

Frequently Asked Questions

CLM Legal Compliance



Q: When do I need a World Trade Organization (WTO) Notice of Intent (NOI)?

A: The WTO may be posted when the CLM Bid Package is in “Intent” status, and the RFR may be posted when the bid package is in “Draft” status. One or both documents may be sent to COMMBUYS prior to the COMMBUYS bid being posted. The purpose of the WTO is to meet the obligation to allow a 40-day window between the posting of an Announcement or an RFR and the vendor deadline (bid opening date) for Goods and Services Procurements with total values greater than or equal to \$498,000.

Q: Is there a minimum requirement for the length of time that a bid must remain open?

A: OSD does not establish a minimum duration for when bids must be open. Departments are obligated, however, to ensure that bids are open for a commercially reasonable period of time sufficient to allow multiple Bidders to prepare and submit quality responses. This duration will depend on the nature and complexity of the bid. However, goods and services Department bids with total values of \$498,000 or greater require a minimum of forty (40) days’ advance notice pursuant to the World Trade Organization (WTO) Treaty on Government Procurement. Consideration for the open duration should be decided as part of the overall sourcing strategy and may be influenced by the industry research conducted by the SST.

Q: How do I use another Department’s contracts?

A: Use of another department’s contract is restricted to entities specifically named in the RFR and included in the MBPO in COMMBUYS.

Q: Is there guidance on documents to be included in bid packages and vendor contracts?

A: See the table on Procurement File and Procurement Folder posted on [OSD website](#).

Q: The CLM Job Aid indicates we should select “blanket” for the type of contract. Does that mean CLM should be used only when the RFR results in an MBPO?

A: A departmental RFR, if awarded, always should result in an MBPO in COMMBUYS. However, all RFRs posted in COMMBUYS, even if not awarded, should be created in CLM. If the RFR is cancelled or a contract is not awarded, the reasons should be documented in the CLM Bid Package record by adding notes or uploading attachments describing how the decision was reached.

Q: The procurement schedule in CLM includes a list of dates, what do they mean?

A: You may modify the dates in the CLM or ignore them; there is no way to delete them. You may use best estimates or enter placeholder dates. The dates are for internal tracking and may be injected into documents. If you use OSD Templates, the dates would be used.

Q: Is there a way to extend the CLM timer so I don’t get signed out?

A: These times are set by the developer and cannot be modified.

Q: Why is “Statewide Contract” a required field if we aren’t using a Statewide Contract?

A: OSD is aware this required field is named “Statewide Contract” and we are working with the developer to change the language. In the meantime, agencies should identify their contract number and enter the start and end date where indicated. These fields also are used by OSD’s sourcing team on Statewide Contracts.

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Q: I prefer to create my own documents and upload to COMMBUYS. Is it possible to do this and be compliant with maintaining a complete procurement file?

A: No. Departments are required to post records in COMMBUYS and are required to utilize the CLM tool to create or upload documents. Additionally, Departments are required to use the CLM workflows and approval paths to ensure documents include all required components and required language. In addition, departments should use the file names created by the CLM tool to make it easier to identify and report on the required documents. Users are asked not to make changes to the default file names in CLM. The CLM tool includes functionality to push required documents directly from CLM to COMMBUYS, which simplifies compliance with procurement document requirements.

Q: Is CLM limited to one eSign system? What if my agency does not subscribe to Adobe Sign?

A: Adobe Sign is the only option for e-signatures in CLM. However, CLM also includes a wet signature option that allows agencies to execute documents using wet signatures or other e-signature systems and upload the signed documents to CLM.

Q: Do I have to create a sourcing strategy?

A: No, but it is recommended that you create a sourcing strategy.

Q: I received an error message that reads: “You don’t have a strategy document.” What does this mean?

A: This error message may cause concern for users, however, it should be considered a notice since it does not hinder users from moving forward. The error message continues to appear even after saving.

Q: Should I put the Contractor Authorized Signatory Listing (CASL) forms with each contract or with the vendor?

A: CASL forms should be attached to each contract record as part of the contract package document in CLM.