

PROCUREMENT INFORMATION MEMORANDUM

Date Issued: September 17, 2015

Number: 16-002

Effective Dates: Date Issued Until Modified or Retired

Subject: Use of Cross-Agency Contracts (Piggybacking) in STAR and with UW System

I. Scope

Agencies (i.e. “Business Units” in PeopleSoft) currently included in the STAR Project (“PeopleSoft Agencies”) can only access and transact against their own contracts. However, agencies can currently use each other’s contracts in accordance with the [State Procurement Manual, PRO-D-29](#). In order for PeopleSoft Agencies to “piggyback” in the new system, and retain the spend data associated with that contract, they will need to request access to a specific contract through a central point of control, which is the State Bureau of Procurement.

Further, UW System has expressed an interest in obtaining business intelligence related to how often PeopleSoft Agencies piggyback on their contracts. Upon request of a PeopleSoft Agency, UW System and UW campuses, the State Bureau of Procurement will post these agreements as transactional contracts in the system as well.

Additional Reference Material:

- PIM 16-001
- DOA-3831: STAR Piggybacking Request

II. Content

General Questions

Who is impacted?

PeopleSoft Agencies will use this new piggybacking request form and process, effective on the date of deployment for the system.

UW System and UW campuses that intend to allow their contracts to be used by PeopleSoft Agencies will also use this request process and new form.

Non-PeopleSoft agencies, and UW entities using other agency contracts, will continue to use the Piggybacking Data Plan, form DOA-3047 to report their contracting activity under PRO-D-29.

Who is responsible?

PeopleSoft Agencies are responsible for assigning their own numbers to their own contracts, and for structuring their contracts to be open for piggybacking if they intend to do so.

The State Bureau of Procurement is responsible for administering PeopleSoft Agencies’ timely access to the contracts of UW System, UW campuses and other Business Units in the system.

Will the Bureau of Procurement still require post-purchase piggybacking data reports?

For PeopleSoft Agencies, no. This new request form and the process outlined in this document will replace the requirement for you to report your piggybacking activity to the Bureau using DOA-3047 effective October 1.

Non-PeopleSoft Agencies and UW entities will continue to use the Piggybacking Data Plan form DOA-3047 to report their usage of PeopleSoft Agency contracts.

Application Questions**Can I just ask that the Bureau of Procurement to allow all Business Units to use all my contracts?**

No. In effect, this would make a PeopleSoft Agency contract an “enterprise” contract (i.e. use of Corporate Contract flag in PeopleSoft), and that is designated only for enterprise contracts established or approved by the Bureau of Procurement.

If a PeopleSoft Agency piggybacks on my contract, will the contract number change?

No. The originating agency contract number will remain the same. The only change that will be made by the Bureau of Procurement is the addition of another PeopleSoft Agency’s Business Unit number to the contract as an entity that is eligible to purchase.

What if the contract has multiple vendors?

The agency completing the new form will be responsible for identifying all the vendors they plan to use on the contract(s) they are requesting access to.

UW Entity Contracts**I’m a UW entity and a PeopleSoft Agency has asked to use my contract? What is the process?**

If the contract has not been piggybacked by a PeopleSoft Agency yet, a new transactional contract will need to be created by the Bureau of Procurement. You as the contracting agency, or the PeopleSoft agency asking to use the contract, may complete the form to initiate this process.

What will UW contract numbers look like in PeopleSoft when a request to piggyback is approved?

The Bureau will use the prefix identified in PIM 16-001 and the contract type “R” (Other) to assign the number.

For example, the Department of Corrections wants to use a UW Madison (0UA) contract.

Field Name	Approving Agency Number	Contracting Agency Number	Dash	Contract Type	FY	Dash	Descriptor (UW Contract Number)	Dash	Sequence Number
Example	505	0UA	-	R	16	-	12540XXX	-	01
Min/Max Number of Characters	3	3	1	1	2	1	Up to 11	1	2

What if the UW contract I want to piggyback has multiple vendors?

For UW entity contracts, the Bureau will maintain a record of requests and assign the appropriate sequence number for each supplier. The agency completing the form will need to identify all the suppliers they plan to use.

Process Questions

I'm a PeopleSoft Agency creating a new contract, and I want others to be able to use it. What should I do?

The requirements for valid agency contract piggybacking as outlined in PRO-D-29 have not changed. All agencies must still follow those guidelines to appropriately establish, and use, piggybacking contracts.

To request that another Business Unit be allowed to use your contract, you may use the new form to request that they be granted access, or they may also initiate the request. Note that the form has fields to identify the requesting Business Unit and originating Business Unit and both must be completed, regardless of which agency requests access.

How will other agencies know my contracts are open for piggybacking?

The same avenues of communication that are available today will be available in the future. Agencies can continue to post their contracts on VendorNet and use other methods (e.g. email, meetings, etc) to communicate availability.

How long will this new request process take?

The Bureau intends to fulfill all requests as quickly as possible (3-5 business days). For rush requests, follow the instructions on the new form.

Will all requests to piggyback be automatically approved, or will any be denied (and for what cause)?

The intent of this new process is to approve, and fulfill, all requests in a timely manner. However, the Bureau will review all requests against applicable policies in place for piggybacking, as well as serial purchasing to ensure the piggyback is compliant. For example, if an agency establishes a contract using a simplified bid and another agency requests to piggyback, the combined spend will determine whether the request will be approved.

If a request to piggyback overlaps with the development of an enterprise procurement, the request may also be denied.

For all denied requests, the Bureau will inform the requesting agency of the decision as soon as practicable.

I'm a PeopleSoft Agency and I currently piggyback on other agencies' contracts. When the system goes live, will I automatically have access to those other contracts?

No. Due to the fact that these contract numbers are changing, you will need to identify what those new contract numbers are and use the new form to request access.

For UW entity contracts, the Bureau of Procurement will review the last 18 months of reported piggybacking activity and create those transactional contracts in PeopleSoft. Those will be open to the Business Units that have reported piggybacking spend against them during the last 18 months.

There are other agencies that are piggybacking on my contract and I want to get spend data. How do I get it?

You may request this data from the Bureau of Procurement via email by contacting doadlprocplan@wisconsin.gov. Requests will be filled as soon as practicable. The Bureau will also research the

possibility of consolidating and posting this data on a quarterly basis, similar to the consolidated data posted under current practice.

Once a piggyback is approved, how long does the approval last? Will we have to re-request on an annual basis?

Once a piggyback is approved, it will be active until the originating agency's contract expires or is terminated. No additional approvals will be required.