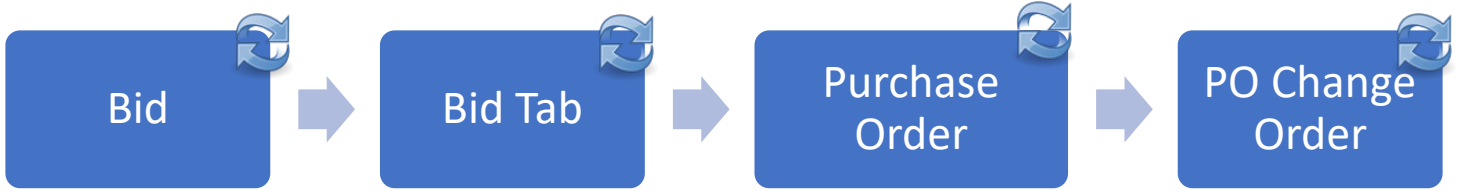




3 CMS Leasing ALT-NON RFI



Stage	Tab	Task	Who
BID			
Create Bid	<input checked="" type="checkbox"/> BidBuy Home Screen	<input checked="" type="checkbox"/> Add Document by clicking the + sign <input checked="" type="checkbox"/> Bid Solicitation <input checked="" type="checkbox"/> Select method to create new bid: Create a bid from scratch <input checked="" type="checkbox"/> Continue	Agency
	<input checked="" type="checkbox"/> General Tab	<input checked="" type="checkbox"/> Description: "CMS [lease number] Notice of Lease Award [agency] [location]" <input checked="" type="checkbox"/> Type Code: 97 – Non RFI/Alt RFI (Facilities Leasing) <input checked="" type="checkbox"/> Allow Electronic Response: Uncheck <input checked="" type="checkbox"/> Bid Available Date: Select today <input checked="" type="checkbox"/> Bid Opening Date: Allow for approvals and the required minimum 14-day public posting period. <input checked="" type="checkbox"/> Enable Rolling Enrollment: Check <input checked="" type="checkbox"/> Info Contact: Complete <input checked="" type="checkbox"/> Bulletin Description: This is a Notice of Lease Award for the [AGENCY] in the City/County of [LOCATION] <input checked="" type="checkbox"/> SPO Name: Enter <input checked="" type="checkbox"/> Is this a Small Business Set-Aside Procurement? : No <input checked="" type="checkbox"/> Is there a BEP/VSB goal? No <input checked="" type="checkbox"/> Save and Continue	Agency
	<input checked="" type="checkbox"/> Items Tab	<u>Add two line items – one for initial term and one for renewal term (if applicable)</u> <input checked="" type="checkbox"/> Add Item <input checked="" type="checkbox"/> Description: Initial Term (or Renewal Term) <input checked="" type="checkbox"/> Quantity: 1 <input checked="" type="checkbox"/> Unit Cost: Enter <input checked="" type="checkbox"/> Unit of Measure: AU (Activity Unit) <input checked="" type="checkbox"/> NIGP Class: 971 <input checked="" type="checkbox"/> NIGP Item: 45 (Office Space) or 91 (Warehouse) <input checked="" type="checkbox"/> Save and Add New if adding another line item or Save and Exit	Agency

	<ul style="list-style-type: none"> 📁 Address Tab 	<ul style="list-style-type: none"> 📁 To change Ship-to or Bill-to-Address, click to search for new address 🖨 Enter Search Criteria 📁 Click Find It 📁 Select a new address 📁 Click Select to update address 📁 Click Save & Continue to save changes and continue 	Agency																																				
	<ul style="list-style-type: none"> 📁 Accounting <p>Note: Accounting Tab triggers the approval paths</p>	<ul style="list-style-type: none"> 📁 Click on 🔍 to search Accounting Codes 📁 Click "Find It" 📁 Select "Not Applicable." 📁 Click "Save Based on Percentages" 📁 Click "Rebuild for All Items" 	Agency																																				
	<ul style="list-style-type: none"> 📁 Attachments 	<ul style="list-style-type: none"> 📁 Add File 👉 Verify that Show Vendor is <i>NOT checked</i> for any file or form that should <u>not</u> be accessible to the public. <table border="1" data-bbox="597 751 1372 1556"> <thead> <tr> <th><u>Document</u></th> <th><u>Show Vendor</u></th> <th><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Signed Notice of Award</td> <td>Yes</td> <td>No</td> </tr> <tr> <td>Approved Space Request</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Best Interest of the State Justification Memo (if applicable)</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Best Interest of the State Letter (if applicable)</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>White Paper</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Forms A</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Forms B and IPG printouts including ownership information (if applicable)</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Site Control</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Conflict of Interest Review Form (if applicable)</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Comptroller Offset</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Communications for the file</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table> <ul style="list-style-type: none"> 📁 Save & Continue 	<u>Document</u>	<u>Show Vendor</u>	<u>Confidential</u>	Signed Notice of Award	Yes	No	Approved Space Request	No	Yes	Best Interest of the State Justification Memo (if applicable)	No	Yes	Best Interest of the State Letter (if applicable)	No	Yes	White Paper	No	Yes	Forms A	No	Yes	Forms B and IPG printouts including ownership information (if applicable)	No	Yes	Site Control	No	Yes	Conflict of Interest Review Form (if applicable)	No	Yes	Comptroller Offset	No	Yes	Communications for the file	No	Yes	Agency
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	<ul style="list-style-type: none"> 📁 Notes 	<ul style="list-style-type: none"> 🖨 As needed 	Agency																																				
	<ul style="list-style-type: none"> 📁 Bidders Tab 	<ul style="list-style-type: none"> 📁 Lookup and Add Vendors 📁 Select NIGP Code 📁 Find It 📁 Select all vendors 📁 Save & Exit 📁 Select bidder participation: Unrestricted Bid 	Agency																																				


		<input type="checkbox"/> Save & Continue	
	<input type="checkbox"/> Reminders	<input type="checkbox"/> As needed	Agency
	<input type="checkbox"/> Summary	<input type="checkbox"/> Review all Data <input type="checkbox"/> Submit for Approval <input type="checkbox"/> Continue The ALT/NON RFI Will Route for Approvals	Agency
Conduct Approvals 			
Send Bid	<input type="checkbox"/> Summary	<input type="checkbox"/> Select Change bid status to "Sent" and Notify Vendors <input type="checkbox"/> Send Bid <input type="checkbox"/> Vendor Notification: OK	SPO
	<input type="checkbox"/> Amendments (if applicable)	<input type="checkbox"/> Create Bid Amendment <input type="checkbox"/> Enter changes to Tabs and Save and Continue <input type="checkbox"/> Attach Any Required Documents and Save and Continue <input type="checkbox"/> Comment Box: You may leave blank if you do not wish to send the Amendment to vendors. Add Comment if You Will Send to Vendors <input type="checkbox"/> Save & Continue <input type="checkbox"/> Return to Bid <input type="checkbox"/> Notify SPO to Apply the Amendment	Agency
	<input type="checkbox"/> Amendments	<input type="checkbox"/> Click Amendment number <input type="checkbox"/> Verify Show to Vendor Option <input type="checkbox"/> Apply Bid Amendment	SPO
BID Tab Bid Tab is required to interface with the PPB Clearinghouse			
Review Quotes	Summary Tab of the Bid	<input type="checkbox"/> Open Bid (at bottom of the page) <input type="checkbox"/> Bid Tab (at bottom of the page)	Agency
Create Quotes	<input type="checkbox"/> Bid Tab	<input type="checkbox"/> Create New Quote	Agency
	<input type="checkbox"/> Quote General Tab	<input type="checkbox"/> Vendor Name <input type="checkbox"/> Received Date <input type="checkbox"/> Are you registered and active in the IPG? Yes/No <input type="checkbox"/> Did you attach Forms A or Forms B? <input type="checkbox"/> Save and Continue	Agency
	<input type="checkbox"/> Quote Items Tab	<input type="checkbox"/> Enter Price in Unit Cost Field for each line item <input type="checkbox"/> Save & Continue	Agency
	<input type="checkbox"/> Quote Terms & Conditions Tab	<input type="checkbox"/> Select Yes	Agency

	<input type="checkbox"/> Quote Attachments Tab	<input type="checkbox"/> Add File <table border="1" style="margin-top: 10px;"> <thead> <tr> <th>Document</th> <th>Confidential</th> </tr> </thead> <tbody> <tr> <td>Communications for the procurement file</td> <td>Yes</td> </tr> </tbody> </table> <p>Note: ALL documents attached to quote must be marked confidential.</p> <input type="checkbox"/> Save & Continue	Document	Confidential	Communications for the procurement file	Yes	Agency					
Document	Confidential											
Communications for the procurement file	Yes											
	<input type="checkbox"/> Summary Tab	<input type="checkbox"/> Submit Quote <input type="checkbox"/> Ok <input type="checkbox"/> Back to Bid	Agency									
Tabulate Bids	<input type="checkbox"/> Bid Summary Tab	<input type="checkbox"/> Bid Tab	Agency									
Award Bid	<input type="checkbox"/> Bid Tab Items Tab	<input type="checkbox"/> Award All <input type="checkbox"/> Ok	Agency									
	<input type="checkbox"/> Attachments	<input type="checkbox"/> Add Files <input type="hand"/> Verify that Show Vendor is <u>NOT checked</u> for any file or form that should <u>not</u> be accessible to the public. <table border="1" style="margin-top: 10px;"> <thead> <tr> <th><u>Document</u></th> <th><u>Show to Vendor</u></th> <th><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Agency specific forms</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Communications for the file</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table> <input type="checkbox"/> Save and Continue	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Agency specific forms	No	Yes	Communications for the file	No	Yes	Agency
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Communications for the file	No	Yes										
<input type="checkbox"/> Bid Tab Summary Tab	<input type="hand"/> Review <input type="checkbox"/> Submit for Approval <input type="checkbox"/> Continue	Agency										
Conduct Approvals 												
PPB Reminder	<input type="checkbox"/> Reminder Tab	<input type="checkbox"/> Due Date: 30 Days <input type="checkbox"/> Comment: Waiver Request <input type="checkbox"/> Remind Whom: PPB Waiver/Other Days Prior to Remind: 30 Days <input type="checkbox"/> Send Email: Check <input type="checkbox"/> Save & Continue	SPO									

Convert to PO	☑ Home Screen	<u>Option 1:</u> ☑ Select Bid Hyperlink in “Recent Documents” <u>Option 2:</u> ☑ Bid Solicitations → Approved → Bid Hyperlink <u>Option 3:</u> ☑ Advanced Search to find Bid	Agency
	☑ Summary Tab of the Bid	☑ Bid Tab (at bottom of the page)	Agency
	☑ Bid Tab Summary Tab	☑ Create PO ☑ Continue	Agency

Purchase Order


Process PO	☑ Home Screen	<u>Option 1:</u> ☑ click PO hyperlink on the Bid <u>Option 2:</u> ☑ PO’s → In Progress → PO Hyperlink	Agency
	☑ General Tab	☑ PO TYPE: Blanket ☑ TYPE CODE: G – Request for Information – Leasing ☑ Days ARO: 1 ☑ Agency Reference Number: CMS [lease number] ☑ Publication Date: Enter ☑ Actual Contract Begin Date: Enter ☑ Actual Contract End Date: Enter ☑ Number of Renewals: 1 (or 0 if a Renewal) ☑ Number of Renewal Terms: 5 ☑ Renewal Term Units: Years ☑ Renewal Bid Available Date: Enter ☑ Next Renewal Start Date: Enter ☑ Fiscal Year of Obligation: Select ☑ SAP Vendor Number: Enter ☑ Full SAP Contract Value: Value of Initial Term OR the Renewal amount (the value of this PO) ☑ Notice of Award Amount: Value of Initial Term AND any Renewal Term (if applicable) <i>Note: this should match the NOA Amount attached at the Bid</i> ☑ Save & Continue	Agency
	☑ Vendor Tab	☑ Distributors Sub-Tab ☑ Include Primary Vendor in the Vendor Distribution List: Check ☑ Save and Continue	
	☑ Items Tab	☑ Delete any renewal line items	Agency
	☑ Control Tab	☑ Master Blanket Begin Date: Enter ☑ Master Blanket End Date: Enter	Agency

		<ul style="list-style-type: none"> ✓ Click on the  ✓ Select Leasing ✓ Save and Continue 																			
	<ul style="list-style-type: none"> ✓ Attachment Tab 	<ul style="list-style-type: none"> ✓ Add File <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Document</th> <th style="text-align: left;">Show to Vendor</th> <th style="text-align: left;">Confidential</th> </tr> </thead> <tbody> <tr> <td>Vendor Signed Lease</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>IOC Offset (if 30 days has passed since award)</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Agency specific forms</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>PPB Certificate of No Objection (if applicable)</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Communications for the procurement file</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table> <ul style="list-style-type: none"> ✓ Save and Continue 	Document	Show to Vendor	Confidential	Vendor Signed Lease	No	Yes	IOC Offset (if 30 days has passed since award)	No	Yes	Agency specific forms	No	Yes	PPB Certificate of No Objection (if applicable)	No	Yes	Communications for the procurement file	No	Yes	Agency
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Communications for the procurement file	No	Yes																			
	<ul style="list-style-type: none"> ✓ Summary Tab 	<ul style="list-style-type: none"> ✓ Update Any Red Overall Validation Errors ✓ Submit for Approval ✓ Save & Continue 	Agency																		

Conduct Approvals

***Please note: Agency may execute the contract only after SPO approval of the PO.
Any contracts that do not receive SPO approval may be void.***

Send PO	<ul style="list-style-type: none"> ✓ BidBuy Home Screen 	<p><u>Option 1:</u></p> <ul style="list-style-type: none"> ✓ Select PO Hyperlink in “Recent Documents” <p><u>Option 2:</u></p> <ul style="list-style-type: none"> ✓ PO’s Ready to Send → PO Hyperlink <p><u>Option 3:</u></p> <ul style="list-style-type: none"> ✓ Advanced Search to find PO <p><u>Option 4:</u></p> <ul style="list-style-type: none"> ✓ Click the hyperlink on the Bid 	Agency
	<ul style="list-style-type: none"> ✓ Summary Tab 	<ul style="list-style-type: none"> ✓ Select “Send Email and Notify Vendor” or “Set to Printed Status ✓ Save and Continue 	Agency
Create Change Order to attach executed contract and complete procurement file	<ul style="list-style-type: none"> ✓ Change Order 	<ul style="list-style-type: none"> ✓ Create Change Order 	Agency

	<input checked="" type="checkbox"/> Change Order: Attachments Tab	<input checked="" type="checkbox"/> Verify that Show Vendor is <i><u>NOT checked</u></i> for any file or form that should <u>not</u> be accessible to the public. Add Files <table border="1" data-bbox="597 212 1341 569"> <thead> <tr> <th><u>Document</u></th> <th><u>Show to Vendor</u></th> <th><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Fully Executed Lease</td> <td>Yes</td> <td>Yes</td> </tr> <tr> <td>250K Form (If applicable)</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Any other documents to complete procurement file</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table>	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Fully Executed Lease	Yes	Yes	250K Form (If applicable)	No	Yes	Any other documents to complete procurement file	No	Yes	Agency
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Fully Executed Lease	Yes	Yes													
250K Form (If applicable)	No	Yes													
Any other documents to complete procurement file	No	Yes													
	Change Order: Reminders Tab	<input checked="" type="checkbox"/> Set Reminder as Desired	Agency												
	Change Order: Summary Tab	<input checked="" type="checkbox"/> Add Comment for whole Change Order <input checked="" type="checkbox"/> Edit the Custom Column Descriptions with actual change information <input checked="" type="checkbox"/> Save & Continue <input checked="" type="checkbox"/> Submit for Approval	Agency												
Conduct Approvals 															
	PO Summary	<input checked="" type="checkbox"/> Access PO <input checked="" type="checkbox"/> Change Order Tab <input checked="" type="checkbox"/> Apply/Delete Change Order	Agency												