

PROCUREMENT INFORMATION MEMORANDUM

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Subject: **New Contract Naming Convention**

I. Scope

In order to track spend and business intelligence on contracts in the STAR System, state agencies implemented a new enterprise contract naming and numbering convention. This document is intended to provide policy and guidance on how the convention will be applied.

Additional Reference Material:

- STAR Agency and Statewide Contract Naming Conventions (PDF)
- STAR Business Units and UW Campus Numbers (Excel)

II. Content

General Questions

Who is impacted?

All agencies included in the implementation of PeopleSoft ERP in-scope of the STAR project ("PeopleSoft Agencies") will use this new naming convention for their contracts.

Agencies and UW campuses that are not part of the STAR project will be indirectly impacted by these changes through the RPA approval process, as the State Bureau of Procurement follows this numbering convention for all contract numbers.

Who is responsible?

Delegated PeopleSoft Agencies are responsible for assigning their own numbers to their own contracts, with the exception of contracts that are approved using the RPA process (See RPA Contract Numbering section).

Consolidated Agency Purchasing Services (CAPS) agencies will work through their DOA CAPS staff to assign and create procurement contracts in PeopleSoft when the following applies:

1. CAPS conducts an official solicitation on behalf of the agency
2. CAPS approves an under \$25,000 sole source waiver
3. Contract approval is obtained through the RPA process

Application Questions

How do I use the Descriptor field?

The Agency Defined Description and/or Sequence Number (“Descriptor” field) has a maximum of 11 characters that can be used. The characters must be alphanumeric; no special characters.

It is recommended that this field be used to communicate the name of the main commodity/service, or to connect the contract in the title to the original bid/proposal number (e.g. “Sourcing Event” number). For example, the contract for office supplies has a descriptor “OFFICESUPPL”.

It is not recommended to use this field to add the vendor name for the contract.

Does each field require a minimum number of characters, or are they just guidelines?

All fields must include the prescribed number of characters, except the Descriptor field which has no minimum. Below is an example of an RPA contract number; fields in red require the prescribed number of characters, and fields in green do not have a minimum:

Field Name	Requesting Agency Number	Approving Agency Number	Dash	Contract Type	FY	Dash	Descriptor	Dash	Sequence Number
<i>Example</i>	410	505	-	S	17	-	KAB1234	-	01
Min/Max Number of Characters	3	3	1	1	2	1	Up to 11	1	2

What if my contract has multiple vendors?

When posting a contract on VendorNet, apply a “00” as the last 2 digits to create a unique “master”, which will identify the contract as one with multiple suppliers. Then in the Scope section of the contract page on VendorNet, list all of the sequential numbers and their respective suppliers.

What if my contract has a prime (often a manufacturer) who has the ability to assign subcontractors (e.g. reseller) that receive the purchase orders? Do they also get a number?

Prime contractors receive a contract number. They are responsible for informing their subcontractors of the number. Subcontractors that submit quotes and invoices on behalf of the prime are responsible for citing the number accurately so agencies know they are using the correct contract.

Contract numbers should only be assigned to prime contracts, as the State does not have a direct contract with the sub/reseller. In PeopleSoft, the reseller can be identified on a special request requisition.

I’m doing a simplified bid. Do I have to assign a contract number to the resulting contract?

As a matter of policy, agencies are not required to assign a contract number to a simplified bid agreement in STAR, however they are encouraged to do so for spend management purposes.

I did a simplified bid and I want to assign a contract number to it. What should that number look like?

A new code for contracts resulting from a simplified bid, “B” (for “bid”) has been added to the STAR Agency and Statewide Contract Naming Conventions table.

I did a best judgment purchase. Can I assign a contract number to it?

No. The purpose of establishing procurement contracts is to manage recurring spend and large (over \$50,000) amounts of spend where a form of competitive bidding or an approved RPA resulted in the contract.

Enterprise Contract Numbering

Some contracts on VendorNet end in “00”; I thought our sequence numbers had to start with “01”?

Enterprise contracts with more than 1 vendor on them have been given the master contract sequence number of “00” as a placeholder for the purposes of posting information to VendorNet only. Contracts with “00” or “0x” cannot be transacted against in PeopleSoft, so this is for reference purposes only. For master contracts with a “00” sequence number, the vendor-specific numbers will be included in the Scope or in attached documentation such as user guides.

Agency Contract Numbering

I want to piggyback on another agency’s contract, but I cannot transact against it in STAR. How can I access the contract?

DOA, SBOP has the ability to “open” an agency’s contract to another business unit if they have completed DOA-3831 (STAR Piggybacking Request) and had the request approved. If you have received that approval and still cannot access the approved contract, contact the SBOP staff that provided the original approval.

I want to piggyback on a UW contract and have it recorded as “on-contract”/compliant spend. Will UW contracts be posted in STAR?

Yes. DOA, SBOP will create these contracts in STAR upon approval of a piggybacking request. Contracts originated by the UW System central office will all start with 505 (DOA) followed by the 285 business unit number reserved for UW System central office. The original UW contract number (space allowing) will be contained in the Descriptor field and the type used will be “R” (for other). For example, an approved piggyback on the UW System contract for networking equipment would look like this:

505285-R17-162058-01

Request for Procurement Authority (RPA) Contract Numbering

What will numbers look like for Sole Source Waivers, approved through an RPA?

For sole sources with only one vendor, the Bureau case letter manager will establish the full contract number. For example, DOC gets a sole source for ABC Company and the RPA number is KAB1234. Their contract number for this sole source looks like this:

410505-S15-KAB1234-01

Who will be responsible for entering approved RPA contracts into the STAR System?

The contracting agency, not the case letter manager or the Bureau of Procurement, will need to enter the contract information into PeopleSoft. DOA CAPS staff will create the procurement contract in PeopleSoft for CAPS supported agencies.

What will numbers look like for General Waivers?

For general waivers with more than one vendor, considering the Bureau does not know exactly which vendors will receive spend during the following year, the Bureau case letter manager will establish the majority of the number, except for the last two digits. Using the same example as above:

410505-W15-KAB1234-xx

The agency should be informed at the time the waiver is approved that they are responsible for assigning the final 2 sequential numbers for each vendor they spend with. DOA CAPS staff will create the procurement contract in PeopleSoft for CAPS supported agencies.

My agency needs to extend the term of a sole source waiver contract which already received a contract number from SBOP. Will the number change?

No, it should not, unless the agency requests a new contract number for business purposes. For contracts resulting from RPAs, the RPA number is in the descriptor field. For amended RPAs, that number contains an “A” after the number. For consistency and spend management purposes, the original number will be retained.

For example, an agency submits RPA #KAB1234 and it is approved; it is originally assigned contract number 410505-S15-KAB1234-01. The agency needs to add 3 months to the term of the contract, and submits an amendment to do so, RPA #KAB1234A. The contract number will not change in this case, because the original contract with the supplier needs to be maintained to demonstrate it is not a new contract.

If the waiver will result in a brand new contract with the same supplier (not an extension of an existing agreement), a new number will be assigned.

Previous contract numbers for RPAs started with 505 (approving agency number), and that has changed. Why?

System security should not allow agencies to modify the contract pages of other agencies in STAR. That enhanced security is in place and will only allow an agency to modify and manage the page for a contract that starts with that user’s business unit number. As such, only DOA (505) and UW System and campus RPAs will continue to start with “505”; all other agencies’ contract numbers resulting from an approved RPA should start with their business unit number.

I work for a UW campus and am not part of the STAR project. Will my contract numbers from approved RPAs change the same way?

Yes, the numbers will change. The SBOP will not maintain two different contract numbering conventions for those agencies that are not part of the STAR project.

Using the 2-alpha character prefix currently assigned to campuses in PRO-E-1, a zero (“0”) has been added to the end of each prefix for UW campuses to create a 3-character “Requesting Agency Number” for contract numbers assigned to approved RPAs for campuses.

For example, UW Madison receives an approved sole source waiver for RPA UAF1234. The contract number looks like this:

5050UA-S16-UAF1234-01