

SDAS Register of Proposals

PROCEDURES MANUAL

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Overview

During the 2009 South Dakota legislative session, House Bill 1260 was passed to address some perceived concerns about the process used to award contracts for “professional services”.

The basic provisions of HB1260 require that a request for proposal needs to be issued before entering into a contract for professional services costing more than \$50,000. Professional services, as defined by the statute, are those which are predominantly mental or intellectual, rather than physical or manual.

Additionally, section 6 of the bill requires that a “**register of proposals**” shall be prepared and maintained by any state agency issuing a request for proposals for a professional service contract. The register shall contain the names of any person (or business) whose qualifications were considered and identify the person that was awarded the contract. This register of proposals could be as simple as a notebook kept in a drawer in the agency where these items were listed.

However, the Bureau of Administration set policy that for executive branch agencies there will be one master register of proposals, and that it will be made available online through the OpenSD website (<http://open.sd.gov>.)

General Approach

After discussions with BOA and BIT, it was decided the best approach would be to use the already existing SDAS PC interface for data entry, in order to be able to validate data and tie into information from the financial systems, and to use the already existing user setup and security.

An RFP Register page has been developed by BFM for inclusion on the OpenSD website. This page reads the data maintained from SDAS in real-time.

Requesting Access

Each agency has at least two staff persons who have the ability to manage financial system security requests and subscriptions to financial reports. One of those individuals will need to submit an electronic security request through the CAPS (Central Accounting and Payroll System) web interface in the normal manner.

(<http://www.state.sd.us/bfm/caps>)

Submitting the security request in this manner provides an audit trail of the request, ensures it is tracked and completed, and makes sure the access for that user is logged and tied into the payroll system for automatic removal when the employee is no longer employed in that position.

SDAS PC Interface Register of Proposals

Maintaining Your Agency's Register of Proposals

Load the Register of Proposals form by clicking on the  icon on the toolbar, or by selecting "RFP Register" under Applications on the menu. The following form will appear:

SDAS PC Interface [Colin Keeler]

File Edit Utilities Window Applications CHRPS

RFP Register

RFPs will not appear on OpenSD until an award date is entered.

RFP Number Agency Award Date

Title/Description

Vendor detail information

Line #	Name	Address_1	Address_2

SDAS PC Interface Register of Proposals

To **ADD** a new RFP to your register:

On a blank screen, simply begin filling out the fields starting with the RFP number. When done, click the “Save” button at the bottom of the form. Remember that if you save a date in the Award Date field, the RFP and its list of responders will show up on the OpenSD website *immediately*, so you may want to leave that field empty until you have everything entered and checked over.

You may, if you choose, enter all of your RFP information and add each responder as the responses are received. You can wait until a contract has been awarded to complete the register by entering the Award Date and flagging the successful responder with the Awarded flag, contract number and contract end-date.

(See the list of fields below for descriptions of what each should contain.)

To **EDIT** an existing RFP:

Click the [RFP Number] button to get a list of all of your RFPs, or type the number of the RFP you wish to edit directly into the field to the right of the button. Then press <TAB> or <ENTER> and the data for the RFP will appear.

Make your changes and click the “Save” button. The changes will be shown on OpenSD immediately (if the award date is present.)

To **DELETE** an RFP from your register:

Click the [RFP Number] button to get a list of all of your RFPs, or type the number of the RFP you wish to edit directly into the field to the right of the button. Then press <TAB> or <ENTER> and the data for the RFP will appear.

Click the “Delete” button at the bottom of the form. The RFP will be removed from OpenSD immediately.

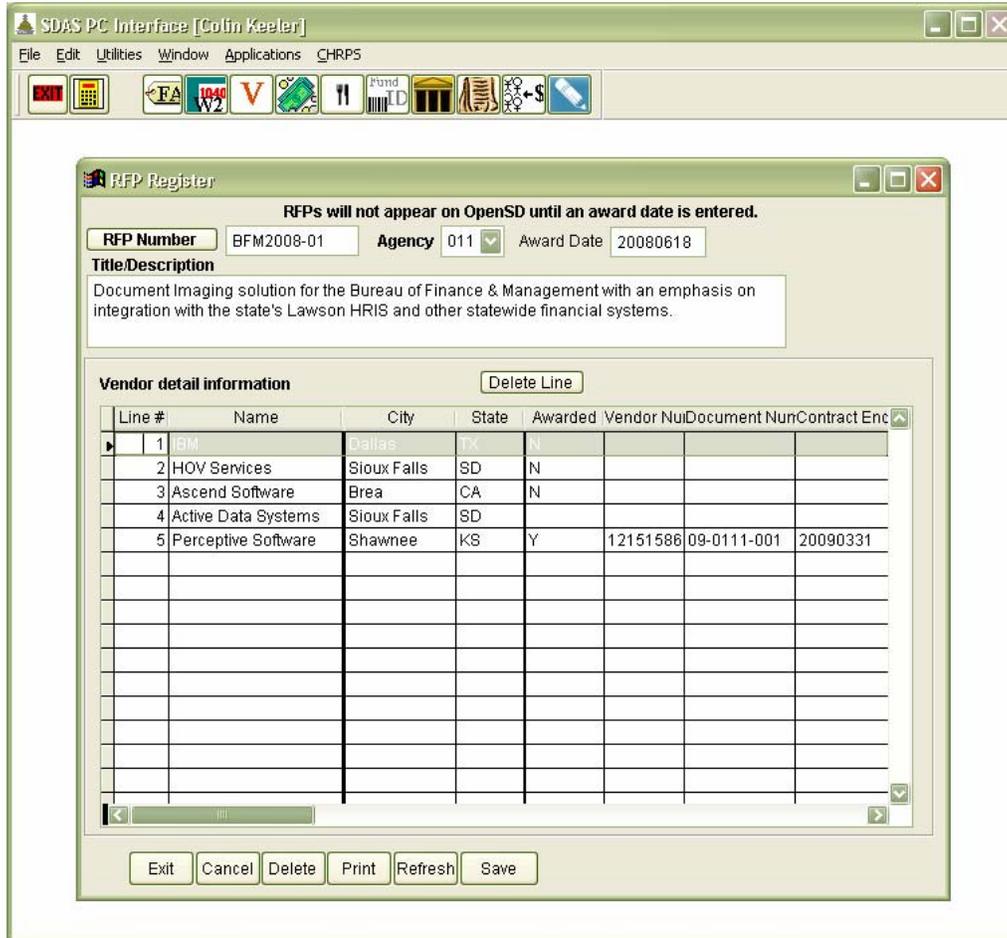
ADD a LINE

Simply arrow down from the last line, and enter your information in the grid.

DELETE a LINE

Place the cursor in the line you wish to delete. That line will be highlighted, and a record marker (▶) will be displayed to the left of the line. Click the “Delete Line” button just above the grid.

Field Definitions



----- **RFP Header Information** -----

RFP Number: This field is the primary key for this data. The RFP number is generally issued by the Office of Procurement Management’s e-Procurement system. Because HB1260 requires these RFPs to be listed on that web site, you should use the RFP number generated by the website. The field will allow you to enter any value, and agencies may have their own RFP numbering systems if they list RFPs that were not issued through the e-Procurement system.

Agency: This field should default to the 2 or 3 digit code for your agency. If you are a user with statewide access, you can select this value from the drop-down list.

Award Date: Only complete this field if a contract (or contracts) have been awarded to a successful responder. The date needs to be entered in the format **YYYYMMDD**.

Title/Description: Enter a brief description of what the request for proposals is about.

----- **Responder Line Information** -----

Line #: This field serves as a sub-key for each of the responders to this RFP. You may use it to re-order how the responders are displayed on OpenSD, although the field itself does not show on the web.

Name: Enter the name of the individual or business responding to the RFP.

City: Enter the City that the responder is located in. This is an *optional field*, although it does display on the web.

State: Enter the State that the responder is located in. This is an *optional field*, although it does display on the web.

Awarded: Place a “Y” in this field if a contract was awarded to this responder as a result of this RFP. Any value other than “Y” will be shown as “no” on the web.

Vendor: Enter the 8 digit vendor number assigned to this responder by the state’s central accounting system. All successful responders will have to submit a W-9 (or substitute W-9) to the Bureau of Finance and Management before payment will be able to be made.

Contract: This field is for the contract number. In some cases this might be the contract number assigned by the OSA (for consultant contracts), in other cases it might be a code assigned by the agency. Regardless, this is the same value which should be entered in the “Contract Number” field on the service purchase order in the central accounting system and/or the Service Contracts module in SDAS.

*****Important:** The contract number entered in this field must match the name of the imaged contract. The agency code and the contract value entered here determine where the OpenSD web pages will look for a .PDF version of this contract document.

Example: Agency = BFM
Contract = 09-0111-01
OpenSD will then look in the BFM folder for the document “09-0111-01.PDF”

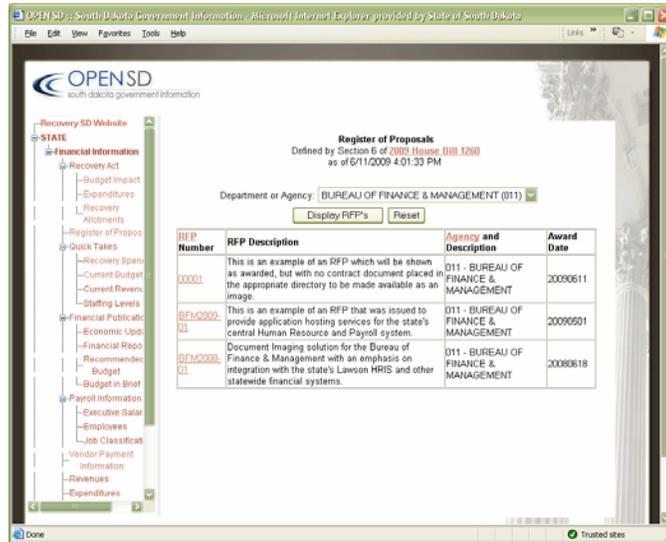
Contract End Date: Enter the end date of the contract, in the format YYYYMMDD. This value will be used to automatically purge the images of the contracts from the web.

(2009 SB144 specifies that contracts must be retained for 2 years beyond their end-date. Agencies may have their own records retention practices or requirements for the retention of contracts, but this is the guideline that will be used for retention of these contract images.)

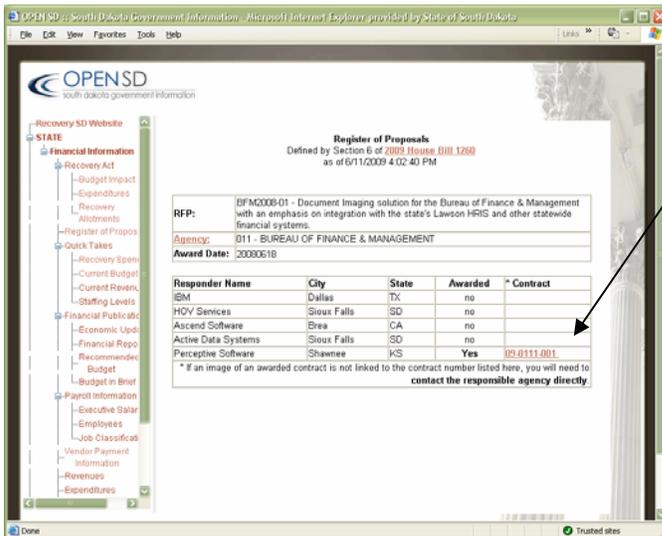
SDAS PC Interface Register of Proposals

Register of Proposals on Open.SD.gov

The resulting register of proposals on the web is linked in real-time to the data maintained through SDAS. The RFPs can be displayed by agency, and then searched using the browser's "find" function.



Each proposal listed can be shown individually with all of the listed responders. If the contract document exists in the proper format and location, the link to the image of the contract will be active.



Linking an Image of your Contract to your RFP

Agency personnel who requested security (through the process on page 2) may save their contract documents on the shared M: drive to link them to the Register of Proposals on OpenSD.

This process involves:

1. Scan (and then electronically redact as necessary);
- or -
Photocopy, (manually redact as necessary), then scan.
2. Save the scan as a .PDF document, with the file name the same as the contract number that was entered in SDAS.
3. Copy the .pdf file into M:\All_SD\Contracts\XXX\ directory (where XXX is your agency department number.)
4. Verify that the link works from Open.SD.gov

Frequently Asked Questions

Q: What RFPs are required to be entered into the SDAS Register of Proposals?

A: Any contract for “professional services” for more than \$50,000 awarded after July 1, 2009 needs to have had a Request for Proposals issued and listed on the Bureau of Administration’s e-Procurement website. These RFPs are required by law to be listed in a register of proposals.

Q: Who is responsible for making sure these RFPs are listed in the register?

A: The agency entering into the contract is responsible.

Q: What is a “professional service?”

A: Any service which is predominantly mental or intellectual, rather than physical or manual. The agency’s judgment is used to make this determination, as they are the most familiar with the contract to be issued and services to be performed.

Q: How long will the RFPs and contracts continue to be listed on the web?

A: 2009 SB144 requires contracts to be kept for 2 years past their end date. An automatic purge of the contract documents will occur monthly, based on that criterion. 2009 HB1260 did not specify how long the Register of Proposals must be kept, so that determination still must be made.

Q: Who is responsible for providing the contract online?

A: The agency entering into the contract is responsible for getting an image of the contract linked to the RFP online. The agency is also responsible for any redaction required.