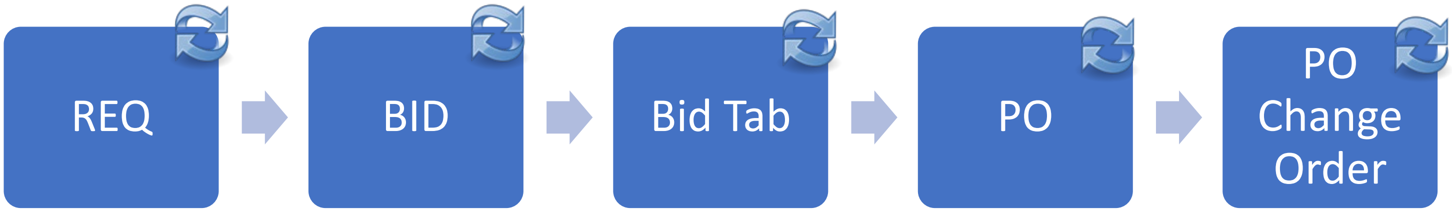
4 Emergency

GOAL: For Emergency Procurements, create a Requisition, Bid, and issue a Purchase Order.

<u>Please note: Requisitions and Bids on Emergencies will run concurrently.</u>



Stage	Tab	Task	Who
		Requisition	
Create Req	BidBuy Homescreen	Add document. Click on the "+" sign to the right of the BidBuy logo Requisitions	Agency
	General	Short Description: This should uniquely identify the procurement as this is a searchable field. **Include 'Emergency Notice'** Requisition Type: Open Market Type Code: Select appropriate option Special Procurement Type: Emergency Save and Continue	Agency
	Items	**Can be a single line item or multiple items. Use Estimated Cost.** <u>Option 1:</u> Add Open Market Item Item Type: Normal or Narrative Description: Specification of the item that the Agency is procuring (This is a searchable field). Quantity Estimated Cost Unit of Measure NIGP Code (Class and Item) Save and Add New (if adding multiple line items) or Save and Exit <u>Option 2</u>: Search Items: Advanced Search Search Field Details Find It Select Items from Search Results	Agency

		🖱 Select Add to Req (Exit or Continue)	
	🖱 Vendor	Vendors will be added at the Bid Stage in the Bidders Tab	Agency
	🖱 Address Tab *Shipping Option 1: Ship to/Bill to ALL items to one location*	🖱 To change Ship-to or Bill-to-Address, click to 🔍 search for new address 💻 Enter **Search Criteria** or enter nothing to receive all addresses 🖱 Click **Find It** 🖱 Select a new address 🖱 Click Select to update address 🖱Click Save & Continue to save changes and continue 🖱 To apply changes to Ship-to to all items on Requisition - Click **Apply Ship-to to All Items** 🖱 To apply changes to Bill-to to all items on Requisition - Click **Apply Bill-to to All Items** 🖱 *Important*: This will override any selections made at the address Sub-Tab for the Item Tab.	Agency
	Items Tab – Address Sub-Tab **Shipping Option 2:** ***Ship to/Bill items to multiple locations***	🖱 **Go to the Items Tab – Address Sub-tab** 🖱 Select the check box in the 'Select All' column next to the item to change address (Ship/Bill to Address) *For DA Users:* 🖱 Select desired address from dropdown menu 🖱 Click Apply to Selected *For BP Users:* 🖱 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 🖱 To apply changes to only selected items - Click **Apply to Selected** 🖱 Click **Save & Continue** to save changes and continue 🖱 *To reset all addresses to the default from the Address Tab - Click Reset Selected to Header*	Agency
	🖱 Accounting **Note: Accounting Tab triggers the approval paths**	🖱 Click on 🔍 to search Accounting Codes 🖱 Click "Find It" 🖱 Select "Emergency." 🖱 Click "Save Based on Percentages" 🖱 Click "Rebuild for All Items"	Agency

<table>
<tr><td></td><td>🖱 Attachments</td><td>🖱 Add Files
✋ Verify that Show Vendor is <i><u>NOT checked</u></i> for any file or form that should <i><u>not</u></i> be accessible to the public
<table><tr><th><u>Document</u></th><th><u>Show to Vendor</u></th></tr><tr><td>Procurement Justification Form</td><td>No</td></tr><tr><td>Labor Relations Checklist</td><td>No</td></tr><tr><td>Cost Estimate/Quote if available</td><td>No</td></tr><tr><td>Agency Specific Forms</td><td>No</td></tr><tr><td>Communications for the file</td><td>No</td></tr></table>
🖱 Save & Continue</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Notes</td><td>🖱 As needed</td><td></td></tr>
<tr><td></td><td>🖱 Summary</td><td>✋ Review all Data
🖱 Submit for Approval
🖱 Continue</td><td>Agency</td></tr>
<tr><td colspan="4">Conduct Approvals
Note: APO should note Bid Number in Approval Comments</td></tr>
<tr><td>Create Bid</td><td></td><td>🖱 Add document. Click on the “+” sign to the right of the BidBuy logo
🖱 Bid Solicitation
🖱 Create a Bid from scratch
🖱 Continue</td><td>Agency</td></tr>
<tr><td colspan="4">BID</td></tr>
<tr><td>Bid – To publish Emergency Statement</td><td>🖱 General</td><td>🖱 Description: Include ‘EMERGENCY Notice’. include a brief description of the procurement
🖱 Type Code: 40 - Emergency
🖱 Allow Electronic Response: Uncheck
🖱 Bid Opening Date: Should match the end date on the Emergency Purchase Statement
🖱 Bid Available Date: Today’s date
🖱 Enable Rolling Enrollment: Check
🖱 Info Contact: Complete
🖱 Bulletin Description: Enter
🖱 SPO Name: Enter
🖱 Special Procurement Rationale: Emergency
🖱 Emergency Rationale: Enter emergency justification that is selected on the Emergency Purchase Statement</td><td>Agency</td></tr>
</table>

<table>
<tr><td></td><td></td><td>🖱 Is this a Small Business Set-Aside Procurement?: No
🖱 Is there a BEP/VBP Participation Goal?: No
🖱 Link to Original Contract: Select 🔍 to search for the Requisition
🖱 Save and Continue</td><td></td></tr>
<tr><td></td><td>🖱 Items</td><td>Can be a single line item or multiple items. Use Estimated or Actual Cost.
🖱 Review and revise as necessary</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Address</td><td>🖱 Review and revise as necessary</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Accounting</td><td>🖱 Click on 🔍 to search Accounting Codes
🖱 Click “Find It”
🖱 Select “Emergency”
🖱 Click “Save Based on Percentages”
🖱 Click “Rebuild for All Items”</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Attachments</td><td>🖱 Add Files
✋ Verify that Show Vendor is <i><u>NOT checked</u></i> for any file or form that should <i><u>not</u></i> be accessible to the public
<table>
<tr><th><u>Document</u></th><th><u>Show to Vendor</u></th></tr>
<tr><td>Emergency 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>
<tr><td>Cost Estimate/Quote if available</td><td>No</td></tr>
</table>
🖱 Save & Continue</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Notes</td><td>✋ Add as necessary</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Bidders</td><td>🖱 Lookup and Add Vendors
🖱 Select NIGP Code
🖱 Find It
🖱 Select vendors
🖱 Save & Exit
🖱 Unrestricted Bid
🖱 Save & Continue</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Reminders</td><td>🖱 Add as necessary</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Summary</td><td>✋ Review all data
🖱 Submit for Approval</td><td>Agency</td></tr>
</table>

<table>
<tr><td colspan="4">Conduct Approvals</td></tr>
<tr><td>Send Bid to Publish</td><td>Summary</td><td>Select Change bid status to “Sent” and Notify Vendors
Send Bid
Click OK</td><td>SPO</td></tr>
<tr><td></td><td>Amendments (if applicable)</td><td>Create Bid Amendment
Enter changes to Tabs and Save and Continue
Attach Any Required Documents and Save and Continue
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
Save & Continue
Return to Bid
Notify SPO to Apply the Amendment</td><td>Agency</td></tr>
<tr><td></td><td>Amendments</td><td>Verify Show to Vendor Option
Apply Bid Amendment</td><td>SPO</td></tr>
<tr><td colspan="4">BID Tab
<i>Note: Bid Tab required to interface with PPB Clearinghouse</i></td></tr>
<tr><td>Create Quote</td><td>Summary Tab of the Bid</td><td>Open Bid (at bottom of the page)
Select Bid Tab (at bottom of the page)</td><td>Agency</td></tr>
<tr><td></td><td>Summary Tab of Bid Tab</td><td>Create New Quote</td><td>Agency</td></tr>
<tr><td></td><td>Quote General Tab</td><td>Vendor Name
Received Date
Are you registered and active in the IPG?
Did you attach Forms A or Forms B?</td><td>Agency</td></tr>
<tr><td></td><td>Quote Items Tab</td><td>Enter Price
Save & Continue</td><td>Agency</td></tr>
<tr><td></td><td>Quote Terms &Conditions Tab</td><td>Review Terms and Conditions in Attachments
Answer appropriately: “Yes,” “Yes with exceptions,” or “No”</td><td>Agency</td></tr>
<tr><td></td><td>Quote Attachments Tab</td><td>Add Files
<table>
<tr><th>Document</th><th>Confidential</th></tr>
<tr><td>Documents submitted by vendor</td><td>Yes</td></tr>
<tr><td>Communications for the procurement file</td><td>Yes</td></tr>
</table>
Note: ALL documents attached to quote must be marked confidential
Save & Continue</td><td>Agency</td></tr>
</table>

<table>
<tr><td></td><td>🖱 Summary Tab</td><td>🖱 Submit Quote
🖱 Back to Bid</td><td>Agency</td></tr>
<tr><td>Tabulate Bids</td><td>🖱 Bid Summary Tab</td><td>🖱 Bid Tab
✋ Review Quotes for Responsiveness
🖱 Select Quotes to be Considered
🖱 Save & Continue</td><td>Agency</td></tr>
<tr><td>Award Bid</td><td>🖱 Bid Tab Items Tab</td><td>🖱 Select Vendor for Award -> Award All or by line item
🖱 Save & Continue</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Bid Tab Attachments</td><td>🖱 Add File
Verify that Show Vendor is <i><u>NOT checked</u></i> for any file or form that should <i><u>not</u></i> be accessible to the public.
<table>
<tr><th><u>Document</u></th><th><u>Show to Vendor</u></th><th><u>Confidential</u></th></tr>
<tr><td>Forms A (if available)</td><td>No</td><td>Yes</td></tr>
<tr><td>Forms B and IPG printouts including ownership information (if available)</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>
</table></td><td>Agency</td></tr>
<tr><td></td><td>🖱 Bid Tab Summary Tab</td><td>🖱 Submit for approval
🖱 Continue</td><td>Agency</td></tr>
<tr><td colspan="4">Conduct Approvals 🔄</td></tr>
<tr><td>Convert to PO</td><td>Home Screen</td><td><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</td><td>Agency</td></tr>
<tr><td></td><td>🖱Summary Tab</td><td>🖱 Bid Tab (at bottom of the page)</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Bid Tab Summary Tab</td><td>🖱 Create PO
🖱 OK</td><td>Agency</td></tr>
<tr><td colspan="4">Purchase Order</td></tr>
<tr><td>Process PO</td><td></td><td><u>Option 1:</u>
🖱 click PO hyperlink on the Bid Summary Tab
<u>Option 2:</u>
🖱 PO’s → In Progress →PO Hyperlink</td><td>Agency</td></tr>
</table>

<table>
<tr><td></td><td>🖱 General Tab</td><td>🖱 Type Code: E – Emergency Purchases
🖱 PO Type: Open Market or Blanket (SAP Only - when syncing with SAP)
🖱 Is this a Small Business Set Aside Procurement? No
🖱 Actual Contract Begin Date: Enter
🖱 Actual Contract End Date: Enter
🖱 Fiscal Year of Obligation: Choose
🖱 SAP Vendor Number: Enter
🖱 Is there a BEP/VBP Participation Goal? No
🖱 Notice of Award Amount: Estimated Cost
🖱 Save & Continue</td><td>Agency</td></tr>
<tr><td></td><td>🖱 Attachments Tab</td><td>🖱 Add File
<table>
<tr><td><u>Document</u></td><td><u>Show to Vendor</u></td><td><u>Confidential</u></td></tr>
<tr><td>Email to Auditor General</td><td>No</td><td>Yes</td></tr>
<tr><td>Financial Disclosures</td><td>No</td><td>Yes</td></tr>
<tr><td>Vendor Executed Contract</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>Communications for the file</td><td>No</td><td>Yes</td></tr>
</table></td><td>Agency</td></tr>
<tr><td></td><td>Summary Tab</td><td>🖱 Submit for Approval
🖱 Continue</td><td>Agency</td></tr>
<tr><td colspan="4">Conduct Approvals</td></tr>
<tr><td>Send PO</td><td>Home Screen</td><td><u>Option 1:</u>
🖱 Select PO Hyperlink in “Recent Documents”
<u>Option 2:</u>
🖱 PO’s Ready to Send →PO Hyperlink
<u>Option 3:</u>
🖱 Advanced Search to find PO
<u>Option 4:</u>
🖱 Click the hyperlink on the Bid</td><td>Agency</td></tr>
<tr><td></td><td>Summary Tab</td><td>🖱 Select “Send Email and Notify Vendor” or “Set to Printed Status
🖱 Save and Continue</td><td>Agency</td></tr>
</table>

<table>
<tr><th colspan="4">Change Order</th></tr>
<tr><td>Create Change Order to attach executed contract</td><td>Change Order</td><td>Create Change Order</td><td>Agency</td></tr>
<tr><td></td><td>Change Order: Attachments Tab</td><td>Add File
Verify that Show Vendor is <i><u>NOT checked</u></i> for any file or form that should <i><u>not</u></i> be accessible to the public.
<table>
<tr><th><u>Document</u></th><th><u>Show to Vendor</u></th><th><u>Confidential</u></th></tr>
<tr><td>Fully Executed Contract</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>
</table></td><td>Agency</td></tr>
<tr><td></td><td>Change Order: Summary Tab</td><td>Submit for Approval</td><td>Agency</td></tr>
<tr><th colspan="4">Conduct Approval</th></tr>
<tr><td></td><td>PO Summary</td><td>Access PO
Change Order Tab
Apply Change Order</td><td>Agency</td></tr>
</table>