager for Operations or designee before they are extended to the consultant.

If GH Pro proposes to increase a consultant’s verified daily rate, the PM is responsible for preparing a salary memo that presents the justification for the increase to the USAID COR and, if the requested increase is above 5%, the USAID CO. Salary justification memos must be accompanied by the proposed SOW, the consultant’s signed 1420 biodata, and an updated CV. The Deputy Director/Operations Manager reviews the salary justification memo and supporting documentation to ensure the documents are appropriately prepared. Once the documents are approved by the Deputy Director/Operations Manager, the PM submits the request to the Dexis Contracts Support Team for processing.

9. **Finalize Biodata**

Once GH Pro verifies the information presented on the biodata and the consultant agrees to the proposed daily rate, the biodata can be finalized. To do so, attach the rate verification form and ATV to the completed biodata, and send it to the Director (Dexis assignments)/Deputy (QED assignments) for co-signature. Save the fully executed biodata to the consultant’s folder.

**Cost Estimate Development**

This section will walk PMs through the process of organizing and creating a cost estimate for any given assignment. While each assignment may be unique, the basic elements of each cost estimate will be the same. The cost estimate is an opportunity to document GH Pro’s budget assumptions and negotiate costs with the client.

1. **Choose the correct template**

   The company designation for an assignment – Dexis or QED – is determined by the Project Director. There are two different cost estimate templates based on the company to which the assignment is allocated; because of differing indirect multipliers for each company, it is *imperative* that you choose the correct template. The Project Director typically saves the blank estimate template in the assignment folder when creating the subfolders for a new assignment. Double check that you are using the correct template before proceeding.
2. **Input Relevant Evaluation Information**

- **Date:** This is the most recent update of the cost estimate. Be sure that if there are multiple variations of the cost estimate, you update this date each time you make changes.

- **Assignment #:** TD number given to the folder (e.g., 065)

- **Assignment Company:** This information is populated based on the template you’ve chosen. Do not change this information.

- **Deltek #:** Deltek is the accounting software used by Dexis and QED. The Deltek number is the cost center to which expenses are assigned. This number corresponds to the company template. Be sure to use the number associated with the correct implementing partner for the assignment.
  - Dexis: 3001-XXX
  - QED: 3011-XXX

3. **Period of Performance (POP)**

- The start date should reflect the date that the TDM is anticipated to be signed, or the activity begins.

- The end date should accurately represent the date when all work for the assignment will be completed.

- Dates should match the POP listed in the SOW.

4. **Direct Labor**

- **Program Manager:** The PMs should charge their time for each assignment for which they are responsible, and should include sufficient level of effort (LOE) in the cost estimate to cover actions on the assignment sufficiently for the life of the activity. The following is a general guideline for what a program manager should be charging for certain types of assignments:
  - **On-boarding:** One full LOE-day per team member. This allows the PM time to draft contracts, prepare consultant Packages, and communication.
  - **Maintenance/Monitoring:** \( \frac{1}{2} \)-day to one full LOE-day per month, per team member. This is the estimated time required to process monthly financial documents, modify contracts if required, check
in with the consultant about work completed to date, and conduct routine follow-up with the USAID Client.

- **Close-out:** ½-day per team member. This LOE affords time for the PM to review final deliverables, modify contracts if required, and process final payments.

- **Deputy Director/Senior Evaluation Advisor (DD/SEA):** An evaluation/assessment may require LOE for the DD/SEA to review evaluation instruments and final reports and provide technical assistance to the consultant team. The amount depends on the complexity of the evaluation/assessment and the related deliverables, but is generally three days and, because the DD/SEA is a QED employee, is included in the total estimated LOE under “Subcontractor Labor.”

- **Communications Manager:** An evaluation/assessment may require LOE for the Communications Manager to review and copy edit deliverables. The amount depends on the complexity of the deliverables, but is generally one to three days and is included in the total estimated LOE for “Labor FT – Dексis Client Side.”

5. **Consultant Labor**

- Each consultant should be listed with his or her full name and title for the assignment.

- Add the daily rate for each consultant determined through the salary verification process.

- LOE days need to match the LOE listed in the SOW.

- When completing the LOE line items, be sure to include all work and travel days.

  - Synchronize with the proposed timeline/calendar to ensure that the number of LOE days can be achieved during that calendar period (i.e., not more work days than there are calendar days).
6. **Applicable Allowances**

All allowances must be approved by the USAID client before the allowance is paid to the consultant. Client approval of the allowance is obtained by detailing the allowance in the cost estimate and the TDM concurrence process.

- **Danger Pay:**
  - Danger Pay is applied to those countries/cities where the USG has deemed appropriate. The rate is based on a percentage of the consultant’s basic daily rate.
  - See the State Department’s Office of Allowances for the current list of countries qualifying for Danger Pay allowance payments and their present rates.
  - Danger pay is included for every day of LOE that the consultant works in that country/city.
  - A consultant must be in country for more than four cumulative hours or longer to receive danger pay; in some cases, the consultant can receive danger pay on travel days/day of arrival.
  - Danger payments are applicable only for a five-day workweek. The consultant doesn’t receive danger pay for weekend days.

- **Post (Hardship) Differential:**
  - Post Differential is applied in countries where the conditions of environment are much different than in the United States. This allowance is a percentage-based payment (between 5 and 35%), based on the consultant’s base daily rate.
  - See the State Department’s Office of Allowances to find applicable rates for each country/city.
  - Post differential begins on the 43rd consecutive calendar day in-country.
  - Post differential payments are based on a five-day work week, even if the consultant charges six days of LOE per week in the field.

*NOTE: if the city where the consultant will work is not listed within the country, use the category rate “Other.”*
  - Post differential begins on the 43rd consecutive calendar day in-country.
  - Post differential payments are based on a five-day work week, even if the consultant charges six days of LOE per week in the field.
7. Travel and Per Diem

A. Airfare

- All airfare travel to and from the location of the assignment should be included under this heading.
  - Any in-country travel (outside of the United States) should be included under the “Other Travel” Subheading of the Cost Estimate.
- The airfare cost under this section should be received from the GH Pro travel agent when possible. When requesting a quote for the cost estimate, be sure to include the following:
  - Departure and arrival city
  - Date of arrival and departure
  - Roundtrip fare
  - Designation of full fare economy class or business class travel
    - Business class travel requires medical justification that complies with GH Pro Project guidelines.
    - Please discuss with senior management before including business class in any cost estimate and notify the USAID client that the consultant holds a valid medical waiver that warrants premium airfare.
- Once the quote is received from [Travel Agent], place it in the cost estimate under the applicable airfare. Note that depending on when you are completing the cost estimate, when it will be approved, and when the airfare ticket will be purchased, you should consider whether to adjust the pricing to include price hikes such as time of year, last minute ticketing, etc.

*A rule of thumb for estimating airfare is to get a quote for the fully refundable coach fare, and add 10% as prices often increase closer to the date of travel.*

- Include the consultant’s name and destinations for each ticket purchased.
If consultants will be traveling to more than one location, each flight should be listed on a separate line.

B. Lodging and M&IE

- Verify all current per diem rates.
  - **International** per diem
  - **CONUS** (Continental U.S.) per diem
- Verify that you’ve included travel days in the consultant’s LOE.
- Be sure to remember to include the consultant’s name and location of where the per diem will be spent. If consultants will be staying in more than one location, each location and the related per diem rate should be listed on a separate line.

*NOTE: Lines are separated by consultant and then by location.*

C. Other Travel

- Travel Agent Fees*
  - Each booking: **$30**

*NOTE: If booking airline and hotel together there is only one $30 fee. It is safe to assume that you will change the consultant’s itinerary at least once after it is booked during the assignment so it is smart idea to include one change fee in your estimate.*

- International SOS (iSOS)
  - Dexis iSOS rate: $4.00 per day, per traveler
    - The Dexis Travel Team will maintain the record and send GH Pro a spreadsheet quarterly with travel from that period broken down by days and cost (Project, Travelers, # of Days).
  - QED iSOS rate: $265 for short-term coverage (30 days or less) or $845 for travel that exceeds 30 days and up to one year.

- Pre-departure Medical Expenses
  - Budget $100 towards the cost of the pre-departure medical evaluation and, if required, costs related to inoculations and malaria prophylaxis.
  - Budget up to $150 per consultant per trip for malaria prophylaxis expenses for short-term assignments (three months
of less) and at cost for malaria prophylaxis (after insurance) for long-term assignments (more than three months).

**D. Ground Transportation**

- Budget approximately $200 for each round trip to/from an airport in the US, Western Europe, etc.
- Transport to and from the in-country airport can range from $35 - $100 each way.
- Budget approximately $10/day/person for local taxis on international assignments.
- If other in-country travel will be required on the assignment (field visits, car rentals, in-country flights, etc.) request estimated costs from Mission in order to budget accordingly.
- When the assignment is domestic (specifically, within DC), remember to include taxis and/or funds for transportation on Metro. Use the WMATA Trip Planner to calculate the charges.

- **DBA** – Currently, the DBA rate is calculated as 2% of all income inclusive of professional fees, post differential and danger pay:
  
  e.g. (2%*(LOE*daily rate)+(Daily Rate*Danger Pay%*#days)+(Daily Rate*Post Diff%*#days)))

- The application of DBA differs based on the consultant’s nationality.
  - U.S. Nationals (USNs): DBA applies to all LOE completed while on travel outside of the U.S.
  - Third Country Nationals (TCNs): DBA applies to all LOE completed while on travel beyond his or her home of record. For example, if a consultant is a Ukrainian citizen and she travels to Washington, D.C. for a TPM and then to Rwanda for an evaluation, DBA applies to her LOE while in these locations as well as traveling to and from D.C. and Rwanda.
  - Cooperating Country Nationals (CCNs): DBA applies to all CCN labor.

- **Visas** – Verify what visas are needed for each country where your consultant(s) will be travelling to.
GH Pro works with [Visa Agent-1], [Visa Agent-2], and [Visa Agent-3] to secure consultant visas. To get a cost estimate quote, go to the respective visa expeditor’s websites for rates on visa services by country.

Note: GH Pro requires that the consultant apply for a tourist visa unless instructed otherwise by USAID or required due to other requirements.

In addition to the visa fee, include the visa handler fee and any expedition fees, if needed.

Remember to include the cost of mailing the passport/visa to and from the consultant’s home and Visa Headquarters in the delivery/courier section under “Other Direct Costs”.

8. Other Direct Costs

• **Communication:** GH Pro assignments typically take on communications costs related to the following:
  - Top-up cards for cell phone time/Data: $15-$20/week
  - Hotel Internet/Phone calls: $50-$80/week
  - Conference calls
  - Long distance calling

• **Financial (bank fees, wire transfer costs, etc.):** Costs incurred by GH Pro when a consultant is paid via MoneyGram or Western Union. Dexis and QED do not charge for direct deposits or wire transfers sent to the consultant. The consultant may seek reimbursement for bank transaction fees, ATM withdrawal fees incurred while on assignment, and exchange fees. To be reimbursed, all fees must be documented.

• **Delivery/Couriers:** This line item includes a host of potential mailing and postage expenses. For example, the consultants may bill GH Pro for shipping documents such as hard copies of receipts or invoices. As the consultants are becoming more tech savvy, and as hard copies are not required by GH Pro, billing for shipping or couriers is rare. Other courier costs may include charges for shipping a passport to/from the visa handler or the GH Pro Home Office. If the mission requires shipping for a report or supplies, this cost is normally minimal.
- **Editing/Formatting**: Estimate between $5,000-$7,500 to cover the costs of editing and formatting reports for Evaluations or Assessments. This line item includes copy editing, technical editing, formatting, and 508 compliance expenses.

- **Printing/Photocopying**: Field printing costs are typically minimal. Be sure to include some costs for evaluation teams to print background documents, discussion guides, and interview protocols.

- **Supplies**: This line item is for general supplies that the team might need during completion of the assignment. Supplies typically entail flip chart paper, pens, and paper. PMs should budget a minimal amount for supplies if they believe the team might need something. All expenses should be pre-approved by the PM before purchase by the consultant(s).

- **Statistical analysis software**: Evaluation teams may request short-term licenses for software to collect and synthesize data. GH Pro has subscriptions to the following software and can easily set up an account for the Assignment:
  - SPSS
  - Survey Monkey (typically $30 per month)
  - DeDoose
  - Ethnograph
  - Epi Info

- **Hotel Tax (US Only)**: Lodging taxes are not included in CONUS per diem rates. Currently, DC hotel tax is 14.5% per day. Other localities may have different taxes and fees. International lodging rates must include the taxes. Separate claims for lodging taxes incurred in foreign areas are not allowed. If the dates of travel to Washington, D.C. are not confirmed, use the highest lodging rate posted.

**Check your work**

- Verify the correct template was used.
- Conduct a basic math and spelling check prior to sending to management for review.
- Make sure each line is adding up correctly with no reference errors.
• Do not remove formulas or multipliers from cells.
• Double check labor info (consultant/PM name, daily rate, LOE).
• Ensure consultant LOE matches the LOE chart in the SOW.
• Confirm that allowances, if applicable, are detailed in the CE.
• Do not make changes to any of the indirect costs.
• Make detailed comments for explanation purposes under the “Notes” column.
• Send the first draft cost estimate to the Director and Deputy Director for Operations before sending to the client. Send the final cost estimate to Senior F&A Officer for Cost Estimate Review before sending for TDM.

Getting to TDM

The Technical Directive Memo is the means by which GH Pro seeks USAID approval for each of its assignments. Recall the roadmap at the beginning of this section which reviewed the phases necessary to get to the TDM-phase (Timeline, Recruitment, and Cost Estimation). At this stage, each component should have already been discussed with the assignment client. Once all components are in place and have the client’s cursory approval, the PM is ready to seek formal approval of the entire activity via the TDM.

The TDM is made up of four primary parts:

1. Scope of Work

This is the final version of the SOW which the client has already reviewed. In your final review, ensure that the dates are correct (match the POP with the cost estimate), you have an individual for every key technical role or agreement from the client that the role will be filled at a later time, and the LOE in the chart is consistent with the cost estimate. The SOW should have all unnecessary information, questions/comments, and highlight removed; it should be a clean document. Remember: all SOWs require a period of performance, deliverables, and a signatory/approver.

2. Cost Estimate

To avoid client sticker shock, be sure to share draft versions of the CE as plans are formulated. The POP, composition of the consultant team, and consultant labor should be consistent with the SOW.

Remember: Draft cost estimates must be reviewed by the Project Director or Deputy Director/Operations Manager prior to sending to the client for review.
3. Final Staffing

All staff positions should be approved and filled during the recruitment process. The client will review GH Pro’s proposed consultant(s), and either approve or reject them. Upon reaching the TDM-phase, all technical staff roles should be finalized and each consultant should have a verified biodata, current CV, and signed Conflict of Interest (COI) form on file. When seeking TDM approval, the PM will send both the updated CV, the consultant’s COI form, and the USAID POC’s name and email address to the Project Director.

4. Final Draft Timeline

During the planning of the assignment, the PM should discuss the timeline of the assignment with the client. The final draft timeline is included with the TDM request to confirm key dates and requirements of the activity.

When the PM is prepared to seek TDM approval, s/he will send all of the required pieces to the Project Director for final review before the TDM approval request is sent:

1. Client-Approved SOW
2. Client-Approved Cost Estimate
3. Client-Approved Staff CVs and COIs
4. Final Draft Timeline

Steps for TDM Approval

For more information on how to get TDM approval, please view this training module on “Getting to TDM.”

Once the assignment has been officially approved by the USAID requestor and the GH Pro COR, the Project Director will notify the Finance and Contracts teams. This serves as notification to these teams to create the coding necessary to set up the TDM in the accounting system (Deltek).

Congratulations, the assignment is active!
II. ASSIGNMENT IMPLEMENTATION

In the Implementation phase, (A)PMs contract consultants and prepare them for the assignment. PMs are responsible for planning and arranging all team member travel and logistics, day-to-day management of consultants while on official travel, financial management and oversight, and deliverables tracking. PMs are also tasked with managing the client satisfaction.

Assignment Launch

In the Project Background section of this handbook, we indicated that some procedures may differ between the two GH Pro implementing partners. While great effort is taken to ensure that Program Managers interface with consultants and clients similarly regardless of company designation, on the back end, internally, there are some differences in basic process and procedure between the two companies. While most administrative actions are identical, the first notable difference is in the cost estimate; each of the companies requires a different template, which captures their current multipliers. The next difference is in how consultants are onboarded during the assignment launch.

Dexis Assignments

The GH Pro Project Director oversees the Senior Management functions of Dexis assignments.

Once the activity (TDM) is approved, the Project Director sends the GH Pro Senior F&A Manager the completed/signed TDM package and relevant approvals. The GH Pro Senior F&A Manager then notifies the relevant Dexis Finance and Administration parties, who, in turn will set up the applicable codes and accounting information in Deltek. The Dexis Finance and Administration team enables the assignment’s Deltek code to be added to the timesheet of each GH Pro Staff member who is named in the CE.

Upon TDM approval, the PM has authorization to incur costs, formalize consultant agreements, and take any other relevant action required to move the assignment forward.
QED Assignments

XXXX XXXX (xxxxxx@qedgroupllc.com) is QED’s home office primary point of contact. He is QED’s Director for Professional Services, and should be kept informed on all relevant correspondence, especially contractual and financial. The steps required to launch a QED assignment is as follows:

1. GH Pro Project Director designates assignment for QED and notifies XXXX by email (with cc: to QED Deputy Director/Evaluations and QED Deputy Director/Operations Manager).

2. GH Pro Director notifies the GH Pro Senior F&A Manager of a live activity. The GH Pro Senior F&A Manager notifies QED.
   - Dexis Finance and Administration is notified, and sets up the applicable codes and accounting information in Deltek.
   - XXXX XXXXX (cc: to QED DD/SEA and DD/Ops) receives the completed/signed TDM from the GH Pro Senior F&A Manager. QED then acknowledges/agrees to the assignment by email.

Onboarding your team

Notifications

When an assignment goes “live” – that is, the TDM is approved by the USAID client and GH Pro COR – be sure to notify the client and each of the selected team members. Team members should receive individual notifications, until each member of the team is under contract, members of the team are introduced to each other via email, and CVs are circulated.
Types of Contract Mechanisms

*Individual Consulting Agreement*

Before a consultant may begin work, receive an advance, or travel with GH Pro, s/he must sign a contract and return it to GH Pro. Dexis and QED each have corporate agreement templates (located on GH Pro Assignment Management Folder) that must be used; there are separate templates for USN, CCN and TCN. Each consultant’s specific SOW will be included as **Attachment A**. Be sure that the SOW is tailored to the consultant’s individual period of performance, roles and responsibilities, deliverables, and level of effort. The Team Leader (TL) will receive the entire SOW and an additional document in **Attachment B**, that details the TL’s roles and responsibilities. This will also be attached to their contract, sent to potential TLs during recruitment, and again included in consultant package #1.

All consultant agreements **must** be reviewed and approved by Dexis or QED corporate management teams before sending to the consultant.

- Dexis agreements are approved by XXXX XXXX (xxxxx@dexisonline.com), who will input the contract into GH Pro’s A1 Tracker (Deltek).
- QED Agreements are sent to XXXX XXXX (xxxxxx@qedgroupllc.com) with a cc: to XXXX XXXX, Project Assistant.

Dexis agreement templates are found here, within Consultant Package #1.

QED agreement templates are found here, within Consultant Package #1.

**Drafting Consultant Agreements:**

**Choose the correct template**

The PM will need to know the consultant’s citizenship in order to choose the appropriate template for USN (or Green Card Holder)/CCN/TCN. The biodata form should list a consultant’s citizenship and/or US visa status.

1. Verify consultant’s legal name, residence, and contact information.

   Use the 1420 biodata form to match the consultant’s legal name and home address.

2. Verify LOE and POP

   Use the SOW and Cost Estimate to verify the number of days/hours the consultant will be permitted to bill.
Using the SOW and Cost Estimate, verify the consultant’s period of performance. Ensure that the POP allows sufficient time for the consultant to begin required desk work, travel to/from the country (if applicable), and reporting.

3. Verify Daily Rate

Use the biodata to verify the daily rate.

4. Draft tailored SOW

Using the assignment SOW, tailor the information to the consultant’s position, removing anything that is irrelevant or may be sensitive. Ensure that deliverables, job description, and LOE chart show only the consultant’s portion of the assignment. **Only the Team Leader is responsible for the assignment’s full SOW.**

5. Send for Corporate approval

When requesting that Dexis or QED corporate backstops review and approve a draft consultant agreement, the below items must also be on file (items in **BOLD** must accompany the approval request):

**Draft contract agreement**

- **Fully Executed Biodata**, including:
  - Daily rate negotiation
  - Anti-Terror Verification
  - Reference Checks (must be completed and saved to the consultant’s folder, but not included)

- **Consultant Resume**

Subcontracts

Subcontracts are used to hire a private company, non-governmental organization (NGO), university research center, or non-profit to assist the project in completing the assignment’s scope of work. It is preferred that all subcontracts be issued as Firm Fixed Price subcontracts, but sometimes a different type of subcontract may be more useful. For more information, please see TIPs sheet. For any cost reimbursement type Subcontract, regardless of value, GH Pro requires Consent to Subcontract from the CO.

Firm Fixed Price subcontracts above $150,000 need to also be approved by the CO.
Different contract types carry different types of financial risk. Dexis must ensure that the type of subcontract proposed carries the minimal amount of risk.

These instructions and requirements assume that you are issuing a Firm Fixed Price type of subcontract, since that is the most frequently used subcontract type on GH Pro. To compete, negotiate, seek approval, and issue a Cost-Type Subcontract, please consult the appropriate Contracting Office’s Point of Contact.

Depending on the situation and Scope of Work for the potential subcontract, competition may be required. Dexis has established the following thresholds for requiring competition:

<table>
<thead>
<tr>
<th>Subcontract Type</th>
<th>Anticipated Value</th>
<th>Level of Competition Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firm Fixed Price</td>
<td>&lt;$25,000</td>
<td>Three written quotes</td>
</tr>
<tr>
<td>Firm Fixed Price</td>
<td>$25,000 - $150,000</td>
<td>RFQ</td>
</tr>
<tr>
<td>Firm Fixed Price</td>
<td>$150,000 or more</td>
<td>RFP</td>
</tr>
<tr>
<td>Time &amp; Materials</td>
<td>&lt;$150,000</td>
<td>RFQ</td>
</tr>
<tr>
<td>Time &amp; Materials</td>
<td>$150,000 or more</td>
<td>RFP</td>
</tr>
<tr>
<td>Cost Plus Fixed Fee</td>
<td>Any Value</td>
<td>RFP</td>
</tr>
</tbody>
</table>

Please note that these thresholds are applicable to Dexis Assignment Subcontracts only.

Also, depending on the situation, you may be able to sole-source a subcontract to a particular company. Please review the Sole Source Justification Memo Template located on the QMS to learn more about when it is appropriate to Sole Source.

Dexis may also sole source a subcontract to a socio-economic set aside, which is a self-certified Small Business, 8(a) Small Business, Woman Owned Small Business, or Service-Disabled Veteran-Owned Small Business if the anticipated value of the Subcontract is below $150,000.00. If this is the case, the Program Manager would need to draft a memo stating that there are at least two other companies possessing that socio-economic status capable of completing the work, and would then also complete the Sole Source Justification Memo. A Sole Source does not remove the requirement of conducting a cost reasonableness analysis or a best-value negotiation.

Once you have determined that a subcontract is required to complete the assignment, and that it will be Firm Fixed Price, you should create an internal estimate of the value of the subcontract. After this is complete, you should reach out to firms for a budget. If an RFQ or RFP is required, please work with
the Contracts POC to complete the document. Regardless of whether or not competition is required, you should reach out to the company (or companies), provide uniform information, and request a budget as well as the other required Subcontract Documentation:

- Partner Information Sheet
- Technical Proposal, if required by RFQ or RFP
- Budget (in Microsoft Excel)
- Cost Notes/Cost Proposal, explaining the budget
  - As part of the cost notes, the company should provide three years (two minimum) of either reviewed or audited financial statements

If you are conducting a competitive procurement, you will need to gather all of the completed technical evaluation sheets and make a selection. If there is any further negotiation or tradeoff between offerors required, do not inform any offerors if they are successful or not until the negotiations are complete.

The budget and cost notes should be reviewed for reasonableness by the Program Manager against the internal cost estimate created prior to competition/gathering budgets. The budget and cost notes should then be sent to the Contracts POC for review and a cost reasonableness analysis. After this is complete, the PM should complete the negotiation memo template, the sole source justification template (if applicable), and run a check of the potential Subcontractor in the Visual Compliance system. After all negotiations and documentation is complete, the Contracts POC will draft a subcontract and lead subcontract negotiations.

**DUNS®**

The DUNS® Number is a unique identifying number assigned to entities doing business with the federal government. It was incorporated into the FAR as the Federal Government’s identification code for all procurement activities.

**CPARs (Process, template, ranking definitions)**

As part of Dexis’ quality assurance process, Subcontractor performance (companies, excluding consultants and vendors) must be reviewed on an annual basis. The purpose of these reviews is to identify strong partners for potential work and to assist with identifying “lessons learned” regarding subcontract and program management. These reviews will also help GH Pro to capture information that will survive changes in project administration and staffing, and be incorporated into the project’s institutional knowledge.
These Subcontractor CPARs are mirrored after the U.S. Government’s CPAR process for reviewing prime contractors, and as such, use the same ranking definitions and questions. The process has been reduced to an online form, administered by the Dexis Contracts Division. Upon close-out of a subcontract, the appropriate member of the Contracts Division will send the online form to the Program Manager. The Program Manager will complete the form in a timely fashion, and the Contracts member will turn the form responses into a Microsoft Word document with a more narrative format. The CPAR will then go the Project Director for review and approval. Once the CPAR has been approved, it is saved in the TD/Assignment folder. Should the Project Director disagree with any rankings, the Contracts member will communicate that to the Program Managers, who will then review and adjust the CPAR as they see fit. These CPARS are internal to GH Pro, and not to be shared with the Subcontractor.

- **Purchase Order**
  - A purchase order is used when the Project Manager purchases a commodity or service that is not a component of the prime Scope of Work of the assignment. Purchase Orders are frequently used for the purchase of edited documents or 508 compliance services.
  - A Purchase Order may be with a company or individual, and may be issued as a stand-alone Purchase Order or off of an existing Purchase Order. Depending on the value of the Purchase Order, competition

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**NICRA: What is it?**

“Indirect costs are costs which cannot be directly identified with a single contract or grant. The indirect costs are applied equitably across all of the business activities of the organization, according to the benefits each gains from them. Some examples of indirect costs are office space rental, utilities, and clerical and managerial staff salaries. To the extent that indirect costs are reasonable, allowable, and allocable, they are a legitimate cost of doing business payable under a U.S. Government contract or grant.

**How rates are established**

Responsibility for negotiating indirect cost rates with organizations doing business with the U.S. Government is specifically assigned. Each organization negotiates its indirect cost rates with one government agency which has been assigned cognizance. Usually the cognizant government agency is that agency which has the largest dollar volume of contracts with the firm or organization. The resulting Negotiated Indirect Cost Rate Agreement (NICRA) is binding on the entire government. The NICRA contains both final rates for past periods and provisional (billing rates) for current and future periods. A procurement office may not negotiate a different rate or base of application for an individual cost reimbursement contract or program.”

—USAID Office of Aquisitions and Assistance, 2014
may be required. Please consult Blanket Purchase Agreement (BPA). Dexis’ Commodity Procurement Guidelines, and use all applicable Commodity Procurement forms. All Purchase Orders must go through the applicable contracting office (Dexis or QED).

- All Purchase Orders must be firm fixed price. If you are issuing a Purchase Order off of a BPA, the value is determined by the set price list included in the BPA. If you are issuing a stand-alone Purchase Order, the value should be determined by the Vendor’s proposed and approved budget, and should not reference LOE or a daily rate for labor.

- To determine the amount of the Purchase Order and the required documentation from the consultant’s company, reference the Commodity Procurement Guidelines. The required documentation includes:
  - Proof that the company is registered in SAM.gov
  - References or Past Performance Reviews for previous work performed by the company
  - Budget, with a breakdown of cost it will take to complete the deliverables and cost notes

- Enter the total amount of the PO in the cost estimate template under the “Consultants – Other (PO)” line item.

**Fixed Price Purchase Orders (FPPO)**

FPPOs are not subject to any adjustment on the basis of the Subcontractor’s cost experience in performing the Subcontract. This mechanism is used for purchasing commercial items, goods, and services, where the costs can be estimated with reasonable certainty. It subjects the Subcontractor to the maximum risk arising from full responsibility for all cost escalations.
Consultant Package #1 (Onboarding)

Consultant Package #1 is a required email the PM sends to each consultant to initiate their formal approval and acceptance into the TD. GH Pro has pre-scripted emails for each consultant package. This email language can be found here. While the documents to send in each packet are the same, be sure to use the forms as they apply to the contractor (Dexis/QED), and tailored for each consultant. See text box for the contents of this email package.

Individual Consulting Agreement

This has been discussed previously in Section xxx

Emergency Locator (EmLoc) Form

This document details the individual consultant’s emergency contact and passport information, along with their birthdate and dependent information. It must be updated annually.

Medical Evaluation Form

This document, signed by the consultant’s doctor, indicates that each traveler is healthy and fit for international travel. Sometimes this form will also indicate if a consultant has a medical condition which requires business class travel. This form must be renewed annually.

ACH/Bank Form

The ACH form indicates where a consultant would like their payments transferred. It is imperative that the information in this form be correct so that funds are not delayed for invoice or advance payments.

Non-Disclosure Agreement (NDA)

GH Pro consultants may have access to proprietary, procurement sensitive, or other confidential U.S. Government information. For this reason, GH Pro requires that all consultants sign an NDA. It is valid for the life of the GH Pro contract.

Consultant Package #1 (Onboarding)

Contains the following documents (those in **BOLD** must be returned and filed):
- **Individual Consulting Agreement**
- **Emergency Locator Form**
- **Medical Evaluation Form**
- **ACH/Bank Form**
- **Non-Disclosure Agreement**
- **W-8/W-9 Form**
- Invoice Template
- Role of Team Leader for GH Pro (to TL Only)
- GH Pro Consultant Guidelines
**W-8/W-9 Form**

IRS Tax Form W-8 completed by non-resident aliens who do work and/or make income in the U.S. or foreign business entities who make income in the United States.

IRS Tax Form W-9 must be completed by all USN contractors. While the reporting threshold is $600 over the tax year, GH Pro requires all consultants to complete this form on an annual basis so that these payments can be accurately reported to the IRS. This also informs the creation of the consultant’s 1099 tax form at the end of the calendar year. Form W-9 also asks the person filling it out to certify that s/he is exempt from backup withholding. Most taxpayers are exempt, but if they aren’t, Dexis or QED will need to withhold income tax from that contractor’s pay at a flat rate of 28% and send it to the IRS. The W-9 should be completed with the consultant’s (or business) name, and Social Security or Tax ID Number. This form is updated annually.

**Invoice Template**

PMs should tailor the invoice template for each consultant, including their name, address information, daily rate, and the assignment/Deltek code. This will help to ensure that each consultant is using the right form, with accurate information for accounting. Each consultant’s invoice template should be saved to their personnel folder.

**Role of Team Leader for GH Pro (for Team Leader Only)**

GH Pro Team Leaders must oversee the overall direction of an assignment consisting of two or more team members. The TL manages the assignment’s preparation, management, communications, and deliverables. Prior to any launch call, it is helpful to discuss GH Pro’s expectations for team and LOE management. This form is included at the recruitment stage, in consultant package #1, and attached to the agreement as Attachment B, following the SOW.

**GH Pro Consultant Guidelines**

This document provides general guidelines to GH Pro consultants on general policies and procedures related to GH Pro assignments, allowable expenses, and general consultant procedures.
Consultant Package #2 (Travel)

Consultant Package #2 is a package the PM must send to each consultant before they travel on any GH Pro assignment. The accompanying email language can be found here. See text box at right for a list of the documents that this email package should contain.

Financial Forms Guidance

This Guidance contains information for consultants as they request reimbursement from travel. It also gives high-level information on per diem and invoicing, and reimbursement processes.

Travel Expense Report Template

This template is required for all consultants wishing to seek reimbursement for costs incurred. Some claimed expenses may include (but are not limited to): per diem, taxi/POV mileage, inoculations, visas, visa photos, or bank fees.

Taxi-Vehicle Log

This log allows consultants to keep track of the taxis and trips that they take while on Temporary Duty (TDY). As there are often multiple trips to the same location, and receipts are not always available, this sheet helps PMs know the origin and destination of a consultant’s travel for meetings, etc. It should also be used for tracking mileage in a Personally Owned Vehicle (POV).

Travel Advance

GH Pro provides up to 50% of advance payment of per diem for consultants; 100% of logistics costs can be provided in advance.

Please allow one to two weeks lead time for the Finance Team to process an advance. Often, if a consultant’s bank account is overseas, the recipient or intermediary bank will hold the advance for one to three business days. By processing an advance one to two weeks before the consultant will incur major expenses, GH Pro gives the Finance Team and the banks adequate time to transfer funds.

GH Pro Safety and Security Procedures

This is a “common sense” guide for GH Pro consultants on managing their personal safety while on TDY. It provides information on where to find USG-approved airlines, per diem, how and what to pack (and what to leave behind), and how to register for the U.S. Department of State’s STEP Smart Traveler Program.
International SOS (iSOS) Card

International SOS is GH Pro’s vendor for providing international emergency evacuation coverage. iSOS can assist with finding a local nurse or medication or arranging for emergency medical evacuation, and also provides health and security alerts. Consultants should be prepared to download the iSOS app and secure a local phone number for best results.

GH Pro maintains two iSOS cards – one with the Dexis policy information and another with QED’s policy information. Please ensure the consultant receives the iSOS card of the company designated for his or her assignment before embarking on international travel.

The Dexis Security Officer will share pre-departure briefing information with the consultant. The pre-departure briefing includes destination specific information about security concerns, Dexis emergency contact information, and recommended vaccines and prophylaxes.

Travel Itinerary

Once the air ticket has been purchased, the PM should share the confirmed itinerary and flight information with the consultant. Please ask the consultant to confirm that the name listed on the itinerary matches the name on his or her passport.

It is important to bring the two pieces of information on the confirmed itinerary to consultant’s attention:

- e-ticket number – the consultant will use the itinerary locator information to check in to his or her flights.
- [Travel Agent]’s 24 emergency contact line – GH Pro consultants are required to work with the travel agent to make any adjustments to his or her itinerary. This includes rescheduling missed flights or rebooking for cancelled flights. Working with the travel agent allows GH Pro to maintain the flights and avoid unnecessary or duplicative expenses for flight rebooking.

Hotel Confirmation

Once booked, the PM should share the hotel confirmation information with the consultant. The confirmation should state the dates of the reservation, the lodging rate, and the hotel’s address. Please remind the consultant to confirm the lodging rate and that it is within the per diem lodging rate upon check in.
Evaluation Tools

The Evaluation Tools package includes the tools, templates, and information required for evaluation teams to develop, present, and report on their evaluation findings. Documents that PMs should send to Evaluation Team Leaders include:

- Evaluation Process and Reporting Tools
- GH Pro Report Template Cover Page

Assignment Ratings

GH Pro asks that all clients and consultants complete a SurveyMonkey assessment of GH Pro’s performance on the assigned TD. Team Leaders are also asked to assess the performance of the other team members. A custom link (created by the PA who manages GH Pro’s SurveyMonkey account) is sent to each group, and includes surveys for:

- Team Leader ratings
- Individual consultant ratings
- Client ratings

Communications

Sharing Background Documents

PMs should collect all relevant background documents from the client for each assignment and evaluation. These documents can be shared by sending a link to the Egnyte folder where the consultant may access the necessary background files.

- To share a folder from Egnyte with external contractors (i.e., consultants), go to the file on the web-version of Egnyte, and access the assignment folder. Right click on ‘Background Documents’ and click “Share Folder Link.”
• **Link Options/Password**: When the share link window comes up, set the access to “anyone with a password,” and the expiration date to an appropriate date for your assignment.

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**Team Introductions**

After all team members have agreed to their contract terms, the PM may circulate the team member CVs and introduce all team members. This email
should include the team members’ names and titles, copies of all team member resumes, confirmation of field dates, and a link to the background documents for the assignment.

**Updates**
While evaluation teams are in the field, updates should be sent to the client weekly on the status of the team’s work to-date. On TA assignments, reports can be sent on a weekly or bi-weekly basis, based on the client’s preference.

**Travel Planning**

*Making Travel Arrangements*

[In-progress]

*Securing Visas*

[In-progress]

- GH Pro works with [Visa Agent-1], [Visa Agent-2], and [Visa Agent-3] to secure consultant visas. To find out what visas are required for individual assignments, visit their respective websites for rates on visa services by country.

**Security Procedures**

**Security & Travel:** In regions experiencing instability – such as Nigeria, Pakistan, Bangladesh, and Mali – missions should provide the GH Pro evaluation teams with frequent updates and regular Regional Security Officer (RSO) communication about the security situation. PMs should communicate to evaluation teams and mission staff GH Pro’s expectation that travel to areas of concern has been reviewed and approved by the RSO before they will be allowed to proceed. The team should only travel in closed cars and to locations that are accessible by road.

Once the Mission (and presumably, the RSO) have agreed to the proposed travel for the evaluation team, then GH Pro defers to the GH Pro Evaluation Team Leader to determine whether the team will travel to the proposed sites. If the TL does not want the team to travel to specific sites, s/he should share his or her concerns with the Mission, senior Mission Health Office staff, and the

---

**PM PRO TIP:**

*It may be helpful to coordinate a meeting between the team leader and RSO to ensure that all selected evaluation sites are approved and cleared for travel prior to finalizing the team’s schedule.*
RSO in order to discuss and resolve their concerns. GH Pro should be kept informed throughout the process.

Another option to consider would be for the TL to remain in a secure location while team members who were comfortable visiting the sites travel.

*International SOS*

International SOS (iSOS) is GH Pro’s vendor for providing international emergency medical and travel coverage. iSOS can assist with finding a local nurse, medication or arranging for emergency medical evacuation, and also provides location-specific health and security alerts. Consultants should be prepared to download the iSOS app before they travel and secure the iSOS local phone number for best results.

Consultant travel is automatically tracked by iSOS and reported to Dexis by [Travel Agent] when an itinerary is purchased. PMs should ensure that the Dexis Corporate Security Officer receives each traveler’s contact information in country.

*High Threat Security Overseas Seminar (HTSOS)*

High Threat Security Overseas Seminar is a mandatory online seminar for all U.S. Government direct-hire personnel and, in some instances, third party contractors such as GH Pro. USAID’s current guidance regarding HTSOS states that travelers must complete HTSOS if Electronic Country Clearance (eCC) is required and prior to travel any Mission in Africa, specific Missions in the Middle East and select Missions in Asia. GH Pro maintains a policy that all consultants traveling to Africa and requiring eCC must first complete HTSOS training.

Find more information about completing this five-hour seminar see Annex C.

*Facility Access*

Facility Access (FA) is an identification card issued by USAID/Washington’s Office of Security. FA grants GH Pro consultants’ access to USAID Offices (USAID/Washington and the USAID Missions) and a USAID email address. The FA application process is similar to that of a Security Clearance but not as comprehensive.

*NOTE: Facility Access information/paperwork contains social security numbers. Therefore, they must be handled in a secure manner.*

1. Pre-fill requisite sections of the forms, including the AID 6-1. Many sections are pre-completed but must be reviewed for accuracy. Email the consultant to request that s/he fill out the following security forms and send everything to GH Pro by email (or by fax if concerned about
privacy). USAID will only accept these forms in electronic copy. Documents needed are:

- **Form OF306 – Declaration for Federal Employment.** This form must be printed and signed and then either scanned and emailed or faxed to GH Pro.

- **Form A6-1 – Request for Security Action.** The consultant only needs to complete sections I-III as applicable. This must remain in original PDF form and does not need to be signed. Because of the format, this form must be emailed rather than faxed.

- **Fingerprint Cards – Two copies must be completed by the consultant.** Please ensure that both city and state/country are filled in appropriately and that the place of birth is spelled correctly.

- **Consultant’s up-to-date CV**

Fingerprints can generally be done at the local police department or in DC at the following location:

- **Central Business Services, 1634 I Street, NW, Suite 702, Washington, DC 20006 Tel. (202) 628-3716**
  - Hours: 9:00 am to 5:00 pm, Monday-Friday, Saturdays by appointment only
  - Identification Required: Passport or Driver’s License

- **ID Systems Inc, 1010 Vermont Ave. NW Suite 221 Washington, DC 20005 Tel. (202) 265-6500**
  - Hours: 7:00 am to 6:30 pm, Monday-Friday, walk-ins welcome
  - Identification Required: Passport or Driver’s License

For consultants who are not based in D.C., local police stations and U.S. Embassies are also often able to complete fingerprint cards. USAID’s Office of Security is very specific about which version of the fingerprint card they will accept. Currently, USAID is using form number **OMB XXX**, Accordingly, PMs should mail the most recent version of the fingerprint cards.

2. **GH Pro:** The Program Manager or Project Assistant will then review and complete the rest of the forms and then transmit them to GH Pro’s Facility Access Coordinator.
These forms and a sample transmittal email are located in the Egnyte drive under Assignment Management, and then Facility Access.

3. The GH Pro Facility Access Coordinator sends the complete package of forms to gh.pdmslogistics@usaid.gov, copying XXXX XXXXX, the USAID/Global Health Bureau AMS Officer (xxxxx@usaid.gov) and the appropriate GH Pro Program Manager.

4. USAID/GH sends the consultant a link to complete the eQIP application online with instructions. The consultants have 10 days to complete all of the forms as directed in eQIP.

5. USAID/GH: AMS Officer checks the eQIP system for the complete forms and then releases them to Security, where an investigator is assigned.

6. Once the investigation is complete, GH Pro will receive the 500-3 from the AMS Officer for the consultant’s temporary facility access. Occasionally a temporary facility access is denied while the full investigation continues.

7. If the consultant will be picking up his or her badge in DC, the Facility Access Coordinator will then work with the Program Manager/Project Assistant to complete the 565-1 and submit to the AMS Officer along with a request to schedule the consultant for the Information Assurance Brief (IAB), which is held every other Tuesday.

8. If the consultant will be getting his or her badge at a Mission, then GH Pro will submit the a566-6 to the USAID/GH Administrative Management Staff (AMS) Officer who will submit to security, to the processed through the Department of State Personal Security and Suitability (DSPSS). This will transfer the Facility Access to a Mission so that the badge can be obtained locally.

9. Once the 565-1 is signed by security, GH Pro or the consultant will pick it up from the GH Bureau in Crystal City. This signed form is valid for 30 days, and the consultant must attend the IAB and pick up the badge within the 30 days.

10. After attending the IAB, the consultant will take the signed 565-1 to the badging office in the basement of the RRB to get their badge.

11. Other Important Notes:
   - For FA revalidation, only the a6-1 is needed in Step 1.
• The temporary clearance is valid for one year, and the investigation for the final facility access continues. Once the final is approved, another 500-3 will be sent to the Facility Access Coordinator by the USAID/GH AMS Officer.

• Please inform consultants that correspondence regarding the FA process should go through the Program Manager. GH Pro will speak with the AMS Officer directly.

• USAID Washington Learning Center registrar contact information: 703-310-0695- Please contact for questions regarding the IAB.

**Program Control**

*Amending Individual Subcontractor Agreements*

If USAID requests a modification to an assignment that changes the SOW, period of performance, or LOE, the steps below must be followed. GH Pro will not pay a consultant for any work that falls outside of the scope, dates, or LOE indicated in the consulting agreement unless an amendment or corporate notification has been approved by the project.

- **Dexis:** The Program Manager completes an individual subcontractor amendment template, provides it to the Project Director for review/approval, sends it to the consultant for signature, returns it to the Director for countersignature, then scans and sends it to the consultant, and files it in electronic and paper files. An alternative to sending documents and scanning is using RightSignature, a document e-signing software. Each Program Manager will have a username and password.

- **QED:** The Program Manager completes a consulting agreement amendment template, provides it to the Director for review/approval, sends it to the consultant for signature, returns it to the Director for countersignature, then scans and sends it to the consultant, and files it in electronic and paper files. An alternative to sending documents and scanning is using RightSignature, a document e-signing software. Each Program Manager will have a username and password.

*Amending a TDM*

If USAID requests a change in an assignment that affects the Scope of Work, Deliverables, and/or cost, the Director will determine how the project will document and approve the change(s). PMs should work with the GH Pro Costing Specialist to develop cost amendments to document cost changes for submission to the client or COR.
Minor changes will be documented by filing the written request in the electronic file or preparing a memo to the file. If the requested change adds or subtracts 10% or more to the total estimated assignment cost, the Director will create a TDM amendment. The amendment will be circulated, approved, and filed using the same process as an original TDM. If necessary, consulting agreements and purchase orders will be amended accordingly.

Financial Management and Review

Invoice Review

PMs are responsible for tracking all billings to their assignments. They must review and approve all consultant invoices, and track consultant LOE before invoices are submitted to finance. Invoices submitted to finance must be complete, signed, and accurate. Any invoices not meeting those requirements will be returned to the consultant and PM, and could result in delays.

Steps for reviewing invoices

1. Select the correct (Dexis/QED) corporate cover page
2. Complete the Consultant’s Name, Assignment Name/TD Number and Deltek Code (Dexis – 3001; QED – 3011)
3. Complete the LOE details
4. If it is the first invoice a consultant has submitted for that assignment, be sure to attach the following:
   a) Consultant’s FE agreement – if a modification has been completed, attach it to the invoice (even if it is not the first invoice)
   b) Consultant’s completed W8/W9
   c) Consultant’s completed ACH form
5. Sign the cover page
6. Review the invoice
   a) Ensure that consultants do not bill more than eight hours per day to GH Pro. If a consultant is working on simultaneous TDs, PMs should coordinate their invoice review to ensure the consultant’s total LOE across assignments does not exceed eight hours per day.
b) Unless mobilizing or de-mobilizing from the field, consultants are not permitted to bill more than 6 days per week while in the field. During periods where consultants are not in the field, billing is five days per week, or Monday through Friday. Note: In Islamic calendar countries, the workweek is Sunday – Thursday.

c) Consultants should complete the “location” column in the invoice. This information is critical as it informs the GH Pro Finance Team’s work to complete the DBA audit on a monthly basis.

d) Allowances: review allowance billing. If allowances are applicable, be sure to attach the OAA sheet for the country to provide back up on the current applicable amount, calendar for Post Differential, and/or other confirmation of dates the allowance is applied.

e) Ensure the consultant has signed each page of the invoice. If LOE carries over to a second tab in the invoice workbook, please confirm that the consultant signed the second page as well as the first.

7. Sign and date the invoice

**LOE Tracking**

PMs are responsible for tracking all charges to their assignments. An LOE tracker may be used to track Direct Billing, Consultant Hours, and ODC charges.

**Accruals**

Accrual accounting is an accounting method that measures the performance and financial position of the company by recognizing transactions regardless of when cash transactions occur. The general idea is that transactions are recognized by matching revenues to expenses at the time the service is provided rather than when payment is made (or received). Costs for Dexis assignments must be accrued for:

- Expenses that have been incurred but not yet recorded in the accounts, and
- Revenues that have been earned but are not yet recorded in the accounts.

On/about the 5th of each month, project costs should be invoiced. Those that cannot be invoiced and processed by the Finance Team in time, but where costs have been incurred because backup documentation may not be completed (invoices, timesheets, expense reports) are required to report as accruals.
Each month, PMs will need to determine if they have any team member(s) or vendors who provided services and/or incurred expenses (TER) for the report month. If either the invoice or the total value of the TER is expected to total $5,000 or more, the PM must report the costs to F&A for accrual. PMs populate the GH Pro Accrual Form on a monthly basis and a separate form for each assignment. F&A will report these costs to Accounting for accrual in the accounting system.

The deadline for reporting accruals to F&A will vary each month but it is normally the 8th or 9th.

PMs may reference the GH Pro Monthly Accrual Reporting Instructions saved Z:\Shared\GH PRO\PM Financial Reports\Accruals\Template_and_Instructions

The Senior F&A Manager is available for any questions regarding the instructions, the accrual template, or the GH Pro monthly accrual reporting process.

**Reporting (Evaluation Reports)**

1. **Put a cover page on your Evaluation First Draft.** The cover page should be attached before the front page of the report, and should live with the report during the review/revision process. It helps to inform the clients on when we started the review process, and where the report currently stands, along with giving the client a due date on when the return the report to GH Pro using this basic table, where you’ll insert the date information as the report goes through the draft/review process. This cover page should only be removed by the editors once it has received technical approval.

**PM PRO TIP:**

The best way to determine if a consultant or vendor incurred costs is to email the consultant or vendor the last week of each month to request their invoices or an estimate of the LOE or travel expenses committed to date.
2. **Send the first draft report to the client** with instruction clearly indicating that it is the first, unedited draft, and will be copy-edited and formatted at a later date.

   a) The focus should ONLY be on technical information at this point.

   b) Your email template for this message is found here:
   C:\Egnyte\Shared\GH PRO\Assignment Management\Assignment Planning\Report Production\1. First Draft

3. **Comments circulated back to evaluation authors.** When you receive the consolidated report with comments in track changes from your client, send it to your evaluation team with instructions to make the next round of edits and get back to you with any questions. Be sure to give them a timeline on when they need to have it back to you (usually 5 working days)

4. **Send the Final Technical Draft to the client.** This is again only a draft report and we are requesting technical approval ONLY. The review period is shorter at this stage (usually 3 – 5 days), unless otherwise requested.

   c) The focus is on the authors responding to the comments from the first round

   d) Your email template for this message is found here:
   C:\Egnyte\Shared\GH PRO\Assignment Management\Assignment Planning\Report Production\2. Second Draft

   e) Save your client’s approval to the important correspondence folder of your TD.

5. **Queue your editor.** Once the document has technical approval, it is ready to go to the editor [xxxx xxxx (GH Pro HQ), xxxxxx xxxxxxx and
   a) Once the report has been fully edited and formatted, it should be 100% in compliance with USAID marking and branding requirements.
   b) The client’s questions and comments should all have been addressed. (Sometimes, we attach a table detailing the comments, the page number, and explanations of how they have been addressed when it might not be evident from the edited version.)
   c) The email template for this message is found here: Z:\Egnyte\Shared\GH PRO\Assignment Management\Assignment Planning\Report Production\3. Final Report
   d) Save your client’s approval to the Important Correspondence folder of your TD.

7. Queue [508 EDITOR] for 508 Compliance
   a) At present, [508 Editor] is the company we work with for 508 compliance. This is to make the document accessible by those who are visually impaired, per USG requirements for public documents. This is a requirement for posting a document to the DEC.
   b) A PA will coordinate the creation of the purchase order based on the PM’s requirements and the quote received by [508 Editor].

8. Post Final Approved, 508-compliant document to the DEC

9. Send confirmation to client
   a) The Confirmation template and instructions is found here: Z:\Egnyte\Shared\GH PRO\Assignment Management\Assignment Planning\Report Production\4. 508-DEC Confirmation
   b) Save your confirmation to the Final Report stage.

GH Pro Naming Convention

1. When you receive a document from the Team Leader, editor, or client, please save the file to Egnyte using the following naming convention: 
   **TD#_Client Name_Name of Assignment_Draft1_Date (MM-DD-YY)**. This serves as the base name for the document as it clearly describes the...
assignment for which the work was prepared as well as the contents of the document.

2. Please update the date of the file and indicate the version number each time revisions are made.

3. When that version is sent to an editor or back to the team, be sure that they add their initials and update the date.

4. Examples:

   - Report received from Team Lead: Save as: 088_MOZ_CHASS_Eval_Draft1 _06-15-16
   - First draft of report edited by [Editor]: 088_MOZ_CHASS_Eval_Draft1 _LC_06-15-16
   - First draft revised by Team Lead: 088_MOZ_CHASS_Eval_Draft1 _TL_06-25-16
   - When it comes back with USAID comments it should be saved as: 088_MOZ_CHASS_Eval_Draft2 _USAID_07-05-16
   - Second draft with Team Lead edits: 088_MOZ_CHASS_Eval_Draft2 _TL_07-10-16
   - [Editor] (or other editor) edits: 088_MOZ_CHASS_Eval_Draft2 _LC_07-15-16
   - Sent to USAID: 088_MOZ_CHASS_Eval_Draft2 _Submitted_07-25-16
   - Etc.
GH Pro Naming Convention

A few basic rules to remember:

- File names should be approximately 40 characters.
- Always begin with the TD#.
- For country names, we will use the ISO Alpha 3 three-letter country codes.
- Drafts should be titled as follows: Draft1 (first draft), Draft2, etc.
- Use acronyms or shortened names for projects whenever possible (ex: XXX_SIAPS_Eval_Rep.)
- Use underscore – not spaces – in between items in the file name (ex: 145_PHL_Health_Portfolio_Eval_Draft1…) except for date (see below), which uses hyphens.
- For dates, use the following format: MM-DD-YY, separated by hyphens (ex: 07-26-16).
- “Draft” is defined by submission to USAID. Therefore, the first draft is the report document received from the Team Leader. The document remains Draft1 until it is submitted to USAID for review. The next round becomes Draft2, and so on.
- The Final report is the document approved by USAID, formatted, edited and prepared as 508 compliant.

5. Remember to remove initials of the Editor and/or Team Lead from the title of the document when sending the deliverable to the USAID client.
IV. ASSIGNMENT CLOSEOUT

Closeout Checklists

See Annex D for the Closeout Checklist you should use for closing out a project. This includes one checklist to be filled out by the Project Manager and signed by the Project Director and another to be filled out by the Finance Department and signed by the Finance & Administration Manager.

Email to Client for Deliverables Completion

The following is a sample email to be sent to the client to confirm that all deliverables have been received and approved.

Dear [Client Name],

[Include any relevant background or final deliverables submission] and [Assignment TD # and Title].

I am writing to confirm your confirmation of delivery of all assigned tasks for this assignment. Per the SOW, below are the deliverables for this assignment.

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Timelines &amp; Deadlines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assist with COP 16 submission, specifically SI requirements</td>
<td>By April 2016</td>
</tr>
<tr>
<td>Assist with broader SI needs for COP 16</td>
<td>By departure</td>
</tr>
<tr>
<td>Weekly Updates to GH Pro</td>
<td>Fridays, each week during field work.</td>
</tr>
</tbody>
</table>

Please confirm that all deliverables have been successfully completed. Please respond by saying, “I approve.”

We will follow with completing the close-out of the activity. Please do not hesitate to let us know if you have any questions. I look forward to hearing from you.

With kind regards,
Feedback from Client -- SurveyMonkey

At the end of each assignment, GH Pro requests feedback from the USAID client, Team Leader, and team members. GH Pro uses this feedback to improve our services to USAID and support our consultants. There are several resources available to help you set up, distribute, and review the surveys. Below is a brief outline of the Survey Monkey process and explanation of how XXXXX can be of help tailoring the surveys for your assignment.

Through the GH Pro Survey Monkey account, there are three survey templates available for your use:

1. Client rating of assignment
2. Consultant rating of assignment
3. Team Leader rating of consultant

Prior to sending the survey, please ask XXXXX to create links specific to your assignment. Send her the assignment number and confirm the survey recipients. XXXXX will create a link such as the one below and share it with you. The link will identify the assignment number and the intended respondent (client, consultant, or team leader) so you can easily identify the various links and send it to the appropriate recipient.

https://www.surveymonkey.com/r/184consultantrating

Program Managers are asked to send the surveys at the end of each assignment. To help guide communication with the various parties, email templates for these communications can be found in the “Assignment Management – Closeout folder.”

Please inform XXXXX when you send the survey. XXXXX will monitor GH Pro’s Survey Monkey account and notify you when completed surveys for your assignment are received. XXXXX will email the completed surveys to you and save the responses in the “Rating Forms” folder in each assignment folder.

Email to Client for Approval to Close-out

GH Pro’s procedures require that we receive your approval to closeout Assignment #___ – (title). May I please have your confirmation that the terms of the assignment have been met?
### ANNEX A. ACRONYMS AND GLOSSARY OF TERMS

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA/GH</td>
<td>Office of the Assistant Administration for the Bureau of Global Health</td>
</tr>
<tr>
<td>ACOR</td>
<td>Assistant Contracting Officer Representative</td>
</tr>
<tr>
<td>AMS</td>
<td>Administrative Management Staff</td>
</tr>
<tr>
<td>ARS</td>
<td>Accruals Report System</td>
</tr>
<tr>
<td>ATV</td>
<td>Anti-Terror Verification</td>
</tr>
<tr>
<td>BPA</td>
<td>Blanket Purchase Agreement</td>
</tr>
<tr>
<td>CCN</td>
<td>Cooperating Country Nationals</td>
</tr>
<tr>
<td>CE</td>
<td>Cost estimate</td>
</tr>
<tr>
<td>CO</td>
<td>Contracting Officer</td>
</tr>
<tr>
<td>COI</td>
<td>Conflict of Interest</td>
</tr>
<tr>
<td>COR</td>
<td>Contracting Officer Representative</td>
</tr>
<tr>
<td>CST</td>
<td>USAID’s Contractor Salary Threshold</td>
</tr>
<tr>
<td>DD/SEA</td>
<td>Deputy Director/Senior Evaluation Advisor</td>
</tr>
<tr>
<td>Dexis</td>
<td>Dexis Consulting Group</td>
</tr>
<tr>
<td>DH</td>
<td>Direct Hire</td>
</tr>
<tr>
<td>DHE</td>
<td>Direct-Hire Equivalent</td>
</tr>
<tr>
<td>DSPSS</td>
<td>Department of State Personal Security and Suitability</td>
</tr>
<tr>
<td>eCC</td>
<td>Electronic Country Clearance</td>
</tr>
<tr>
<td>EmLoc</td>
<td>Emergency Locator</td>
</tr>
<tr>
<td>F&amp;A</td>
<td>Finance and Administration</td>
</tr>
<tr>
<td>FAACTs</td>
<td>Dexis accounting department</td>
</tr>
<tr>
<td>FACT</td>
<td>QED’s Accounting Department</td>
</tr>
<tr>
<td>FAO</td>
<td>Senior Finance &amp; Administration Officer</td>
</tr>
<tr>
<td>FSN</td>
<td>Foreign Service National</td>
</tr>
<tr>
<td>FSO</td>
<td>Foreign Service Officer</td>
</tr>
<tr>
<td>GH</td>
<td>Global Health</td>
</tr>
<tr>
<td>GH Pro</td>
<td>Global Health Program Cycle Improvement Project</td>
</tr>
<tr>
<td>GH/HIDN</td>
<td>Office of Health, Infectious Diseases and Nutrition</td>
</tr>
<tr>
<td>GH/P3</td>
<td>Office of Policy, Programs, and Planning</td>
</tr>
<tr>
<td>GH/PDMS</td>
<td>Office of Professional Development and Management Support</td>
</tr>
<tr>
<td>GH/PRH</td>
<td>Office of Population and Reproductive Health</td>
</tr>
</tbody>
</table>
HR  Human resources
HTSOS  High Threat Security Overseas Seminar
IAB  Information Assurance Brief
ICT  Information and Communications Technology
iSOS  International SOS
LID  limited internal distribution
LOE  Level of Effort
LTTA  Long-term technical assistance
MCH  Maternal and child health
NDA  Non-Disclosure Agreement
NGO  Non-governmental Organization
OHA  Office of HIV/AIDS
OHS  Office of Health Systems
OPM  United States Office of Personnel Management
PA  Project Assistant
PM  Program Manager
PMO  Program Management Office
POP  Period of Performance
POV  Personally Owned Vehicle
PSC  Personal Services Contractor
QED  The QED Group, LLC
RSO  Regional Security Officer
SBCC  Social and behavior change communication
SOW  Scope/Statement of Work
STTA  Short-term technical assistance
TA  Technical Assistance
TB  Tuberculosis
TCN  Third-Country Nationals
TD  Technical Directive
TDM  Technical Directive Memo
TDY  Temporary Duty
TL  Team Leader
TPM  Team Planning Meeting
USAID  U.S. Agency for International Development
<table>
<thead>
<tr>
<th>USG</th>
<th>U.S. Government</th>
</tr>
</thead>
<tbody>
<tr>
<td>USN</td>
<td>U.S. Nationals</td>
</tr>
</tbody>
</table>
ANNEX B. TOOLS AND RESOURCES

ISO Country Alpha-3
Assignment Tracker - Egnyte - https://www.egnyte.com/how-it-works/cloud-sync-share.html
Google Account access
Right Signature
Cost Estimate Cheat Sheet
Per Diem Rates
  - International
  - CONUS
International SOS Enrollment Form
Visa
Tips for developing a consultant SOW
Sample email to potential candidate
1420 Biographical Data Sheet and Instructions
Helpful language for negotiating a daily rate
Recruitment tracker template
GH Pro information sheet
Sample rejection email
Conference Lines
Anti-Terror Verifications/Visual Compliance:
Restricted Party Screenings: https://www1.visualcompliance.com/vce/rps.cfm

Estimating Assignment Costs
Company-specific cost estimate templates. (Templates included here show the most typical PMO charge of 25%; templates for 20% and 30% PMO charge are located in the electronic folder.)
Fly America Act
Open Skies Act
- What is Open Skies?

2014 SOS Rate Sheet
Technical Directive Memo template
TDM Template
Reporting Cover Sheet
SF-182 Instructions (see also: Annex C)
ANNEX C. SECURITY TRAINING

High Threat Security Overseas Seminar (HTSOS)

GH Pro High Threat Security Overseas Seminar (HTSOS) Registration Process

(Updated November 4, 2016)

USAID’s Office of Security introduced a new High Threat Security Overseas Seminar (HTSOS) online training program in early 2014. Given that completion of HTSOS is often a prerequisite for electronic Country Clearance (eCC) approval, and GH Pro must submit the Certificate of Completion with each eCC request, HTSOS is mandatory for all GH Pro consultants who will travel to missions in Africa, Afghanistan, Pakistan, and Mexico.

Information to share with GH Pro consultants:

- **Type of training:** Online.
- **Registration:** The consultant will receive an email directly from the Foreign Service Institute (FSI) confirming registration, which will include a web link to the course.
- **Length:** The course is estimated to take five hours to complete.
- **Timing:** The course must be completed before the consultant travels.
- **HTSOS Certificate of Completion:** GH Pro consultants must save a copy of the Certificate of Completion and send it to GH Pro for retention. The HTSOS certification is valid for five years.

Note to GH Pro Program Managers:

- **Cost:** Enrollment in the HTSOS training is $55. This expense must be factored into the cost estimate for the assignment. Add this as a line item under “travel” expenses.
- **LOE required to complete HTSOS Training:** Please factor five to eight hours of LOE into the cost estimate for the assignment. This will allow the consultant to bill for the time s/he requires to complete the training.
- **Timeline for processing:** Given that the registration requires approvals from several USAID points of contact (POCs) and the course takes at least five hours to complete, please begin the registration process as early as possible.
- **Registration process and estimated time to complete this requirement:** Please inform the consultant that GH Pro will register him or her for the training and that it will require approximately five hours of his or her time to complete.
- **Notifications:** FSI does not notify GH Pro when the consultant is registered for HTSOS. Please ask your consultant to notify you when they receive the registration email and complete the online course.
- **Submitting certificate with eCC:** Please remember to submit the Certificate of Completion with each eCC request.
Important Notes for Completing the SF-182:

- **Protect personally identifiable information (PII):** Please ensure that the consultant’s PII (date of birth (DOB), SS#, phone number) is not included on the form when it is shared with USAID and Dexis representatives for approval. Add this information as a last step before the form is submitted to FSI.

- **Adding text boxes:** The form will likely be shared with you as a scanned document. You may need to add text boxes to the form using Adobe Acrobat’s Text tool (see section below on Billing and PII information).

- **Collecting signatures:** Send the form to each person for signature one at a time. Most USAID POCs do not use RightSignature and prefer to print and sign the form. Dexis Contracts Manager, Dexis Contract Manager, prefers to use RightSignature.

- **Share daily rate with USAID COR:** It’s helpful to include the consultant’s daily rate in the email to the COR and Office of Professional Development and Management Support (PDMS) representative. This information helps USAID to determine the GS grade equivalent and complete Section A – boxes 14 and 16.

- **Privacy Act Statement:** This section does not apply to GH Pro consultants.
How to Complete the HTSOS Enrollment Form

I. Prepare an SF-182 for each consultant:

Section A: Trainee Information

1. Complete Fields 1, 6, 9, and 13 with the consultant’s information.
   \textbf{Important Note:} \textit{Do not} include the personally identifiable information (address, DOB, SS# and phone number) at this time. This information is added to the form immediately before it is submitted to FSI.

2. Complete Fields 7 and 8 with information about the USAID requestor (Office or Mission).
3. Leave Fields 10 through 12 as already populated.
4. Leave Field 14 blank.
5. Complete Fields 15 through 17 by referencing the General Schedule 2016 Salary Table (available at the end of this document).
   - Field 15 will remain the same for each consultant: 15. Series: 685.
   - To complete fields 16. Grade and 17. Step, please compare the consultant’s daily rate to the GS 2016 Salary Table.

Section B: Training Course Data

1. Leave 1a, 1c, and 1d blank unless the consultant will also complete the Foreign Affairs Counter Terrorism (FACT) training.
2. Leave 2a and 2b as already populated.
3. Complete Fields 3 and 4 by estimating the training date. The course is often completed in one day.
4. Leave Fields 5-17 as already populated.
5. Update Field 18 to state: “Training will be completed to prepare traveler for potential security issues while based at/traveling to USAID/XXX [Office or County Name].”

Section C: Costs and Billing Information

1. Leave this section as is unless your consultant will also complete the FACT training. If the consultant will also enroll in FACT, the cost of that training must be noted here as well. Please confirm the cost of the FACT training before you submit the SF-182.
2. List Dexis Contracts Manager’s name in Field 6. Billing Instructions. Do not add GH Pro’s credit card (CC) information to Field 6 at this time. CC information will be added just before sending the completed form to Dexis Contracts Manager.

II. Request Approvals:

Section D: Approvals
The Program Manager should secure signatures from the following parties in the following order:

1. The USAID assignment POC (Listed as Immediate Supervisor)
2. GH Pro USAID COR (listed as Second-Line Supervisor)
3. USAID GH/PDMS Supervisor (listed as Training Officer)
4. Dexis Contracts Manager (listed as Authorizing Official)

See the email template in the HTSOS folder (Z:\Shared\GH PRO\FACT & HTSOS Trainings) for assistance drafting the request for USAID authorization. The request to the COR and PDMS Supervisor should include a note stating the consultant’s daily rate and approximate GS Grade and Step.

III. Billing and PII:

CC and PII

Once the SF-182 is signed by all required parties:

1. Add the Dexis GH Pro credit card info under Dexis Contracts Manager name in Section C – box 6. Ensure the CC information is exactly as shown in the example SF-182 below. Send the form to Dexis Contracts Manager for signature.
2. Create a square in RightSignature for Dexis Contracts Manager to sign her name in the box next to the credit card information.

**Important Note:** There is no signature area on the form but FSI requires her signature next to the CC number. Be sure to add a text box to the right of Dexis Contracts Manager’s name.

3. Once Dexis Contracts Manager signs the form, add the consultant’s PII to Section A – Fields 2, 3, 4, and 5.
4. Complete a Credit Card Authorization (CCA) form and maintain this record for GH Pro’s monthly credit card reconciliation efforts.
IV. Submit the completed SF-182 to FSI:

1. Forward the completed registration form to the FSI registrar general email address, (FSIREGISTRARHT401@state.gov). FSI POCs are XXXXX XXXX (703-xxx-xxxx) and XXXX XXXXX (703-xxx-xxxx).

V. Inform Consultant of Registration:

1. Remind consultant that s/he will receive an email from FSI with information necessary to access the course.
2. Ask the consultant to complete the HTSOS course as soon as possible. Many USAID Missions will not approve an eCC until the consultant completes HTSOS.
3. Please remind the consultant to forward the Certificate of Completion to GH Pro. The certificate remains on file with GH Pro.
FACT Training

OT611 - Foreign Affairs Counter Threat Course
## ANNEX D. CLOSE-OUT CHECKLISTS

### Assignment/Technical Directive Close-out Checklist

<table>
<thead>
<tr>
<th>Assignment/Technical Directive No:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment/Technical Directive Name:</td>
<td></td>
</tr>
<tr>
<td>Deltek Code:</td>
<td></td>
</tr>
<tr>
<td>Assignment Start Date:</td>
<td></td>
</tr>
<tr>
<td>Assignment End Date:</td>
<td></td>
</tr>
<tr>
<td>Assignment Location:</td>
<td></td>
</tr>
<tr>
<td>Assignment Team Size:</td>
<td></td>
</tr>
<tr>
<td>Team Name(s) and Role(s):</td>
<td></td>
</tr>
</tbody>
</table>
To Be Completed by Program Manager

<table>
<thead>
<tr>
<th>Item</th>
<th>Program Manager Completed</th>
<th>Management Confirmed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original SOW</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Final Revised SOW</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Final Cost Estimate (CE) and any amendments</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Signed TDM</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Signed TDM Amendments</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Memos</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Cable/Travel Clearance</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Fully Executed Consultant Agreement and any modifications</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Purchase Orders/Subcontract</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Fully Executed PO</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Audited Financials</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• References</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Negotiation Memo</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Budget</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Duns Number</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• NICRA</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Audited Balance Sheet/P&amp;L (if there is no NICRA)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Cost Notes</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Itineraries and Invoices for all consultant travel including changes</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Memos</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Final Report/Deliverables have been received and approved</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>508 Compliant, if applicable</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Correspondence/Comments about Report</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Inventory Purchase and Disposition Forms</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Collect Client/Evaluation rating form(s)</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Final Report saved to DEC, if applicable</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

Project Director Approval

<table>
<thead>
<tr>
<th>Signature:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Name:</td>
<td>Date:</td>
</tr>
</tbody>
</table>
To Be Completed by Finance Department:

<table>
<thead>
<tr>
<th>Item</th>
<th>F &amp; A Completed</th>
<th>Management Confirmed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Following documents are on file for each consultant:</td>
<td>☒</td>
<td>☒</td>
</tr>
<tr>
<td>• CV</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 1420 Biographical Data Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Copy of Passport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Medical Evaluation Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Emergency Locator Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Security Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Bank/Wire Information Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• W-9 or W-8 Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify Consultant Invoices</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Days, rates, totals, and allowances do not exceed agreement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Final invoice and TER received</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify Consultant Advances have been reconciled</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>DBA calculation</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Calculated and Posted to Deltek</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outstanding A/P vouchers or Vendor Payments</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Review JSR Costs billed to Client</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• DBA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• MedEx</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Airfare</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review cost estimate</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Total CE vs Actual Costs within Ceiling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify No Unassigned TD TAG/Funding Source</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Review PMO</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>• Verify PMO allocation calculation and billing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Check final allocation vs CE ceiling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Deltek and financial tracker to be sure all CMF info is up to</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>date (e.g., end date, funding, TAG assignments) etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Close Assignment on Financial Tracker/Deltek</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Print Final Financial Reports</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

**Finance & Administration Manager Approval**

<table>
<thead>
<tr>
<th>Signature:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Name:</td>
<td>Date:</td>
</tr>
</tbody>
</table>

After Project Director has approved the checklist save the completed closeout files to Egnyte