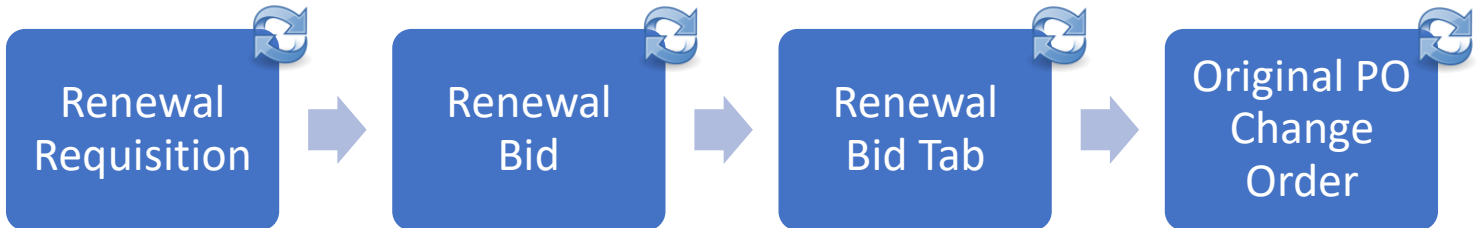





14 Exercising A Renewal


GOAL: Create a renewal in accordance with the original terms of a contract.




Stage	Tab	Task	Who
Requisition			
Renewal REQ	🔒 Home Screen	<u>Option 1:</u> 🔒 Create new Req. Add document. Click on the “+” sign to the right of the BidBuy logo 🔒 Requisition <u>Option 2:</u> 🔒 Clone the original Requisition being renewed.	Agency
	🔒 General Tab	🔒 Short Description: Begin with “Renewal Notice” 🔒 Requisition Type: Open Market 🔒 Type Code: Select as appropriate 🔒 Link to Original Contract: Select Magnifying glass to search for original PO and select	Agency
	🔒 Items	Add one line-item for total renewal with estimated cost. 🔒 Add Open Market Item 📄 Description: Explain Renewal Request (Renewal 1 of 2 with general description of items) 🔒 Qty: Enter as appropriate 🔒 Unit Cost: Enter Renewal Cost 🔒 UOM: Select 🔒 NIGP Codes: Enter by using dropdown or search by clicking 🔍 🔒 Save & Exit	Agency
	🔒 Vendors	<u>Vendors will be added at the Bid Stage in the Bidders Tab</u>	


	<p>✓ Address Tab</p> <p>Shipping</p> <p>Option 1: Ship to/Bill to ALL items to <u>one location</u></p>	<p>✓ To change Ship-to or Bill-to-Address, click  to search for new address</p> <p>✓ Enter Search Criteria or enter nothing to receive all addresses</p> <p>✓ Click Find It</p> <p>✓ Select a new address</p> <p>✓ Click Select to update address</p> <p>✓ Click Save & Continue to save changes and continue</p> <p>✓ To apply changes to Ship-to to all items on Requisition - Click Apply Ship-to to All Items</p> <p>✓ To apply changes to Bill-to to all items on Requisition - Click Apply Bill-to to All Items</p> <p>Important: This will override any selections made at the address Sub-Tab for the Item Tab.</p>	Agency						
	<p>✓ Items Tab – Address Sub-Tab</p> <p>Shipping</p> <p>Option 2: Ship to/Bill items to <u>multiple locations</u></p>	<p>✓ Go to the Items Tab – Address Sub-tab</p> <p>✓ Select the check box in the ‘Select All’ column next to the item to change address (Ship/Bill to Address)</p> <p><i>For DA Users:</i></p> <ul style="list-style-type: none"> ✓ Select desired address from dropdown menu ✓ Click Apply to Selected <p><i>For BP Users:</i></p> <ul style="list-style-type: none"> ✓ Click  at the lower part of the screen next to the Ship-to Address or Bill-to address ✓ Enter Search Criteria for address desired ✓ Click Find It ✓ Select radio dial next to desired address ✓ Click Select <p>✓ To apply changes to only selected items - Click Apply to Selected</p> <p>✓ Click Save & Continue to save changes and continue</p> <p><i>To reset all addresses to the default from the Address Tab - Click Reset Selected to Header</i></p>	Agency						
	<p>✓ Accounting</p> <p>Note:</p> <p>Accounting Tab triggers the approval paths</p>	<p>✓ Click  to search Accounting Codes</p> <p>✓ Click “Find It”</p> <p>✓ Select “Renewals”</p> <p>✓ Click “Save Based on Percentages”</p> <p>✓ Click “Rebuild for All Items”</p>	Agency						
	<p>✓ Attachments</p>	<p>✓ Add File</p> <table border="1" data-bbox="649 1659 1250 1848"> <thead> <tr> <th><u>Document</u></th> <th><u>Show to Vendor</u></th> </tr> </thead> <tbody> <tr> <td>Procurement Justification Form</td> <td>No</td> </tr> <tr> <td>BEP Goal Setting Review Form</td> <td>No</td> </tr> </tbody> </table>	<u>Document</u>	<u>Show to Vendor</u>	Procurement Justification Form	No	BEP Goal Setting Review Form	No	Agency
<u>Document</u>	<u>Show to Vendor</u>								
Procurement Justification Form	No								
BEP Goal Setting Review Form	No								

		Any All-Agency or Agency specific Forms	No		
		Any communications for the procurement file	No		
	Summary	Submit for Approval			Agency
Conduct Approvals					
Convert to Bid Note: This is to post the Renewal Notice to the public. It is not requesting a bid from the public.	Home Screen	<u>Option 1:</u> Requisitions Ready for Purchasing Box Requisition Hyperlink <u>Option 2:</u> Requisitions → Ready for Purchasing → Requisition Hyperlink <u>Option 3:</u> Recent Documents			Agency
	Summary Tab of the Req	Convert to Bid Ok Bid Document Hyperlink			Agency
Bid					
BID	General	Short Description: Begin with “Renewal Notice” Type Code: 70 – Renewal Allow Electronic Response: Uncheck Bid Available Date: Now Enable Rolling Enrollment: Check Bid Opening Date: Allow for approvals and the required 14-day public posting period. Bulletin Description: Begin with “RENEWAL NOTICE THIS IS NOT A SOLICITATION:” Details of the Renewal Period SPO Name: Enter Is this a Small Business Set Aside Procurement?: Yes/No Is there a BEP/VBP Participation Goal? Yes/No Link to Original Contract (PO): Select PO with magnifying glass (if not done already at the Req) Complete Remaining Fields Save & Continue			Agency
	Accounting Tab	Review and revise as necessary Note if any items were added: Save Based on Percentages Rebuild For All Items			Agency
	Attachments	Add Files			Agency

		<u>Document</u>	<u>Show to Vendor</u>	
		Unsigned Notice of Award	No	
		Comptroller Offset	No	
		\$250K PPB questions	No	
		Forms A OR:	No	
		Forms B and IPG printouts including ownership information OR:	No	
		Certificate of No Change	No	
		Conflict of Interest review form	No	
		Draft or Vendor Signed Renewal Document	No	
		Approved Goal Setting Forms	No	
		All-Agency and Agency specific forms	No	
		Communications for the file	No	
	<input checked="" type="checkbox"/> Bidders Tab	<input checked="" type="checkbox"/> Lookup and Add Vendors <input checked="" type="checkbox"/> Select NIGP Code <input checked="" type="checkbox"/> Find It <input checked="" type="checkbox"/> Select all vendors <input checked="" type="checkbox"/> Save & Exit <input checked="" type="checkbox"/> Select Bidder Participation: Unrestricted Bid <input checked="" type="checkbox"/> Hide Bid Holders List on Vendor Side: Check <input checked="" type="checkbox"/> Save & Continue		
	<input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Submit for Approval		Agency
Conduct Approvals 				
Send Bid	<input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Select Change bid status to "Sent" and Notify Vendors <input checked="" type="checkbox"/> Send Bid <input checked="" type="checkbox"/> Click OK		SPO
PPB Waiver (if renewal is \$250K and above)	<input checked="" type="checkbox"/> Reminder Tab of the Bid	Send Reminder to PPB <input checked="" type="checkbox"/> Select Due Date <input checked="" type="checkbox"/> Select Days Prior to Remind – 14 <input checked="" type="checkbox"/> Comment: Waiver Request <input checked="" type="checkbox"/> Remind Whom: PPB Waiver/Other <input checked="" type="checkbox"/> Send Email - Check		SPO
Bid Amendment (to publish SPO-signed Notice of Award)				

Bid Amendment	✓ Amendments Tab	✓ Create Amendment	SPO									
	✓ Attachments Tab	✓ Add File <table border="1"> <tr> <td><u>Document</u></td> <td><u>Show to Vendor</u></td> </tr> <tr> <td>SPO Signed NOA</td> <td>Yes</td> </tr> </table>	<u>Document</u>	<u>Show to Vendor</u>	SPO Signed NOA	Yes	SPO					
<u>Document</u>	<u>Show to Vendor</u>											
SPO Signed NOA	Yes											
	✓ Summary Tab	Add Comment: This is not a solicitation for bids. This is a Notice of Contract Renewal. ✓ Save and Continue ✓ Apply Bid Amendment	SPO									
Bid Tab Note: Bid Tab is required to interface with the PPB Clearinghouse												
Create Quote	✓ Summary Tab of the Bid	✓ Open Bid (at bottom of the page) ✓ Select Bid Tab (at bottom of the page)	Agency									
	✓ Summary Tab of Bid Tab	✓ Create New Quote	Agency									
	✓ Quote General Tab	✓ Vendor Name ✓ Received Date ✓ Are you registered and active in the IPG? ✓ Did you attach Forms A or Forms B?	Agency									
	✓ Quote Items Tab	✓ Enter Price to match Renewal Pricing ✓ Save & Continue	Agency									
	✓ Quote Terms & Conditions Tab	✓ Select Yes	Agency									
	✓ Quote Attachments Tab	✓ Add File <table border="1"> <tr> <td><u>Document</u></td> <td><u>Show to Vendor</u></td> <td><u>Confidential</u></td> </tr> <tr> <td>Any updated documents</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Any communications for the file</td> <td>No</td> <td>Yes</td> </tr> </table> <p>Note: ALL documents attached to quote must be marked confidential.</p> ✓ Save & Continue	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Any updated documents	No	Yes	Any communications for the file	No	Yes	Agency
	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>									
	Any updated documents	No	Yes									
Any communications for the file	No	Yes										
✓ Quote Summary	✓ Review Data ✓ Submit Quote ✓ Back to Bid	Agency										
✓ Bid Tab Items Tab	✓ Select Vendor for Award -> Award All or by line item ✓ Save & Continue	Agency										

	<input checked="" type="checkbox"/> Bid Tab <input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Submit for Approval <input checked="" type="checkbox"/> Continue	Agency												
Conduct Approvals 															
STOP HERE – DO NOT CONVERT TO PO															
Access Original PO	<input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Navigate to Original PO	Agency												
Create Change Order to Original PO	<input checked="" type="checkbox"/> Change Order Tab	<input checked="" type="checkbox"/> Create Change Order	Agency												
	<input checked="" type="checkbox"/> General Tab	<input checked="" type="checkbox"/> Update Fields (<i>keep notes for Bold Fields</i>) <input checked="" type="checkbox"/> Actual Contract Begin Date: Do not change <input checked="" type="checkbox"/> Number of Renewals (number of times you can renew): Reduce as appropriate <input checked="" type="checkbox"/> Number of Renewal Terms: (number of units in one term): optional, change if required per renewal agreement <input checked="" type="checkbox"/> Renewal Term Units (renewal indicator; ex. Months, years, etc.): optional, change if required per renewal agreement <input checked="" type="checkbox"/> Next Renewal Start Date: Update <input checked="" type="checkbox"/> Renewal Bid#: Enter the Renewal Bid Document # <input checked="" type="checkbox"/> Save & Continue	Agency												
	<input checked="" type="checkbox"/> Items Tab	<u>For Items that WILL NOT be renewed:</u> <input checked="" type="checkbox"/> Edit short description if necessary – ADD TO END OF DESCRIPTIONS – i.e., NOT VALID FOR ORDERING <input checked="" type="checkbox"/> Zero out each item unit cost, quantity, discount, etc. that will not be renewed. <input checked="" type="checkbox"/> Zero out target value custom column. <u>For items that WILL BE renewed:</u> <input checked="" type="checkbox"/> Update as necessary <i>If necessary, update accounting information for current renewal term.</i>	Agency												
	<input checked="" type="checkbox"/> Control Tab	<input checked="" type="checkbox"/> Master Blanket/Contract End Date: Update to new end date													
	<input checked="" type="checkbox"/> Attachment	<input checked="" type="checkbox"/> Add File <table border="1" data-bbox="600 1512 1274 1911"> <thead> <tr> <th><u>Document</u></th> <th><u>Show to Vendor</u></th> <th><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Vendor signed renewal</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Published Renewal NOA</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>IOC Offset (if 30 days since publication of renewal)</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table>	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Vendor signed renewal	No	Yes	Published Renewal NOA	No	Yes	IOC Offset (if 30 days since publication of renewal)	No	Yes	Agency
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>													
Vendor signed renewal	No	Yes													
Published Renewal NOA	No	Yes													
IOC Offset (if 30 days since publication of renewal)	No	Yes													

		Communications for the procurement file	No	Yes											
	Summary	<ul style="list-style-type: none"> Comment for the Whole Change Order: Describe Renewal (Ex. Renewal Option 1 of 3) Custom Field Descriptions: Update and revise to fully explain change Submit for Approval 				Agency									
Conduct Approvals 															
Create Change Order to attach executed Renewal and complete Procurement File	Change Order	Create Change Order				Agency									
	Change Order General Tab	Actual Contract End Date: Change to end of Current Renewal Period				Agency									
PO Change Order	Change Order: Attachments Tab	<p>Verify that Show Vendor is <u>NOT checked</u> for any file or form that should <u>not</u> be accessible to the public.</p> <p>Add Files</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>Document</u></th> <th style="text-align: left;"><u>Show to Vendor</u></th> <th style="text-align: left;"><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Fully Executed Renewal</td> <td>Yes</td> <td>Yes</td> </tr> <tr> <td>Any other documents to complete procurement file</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table> <p>Save & Continue</p>				<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Fully Executed Renewal	Yes	Yes	Any other documents to complete procurement file	No	Yes	Agency
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>													
Fully Executed Renewal	Yes	Yes													
Any other documents to complete procurement file	No	Yes													
		<p>Select the Change Order Subtab, review the approvals, and select Apply Change Order.</p> <p>Please Note: If price is changing for the renewal term: do NOT apply the change order until the Start Date of the change order.</p> <p>Helpful hint: set a reminder to apply the change order on the proper date.</p>													