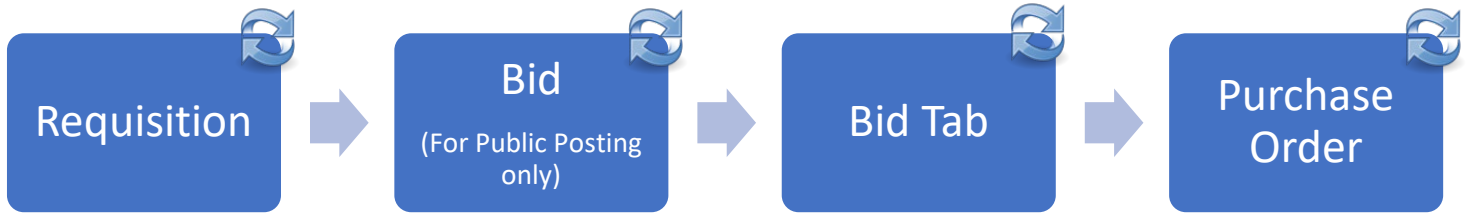



### 5 Sole Source






















**GOAL:** Create a Sole Source Procurement with Required Notices.




Stage	Tab	Task	Who
<b>Requisition</b>			
Create Req	BidBuy Home Screen	<ul style="list-style-type: none"> <li>🔒 Click on the “+” sign to the right of the BidBuy logo</li> <li>🔒 Requisition</li> </ul>	Agency
	🔒 General Tab	<ul style="list-style-type: none"> <li>🔒 Short Description: This should uniquely identify the procurement as this is a searchable field. Include “Sole Source”</li> <li>🔒 Requisition Type: <b>Open Market</b></li> <li>🔒 Type Code: Select the appropriate type code as this is a searchable field.</li> <li>🔒 Special Procurement Type: <b>Sole Source</b></li> <li>🔒 Save and Continue</li> </ul>	Agency
	🔒 Items Tab	<p><b>Option 1:</b> Add Open Market Item</p> <ul style="list-style-type: none"> <li>🔒 Item Type: Normal (this defaults to Normal)</li> <li>🔒 Description: Specification of the item that the Agency is procuring (This is a searchable field).</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>Option 2:</b> Search Items:</p> <ul style="list-style-type: none"> <li>🔒 Advanced Search</li> <li>🔒 Search Field Details</li> <li>🔒 Find It</li> <li>🔒 Select Items from Search Results</li> <li>🔒 Select Add to REQ (Exit or Continue)</li> </ul>	Agency


<p>Note: only use this if Ship to/Bill to items to <b><u>multiple locations</u></b></p> <p>Items Tab – Address Sub-Tab</p> <p><b>Shipping Option 2: Ship to/Bill items to <u>multiple locations</u></b></p>	<ul style="list-style-type: none"> <li>☞ Go to the Items Tab – Address Sub-tab</li> <li>☞ Select the check box in the ‘Select All’ column next to the item to change address (Ship/Bill to Address)</li> </ul> <p><i>For DA Users:</i></p> <ul style="list-style-type: none"> <li>☞ Select desired address from dropdown menu</li> <li>☞ Click Apply to Selected</li> </ul> <p><i>For BP Users:</i></p> <ul style="list-style-type: none"> <li>☞ Click 🔍 at the lower part of the screen next to the Ship-to Address or Bill-to address</li> <li>☞ Enter Search Criteria for address desired</li> <li>☞ Click Find It</li> <li>☞ Select radio dial next to desired address</li> <li>☞ Click Select</li> </ul> <p>☞ To apply changes to only selected items - Click <b>Apply to Selected</b></p> <p>☞ Click <b>Save &amp; Continue</b> 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>	<p>Agency</p>
<ul style="list-style-type: none"> <li>☞ Vendors Tab</li> </ul>	<p><b><u>Vendors will be added at the Bid Stage in the Bidders Tab</u></b></p>	
<ul style="list-style-type: none"> <li>☞ Address Tab</li> </ul> <p><b>Shipping Option 1: Ship to/Bill to ALL items to <u>one location</u></b></p>	<ul style="list-style-type: none"> <li>☞ To change Ship-to or Bill-to-Address, click 🔍 to search for new address</li> <li>☞ Enter <b>Search Criteria</b> or enter nothing to receive all addresses</li> <li>☞ Click <b>Find It</b></li> <li>☞ Select a new address</li> <li>☞ Click Select to update address</li> <li>☞ Click Save &amp; Continue to save changes and continue</li> <li>☞ To apply changes to Ship-to to all items on Requisition - Click <b>Apply Ship-to to All Items</b></li> <li>☞ To apply changes to Bill-to to all items on Requisition - Click <b>Apply Bill-to to All Items</b></li> <li>☞ <b><i>Important:</i></b> This will override any selections made at the address Sub-Tab for the Item Tab.</li> </ul>	<p>Agency</p>
<p>Accounting Tab</p> <p><b>Note: Accounting Tab triggers all approval paths</b></p>	<ul style="list-style-type: none"> <li>☞ Account Code: Click 🔍</li> <li>☞ Search based on a specific word or click <b>Find It</b> to show all codes.</li> <li>☞ Select - <b>Sole Source</b></li> <li>☞ Save Based on Percentages</li> <li>☞ Rebuild for all items</li> </ul>	<p>Agency</p>
<ul style="list-style-type: none"> <li>☞ Attachments</li> </ul>	<ul style="list-style-type: none"> <li>☞ Add Files</li> <li>☞ Verify that <b>Show Vendor</b> is <b><i>NOT checked</i></b> for any file or form that should <b><i>not</i></b> be accessible to the public.</li> </ul>	<p>Agency</p>



























		<table border="1"> <thead> <tr> <th>Document</th> <th>Show to Vendor</th> </tr> </thead> <tbody> <tr> <td>Procurement Justification Form</td> <td>No</td> </tr> <tr> <td>Labor Relations Checklist</td> <td>No</td> </tr> <tr> <td>Agency specific forms</td> <td>No</td> </tr> <tr> <td>Communications for the procurement file</td> <td>No</td> </tr> </tbody> </table>	Document	Show to Vendor	Procurement Justification Form	No	Labor Relations Checklist	No	Agency specific forms	No	Communications for the procurement file	No	
Document	Show to Vendor												
Procurement Justification Form	No												
Labor Relations Checklist	No												
Agency specific forms	No												
Communications for the procurement file	No												
	🔒 Save & Continue												
🔒 Notes	🖨 As needed		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> 													
Process Bid	🔒 Home Screen	<p><u>Option 1:</u></p> <ul style="list-style-type: none"> <li>🔒 Requisitions Ready for Purchasing Box</li> <li>🔒 Requisition Hyperlink</li> </ul> <p><u>Option 2:</u></p> <ul style="list-style-type: none"> <li>🔒 Requisitions</li> <li>🔒 Ready for Purchasing</li> <li>🔒 Requisition Hyperlink</li> </ul>	Agency										
	🔒 Summary Tab of the Req	<ul style="list-style-type: none"> <li>🔒 Convert to Bid</li> <li>🔒 Bid Document Hyperlink</li> </ul>	Agency										
<b>BID</b>													
Bid	🔒 General Tab	<ul style="list-style-type: none"> <li>🔒 <b>Type Code: 35 – Sole Source</b></li> <li>🔒 Allow Electronic Response: Uncheck</li> <li>🔒 Bid Opening Date: Select a date from the Sole Source Hearing Schedule that allows for approvals and 14-day publication.</li> <li>🔒 Purchase Method: <b>Open Market</b></li> <li>🔒 Enable Rolling Enrollment: Check</li> <li>🖨 Info Contact:</li> </ul> <p>Dianne Richman  Chief Procurement Office – General Services  401 S. Spring St.  712 Wm. G. Stratton Office Building  Springfield, IL 62706  Dianne.Richman@illinois.gov  217-558-6897</p>	Agency										

		<p> <b>Bulletin Description:</b> This is a notice of intent to award a contract as a sole (economically feasible) source to: [Vendor Name] for [What -include brief description of the procurement]. See attachment for details. The hearing will be canceled unless an interested party submits written comments or makes a written request for public hearing by Friday, DATE at 4 p.m. to the Info Contact above.</p> <p> SPO Name: Enter SPO Name</p> <p> Sole Source Rationale: Select sole source justification that will be displayed to the public <i>Note: This must match the justification selected on the SSJF.</i></p> <p> Is this a Small Business Set-Aside Procurement: No</p> <p> Is there a BEP/VBP Goal?: answer appropriately</p>													
 Items Tab	 Review and revise as necessary <i>Note: Line Items must match SSJF</i>		Agency												
 Address	 Review and revise as necessary		Agency												
 Accounting	 Review and revise as necessary		Agency												
 Attachments	<table border="1" data-bbox="589 1077 1344 1476"> <thead> <tr> <th data-bbox="589 1077 1027 1119">Document</th> <th data-bbox="1027 1077 1344 1119">Show to Vendor</th> </tr> </thead> <tbody> <tr> <td data-bbox="589 1119 1027 1234">SSJF part I signed by SPO with Bid Number on each page of SSJF</td> <td data-bbox="1027 1119 1344 1234">Yes</td> </tr> <tr> <td data-bbox="589 1234 1027 1308">Sole Source Hearing Details Form</td> <td data-bbox="1027 1234 1344 1308">Yes</td> </tr> <tr> <td data-bbox="589 1308 1027 1392">Sole Source Vendor Letter if received</td> <td data-bbox="1027 1308 1344 1392">Yes</td> </tr> <tr> <td data-bbox="589 1392 1027 1434">Agency specific forms</td> <td data-bbox="1027 1392 1344 1434">No</td> </tr> <tr> <td data-bbox="589 1434 1027 1476">Any communications for the file</td> <td data-bbox="1027 1434 1344 1476">No</td> </tr> </tbody> </table>	Document	Show to Vendor	SSJF part I signed by SPO with Bid Number on each page of SSJF	Yes	Sole Source Hearing Details Form	Yes	Sole Source Vendor Letter if received	Yes	Agency specific forms	No	Any communications for the file	No		Agency
Document	Show to Vendor														
SSJF part I signed by SPO with Bid Number on each page of SSJF	Yes														
Sole Source Hearing Details Form	Yes														
Sole Source Vendor Letter if received	Yes														
Agency specific forms	No														
Any communications for the file	No														
 Notes	 Add as necessary		Agency												
 Bidders Tab	<p> <b>Lookup and Add Vendors</b></p> <p> Select NIGP Code</p> <p> Find It</p> <p> Select all vendors (<i>confirm sole source vendor is on the Bidder's List</i>)</p> <p> Save &amp; Exit</p> <p> Select <b>Unrestricted Bid – all vendors can view and respond</b></p>		Agency												


		<ul style="list-style-type: none"> <li>🔒 <u>Hide Bid Holders List on Vendor Side: Check</u></li> <li>🔒 Save &amp; Continue</li> <li>🔒 Repeat steps for each NIGP code being used</li> </ul>									
	🔒 Reminder Tab	🔒 As needed	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	🔒 Summary	<ul style="list-style-type: none"> <li>🔒 Send Bid</li> <li>🔒 Vendor Notification: OK <i>Send email to Dianne Richman to add SS to hearing agenda (provide SSJF, hearing notice, and SSJF part II)</i></li> </ul>	SPO								
Create Amendment (If no hearing requested)	🔒 Summary Tab	<p>Update the Summary Tab to Reflect Hearing Status</p> <ul style="list-style-type: none"> <li>🔒 Comment to the Whole Bid Amendment: As there were no requests for a hearing, the sole source hearing has been canceled.</li> <li>🔒 Apply Bid Amendment</li> <li>🔒 Click OK</li> </ul> <p><i>Another amendment will need to be created when the Sole Source Justification Part II Form is approved.</i></p>	SPO								
Create Amendment to attach CPO signed SSJF Part II	🔒 Amendment: Attachment Tab	<ul style="list-style-type: none"> <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>SSJF Part II</td> <td>Yes</td> </tr> <tr> <td>CPO Determination Memo (if hearing was held)</td> <td>Yes</td> </tr> <tr> <td>Audio recording (if hearing was held)</td> <td>No</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>🔒 Save &amp; Continue</li> </ul>	<u>Document</u>	<u>Show to Vendor</u>	SSJF Part II	Yes	CPO Determination Memo (if hearing was held)	Yes	Audio recording (if hearing was held)	No	SPO
	<u>Document</u>	<u>Show to Vendor</u>									
SSJF Part II	Yes										
CPO Determination Memo (if hearing was held)	Yes										
Audio recording (if hearing was held)	No										
	🔒 Amendment: Summary Tab	<ul style="list-style-type: none"> <li>🔒 Comment to the Whole Bid Amendment: <ul style="list-style-type: none"> <li>○ <u>Option 1</u>: The CPO has upheld the decision to award a Sole Source contract or Sole Economically Feasible Source to <b>VENDOR NAME</b>. Written approval is attached.</li> <li>○ <u>Option 2</u>: The CPO has upheld the decision to award a Sole Source contract or Sole Economically Feasible Source to <b>VENDOR</b></li> </ul> </li> </ul>	SPO								

		<p><b>NAME</b> with special conditions detailed on the attached form.</p> <ul style="list-style-type: none"> <li>○ <u>Option 3</u>: The CPO has denied the decision to award a Sole Source contract Sole Economically Feasible Source to <b>VENDOR NAME</b>. Written denial is attached.</li> </ul> <p>📎 SPO to Apply Bid Amendment</p>							
<b>BID Tab</b>									
<b>Create Quote</b>	📎 Bid: Summary Tab	<p>📎 Access Bid</p> <p>📎 Open Bid (at bottom of the page)</p> <p>📎 Bid Tab (at bottom of the page)</p> <p>📎 Create New Quote</p>	Agency						
	📎 Quote: General Tab	<p>📎 Vendor Name</p> <p>📎 Received Date</p> <p>📎 Are you registered and active in the IPG?</p> <p>📎 Did you attach Forms A or Forms B?</p>	Agency						
	📎 Quote: Items Tab	<p>📎 Enter Price</p> <p>📎 Save &amp; Continue</p>	Agency						
	📎 Quote: Terms & Conditions Tab	<p>📎 Yes</p>	Agency						
	📎 Quote: Attachments Tab	<p>📎 Add Files</p> <table border="1"> <thead> <tr> <th><u>Document</u></th> <th><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>All quote documents</td> <td>Yes</td> </tr> <tr> <td>Communications for the procurement file</td> <td>Yes</td> </tr> </tbody> </table> <p><i>Note: ALL documents attached to quote must be marked confidential.</i></p> <p>📎 Save &amp; Continue</p>	<u>Document</u>	<u>Confidential</u>	All quote documents	Yes	Communications for the procurement file	Yes	Agency
	<u>Document</u>	<u>Confidential</u>							
All quote documents	Yes								
Communications for the procurement file	Yes								
📎 Quote: Summary Tab	<p>📎 Submit Quote</p> <p>📎 Back to Bid</p>	Agency							
<b>Tabulate Bid</b>	📎 Bid Summary Tab	📎 Bid Tab	Agency						
	📎 Bid Tab Items Tab	<p>📎 Select Vendor for Award -&gt; Award All</p> <p>📎 Save &amp; Continue</p>	Agency						
<b>Award Bid</b>	📎 Bid Tab Attachments Tab	<table border="1"> <thead> <tr> <th><u>Document</u></th> <th><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Forms A</td> <td>Yes</td> </tr> </tbody> </table>	<u>Document</u>	<u>Confidential</u>	Forms A	Yes	Agency		
<u>Document</u>	<u>Confidential</u>								
Forms A	Yes								

		Forms B and IPG printouts including ownership information	Yes		
		Conflict of Interest review form	Yes		
		Comptroller Offset	Yes		
		Agency specific forms	Yes		
		Communications for the file	Yes		
	<input type="checkbox"/> Bid Tab <input type="checkbox"/> Summary Tab	<input type="checkbox"/> Review <input type="checkbox"/> Submit for Approval <b>NOTE: Do not submit Bid Tab for approvals until the CPO determination has been applied as an amendment</b>			Agency
<b>Conduct Approvals</b> 					
Access the Bid and Convert to PO	<input type="checkbox"/> Home Screen	<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"/> Advanced Search to find Bid			Agency
	<input type="checkbox"/> Bid Tab: <input type="checkbox"/> Summary Tab	<input type="checkbox"/> Create PO <input type="checkbox"/> Continue			Agency
<b>Purchase Order</b>					
Process PO	<input type="checkbox"/> Summary Tab	<u>Option 1:</u> <input type="checkbox"/> click new PO hyperlink on the Bid Summary Tab <u>Option 2:</u> <input type="checkbox"/> PO's → In Progress → PO Hyperlink			Agency
	<input type="checkbox"/> General Tab	Complete Required Fields, including: <input type="checkbox"/> <b>TYPE CODE: D - Sole Source</b> <input type="checkbox"/> <b>PO TYPE: Open Market</b>			Agency

	<ul style="list-style-type: none"> <li> <b>Blanket (SAP Only - when syncing with SAP)</b></li> <li> Is this a Small Business Set Aside Procurement?: No</li> <li> Actual Contract Begin Date: Enter</li> <li> Actual Contract End Date: Enter</li> <li> Fiscal Year of Obligation: Enter</li> <li> SAP Vendor Number: Enter</li> <li> Full SAP Contract Value: Enter</li> <li> Is there a BEP/VBP Participation Goal?: No</li> <li> Notice of Award Amount: Enter <i>Note: this amount should match the amount on the NOA attached at the Bid Stage</i></li> <li> Save &amp; Continue</li> </ul>													
 Control Tab <i>(this tab will only appear when you are using a Blanket PO)</i>	If an Agency Specific Master Contract Select: <ul style="list-style-type: none"> <li> Cooperative Purchasing Allowed: Check No</li> <li> Add New: Search and Identify Agency</li> <li> Establish Control Thresholds</li> <li> Save and Continue</li> </ul>	Agency												
 Attachment Tab	<ul style="list-style-type: none"> <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> <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>Show to Vendor</u></th> <th style="text-align: left;"><u>Confidential</u></th> </tr> </thead> <tbody> <tr> <td>Vendor Signed BOA or Contract</td> <td>No</td> <td>Yes</td> </tr> <tr> <td>IOC Offset (if 30 days has passed since Bid Tab approval)</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>	Vendor Signed BOA or Contract	No	Yes	IOC Offset (if 30 days has passed since Bid Tab approval)	No	Yes	Any other documents to complete procurement file	No	Yes	Agency
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>												
Vendor Signed BOA or Contract	No	Yes												
IOC Offset (if 30 days has passed since Bid Tab approval)	No	Yes												
Any other documents to complete procurement file	No	Yes												
 Summary Tab	<ul style="list-style-type: none"> <li> Correct Any Validation Errors</li> <li> Submit for Approval</li> <li> Continue</li> </ul>	Agency												
<b>Conduct Approvals</b>  <b>Note: Agency may execute the contract only after SPO approval of the PO. Any contracts that do not receive SPO approval for execution may be void.</b>														
	<ul style="list-style-type: none"> <li><u>Option 1:</u></li> <li> Select PO Hyperlink in “Recent Documents”</li> <li><u>Option 2:</u></li> <li> PO’s Ready to Send → PO Hyperlink</li> <li><u>Option 3:</u></li> <li> Advanced Search to find PO</li> </ul>	Agency												



		<p>Option 4:</p> <ul style="list-style-type: none"> <li>Click the hyperlink on the Bid</li> </ul>										
	PO Summary Tab	Choose "Send Email and Notify Vendor" or "Set to Printed Status"	Agency									
Create Non-material Change Order to attach Fully Executed Contract and Complete Procurement File	Change Order	Create Change Order	Agency									
	Change Order: Attachments Tab	<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> <p>Add Files</p> <table border="1"> <thead> <tr> <th>Document</th> <th>Show to Vendor</th> <th>Confidential</th> </tr> </thead> <tbody> <tr> <td>Fully Executed Contract</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> <p>Save &amp; Continue</p>	Document	Show to Vendor	Confidential	Fully Executed Contract	No	Yes	Any other documents to complete procurement file	No	Yes	Agency
Document	Show to Vendor	Confidential										
Fully Executed Contract	No	Yes										
Any other documents to complete procurement file	No	Yes										
	Change Order: Reminders Tab	Set Reminder as needed	Agency									
	Change Order: Summary Tab	<ul style="list-style-type: none"> <li>Add Comment for whole Change Order</li> <li>Save &amp; Continue</li> <li>Submit for Approval</li> </ul>	Agency									
<b>Conduct Approval</b> 												
	PO Summary	<ul style="list-style-type: none"> <li>Access PO</li> <li>Change Order Tab</li> <li>Apply/Delete Change Order</li> </ul>	Agency									