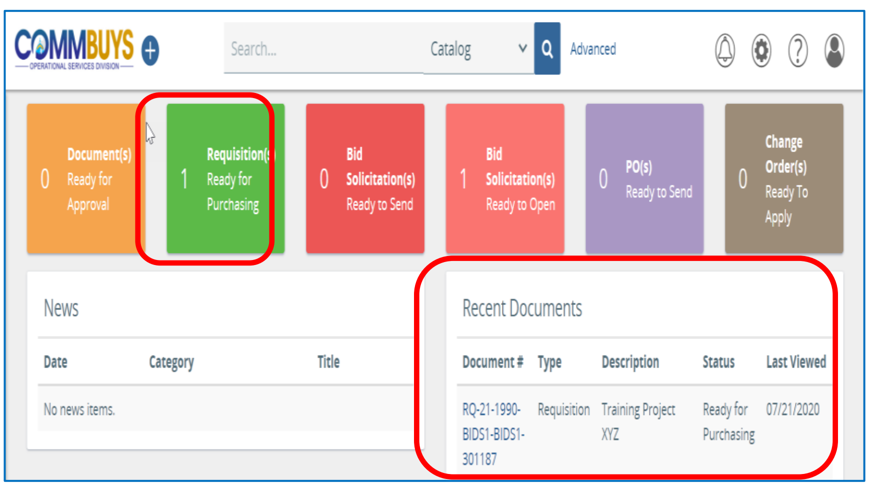
Job Aid:
How to Create an Open Enrollment Bid Using a Requisition

This Job Aid Shows How To:
- Create an Open Enrollment Bid from an approved Requisition.

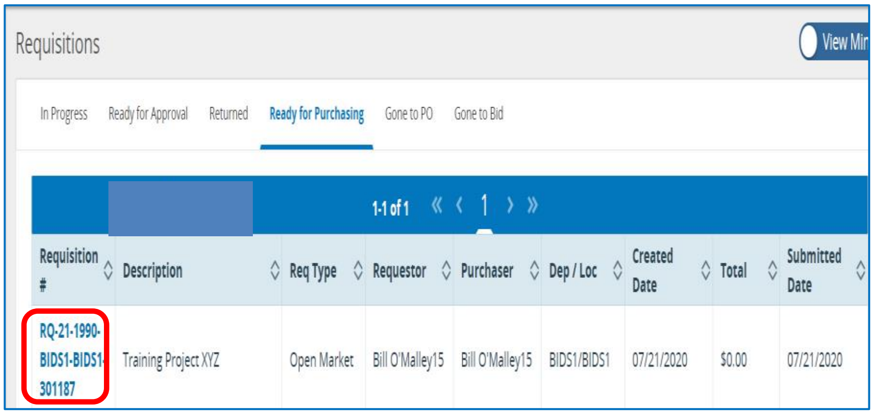
Of Special Note:
Guidance for open enrollments can be found in Section III, E, xi, c of the Best Value Procurement Handbook.

Open Enrollment:
- Allows you to re-open the contract at any time (or at set intervals) to add new vendors.
- Allows adding vendors to an established contract
- Allows awarding to vendors during the open enrollment period
- Has multiple quote submission periods
- Must act as informal

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

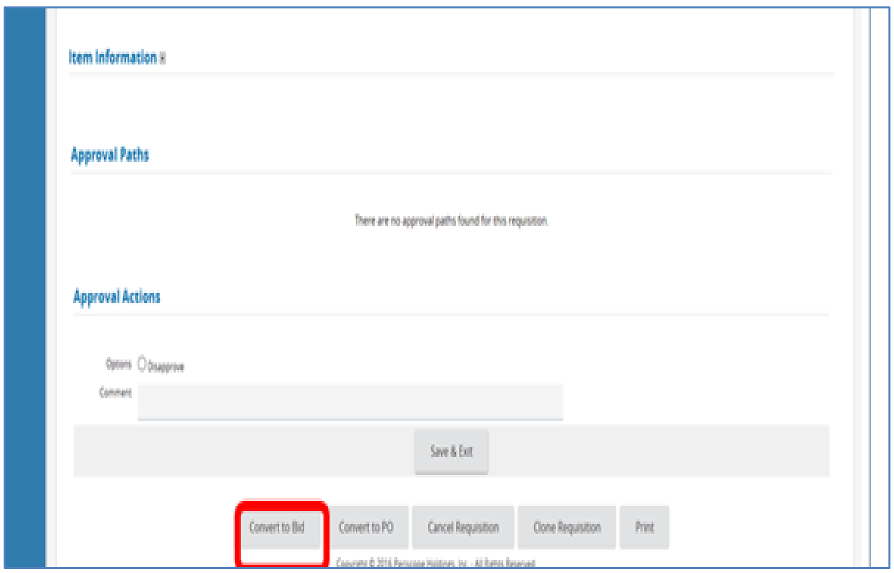
Screenshot	Directions
	**Step 1: Locating the Requisition** Locate the desired approved requisition from the main menu by clicking on the green **Requisition(s) Ready for Purchasing** tile box. The requisition might also be found in the **Recent Documents** section of the page. If so, click on the blue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

Screenshot	Directions



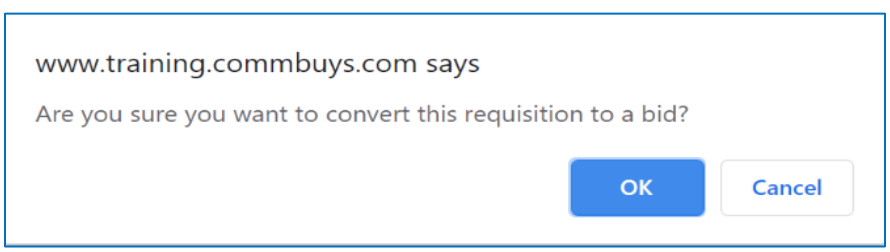
Step 2: Clicking on the Hyperlink

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.



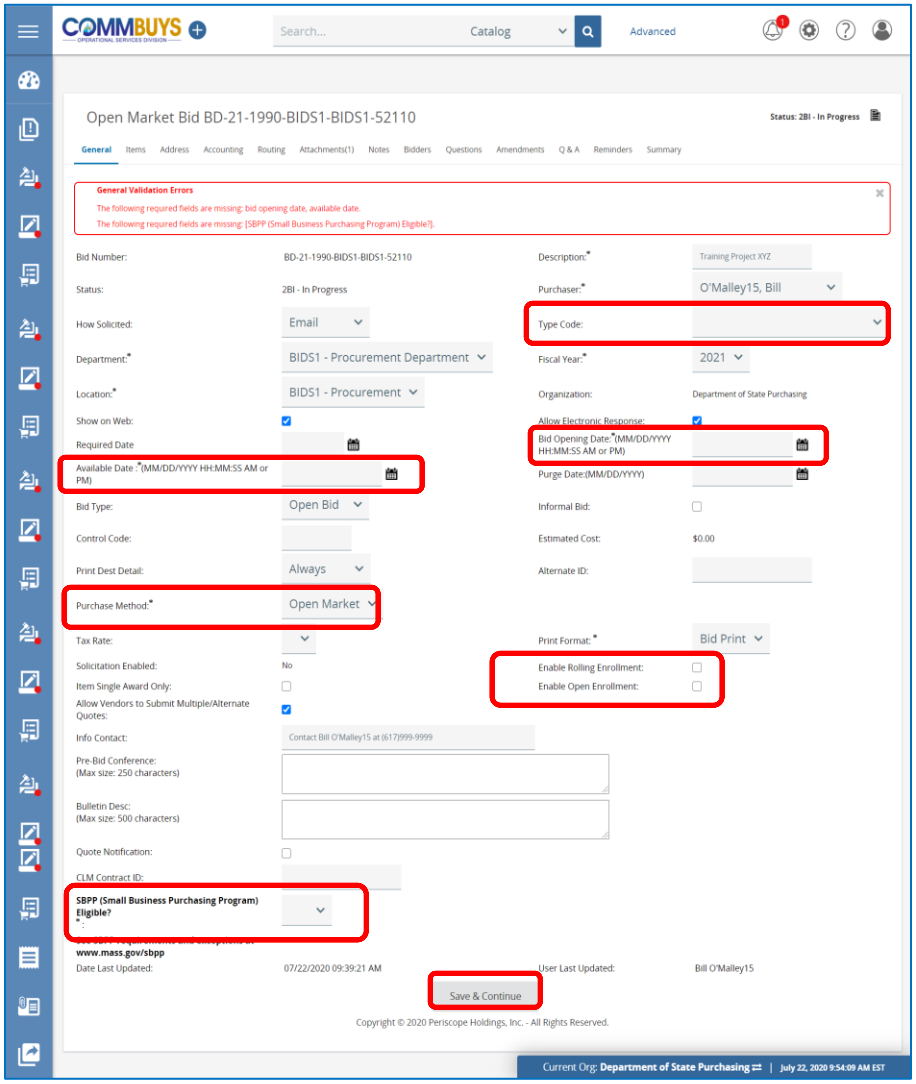
Step 3: Converting the Requisition to a Bid

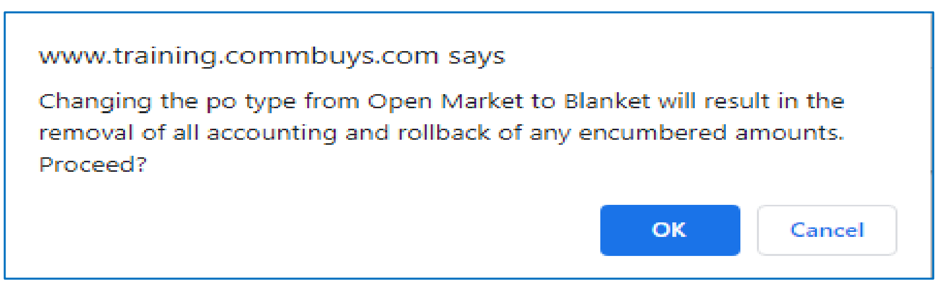
1. The requisition opens to the **Summary** tab. Scroll to the bottom of the page and click on the **Convert to Bid** button.



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

Screenshot	Directions
	**Step 4: Opening the Bid** 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.
	**Step 5: Viewing the Bid Summary Screen** 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).

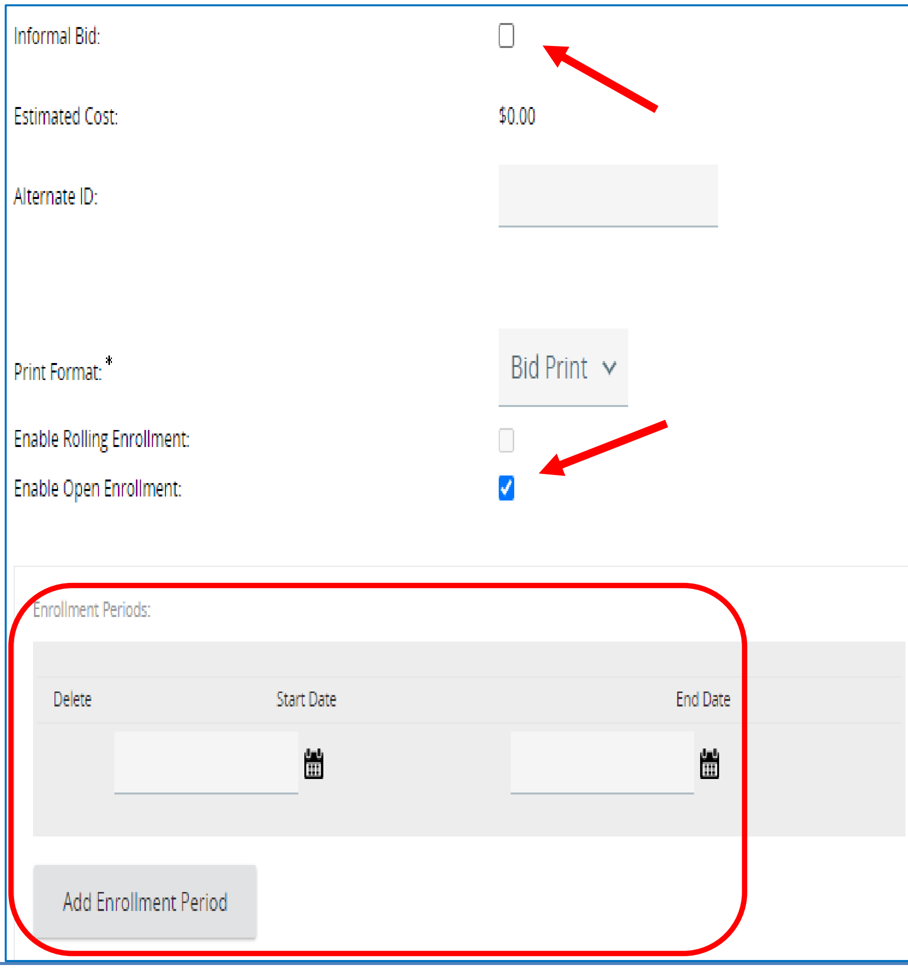
NOTE: If the year must be changed, select the desired year before selecting the month, day, and time.

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



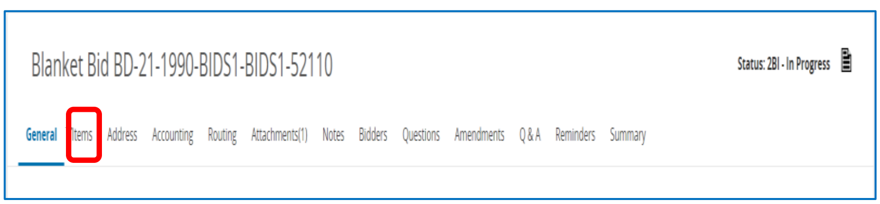
Step 7: Selecting Open Enrollment

1. The last two fields on the lower right side of the page are for Rolling and Open Enrollment. Select the **Enable Open Enrollment** checkbox. When you do so, note that the **Informal Bid** checkbox does not fill in with a checkmark.

   Also note that an **Enrollment Periods** popup box displays – a function that will allow the user to enter the start date and end date of the open enrollment period. It also allows you to add additional periods.

2. Once the period(s) has been entered, click on the **Add Enrollment Period** button.

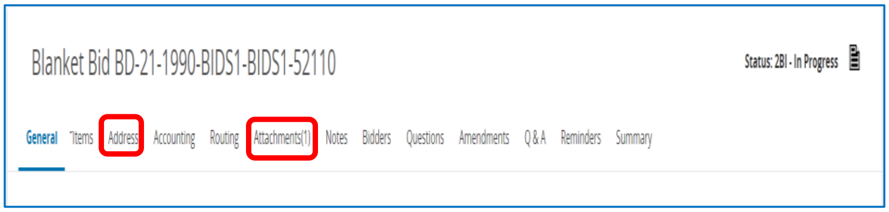
3. Scroll to the bottom of the General tab page and click on the **Save & Continue** button.



Step 8: Verifying the Items Tab

Click on the **Items** tab and verify what was entered during the Requisition stage. Edits can be made if needed.

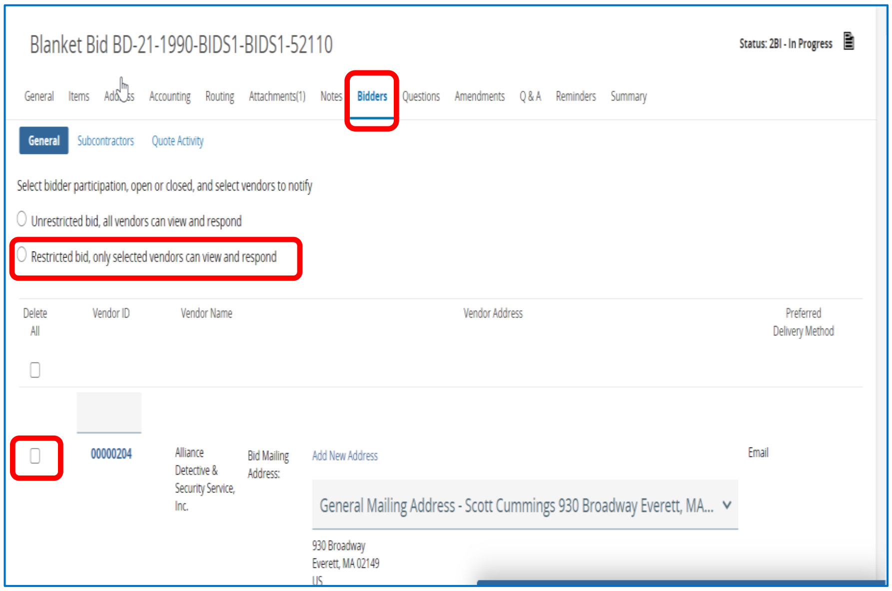
Screenshot	Directions



Step 9: Verifying the Address and Attachments Tabs

1. Click on the **Address** tab. Verify that the Ship-to and Bill-to addresses are correct.

2. Click on the **Attachments** tab. Verify and/or add files if needed.



Step 10: Verifying the Bidders Tab

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

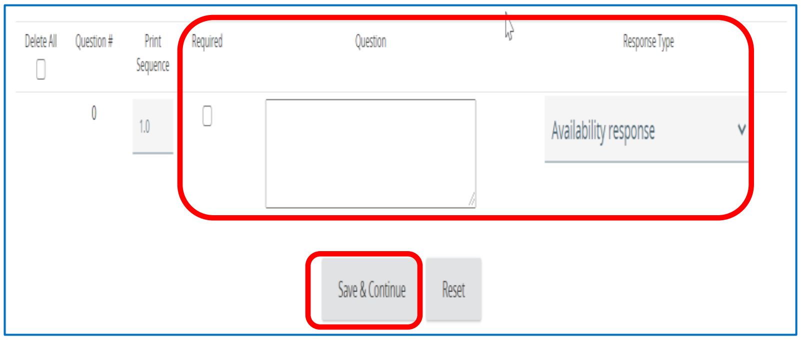
2. If you have cause to delete vendors from the original list, select the radio button next to **Restricted** bid.

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

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.

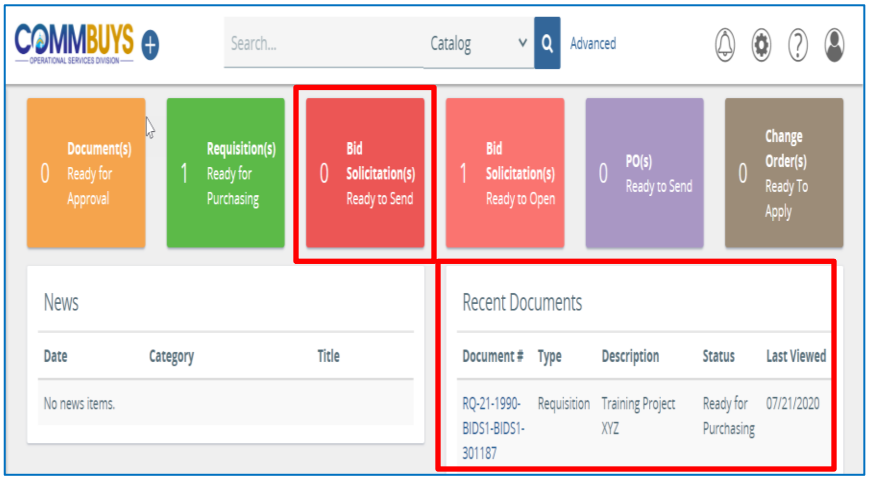
4. Click on the **Save & Continue** button.

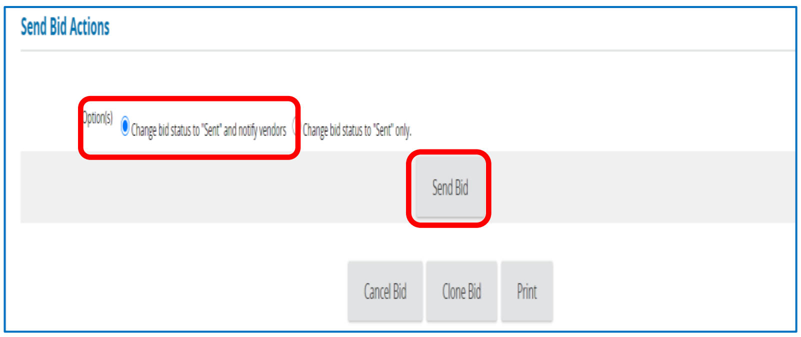
NOTE: When a question is received, provide an answer and ensure that the **Show All on Web** checkboxes are checked, and that the **Show Original Vendor Only** checkboxes are unchecked. This is the best practice as all questions and answers will be viewable by all vendors. All questions and answers may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

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.

Screenshot	Directions

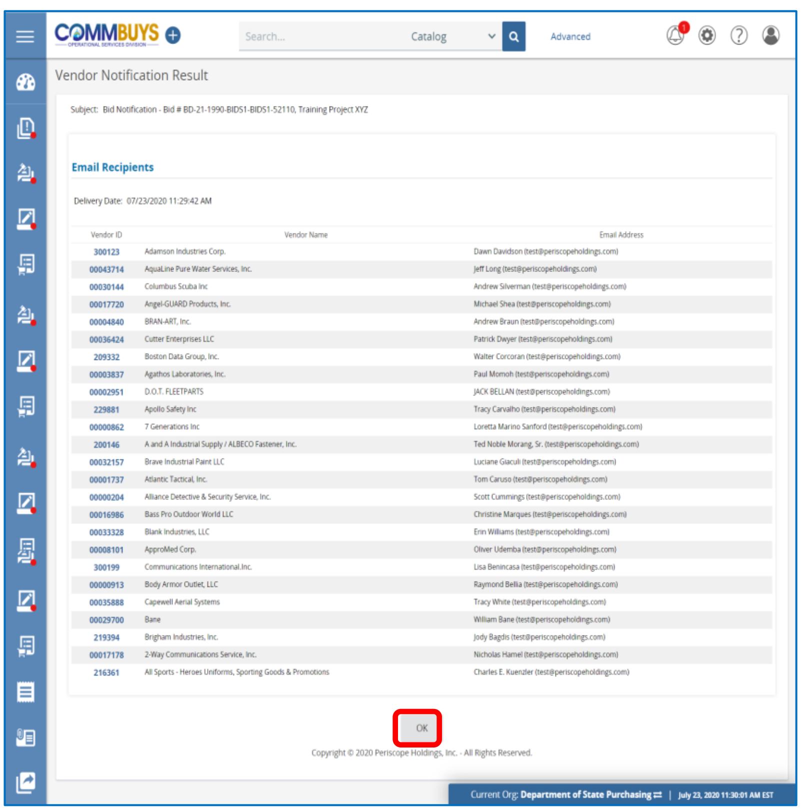




Step 14: Sending the Bid

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.