# Job Aid:
## How to Create a Rolling Enrollment Bid Using a Requisition

### This Job Aid Shows How To:

- Create a Rolling Enrollment Bid from an approved Requisition.
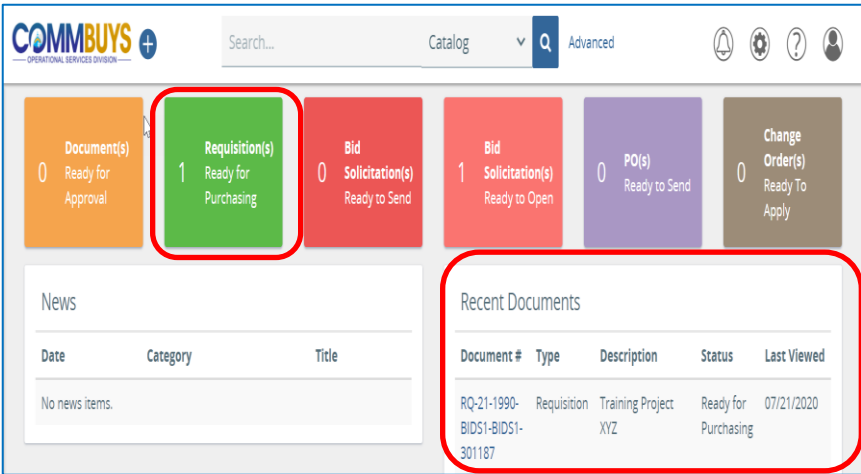
### Of Special Note:

Guidance for rolling enrollments can be found in Section III, E, xi, c of the [Best Value Procurement Handbook](#).

**Rolling Enrollment:**
- Allows you to accept bids and review them as they come.
- Has one enrollment period to award vendors to an established contract
- Allows purchaser to award vendors anytime
- Must act as informal

Under a Rolling Enrollment process the RFR never closes, allowing Bidders to respond at any point during the life of the solicitation. Managing rolling enrollments requires advanced planning by the to ensure that submissions are handled appropriately and in a timely fashion. Bids may be designated as Rolling Enrollment upon creation of the bid in COMMBUYS. In COMMBUYS, a Rolling Enrollment bid is posted as an Informal Bid with a Bid Opening Date set to be the same as (or before) the end date for the associated contract.

**NOTE:** Information regarding the creation of a requisition can be found in the Buyer Job Aid *How to Create an Open Market Requisition.*

| Screenshot | Directions |
|---|---|
|  | **Step 1: Locating the Requisition**<br><br>After approval, the status of the open market requisition changed to **Ready for Purchasing**. Locate the approved requisition from the main menu by clicking on the green **Requisition(s) Ready for Purchasing** box.<br><br>The requisition might also be found in the **Recent Documents** section of the page. If so, click on the blue hyperlink in the Document # column and skip down to Step 3. |

| Screenshot | Directions |
|---|---|

**Step 2: Clicking on the Hyperlink**

After clicking on the green **Requisition(s) Ready for Purchasing** box, click on the blue hyperlink in the **Requisition #** column to open the desired requisition.

| Requisition # | Description | Req Type | Requestor | Purchaser | Dep / Loc | Created Date | Total | Submitted Date |
|---|---|---|---|---|---|---|---|---|
| RQ-21-1990-BIDS1-BIDS1-301187 | Training Project XYZ | Open Market | Bill O'Malley15 | Bill O'Malley15 | BIDS1/BIDS1 | 07/21/2020 | $0.00 | 07/21/2020 |

Requisitions — In Progress · Ready for Approval · Returned · Ready for Purchasing · Gone to PO · Gone to Bid — 1-1 of 1

**Step 3: Converting the Requisition to a Bid**

1. The requisition opens to the **Summary** tab. Scroll to the bottom of the page and click on the **Convert to Bid** button.

Item Information

Approval Paths

There are no approval paths found for this requisition.

Approval Actions

Options ○ Disapprove
Comment

Save & Exit

Convert to Bid | Convert to PO | Cancel Requisition | Clone Requisition | Print

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2. A popup message displays asking if you are sure. Click on the **OK** button to confirm.

www.training.commbuys.com says

Are you sure you want to convert this requisition to a bid?

OK     Cancel

| Screenshot | Directions |
|---|---|
| Open Market Requisition RQ-21-1990-BIDS1-BIDS1-301187      **Status: 1RGB - Gone to Bid** <br><br> General   Items   Vendors   Address   Accounting   Routing   Attachments(1)   Notes   Reminders   **Summary** <br><br> **System Warning(s)**      ✕ <br> New bid is **BD-21-1990-BIDS1-BIDS1-52110** | **Step 4: Opening the Bid** <br><br> The Requisition screen redisplays with a **Gone to Bid** status. Click on the **blue hyperlink** in the yellow System Warning(s) box to open the bid. |
| Open Market Bid BD-21-1990-BIDS1-BIDS1-52110      Status <br><br> **General**   Items   Address   Accounting   Routing   Attachments(1)   Notes   Bidders   Questions   Amendments   Q & A   Reminders   **Summary** <br><br> **Overall Validation Errors** <br> The following required fields are missing: bid opening date, available date. <br> The following required fields are missing: [SBPP (Small Business Purchasing Program) Eligible?]. <br><br> **Header Information** | **Step 5: Viewing the Bid Summary Screen** <br><br> The **Summary** screen opens with a warning displaying Validation Errors. Click on the **General** tab. |
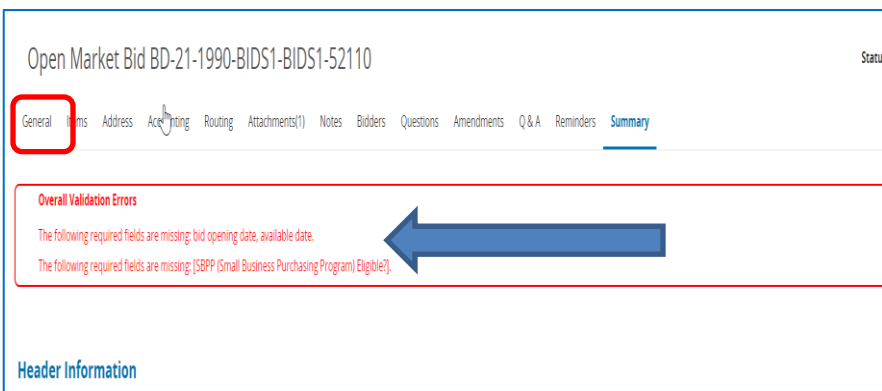
## Step 6: Completing the Bid General Tab

The **General** tab displays. All information from the requisition (except Reminders) is automatically populated into the bid. The fields that require completion include:

**Type Code:** Using the dropdown arrow, select one of the following:

- **NS**: Bid for a non-statewide (departmental) solicitation
- **SS**: Bid for a statewide solicitation – **OSD use only.**

**Available Date\***: Enter the date the bid (solicitation) will be made available for vendors to view and submit quotes. Click on the calendar icon to set the desired month, day, and time.

**Bid Opening Date\*:** Enter the date that quotes will no longer be accepted and submitted quotes can be opened for viewing. Click on the calendar icon to set the desired month, day, and time (using the slide bars).

**NOTE:** If the year must be changed, select the desired year before selecting the month, day, and time.

**Purchase Method\*:** Select **Blanket** and click on the pop-up **OK** button. Two new fields display and must be completed:

- **Blanket Begin Date**: (the estimated contract beginning date)
- **Blanket End Date**: (the estimated contract ending date)

**SBPP** (**Small Business Purchasing Program) Eligible?:** If displayed, select **Yes** if the transaction amount is less than or equal to $150K or **No** if over $150K.

| Screenshot | Directions |
|---|---|
| Informal Bid: ☑ ← | **Step 7: Selecting Rolling Enrollment** |
| Estimated Cost: $0.00 | 1. The last two fields on the lower right side of the page are for Rolling and Open Enrollment. Select the **Enable Rolling Enrollment** checkbox. When you do so, note that the Informal Bid checkbox automatically fills in with a checkmark. |
| Alternate ID: | |
| Print Format: * Bid Print ∨ | 2. Ensure that the Bid Opening Date has been set to be the same as (or before) the end date for the associated contract. |
| Enable Rolling Enrollment: ☑ ← | |
| Enable Open Enrollment: ☐ | 3. Scroll to the bottom of the General tab page and click on the **Save & Continue** button. |
| Blanket Bid BD-21-1990-BIDS1-BIDS1-52110    Status: 2BI - In Progress 📄<br><br>General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary | **Step 8: Verifying the Items Tab**<br><br>Click on the **Items** tab and verify what was entered during the Requisition stage. Edits can be made if needed. |
| Blanket Bid BD-21-1990-BIDS1-BIDS1-52110    Status: 2BI - In Progress 📄<br><br>General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary | **Step 9: Verifying the Address and Attachments Tabs**<br><br>1. Click on the **Address** tab. Verify that the Ship-to and Bill-to addresses are correct.<br><br>2. Click on the **Attachments** tab. Verify and/or add files if needed. |

| Screenshot | Directions |
|---|---|

**Screenshot**

Blanket Bid BD-21-1990-BIDS1-BIDS1-52110    Status: 2BI - In Progress

General   Items   Addes   Accounting   Routing   Attachments(1)   Notes   **Bidders**   Questions   Amendments   Q & A   Reminders   Summary

**General**   Subcontractors   Quote Activity

Select bidder participation, open or closed, and select vendors to notify

○ Unrestricted bid, all vendors can view and respond

○ Restricted bid, only selected vendors can view and respond

| Delete All | Vendor ID | Vendor Name | Vendor Address | Preferred Delivery Method |
|---|---|---|---|---|
| ☐ | | | | |
| ☐ | 00000204 | Alliance Detective & Security Service, Inc. | Bid Mailing Address:   Add New Address   General Mailing Address - Scott Cummings 930 Broadway Everett, MA... ▼   930 Broadway Everett, MA 02149 US | Email |

**Directions**

**Step 10: Verifying the Bidders Tab**

1.  Click on the **Bidders** tab. The Vendors identified in the Requisition will display.

2.  If you have cause to delete vendors from the original list, select the radio button next to **Restricted** bid.

3.  Amend the list of Bidders by deselecting the checkbox in the Delete column for those vendors you wish to eliminate. (**NOTE:** This is not a best practice).

4.  To add more Bidders, click on the **Lookup & Add Vendors** button at the bottom of the page.

5.  If any changes have been made to the Bidders tab, click on the **Save & Continue** button; otherwise go to the next step.

| Screenshot | Directions |
|---|---|

**Step 11: Completing the Questions Tab**

If you have questions to ask of vendors:

1. Click on the **Questions** tab.

2. Select the **Required** checkbox. Doing so will require vendors to answer the question before their quote can be submitted.

3. Enter the question text in the **Question** field.

4. Select a value from the **Response Type** dropdown list to establish a format for the vendor response.

5. Click on the **Save & Continue** button to save your entries.

**NOTE:** The next tab is the **Amendments** tab which has no functionality until after the bid is posted.

| Screenshot | Directions |
|---|---|
| | **Step 12: Completing the Q&A Tab** |

<table>
<tr><td>

| Question # | Created Date | User Created | Question Subject | Question | Answer | Show All on Web | Show Original Vendor Only | Delete All |
|---|---|---|---|---|---|---|---|---|
| | | | | | | ☐ | ☐ | ☐ |
| Add New: | | | | | | ☐ | | |

☐ Allow vendor to submit questions

☐ Send notification when vendor submitting question

Save & Continue    Reset

</td><td>

1. Click on the **Q&A** tab.

2. To dialogue with vendors, select the **Allow vendor to submit questions** checkbox.

3. If you would like COMMBUYS to notify you by email when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.

**NOTE:** Numbers 2 and 3 above are considered a best practice.

4. Click on the **Save & Continue** button.

**NOTE:** When a question is received, provide an answer and ensure that the **Show All on Web** checkboxes are checked, and that the **Show Original Vendor Only** checkboxes are unchecked. This is the best practice as all questions and answers will be viewable by all vendors. All questions and answers may be subject to disclosure through Freedom of Information Act requests.

</td></tr>
<tr><td>

There is no item accounting available for this item.

Submit for Approval    Cancel Bid    Clone Bid    Print

</td><td>

**Step 13: Submitting for Approval**

1. Click on the **Summary** tab to review the bid information.

2. Scroll to the bottom of the page and click on the **Submit for Approval** button.

</td></tr>
</table>

| Screenshot | Directions |
|---|---|
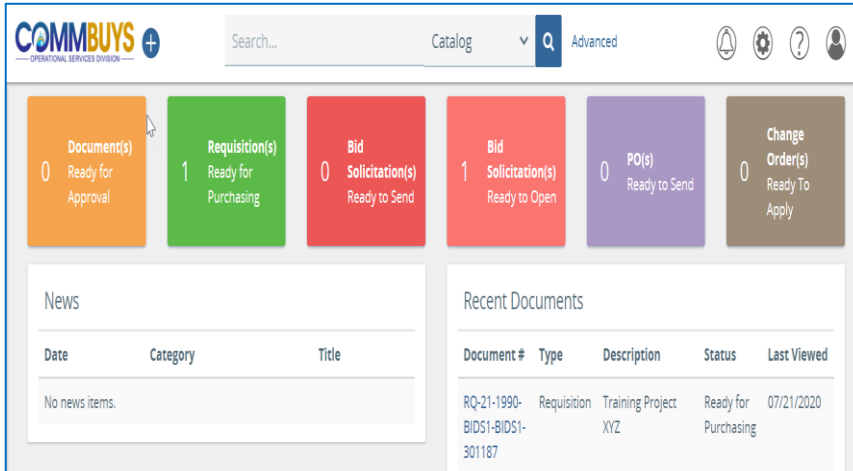
**Step 14: Sending the Bid**

Once the bid is approved, you will receive an email notification from COMMBUYS.

1. Locate the bid by selecting the **Bid Solicitation(s) Ready to Send** tile box or look for it in the **Recent Documents** box.

2. Click on the blue hyperlink for the bid. The Summary tab page displays with a status of Ready to Send.

3. Scroll to the bottom of the page and click on the **Send Bid** button.
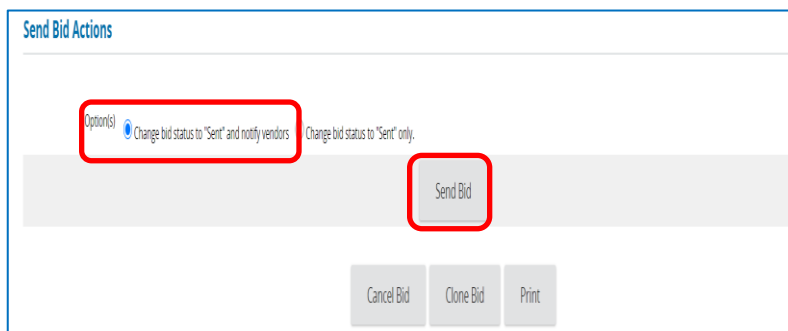
**Step 15: Verifying the Bidders**

The list of bidders (vendors) to notify by email displays. Click on the **OK** button to verify.

**NOTE:** Your bid is now in Sent status which indicates that all selected bidders will receive the bid electronically on the available date.