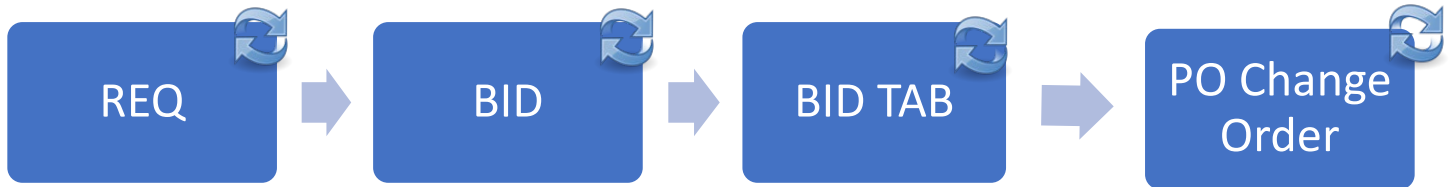


### 4 Emergency Extension

**GOAL:** For an Emergency Extension. Create a requisition, Bid, and Original Purchase Order Material Change Order.



Stage	Tab	Task	Who
<b>Requisition</b>			
Clone Req	<ul style="list-style-type: none"> <li>Summary Tab of the Original Emergency Requisition</li> </ul>	<ul style="list-style-type: none"> <li>Clone Requisition</li> <li>Select Clone Hyperlink</li> </ul>	Agency
	<ul style="list-style-type: none"> <li>General Tab</li> </ul>	<ul style="list-style-type: none"> <li>Short Description: This should uniquely identify the procurement as this is a searchable field. <b>Include 'Emergency Extension'</b></li> <li>Type Code: Select Appropriate</li> <li>Requisition Type: Open Market will be utilized for Emergency Extension</li> <li>Special Procurement Type: Emergency</li> <li>Link to Original Contract: Link to the original Bid</li> <li>Save and Continue</li> </ul>	Agency
	<ul style="list-style-type: none"> <li>Items Tab</li> </ul>	<p><b><u>Add or Update Items to Include Only Additional Costs Above the Original Estimated Cost</u></b></p> <p><b><u>Option 1:</u></b> Add Open Market Item:</p> <ul style="list-style-type: none"> <li>Item Type: Normal or Narrative</li> <li>Description: Specification of the item that the Agency is procuring (This is a searchable field). Include "Emergency Extension"</li> <li>Quantity</li> <li>Estimated Cost</li> <li>Unit of Measure</li> <li>NIGP Code (Class and Item)</li> <li>Save and Add New (if adding multiple line items) or Save and Exit</li> </ul> <p><b><u>Option 2:</u></b> Search Items:</p> <ul style="list-style-type: none"> <li>Advanced Search</li> <li>Search Field Details</li> </ul>	Agency







































		<ul style="list-style-type: none"> <li>🔍 Find It</li> <li>🔍 Select Items from Search Results</li> <li>🔍 Select Add to Req (Exit or Continue)</li> </ul>											
	🔍 Vendor Tab	<b><u>Vendors will be added at the Bid Stage in the Bidders Tab</u></b>	Agency										
	🔍 Addresses	<ul style="list-style-type: none"> <li>🔍 Select Appropriate Addresses</li> <li>🔍 Save &amp; Continue</li> </ul>	Agency										
	🔍 Accounting <b>Note:</b> <b>Accounting Tab triggers the approval paths</b>	<ul style="list-style-type: none"> <li>🔍 Click on 🔍 to search Accounting Codes</li> <li>🔍 Click “Find It”</li> <li>🔍 Select “Emergency.”</li> <li>🔍 Click “Save Based on Percentages”</li> <li>🔍 Click “Rebuild for All Items”</li> </ul>	Agency										
	🔍 Attachments	<ul style="list-style-type: none"> <li>🔍 Add File</li> </ul> <p>Verify that <b>Show Vendor</b> is <i>NOT checked</i> for any file or form that should <i>not</i> be accessible to the public.</p> <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>Procurement Justification Form</td> <td>No</td> </tr> <tr> <td>Vendor Quote if available</td> <td>No</td> </tr> <tr> <td>Communications for the procurement file</td> <td>No</td> </tr> <tr> <td>Agency Specific Documents</td> <td>No</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>🔍 Save &amp; Continue</li> </ul>	Document	Show to Vendor	Procurement Justification Form	No	Vendor Quote if available	No	Communications for the procurement file	No	Agency Specific Documents	No	Agency
Document	Show to Vendor												
Procurement Justification Form	No												
Vendor Quote if available	No												
Communications for the procurement file	No												
Agency Specific Documents	No												
	🔍 Notes	🔍 As needed											
	🔍 Summary	<ul style="list-style-type: none"> <li>👋 Review all Data</li> <li>🔍 Submit for Approval</li> <li>🔍 Continue</li> </ul>	Agency										

**Conduct Approvals**

**BID**

<b>Process Bid</b>	🔍 Home Screen	<ul style="list-style-type: none"> <li><u>Option 1:</u></li> <li>🔍 Requisitions Ready for Purchasing Box</li> <li>🔍 Requisition Hyperlink</li> <li><u>Option 2:</u></li> <li>🔍 Requisitions</li> <li>🔍 Ready for Purchasing</li> <li>🔍 Requisition Hyperlink</li> </ul>	Agency
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Process Bid – Notice of Emergency Extension Hearing	Summary Tab of the Req	<ul style="list-style-type: none"> <li>Convert to Bid</li> <li>Bid Document Hyperlink</li> </ul>	Agency										
	General	<ul style="list-style-type: none"> <li>Type Code: 45 - Emergency Extension</li> <li>Allow Electronic Response: <b>Uncheck</b></li> <li>Bid Available Date: Today's date</li> <li>Bid Opening Date: Date of Emergency Extension Hearing</li> <li>Enable Rolling Enrollment: <b>Check</b></li> <li>Info Contact: Complete</li> <li>Bulletin Description: Include 'Emergency Extension Hearing Notice'</li> <li>SPO Name: Enter</li> <li>Special Procurement Rationale: Emergency</li> <li>Emergency Rationale: Enter emergency justification that is selected on the Emergency Purchase Statement</li> <li>Is this a Small Business Set-Aside Procurement?: No</li> <li>Is there a BEP/VBP Participation Goal?: Yes/No</li> <li>Link to Original Contract: Link to the original Bid</li> <li>Save and Continue</li> </ul>	Agency										
	Items	Review and revise as necessary	Agency										
	Address	Review and revise as necessary	Agency										
	Accounting	Review and revise as necessary	Agency										
	Attachments	<ul style="list-style-type: none"> <li>Add Files</li> <li>Verify that <b>Show Vendor</b> is <i>NOT checked</i> for any file or form that should <i>not</i> be accessible to the public</li> </ul> <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>Document</th> <th>Show to Vendor</th> </tr> </thead> <tbody> <tr> <td>Emergency Extension Hearing Notice</td> <td>Yes</td> </tr> <tr> <td>Emergency Extension Purchase Statement</td> <td>Yes</td> </tr> <tr> <td>Agency Specific Forms</td> <td>No</td> </tr> <tr> <td>Communications for the file</td> <td>No</td> </tr> </tbody> </table>	Document	Show to Vendor	Emergency Extension Hearing Notice	Yes	Emergency Extension Purchase Statement	Yes	Agency Specific Forms	No	Communications for the file	No	Agency
	Document	Show to Vendor											
	Emergency Extension Hearing Notice	Yes											
	Emergency Extension Purchase Statement	Yes											
	Agency Specific Forms	No											
Communications for the file	No												
Notes	Add as necessary	Agency											
Bidders	<ul style="list-style-type: none"> <li>Lookup and Add Vendors</li> <li>Select NIGP Code</li> <li>Find It</li> <li>Select vendors</li> <li>Save &amp; Exit</li> <li>Unrestricted Bid</li> <li>Save &amp; Continue</li> </ul>	Agency											
Summary	<ul style="list-style-type: none"> <li>Review all data</li> <li>Submit for Approval</li> <li>Continue</li> </ul>	Agency											


<b>Conduct Approvals</b> 									
Send Bid	<ul style="list-style-type: none"> <li> Summary</li> </ul>	<ul style="list-style-type: none"> <li> Select Change bid status to "Sent" and Notify Vendors</li> <li> Send Bid</li> <li> Click OK</li> </ul>	SPO						
Attach CPO Determination and Audio Recording of Extension Hearing	<ul style="list-style-type: none"> <li> Amendments</li> </ul>	<ul style="list-style-type: none"> <li> Create Bid Amendment</li> <li> Attachments</li> <li> Add File</li> </ul> <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> </tr> </thead> <tbody> <tr> <td>CPO Determination</td> <td>Yes</td> </tr> <tr> <td>Audio Recording</td> <td>No</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li> Apply Bid Amendment</li> </ul>	<u>Document</u>	<u>Show to Vendor</u>	CPO Determination	Yes	Audio Recording	No	SPO
<u>Document</u>	<u>Show to Vendor</u>								
CPO Determination	Yes								
Audio Recording	No								
<b>BID Tab</b>									
Note: Bid Tab required to interface with the PPB Clearinghouse									
Create Quote	<ul style="list-style-type: none"> <li> Summary Tab of the Bid</li> </ul>	<ul style="list-style-type: none"> <li> Open Bid (at bottom of the page)</li> <li> Select Bid Tab (at bottom of the page)</li> </ul>	Agency						
	<ul style="list-style-type: none"> <li> Summary Tab of Bid Tab</li> </ul>	<ul style="list-style-type: none"> <li> Create New Quote</li> </ul>	Agency						
	<ul style="list-style-type: none"> <li> Quote General Tab</li> </ul>	<ul style="list-style-type: none"> <li> Vendor Name</li> <li> Received Date</li> <li> Are you registered and active in the IPG?</li> <li> Did you attach Forms A or Forms B?</li> </ul>	Agency						
	<ul style="list-style-type: none"> <li> Quote Items Tab</li> </ul>	<ul style="list-style-type: none"> <li> Enter Price</li> <li> Save &amp; Continue</li> </ul>	Agency						
	<ul style="list-style-type: none"> <li> Quote Terms &amp; Conditions Tab</li> </ul>	<ul style="list-style-type: none"> <li> Answer appropriately: "Yes," "Yes with exceptions," or "No"</li> </ul>	Agency						
	<ul style="list-style-type: none"> <li> Quote Attachments Tab</li> </ul>	<ul style="list-style-type: none"> <li> Add Files</li> </ul> <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>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Documents submitted by vendor</td> <td>Yes</td> </tr> </tbody> </table> <p><b>Note: ALL documents attached to quote must be marked confidential</b></p> <ul style="list-style-type: none"> <li> Save &amp; Continue</li> </ul>	<u>Document</u>	<u>Confidential</u>	Documents submitted by vendor	Yes	Agency		
<u>Document</u>	<u>Confidential</u>								
Documents submitted by vendor	Yes								
	<ul style="list-style-type: none"> <li> Summary Tab</li> </ul>	<ul style="list-style-type: none"> <li> Submit Quote</li> <li> Back to Bid</li> </ul>	Agency						
Tabulate Bids	<ul style="list-style-type: none"> <li> Bid Summary Tab</li> </ul>	<ul style="list-style-type: none"> <li> Bid Tab</li> <li> Review Quotes for Responsiveness</li> <li> Select Quotes to be Considered</li> <li> Save &amp; Continue</li> </ul>	Agency						
Award Bid	<ul style="list-style-type: none"> <li> Bid Tab Items</li> </ul>	<ul style="list-style-type: none"> <li> Select Vendor for Award -&gt; Award All or by line item</li> </ul>	Agency						


	Tab	Save & Continue										
	Bid Tab Attachments	Add File Verify that <b>Show Vendor</b> 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>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>	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Agency specific forms	No	Yes	Communications for the file	No	Yes	
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>										
Agency specific forms	No	Yes										
Communications for the file	No	Yes										
	Bid Tab Summary Tab	Submit for approval Continue	Agency									
Conduct Approvals												

STOP HERE – DO NOT CONVERT TO PO

# Create Material Change Order to Original PO to Reflect Extension

Access Original PO	Summary Tab	<ul style="list-style-type: none"> <li>Navigate to PO</li> </ul>	Agency																		
Create Change Order to Original PO	<ul style="list-style-type: none"> <li>Change Order Tab</li> </ul>	<ul style="list-style-type: none"> <li>Create Change Order</li> </ul>	Agency																		
	<ul style="list-style-type: none"> <li>General Tab</li> </ul>	<ul style="list-style-type: none"> <li>Update Fields (keep notes for Bold Fields)</li> <li>Full SAP Contract Value: Estimated Total Value for the Procurement, if changed</li> <li>Actual Contract Begin Date: Do Not Change</li> <li>Actual Contract End Date: Date of End of Extension</li> <li>Update Award Amount (including initial term plus Extension)</li> </ul>	Agency																		
	<ul style="list-style-type: none"> <li>Items Tab</li> </ul>	<p><b>Add or Update Items to Include all Estimated or Actual Costs</b></p> <ul style="list-style-type: none"> <li>Quantity: Make Any Changes</li> <li>Price: Make Any Changers</li> </ul>	Agency																		
	<ul style="list-style-type: none"> <li>Attachments</li> </ul>	<ul style="list-style-type: none"> <li>Add File Verify that <b>Show Vendor</b> is <u>NOT checked</u> for any file or form that should <u>not</u> be accessible to the public.</li> </ul> <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>CPO Approved Emergency Extension Statement</td> <td>Yes</td> <td>No</td> </tr> <tr> <td>Vendor Signed Amendment</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>Comptroller Offset</td> <td>No</td> <td>Yes</td> </tr> <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>	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	CPO Approved Emergency Extension Statement	Yes	No	Vendor Signed Amendment	No	Yes	Comptroller Offset	No	Yes	Agency specific forms	No	Yes	Communications for the file	No	Yes	Agency
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>																			
CPO Approved Emergency Extension Statement	Yes	No																			
Vendor Signed Amendment	No	Yes																			
Comptroller Offset	No	Yes																			
Agency specific forms	No	Yes																			
Communications for the file	No	Yes																			
	<ul style="list-style-type: none"> <li>Summary</li> </ul>	<ul style="list-style-type: none"> <li>Comment for the Whole Change Order: Describe Emergency Extension</li> <li>Field Descriptions: Update and revise to fully explain change</li> <li>Submit for Approval</li> </ul>	Agency																		

Conduct Approvals 

Change Order	☞ Summary	☞ Apply Change Order	Agency						
Create a Non-Material Change Order to attach executed contract	☞ Change Order Tab	☞ Create Change Order	Agency						
	☞ Change Order: Attachments Tab	☞ Add File <table border="1" data-bbox="613 443 1362 600"> <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 (extension)</td> <td>Yes</td> <td>Yes</td> </tr> </tbody> </table> <p>Verify documents are marked confidential if appropriate.</p> ☞ Save and Exit	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Fully Executed Contract (extension)	Yes	Yes	Agency
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>							
Fully Executed Contract (extension)	Yes	Yes							
	☞ Change Order: Summary	☞ Comment for the Whole Change Order: Attaching Executed Contract ☞ Submit for Approval	Agency						
<b>Conduct Approvals</b> 									
	☞ Change Order: ☞ Summary	☞ Apply Change Order	Agency						