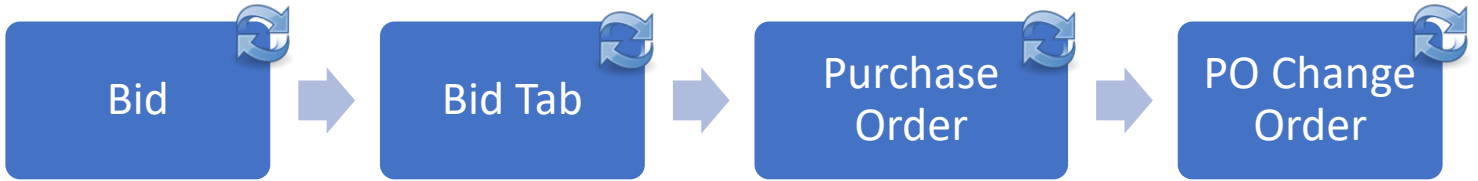



3 CMS Leasing RFI

GOAL: Create an RFI for Leasing that allows for electronic responses.





Stage	Tab	Task	Who
BID			
Create Bid	BidBuy Home Screen	<ul style="list-style-type: none"> ✓ Click Add Documents (the + sign) ✓ Bid Solicitation ✓ Select method to create new bid: Create a bid from scratch ✓ Continue 	Agency
BID	<ul style="list-style-type: none"> ✓ General Tab 	<ul style="list-style-type: none"> ✓ Description: "CMS [lease number] RFI [location]" ✓ Type Code: 25 – Request For Information - Leasing ✓ Bid Available Date: Select today ✓ Bid Opening Date: Allow for approvals and the required minimum 14-day public posting period. ✓ Purchase Method: Open Market ✓ Info Contact: Complete ✓ Pre-bid Conference: Complete if applicable ✓ Bulletin Description: Enter ✓ SPO Name: Enter ✓ Is this a Small Business Set-Aside Procurement?: No ✓ Is there a BEP/VSB goal? No ✓ Save & Continue 	Agency
	<ul style="list-style-type: none"> ✓ Items Tab 	<p><u>Add two line items – one for initial term and one for renewal term (if applicable)</u></p> <ul style="list-style-type: none"> ✓ Add Item ✓ Description: Initial Term (or Renewal Term) ✓ Quantity: 1 ✓ Unit Cost: Estimate using BOMA and/or Portfolio Estimation ✓ Unit of Measure: AU (Activity Unit) ✓ NIGP Class: 971 ✓ NIGP Item: 45 (Office Space) or 91 (Warehouse) ✓ Save and Add New if adding another line item or Save and Exit 	Agency

🔒 Address	<ul style="list-style-type: none"> 👉 Review and revise as necessary 👉 Save & Continue 	Agency																				
🔒 Accounting Note: Accounting Tab triggers the approval paths	<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																				
🔒 Attachments	<ul style="list-style-type: none"> 🔒 Add File 👉 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="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Document</th> <th style="text-align: left;">Show to Vendor</th> </tr> </thead> <tbody> <tr> <td>RFI Document</td> <td>Yes</td> </tr> <tr> <td>Exhibit A (Boundary Map) PDF</td> <td>Yes</td> </tr> <tr> <td>Exhibit A (Boundary Map) EST</td> <td>Yes</td> </tr> <tr> <td>Exhibit B (Tenant Space Configuration)</td> <td>Yes</td> </tr> <tr> <td>Exhibit C (Sample Lease)</td> <td>Yes</td> </tr> <tr> <td>RFI Template Response</td> <td>Yes</td> </tr> <tr> <td>Blank Forms A and B</td> <td>Yes</td> </tr> <tr> <td>Approved Space Request</td> <td>No</td> </tr> <tr> <td>Any communications for the procurement file</td> <td>No</td> </tr> </tbody> </table>	Document	Show to Vendor	RFI Document	Yes	Exhibit A (Boundary Map) PDF	Yes	Exhibit A (Boundary Map) EST	Yes	Exhibit B (Tenant Space Configuration)	Yes	Exhibit C (Sample Lease)	Yes	RFI Template Response	Yes	Blank Forms A and B	Yes	Approved Space Request	No	Any communications for the procurement file	No	Agency
Document	Show to Vendor																					
RFI Document	Yes																					
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Exhibit B (Tenant Space Configuration)	Yes																					
Exhibit C (Sample Lease)	Yes																					
RFI Template Response	Yes																					
Blank Forms A and B	Yes																					
Approved Space Request	No																					
Any communications for the procurement file	No																					
🔒 Notes	<ul style="list-style-type: none"> 🔒 Add as necessary 	Agency																				
🔒 Bidders Tab	<ul style="list-style-type: none"> 🔒 Lookup and Add Vendors 🔒 Select NIGP Code 🔒 Find It 🔒 Select all vendors 🔒 Save & Exit 🔒 Unrestricted Bid 🔒 Save & Continue 	Agency																				
🔒 Questions	<ul style="list-style-type: none"> 🔒 Do Not Enter Questions for Electronic Response 	Agency																				
🔒 Q & A	<ul style="list-style-type: none"> 🔒 Do Not Utilize Q & A 	Agency																				
🔒 Reminders	<ul style="list-style-type: none"> 🔒 Add as necessary 	Agency																				
🔒 Summary	<ul style="list-style-type: none"> 👉 Review all data 🔒 Submit for Approval 🔒 Continue 	Agency																				


Conduct Approvals 								
Send Bid	<input checked="" type="checkbox"/> Summary	<input checked="" type="checkbox"/> Select Change bid status to "Sent" and Notify Vendors <input checked="" type="checkbox"/> Send Bid <input checked="" type="checkbox"/> Vendor Notification: OK	SPO					
	<input checked="" type="checkbox"/> Amendments (if applicable)	<input checked="" type="checkbox"/> Create Bid Amendment <input checked="" type="checkbox"/> Enter changes to Tabs and Save and Continue <input checked="" type="checkbox"/> Attach Any Required Documents and Save and Continue <input checked="" 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 checked="" type="checkbox"/> Save & Continue <input checked="" type="checkbox"/> Return to Bid <input checked="" type="checkbox"/> Notify SPO to Apply the Amendment	Agency					
	<input checked="" type="checkbox"/> Amendments	<input checked="" type="checkbox"/> Click Amendment number <input checked="" type="checkbox"/> Verify Show to Vendor Option <input checked="" 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	Receive Paper Responses <input checked="" type="checkbox"/> Open Bid <input checked="" type="checkbox"/> Bid Tab	Agency					
Create Quotes (After Bid Opening Date)	<input checked="" type="checkbox"/> Bid Tab	<input checked="" type="checkbox"/> Create New Quote	Agency					
	<input checked="" type="checkbox"/> Quote General Tab	<input checked="" type="checkbox"/> Vendor Name <input checked="" type="checkbox"/> Received Date <input checked="" type="checkbox"/> Are you registered and active in the IPG? <input checked="" type="checkbox"/> Did you attach Forms A or Forms B?	Agency					
	<input checked="" type="checkbox"/> Quote Items Tab	<input checked="" type="checkbox"/> Enter Price in Unit Cost Field for each line item <input checked="" type="checkbox"/> Save & Continue	Agency					
	<input checked="" type="checkbox"/> Quote Terms & Conditions Tab	<input checked="" type="checkbox"/> Yes	Agency					
	<input checked="" type="checkbox"/> Quote Attachments Tab	<input checked="" type="checkbox"/> Add File <table border="1" data-bbox="584 1696 1312 1890"> <thead> <tr> <th>Document</th> <th>Confidential</th> </tr> </thead> <tbody> <tr> <td>Documents submitted by vendor</td> <td>Yes</td> </tr> <tr> <td>Picture or copy of time-stamped submission</td> <td>Yes</td> </tr> </tbody> </table>	Document	Confidential	Documents submitted by vendor	Yes	Picture or copy of time-stamped submission	Yes
Document	Confidential							
Documents submitted by vendor	Yes							
Picture or copy of time-stamped submission	Yes							

		Communications for the procurement file	Yes																															
		<p>Note: ALL documents attached to quote must be marked confidential.</p> <p> Save & Continue</p>																																
	Summary Tab	Submit Quote Back to Bid		Agency																														
		<p>Repeat for Additional Quotes as Necessary. Enter a new Quote for each BAFO. Include "BAFO" in the description.</p>																																
Tabulate Bids	Bid Summary Tab	Bid Tab (at bottom of the page) Select Quotes to be Considered <p>Note: Uncheck any quote that should not be considered for award.</p>		Agency																														
Award Bid	Bid Tab Items Tab	Select Vendor for Award Award All Ok		Agency																														
	Attachments	Add Files Verify that Show Vendor is <i>NOT checked</i> for any file or form that should <i>not</i> be accessible to the public.		Agency																														
		<table border="1"> <thead> <tr> <th><u>Document</u></th> <th><u>Show to Vendor</u></th> <th><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Unsigned Notice of Award</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</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>SPO Determination of Qualifying Responses Form</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Selection Recommendation</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Conflict of Interest review form</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>RFI Opening Sign-In Sheet</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Comptroller Offset</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Completed Non-responsive forms</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table>	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Unsigned Notice of Award	No	Yes	Forms A	No	Yes	Forms B and IPG printouts including ownership information	No	Yes	SPO Determination of Qualifying Responses Form	No	Yes	Selection Recommendation	No	Yes	Conflict of Interest review form	No	Yes	RFI Opening Sign-In Sheet	No	Yes	Comptroller Offset	No	Yes	Completed Non-responsive forms	No	Yes		
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Completed Non-responsive forms	No	Yes																																

		Completed responsiveness and responsibility checklist	No	Yes					
		Agency specific forms	No	Yes					
		Communications for the file	No	Yes					
		<input type="checkbox"/> Save and Continue							
	<input type="checkbox"/> Bid Tab <input type="checkbox"/> Summary Tab	<input type="hand"/> Review <input type="checkbox"/> Submit for Approval			Agency				
Conduct Approvals 									
Publish Amendment	<input type="checkbox"/> Amendments Tab	<input type="checkbox"/> Create Amendment			SPO				
	<input type="checkbox"/> Attachments Tab	<input type="checkbox"/> Add File	<table border="1"> <thead> <tr> <th><u>Document</u></th> <th><u>Show to Vendor</u></th> </tr> </thead> <tbody> <tr> <td>SPO Signed Notice of Award</td> <td>Yes</td> </tr> </tbody> </table>		<u>Document</u>	<u>Show to Vendor</u>	SPO Signed Notice of Award	Yes	SPO
	<u>Document</u>	<u>Show to Vendor</u>							
SPO Signed Notice of Award	Yes								
<input type="checkbox"/> Amendment Tab	<input type="checkbox"/> Apply Amendment for Notice of Award			SPO					
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 (after protest period or protest determination)	<input type="checkbox"/> Documents	<u>Option 1:</u> <input type="checkbox"/> Select Bid Hyperlink in "Recent Documents" <u>Option 2:</u> <input type="checkbox"/> Bid Solicitations → Approved → Bid Hyperlink <u>Option 3:</u> <input type="checkbox"/> <input type="checkbox"/> Advanced Search to find Bid			Agency				
	<input type="checkbox"/> Summary Tab of the Bid	<input type="checkbox"/> Bid Tab			Agency				
	<input type="checkbox"/> Bid Tab Summary Tab	<input type="checkbox"/> Create PO <input type="checkbox"/> Continue			Agency				


Purchase Order																	
Process PO	Home Screen	<p><u>Option 1:</u></p> <ul style="list-style-type: none"> click PO hyperlink on the Bid <p><u>Option 2:</u></p> <ul style="list-style-type: none"> PO's → In Progress → PO Hyperlink 	Agency														
	General Tab	<ul style="list-style-type: none"> 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 Renewal Term (value of this PO) Notice of Award Amount: Value of Initial Term AND any Renewal Term (if applicable) Note: this amount should match the NOA Save & Continue 	Agency														
	Items Tab	<ul style="list-style-type: none"> Delete any renewal line items 	Agency														
	Vendor Tab	<ul style="list-style-type: none"> Distributors Sub Tab: Include Primary Vendor in the Vendor Distribution List: Check 	Agency														
	Control Tab	<ul style="list-style-type: none"> Master Blanket Begin Date: Enter Master Blanket End Date: Enter Add Department by clicking  and selecting Leasing Save and Continue 	Agency														
	Attachments Tab	<table border="1"> <thead> <tr> <th>Document</th> <th>Show to Vendor</th> <th>Confidential</th> </tr> </thead> <tbody> <tr> <td>Vendor-Signed Contract</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>250 Form</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Distribution Letter</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> </tbody> </table>	Document	Show to Vendor	Confidential	Vendor-Signed Contract	No	Yes	250 Form	No	Yes	Distribution Letter	No	Yes	IOC Offset (if 30 days has passed since award)	No	Yes
Document	Show to Vendor	Confidential															
Vendor-Signed Contract	No	Yes															
250 Form	No	Yes															
Distribution Letter	No	Yes															
IOC Offset (if 30 days has passed since award)	No	Yes															

		Protest Documentation (if applicable)	No	Yes	
		Communications for the procurement file	No	Yes	
		<input checked="" type="checkbox"/> Save and Continue			
	<input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Update Any Red Overall Validation Errors <input checked="" type="checkbox"/> Submit for Approval <input checked="" type="checkbox"/> 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	<input checked="" type="checkbox"/> BidBuy Home Screen	<u>Option 1:</u> <input checked="" type="checkbox"/> Select PO Hyperlink in "Recent Documents" <u>Option 2:</u> <input checked="" type="checkbox"/> PO's Ready to Send → PO Hyperlink <u>Option 3:</u> <input checked="" type="checkbox"/> Advanced Search to find PO <u>Option 4:</u> <input checked="" type="checkbox"/> Click the hyperlink on the Bid	Agency									
	<input checked="" type="checkbox"/> Summary Tab	<input checked="" type="checkbox"/> Select "Send Email and Notify Vendor" or "Set to Printed Status" <input checked="" type="checkbox"/> Save and Continue	Agency									
Create Change Order to attach executed contract and complete procurement file	<input checked="" type="checkbox"/> Change Order	<input checked="" type="checkbox"/> Create Change Order	Agency									
	<input checked="" type="checkbox"/> Change Order: Attachments Tab	<input checked="" type="checkbox"/> Verify that Show Vendor is <u>NOT checked</u> for any file or form that should <u>not</u> be accessible to the public. Add Files <table border="1" style="width: 100%; border-collapse: collapse;"> <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 Contract</td> <td>Yes</td> <td>Yes</td> </tr> <tr> <td>Any other documents to</td> <td>No</td> <td>Yes</td> </tr> </tbody> </table>	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Fully Executed Contract	Yes	Yes	Any other documents to	No	Yes	Agency
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>										
Fully Executed Contract	Yes	Yes										
Any other documents to	No	Yes										

		complete procurement file			
	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 Apply/Delete Change Order			Agency