Bureau of the Fiscal Service

Vendor Onboarding Training – SIN 518210FM

Financial Management Quality Service Management Office (FM QSMO)

As of: November 2026

Disclaimer

The purpose of this training is for the U.S. Department of the Treasury Financial Management Quality Management Service Office (FM QSMO) to provide a general overview of the application and evaluation process for the FM QSMO SIN (518210FM). This training is not intended to supersede or conflict with any general or specific instructions published by GSA as part of the Multiple Award Schedule (MAS) solicitation, the IT Category attachment thereto, or SIN 518210FM. These materials will be updated periodically to provide additional clarity or information.

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Learning Objectives

By the end of this training, Vendors will have the information needed to:

- Define the purpose of the FM Marketplace and the Financial Management Capability Framework (FMCF). *(Learning Objective 1: FM QSMO Objective)*
- Apply to the FM QSMO Special Item Number (SIN) 518210FM. *(Learning Objective 2: Apply to the SIN)*
- Identify and apply the SIN evaluation criteria relevant to their FM solutions/services. *(Learning Objective 3: SIN Evaluation Criteria)*
- Demonstrate the capability of their Core FS offering to meet the FMCF. *(Learning Objective 4: Core FS Evaluation)*
- Differentiate the types of acquisition activities that occur during and after the FM Marketplace entry level evaluation. *(Learning Objective 5: Agency Acquisitions)*

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FM QSMO Overview

FM Marketplace Delivery Approach

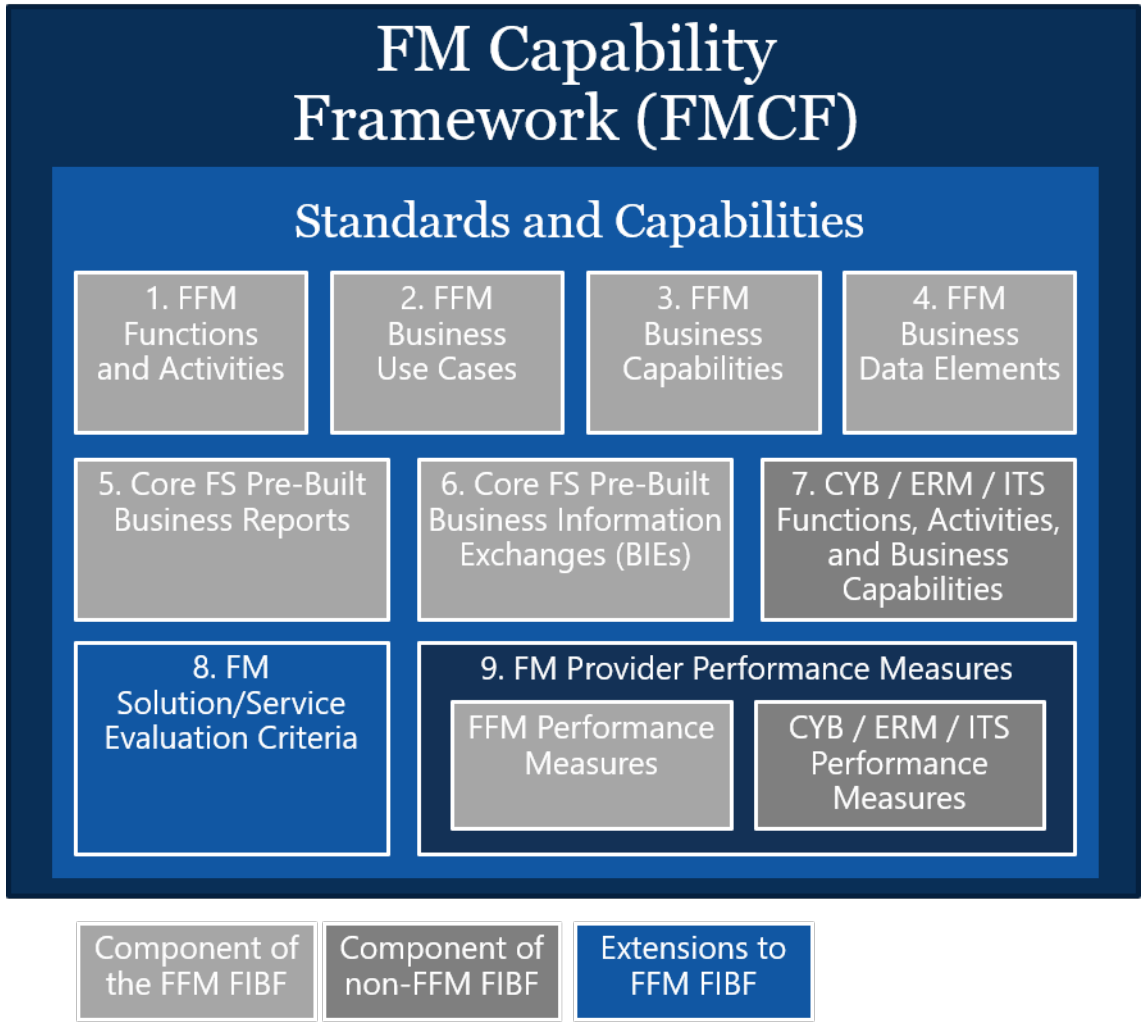
The FM QSMO acts as the broker between agencies and commercial/federal solutions. Solutions are centrally coordinated, standards are embedded within them, and there is a unified effort to achieve goals.



Financial Management Capability Framework

The Financial Management Capability Framework (FMCF) is the set of standards and capabilities that define baseline needs for services and solutions in the FM Marketplace, including requirements for cloud-based core financial systems (Core FS).

- The FMCF serves as contractual requirements of SIN 518210FM.
- The FMCF consists of nine (9) sections or components, depicted in the visual to the right.
- The FMCF artifacts can be found on the FMCF webpage.
- The FMCF is used as a basis for evaluating and ensuring that Marketplace services and solutions meet baseline needs.
- Only a subset of FMCF artifacts may apply to a service or solution, depending on the type of vendor offering being delivered.



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FM QSMO SIN Application and Evaluation Process

Background

GSA, in partnership with FM QSMO, established a new Special Item Number (SIN) 518210FM under the existing GSA Multiple Award Schedule (MAS) contract vehicle to provide access to commercial offerings of the FM Marketplace.

The application and evaluation approach ensures that approved vendors contribute to FM QSMO's vision of a marketplace of quality solutions/services that drives innovation, compliance with federal policies, standardization, and automation.

SIN Highlights:

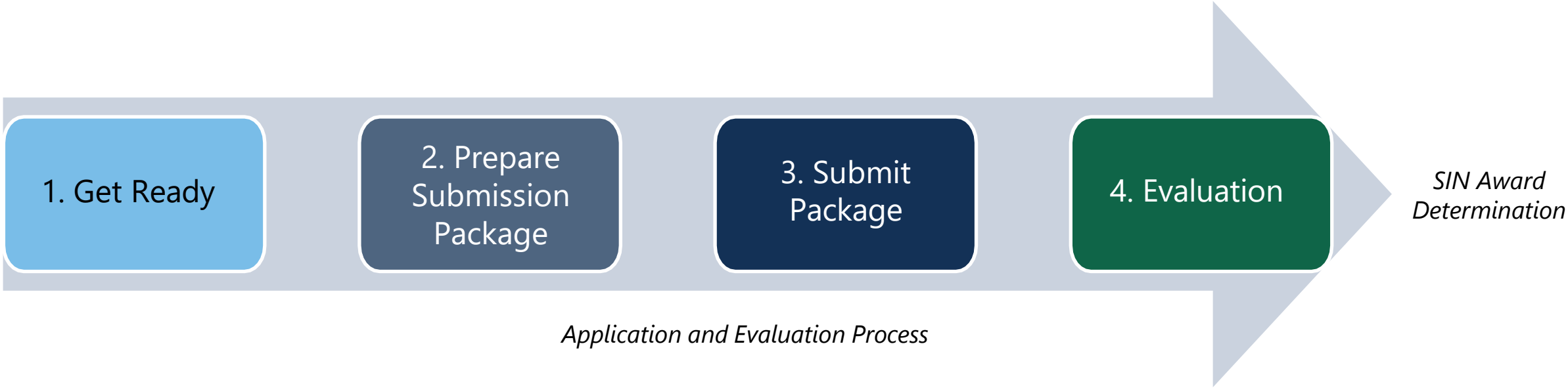
- GSA serves as the contracting activity for the SIN.
- FM QSMO conducts technical evaluations of vendors applying to the SIN.
- The SIN is available for continuous vendor onboarding.
- Agencies will be able to place orders against the GSA MAS contracts for offerings under the SIN.

The scope of the SIN includes:

- **Core FS Solutions** – partially pre-configured FM software suites offered in a cloud environment.
- **Additional FM Solutions** – capabilities that augment those provided in the Core FS such as reporting tools, business information exchanges, analytics and intelligence.
- **FM Adoption and Transition Services** – services to identify, select, migrate to FM offerings such as planning, data conversion, IV&V, integration support.
- **FM Technology Operations Support** – support and assistance with implementations and operations such as development, testing, service desk, O&M, and legacy financial system support.

Apply to the FM QSMO SIN

- Commercial vendors will undergo a multi-step process to be added to SIN 518210FM.
- Understanding the GSA MAS Program is essential to participating in SIN 518210FM. Information, guidance, and resources are available to both new vendors and existing MAS contract holders through the *GSA Vendor Support Center.*
- Questions about the FM Marketplace, FMCF, or technical aspects of SIN 518210FM should be sent to FMQSMO@fiscal.treasury.gov.

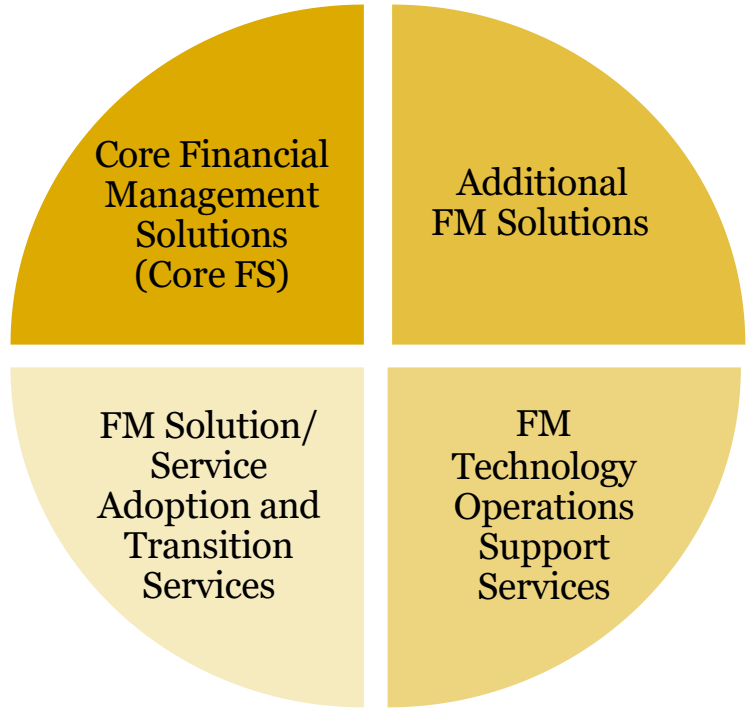


Application and Evaluation Process

Step 1: Get Ready

Vendors must review all relevant FM QSMO onboarding materials and resources (e.g., SIN subgroup descriptions, instructions, FMCF) *before* applying to the Marketplace.

- **Review the SIN 518210FM materials** to determine what solutions/services are within scope of the SIN and their appropriate subgroups.
  - Vendors must assess their offerings against the scope of the SIN and determine the subgroups to which they should apply.
- **Review the following documents** on the FMCF webpage to understand the required FM Marketplace standards and capabilities:
  - **FMCF:** The FMCF is the set of standards and capabilities that are the foundation for all FM solutions and services in the FM Marketplace.
  - **Guide to the FM Marketplace:** This document provides an overview of the FM Marketplace and how the FMCF applies.
  - **Additional FM QSMO Resources:** Templates and documents such as the FMCF 101 Vendor Training enable Vendors to apply the FMCF to their solutions and services.



Subgroups under SIN 518210FM

Step 2: Prepare Submission Package

A complete and responsive vendor submission package for SIN 518210FM will include the following:

Administrative, technical, and pricing offer submission elements required by the GSA MAS solicitation and the IT Category attachment.

Resource: MAS Solicitation

All vendor submission packages include:

- Documentation for proposed offerings using the *FM Solution/Service Definition Template*.
- Technical narrative responses addressing the FM Marketplace entry level evaluation criteria (i.e., self-evaluation/assessment and/or attestation) using the *Technical Narrative Response Template*.
- Volume of supporting documentation referenced in the *FM Solution/Service Definition Template, Technical Narrative Response Template,* and *Core FS Pre-Built BIE Response Template* (if applicable), with a list of the documentation provided.

Resources:

- FM Solution/Service Definition Template
- Technical Narrative Response Template

Submission packages for the Core FS subgroup also include:

- Technical narrative responses addressing the Core FS business information exchange (BIE) capabilities using the *Core FS Pre-Built BIE Response Template*.
- Volume of Operational Capability Demonstration (OCD) reports and BIE files as indicated in the *Core FS OCD Execution Plan*, with a list of the documentation provided.

Resources:

- Core FS Pre-Built BIE Response Template
- Core FS OCD Execution Plan

FM Solution/Service Definition Template

All vendors will complete the *FM Solution/Service Definition Template* as part of their submission package.

Overview

- Document Marketplace Category, Solution/Service Name, and the Solution/Service Description

Business View: *Show the solution/service's alignment to federal financial management*

- Select the FIBF FFM Functions and Activities covered by the solution/service.
- Solutions in the Core FS subgroup must address all FFM Functions and Activities. Solutions/services outside of the Core FS subgroup may address some FFM Functions and Activities, and if so, should be indicated accordingly. A solution/service does **not** need to address all FFM Functions and Activities.

Asset View:

Service Delivery Layer and Tower – Sub Tower: ***What*** *is used to* ***build*** *the solution/service*

Service Delivery Resource and Cost Pool: ***How*** *to* ***provide*** *the Service Delivery Layers*

- Select the Service Delivery Layers that are covered by the solution/service. The Service Delivery Layers, broken down by Tower – Sub Tower, describe the basic building blocks of a solution/service.
- Select the Service Delivery Resources that are covered by the solution/service. The Service Delivery Resources, broken down by Cost Pool, describe the means by which the work to provide the services identified in the delivery layers is performed (i.e., using technology, workforce, and/or advisory).
- The *FM Solution/Service Evaluation Criteria* component of the FMCF relies on the vendor indicating whether they are providing a type of Services or Technology. Solution/Service offerings that include "Workforce" and/or "Advisory" resources are considered "Services" and offerings that include "Technology" resources are considered a type of "Technology" offering.

Service Provider and Service Customer Key Responsibilities: ***Who*** *is responsible for supporting the solution/service*

- Indicate the key responsibilities of the Service Provider delivering and the Service Customer using the FM solution/service package, organized by Information Technology Infrastructure Library (ITIL) Practice.

Submission Requirements for All Marketplace Offerings

All vendors will provide the following as part of their submission package:

Technical Narrative Responses

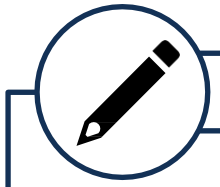
- Vendors will use the *Technical Narrative Response Template* to address the FM Marketplace entry level evaluation criteria for their proposed offerings.
- Referencing the *FM Solution/Service Evaluation Criteria* component of the FMCF as a guide, vendors will describe how their proposed offerings meet the relevant capabilities.
- **Note**: Only a subset of evaluation criteria will apply depending on the type of offering (e.g., Services Only, Other Technology, or Core FS) being proposed.

Volume of Supporting Documentation

- Vendors may reference pre-existing documentation to support their *FM Solution/Service Definition Template, Technical Narrative Response Template,* and *Core FS Pre-Built BIE Response Template* (if applicable). For example, vendors may reference existing solution end-user documentation, existing vendor program/process documentation, evidence of independent evaluation of vendor operational security, and evidence of solution FedRAMP status.
- **Vendors must clearly indicate where pre-existing documentation is referenced by providing the source document title, section, page number and paragraph**.

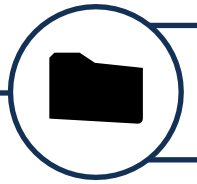
Additional Submission Requirements for Core FS Solutions

Vendors proposing Core FS solutions will also provide the following as part of their submission package:



Core FS Pre-Built BIE Response

- Vendors will prepare a technical narrative responses addressing the Core FS BIE capabilities using the *Core FS Pre-Built BIE Response Template*.
- Referencing the *Core FS Pre-Built BIEs* component of the FMCF as a guide, vendors will describe how their proposed offerings meet the relevant BIE capabilities.
- Vendors may reference pre-existing documentation to support their *Core FS Pre-Built BIE Response Template* (as well as their *Technical Narrative Response Template*) in the Volume of Supporting Documentation.



Volume of OCD Reports and BIE Files

- Vendors will prepare a volume of OCD reports and BIE files as indicated in the *Core FS OCD Execution Plan*.
- OCD reports and BIE files will be included in the submission package, using the file naming conventions specified in the *Core FS OCD Execution Plan*.

Core FS OCDs

Vendors proposing Core FS solutions will conduct an Operational Capability Demonstration (OCD) using the Core FS OCD Execution Plan.

- Core FS OCDs consist of vendors executing six (6) business scenarios based on selected FIBF FFM Business Use cases, Functions and Activities, and System Requirements.
- Core FS OCDs are conducted using a vendor-maintained instance of the proposed solution in a vendor-provided cloud environment.

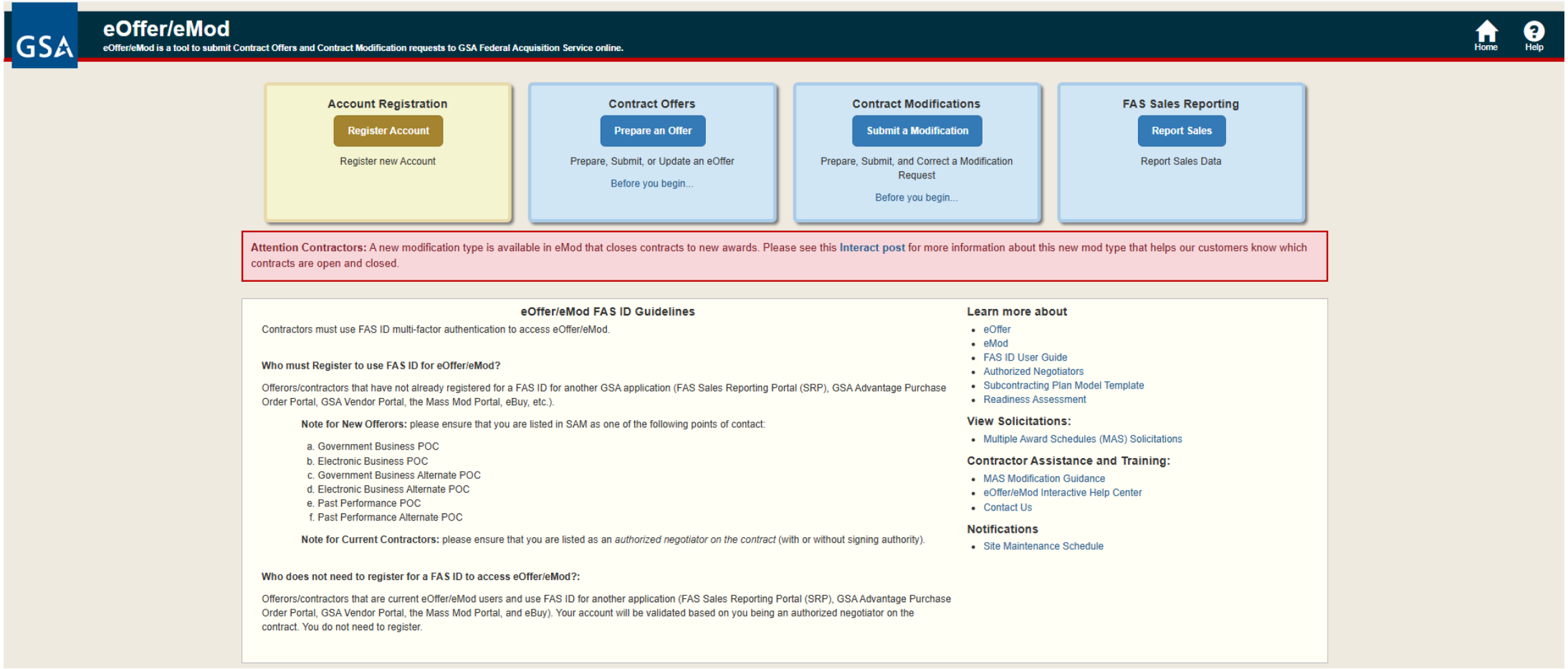
More information is available in the Core FS OCD Quick Reference Guide.

The ***Core FS OCD Execution Plan*** details the six (6) scenarios that vendors will demonstrate as part of their Core FS OCDs.

- Each scenario contains a series of FFM Business Use Cases that capture required Core FS functionality.
- Each scenario "Outline" tab provides sample data and correlation points to applicable FMCF artifacts.
- Each scenario "Demonstration" tab maps applicable FMCF components to address Core FS functional requirements.
- Proposed Core FS solutions must adequately demonstrate all functionality detailed in the *Core FS OCD Execution Plan*.

Step 3: Submit Package

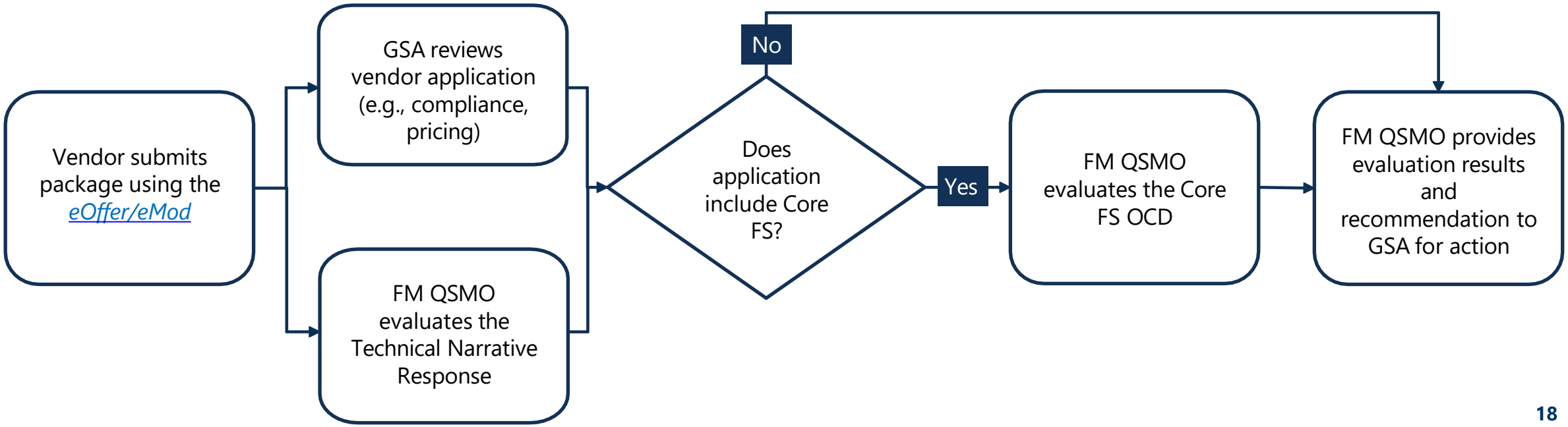
The vendor will submit the package through eOffer/eMod, a tool to submit Contract Offers and Contract Modification requests to GSA Federal Acquisition Service online.



Step 4: FM QSMO Evaluation

After the vendor submits the package, the evaluation process will begin.

- GSA will evaluate the general administrative, technical, and pricing elements of vendor submissions. The FM QSMO will evaluate the SIN 518210FM specific technical elements based on the *FM Solution/Service Evaluation Criteria* component of the FMCF.
- **Core FS Providers Only:** Core FS vendors will demonstrate the capabilities of their proposed Core FS solution live during the Core FS OCD evaluation.
- For each evaluation category/criteria, vendor submissions will be rated as "Acceptable" or "Unacceptable" based on review of documentation and/or demonstration of compliance with applicable components of the FMCF.



Technical Narrative Response Evaluations

For all vendors and all proposed solutions/services, the FM QSMO will conduct an evaluation of the technical narrative responses.

Key Points

- Evaluation includes review of vendor documentation for up to five (5) categories as follows:
  - **Business**: How the services support business activities and processes specified in the FIBF FFM standards and/or FMCF.
  - **Technology Design**: How the technology solution supports business activities and processes specified in the financial management Technical and Operations standards of the FMCF and relevant Federal IT standards and requirements.
  - **Technology Operations**: How the technology solution responds to user demand and needed changes.
  - **Programmatic:** Strategy for and management of the service offerings and delivery.
  - **Organizationa**l: Organizational ability to deliver quality FM services and ensure customer satisfaction.
- FM QSMO will evaluate vendor technical narrative responses to SIN 518210FM; agencies may conduct further evaluation at the agency acquisition level.

Technical Narrative Response

Evaluation Categories	Vendor Offering Type		
	Services Only	Other Technology	Core FS
Business	✓	✓	✓
Technology Design		✓	✓
Technology Operations		✓	✓
Programmatic	✓	✓	✓
Organizational	✓	✓	✓

Core FS OCD Evaluations

For vendors proposing Core FS solutions, the FM QSMO will also conduct an OCD evaluation.

Key Points

- Upon determining acceptable results from the technical narrative response evaluation, the FM QSMO will contact the vendor to schedule the OCD.
- Core FS OCD evaluations will include both a live demonstration of the proposed solution by the vendor and FM QSMO review of the OCD reports and BIE files as outlined and specified in the *Core FS OCD Execution Plan*.
- The OCD is limited to approximately eight (8) hours in total. Vendors have the flexibility to conduct the OCD in a single day or across two consecutive business days within the same week.
- The FM QSMO allows agencies to participate in the OCDs in either an observational or advisory capacity.

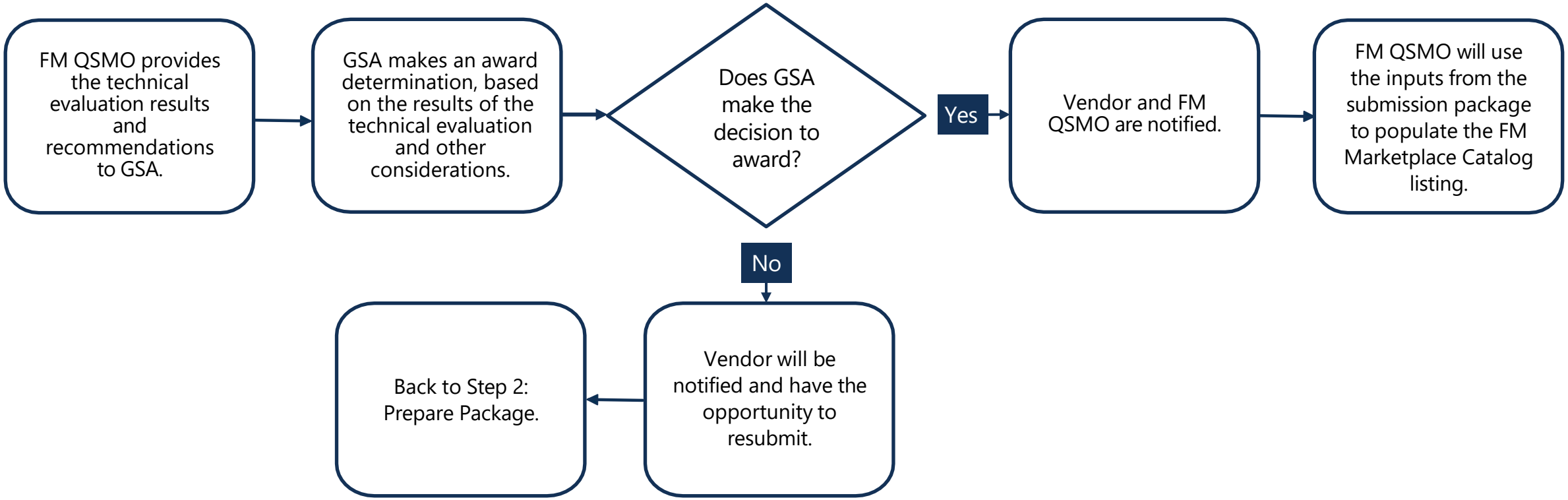


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SIN Award Determinations and Agency Acquisitions

SIN Award Determination and Onboarding

When an evaluation is complete, the FM QSMO will provide the results and a recommendation to GSA, who will make the final award decision. Once the SIN is awarded, vendors may participate on opportunities in the FM Marketplace.



Agency Acquisitions

- Agencies will satisfy fair opportunity and conduct further evaluation of vendors and solutions/services at the agency acquisition level.
- The agency acquisition process under SIN 518210FM expands on the GSA MAS ordering procedures with pre-solicitation and post-award activities, which are outlined in the Agency Acquisition Guide.
- Agency-specific requirements may be defined in addition to the FMCF standards and capabilities. **Therefore, vendors offering solutions/services through the FM Marketplace may be expected to demonstrate their ability to meet additional agency-specific requirements as needed.**
- Prior to issuing solicitations under the SIN, agencies will submit their procurement materials to the FM QSMO Task Order Review Board (TORB) to ensure alignment with the FMCF. Agencies will provide copies of their awards to the FM QSMO.



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Key Takeaways

Key Takeaways

1. The FM QSMO manages a marketplace of solutions and services to help agencies meet their financial management needs. The Financial Management Capability Framework (FMCF) defines baseline standards and capabilities for solutions and services in the FM Marketplace. *(Learning Objective 1: FM QSMO Objective)*

2. All vendors will submit a completed *FM Service/Solution Definition Template* for each offering, technical narrative responses, and a volume of supporting documentation. Vendors proposing Core FS solutions will provide additional BIE narrative responses and OCD reports and BIE files. *(Learning Objective 2: Apply to the SIN)*

3. Vendors' submission packages will be evaluated against the criteria outlined in the *FM Solution/Service Evaluation Criteria* component of the FMCF. The applicable criteria are dependent on the type of offering being proposed (e.g., Services Only, Other Technology, or Core FS). *(Learning Objective 3: SIN Evaluation Criteria)*

4. For proposed Core FS solutions, vendors will demonstrate their solution by successfully executing six (6) business scenarios based on selected FIBF Business Use Cases, Functions and Activities, and System Requirements. *(Learning Objective 4: Core FS Evaluation)*

5. Agencies will conduct acquisitions under SIN 518210FM, which may include agency-specific requirements in addition to the FMCF. *(Learning Objective 5: Agency Acquisitions)*

Thank You



Email the FM QSMO at FMQSMO@fiscal.treasury.gov



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