Partnering with CAPS: Req to Check

Presenters: Ashley Lund, Mark Simon

What does "procurement authority" mean to you?

Please insert your thoughts in the chat box.

Procurement Authority:

The legal authorization granting an Agency the right to purchase goods or services from a supplier.

Special Considerations

↓

Mandatory Contract

↓

Optional Contract

↓

Purchasing Thresholds

| <$5,000	$5,000-$50,000	>$50,000
Best Judgment	Simplified Bid	Request for Bid or Proposal

Best Judgment (PRO-302)

Threshold Requirements

- Under $5,000 in a fiscal year

- Best Judgment does not apply to purchases of printing, as covered in PRO-505

Requisition Requirements

- Required Attachments:
  - None

- Recommended Attachments:
  - Quote, when available

- Approval Justification:
  - Best Judgment
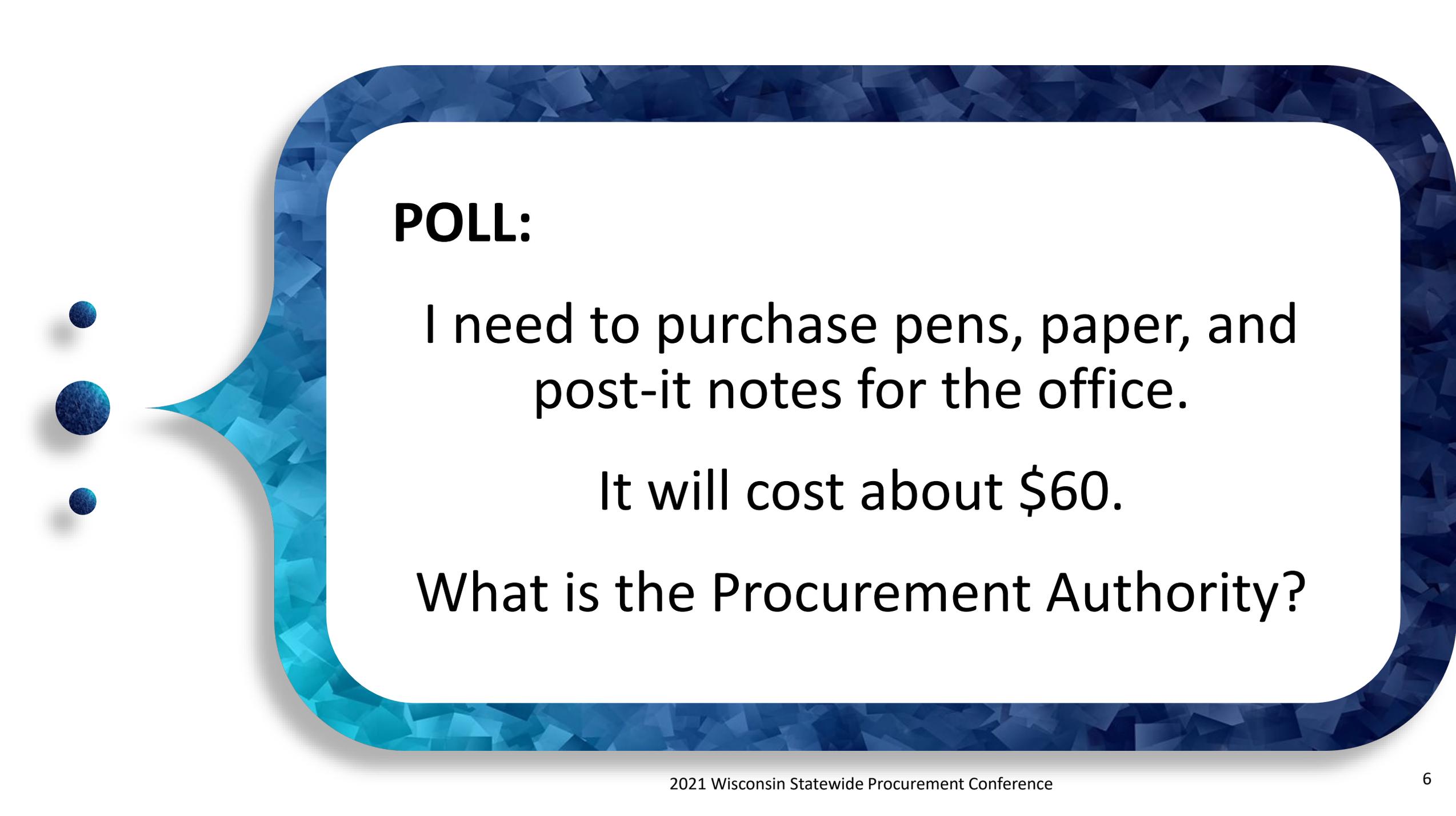
POLL:

I need to purchase pens, paper, and post-it notes for the office.

It will cost about $60.

What is the Procurement Authority?

POLL:

What is the Procurement Authority?

Option 1

Order from Amazon as

a Best Judgment purchase

Option 2

Order from Staples

per contract:

505ENT-M19-OFFSUPPLY-01

ANSWER:

Option 2

Order from Staples per contract:

505ENT-M19-OFFSUPPLY-01

This is a mandatory contract and must be used for any dollar amount

Simplified Bid (PRO-303)

Threshold Requirements

- Over $5,000 and up to $50,000 over the full contract duration

- Agencies will report such transactions with supplier-diverse businesses, as required by PRO-606

Requisition Requirements

- Required Attachments:
  - DOA-3088: Simplified Bidding Record

- Approval Justification:
  - Simplified Bid

Wisconsin Department of Administration
State Bureau of Procurement
DOA-3088 (R11/2016)

Simplified Bidding Record
Purchases over $5,000 through $50,000;
Printing, $50 through $50,000

Date	**1/1/21**	Agency/Location	**DOA**

Person Completing: **Ashley Lund**

Simplified Bid Number

Req or Reference Number

Instructions:
- Agency shall contact at least three (3) suppliers and use PRO-C-8 as guidance.
- Agency shall make an effort to solicit small businesses, veteran-owned businesses, disabled veteran-owned business and minority businesses and work centers.
- The completed form shall be attached to the requisition or procurement/transactional contract.
- Generic specifications shall be used when possible.
- When necessary to use a brand name to identify a level of quality, suppliers must be informed that equivalent alternatives may be acceptable; agency will be the sole determinate of equivalency.
- The winning bidder should be indicated. Reasons for rejecting any bids shall be noted below.

Codes:
MBE: Minority Business Enterprise (Certified)
WC: Work Center(Certified)
DVB: Disabled Veteran-owned Business (Certified)

Item Description	QTY	Supplier Name & Address **Stella's Snow Plowing**	Supplier Name & Address **Ashley's Landscaping**	Supplier Name & Address **Mark's Snow Removal**
		Supplier ID / MBE WC DVB / Unit Price — Total	Supplier ID / MBE WC DVB / Unit Price — Total	Supplier ID / MBE WC DVB / Unit Price — Total
Per Trip		**$50**	**No bid**	**$75**
		Grand Total **$50/trip**	Grand Total **No Bid**	Grand Total **$75/trip**

Contact Person
Email Address
Phone Number
Contact Date
Reply Date
Method of Bid: Phone, email, fax, website, etc.
Delivery

Additional information (note the following as appropriate: bids rejected and why; preferences exercised; explain reason if less than 3 suppliers were contacted:

Stella's Snow Plowing was chosen, as Ashley's Landscaping chose not to bid, and Mark's was not the lowest bidder.

Sole Source Under $25,000 (PRO-501)

Threshold Requirements

- Under $25,000 throughout contract duration

- Reason for Waiver:
  - Uniqueness
  - Patent or Proprietary
  - Intrinsic Value
  - Emergency
  - Substantial Time Pressure

Requisition Requirements

- Required Attachments:
  - Contract notated in Contract ID
  - Signed authorization letter from CAPS Section Chief

- Approval Justification:
  - Contract ID

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION

CORRESPONDENCE/Memorandum

Date: August 31, 2021

To: Reginald Q. Throckmorton, Director, Department of Remote Weather Stations

From: Catherine Neidner, Section Chief

Department of Administration, Consolidated Agency Purchasing Services

Subject: Noncompetitive Negotiation Under $25,000.00 Approval

I've reviewed your request to waive the Simplified Bidding requirement (PRO-303) and to enter into a noncompetitive negotiation (PRO-501, Sole Source) with Stella's Snow Plowing for snow removal services in Northtown, WI. In accordance with the supporting documentation, Stella's Snow Plowing is the only recognized provider of this service.

This memo serves as your approval of this sole source procurement, and you may move forward in your process. The cost for the service shall not exceed $1000 and will be for nine months, from September 1, 2021, through May 31, 2022.

Keep a copy of this approval for your records. Attach a copy of this memo to your STAR Requisition and identify PRO-501 in the Requisition Approval Justification box as the authority for this sole source purchase. Also, use 123CAP-S22-RWASSU00123-01 in the contract ID field on the requisition.

Thank you.

Approved:

_____   _____
                                          Date

_____
Catherine Neidner

RPA (PRO-210)

Threshold Requirements

- Over $25,000 throughout contract duration

- Reason for Waiver:
  - Sole Source and General Waivers
  - Motor Vehicle Purchases
  - Legal Service Purchases
  - Collective/Collaborative Contracting: Piggybacking

Requisition Requirements

- Required Attachments:
  - Contract notated in Contract ID
  - Case Letter present on the transactional contract or requisition

- Approval Justification:
  - RPA Number

Enterprise, CAPS, or Piggybacking Contract ([PRO-502](#))

Threshold Requirements

- Statewide Enterprise Contracts:
  - Mandatory Contracts
  - Optional Contracts

- CAPS Contracts:
  - Mandatory Contracts

- Piggybacking off UW System

Requisition Requirements

- Required Attachments:
  - Contract notated in Contract ID

- Approval Justification:
  - Contract Number

[Collaborative Contracting:
A Visual Guide](#)

Grant (PRO-504)

Threshold Requirements

- Awarding grant funds to participants

[Grants and Non-Procurement Transactions: A Visual Guide](#)

Requisition Requirements

- Required Documents: Exemption Letter
- Recommended Documents:
    - Contract Letter
        - Grant Program Name
        - Date Range
        - Dollar Amount
- PO Type: Grant
- Approval Justification: Grant

Interagency (PRO-504)

Threshold Requirements

- Purchase of commodities or services from WI State agencies

[Grants and Non-Procurement Transactions: A Visual Guide](#)

Requisition Requirements

- Required Attachments:
  - None

- Approval Justification:
  - Interagency

Intergovernmental ([PRO-504](#))

Threshold Requirements

- Purchase of commodities or services from the federal government

- Must be a federal government listed as the supplier

[Grants and Non-Procurement Transactions: A Visual Guide](#)

Requisition Requirements

- Required Attachments:
  - None

- Approval Justification:
  - Intergovernmental

Collective/Collaborative Purchase ([PRO-502](#))

Threshold Requirements

- Purchase from any vendor on agreements established by:
  - Another state government
  - Federal government
  - A Wisconsin municipality

[Collaborative Contracting: A Visual Guide](#)

Requisition Requirements

- Required Attachments:
  - Procurement Plan, if over $50,000

- Approval Justification:
  - Collective Purchase
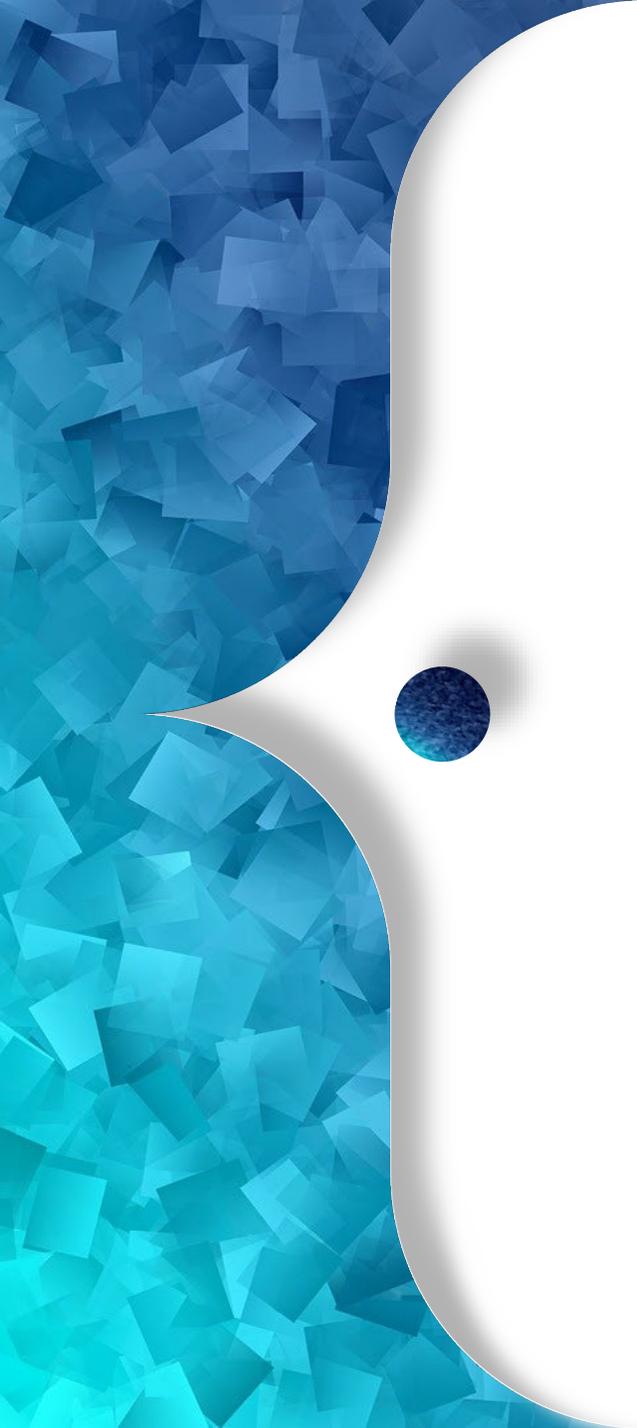
Creating a Requisition

POLL:

What complications do you face when creating requisitions?

- Entering the Requisition
- Procurement Authority
- Amount Only Flag
- Supplier ID Number
- Unit of Measure

- NIGP Code Selections
- PO Type
- Documentation & Attachments
- Other

Special Considerations

↓

Mandatory Contract

↓

Optional Contract

↓

Purchasing Thresholds

| <$5,000
Best Judgment | $5,000-$50,000
Simplified Bid | >$50,000
Request for Bid or Proposal |

VendorNet

Welcome to VendorNet

VendorNet | Registration | Bids | **Contracts** | **NIGP Codes** | **Forms** | General Procurement | FAQ | Contact Us | Login

https://VendorNet.wi.gov

VendorNet   Registration   Bids   **Contracts**   NIGP Codes   Forms   General Procurement   FAQ   Contact Us   Login

Search Contracts

Keyword or Number | laptop

Agency |

NIGP |

Supplier |

Piggyback ○ Yes ○ No ◉ Both		**Cooperative Purchase** ○ Yes ○ No ◉ Both	
Mandatory Purchase ○ Yes ○ No ◉ Both		**PCard** ○ Yes ○ No ◉ Both	

*Hit Enter to Search

This site does not contain UW Madison Contracts. Please navigate to UW Contracts

Contract Number	Title	Agency	Start Date
505ENT-O21-ELECRECYCLE-01	Recycling of Electronic Waste	ADMINISTRATION, DEPT OF	7/28/2020
410014-M20-BXD7238-RFB-01	Correctional Setting Computer Laptops and Related Accessories	CORRECTIONS, DEPT OF	6/28/2019
505ENT-M18-AudioVideo-00	IT - Audio Video Conferencing Equipment and Related Services	ADMINISTRATION, DEPT OF	6/6/2018
505ENT-M17-WICOMPUTER-00	Computer Equipment and Related Services	ADMINISTRATION, DEPT OF	11/16/2016

23

Contract Options

Contract Number	Title	Agency	Start Date
505ENT-O21-ELECRECYCLE-01	Recycling of Electronic Waste	ADMINISTRATION, DEPT OF	7/28/2020
410014-M20-BXD7238-RFB-01	Correctional Setting Computer Laptops and Related Accessories	CORRECTIONS, DEPT OF	6/28/2019
505ENT-M18-AudioVideo-00	IT - Audio Video Conferencing Equipment and Related Services	ADMINISTRATION, DEPT OF	6/6/2018
505ENT-M17-WICOMPUTER-00	Computer Equipment and Related Services	ADMINISTRATION, DEPT OF	11/16/2016
505ENT-M16-WSCAEDUFURN-00	*** Expired *** WSCA-NASPO EDUCATIONAL FURNITURE (PARTICIPATING ADDENDUM)	ADMINISTRATION, DEPT OF	11/17/2015
505ENT-O16-NASPOCOMPUT-00	NASPO Computer Equipment, Peripherals, and Related Services	ADMINISTRATION, DEPT OF	10/1/2015
505ENT-M15-BSI OFFURN-01	MANDATORY STATEWIDE OFFICE FURNITURE CONTRACT - BUREAU OF CORRECTIONAL ENTERPRISES (BCE)	ADMINISTRATION, DEPT OF	8/15/2014

View Contract

Title:	Computer Equipment and Related Services
Agency:	ADMINISTRATION, DEPT OF
Contract Number:	505ENT-M17-WICOMPUTER-00
Start Date:	11/16/2016
End Date:	11/11/2021
Cooperative Purchase?	Yes
Mandatory Purchase?	Yes
PCard?	Yes
Piggyback?	No
Manager:	Susanne Matschull, Phone: 608-266-9796 Fax: 608-267-0600

Awarded Suppliers

Contract Vendor(s):	CDW GOVERNMENT LLC-VERNON HILLS
	Insight Public Sector, Inc-Tempe
	Paragon Development Systems-
	SHI International Corp-Chicago
	Vanguard Computers, Inc.-Brookfield
	Vanguard Storage & Recovery-Brookfield

Documentation

Documents:

4. Contacts/Pricing for Insight Public Sector   10/5/2021

1. Quick Contract Guide   11/20/2019

1. Third Party Product List   3/7/2017

2. Mandatory Contract Requirements   12/12/2016

3. Statement of Work Template   12/21/2016

4. Contacts/Pricing for Paragon Development Systems   12/16/2020

4. Contacts/Pricing For CDW Government LLC   11/20/2019

4. Contacts/Pricing for Vanguard Storage and Recovery   2/11/2021

4. Contacts/Pricing for SHI International   7/13/2021

4. Contacts/Pricing for Vanguard Computers Inc.   3/3/2021

5. CDW Government LLC Contract   3/7/2017

5. Insight Public Sector, Inc. Contract   3/13/2017

5. Paragon Development Systems Contract   3/13/2017

5. SHI International Corp. Contract   3/13/2017

5. Vanguard Computers, Inc. Contract   3/7/2017

5. Vanguard Storage and Recovery Contract   3/7/2017

NIGP Code Examples

NIGP Codes

Code	Description
20400	COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS
20453	Microcomputers, Desktop or Tower based
20454	Microcomputers, Handheld, Laptop, and Notebook
20455	Microcomputers, Multi-Processor
20700	COMPUTER ACCESSORIES AND SUPPLIES
92000	DATA PROCESSING, COMPUTER, PROGRAMMING, AND SOFTWARE SERVICES
92031	Installation of Computers, Peripherals, and Related Equipment (Including Software)
93900	EQUIPMENT MAINTENANCE AND REPAIR SERVICES FOR COMPUTERS, OFFICE, PHOTOGRAPHIC, AND RADIO/TELEVISION EQUIPMENT
93921	Computers, Data Processing Equipment and Accessories (Not Word Processing Equipment), Maintenance and Repair

Procurement Center

Announcements

No Announcements

STAR Approvals

0

STAR Inquiry

Reporting Tools

Procurement Workcenter

Requisitions

Purchase Orders

PCARD Center

Receiving

Transactional Contracts

Strategic Sourcing

Process Requisitions ∧

Manage Requisitions

Requisition Entry

Manage Requisition Approvals

Requester's Workbench

Expedite Requisitions

Sourcing Workbench

View Supplier Info

Source Requisitions ∨

Review Requisitions ∨

Requisition Settings

Business Unit 50500 🔍   Department of Administration   Requisition Name [   ]

*Requester [LUNDAXHUG   ] 🔍   Lund,Ashley Kay   Priority [Medium ▾]

*Currency [USD   ]

Default Options ⓘ

◉ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

○ Override   If you select this option, the defaults specified below will override any predefined values for these fields,only non-blank values are assigned.

Line Defaults ⓘ

Supplier [   ] 🔍   Category [   ] 🔍

Supplier Location [   ] 🔍   Unit of Measure [   ] 🔍

Buyer [   ] 🔍

Shipping Defaults

Ship To [   ] 🔍   Add One Time Address

Due Date [   ] 📅   Attention [   ]

Distribution Defaults

SpeedChart [   ]

Accounting Defaults   Personalize | Find | 🖼 | 🔢   First ◀ 1 of 1 ▶ Last

[Chartfields1] [Details] [Asset Information] 📄

Dist	Percent	Location	GL Unit	Bud Ref	Fund	Appropriation	Dept	Account	Program
1	[ ]	MADEWI0017 🔍	50500 🔍	[ ] 🔍	[ ] 🔍	[ ] 🔍	505R30000(🔍	[ ] 🔍	[ ]

[OK]   [Cancel]

31

505ENT-M17-WICOMPUTER-03

NIGP Codes

Code	Description
20400	COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS
20453	Microcomputers, Desktop or Tower based
20454	Microcomputers, Handheld, Laptop, and Notebook
20455	Microcomputers, Multi-Processor
20700	COMPUTER ACCESSORIES AND SUPPLIES
92000	DATA PROCESSING, COMPUTER, PROGRAMMING, AND SOFTWARE SERVICES
92031	Installation of Computers, Peripherals, and Related Equipment (Including Software)
93900	EQUIPMENT MAINTENANCE AND REPAIR SERVICES FOR COMPUTERS, OFFICE, PHOTOGRAPHIC, AND RADIO/TELEVISION EQUIPMENT
93921	Computers, Data Processing Equipment and Accessories (Not Word Processing Equipment), Maintenance and Repair

Business Unit 50500 🔍 Department of Administration Requisition Name FY21 Laptop Computer SHI

*Requester LUNDAXHUG 🔍 Lund,Ashley Kay Priority Medium ▾

*Currency USD

Default Options ⑦

◉ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

○ Override   If you select this option, the defaults specified below will override any predefined values for these fields,only non-blank values are assigned.

Line Defaults ⑦

Supplier 0000004111 🔍   Category 20454 🔍

Supplier Location LOC-6 🔍   Unit of Measure EA 🔍

Buyer 🔍

Shipping Defaults

Ship To MADDAR 🔍   Add One Time Address

Due Date 📅   Attention CAPS- 6th Floor SBOP

Distribution Defaults

SpeedChart

Accounting Defaults   Personalize | Find | 🗗 | 📊   First ◀ 1 of 1 ▶ Last

| Chartfields1 | Details | Asset Information | 📇 |

Dist	Percent	Location	GL Unit	Bud Ref	Fund	Appropriation	Dept	Account	Program
1		MADEWI0017 🔍	50500 🔍	🔍	🔍	🔍	505R30000(🔍	🔍	

OK   Cancel

35

Special Requests ⑦

Enter information about the non-catalog item you would like to order:

🛒 1 Line   [Checkout]

Item Details

*Item Description	Laptop Computer- Part # 123		
*Price	100	*Currency	USD
*Quantity	1	*Unit of Measure	UNT 🔍
*Category	20454 🔍	Due Date	📅

Supplier

Supplier ID   0000004111 🔍

Supplier Name   SHI International Corp 🔍   SHI International Corp   Suggest New Supplier

Supplier Item ID   [   ]

Manufacturer

Mfg ID   [   ] 🔍

Manufacturer

Mfg Item ID   [   ]

Additional Information

Extended notes on the product you are purchasing. Some examples. Product specifications, color, type. Anything you think is important to share about this line.

☑ Send to Supplier   ☑ Show at Receipt   ☑ Show at Voucher

Request New Item

☐ Request New Item   A notification will be sent to a buyer regarding this new item request.

[Add to Cart]

Amount Only Flag

Line Details

Line Details ⑦

No Image   Line   1 🔍 Laptop Computer

▼ Item Details ⑦

Merchandise Amount	100.00 USD
Item ID	
Category	20454
Original Substituted Item Description	
Physical Nature	Goods ⌄
Buyer	🔍

Buyer Information

Configuration Info

▼ Contract Information ⑦

☑ Use Contract if Available

Contract ID [_____] 🔍 📄

Contract Details

Version [_____]

Contract Line [_____] 🔍

Category Line [_____] 🔍

Reseller Contract ID [_____] 🔍

Reseller Version

Reseller Contract Line [____] 🔍

Reseller Category Line [____] 🔍

Look Up Contract ID   ✕

Help

SetID   SHARE

Contract ID [begins with ⌄] [_____]

Short Supplier Name [begins with ⌄] [_____] 🔍

Description [begins with ⌄] [_____]

[Look Up] [Clear] [Cancel] Basic Lookup

Search Results

View 100   First ◄ 1-4 of 4 ► La

Supplier SetID	Supplier ID	Contract ID	Short Supplier Name	Contract Status	Description	Contract Beginning Date
SHARE	0000004111	505ENT-M21-NASPOSVAR-03	SHI INTERN-001	Approved	VAR SOFTWARE SUPPORT AND MAINT	09/02/202
SHARE	0000004111	505ENT-M17-WICOMPUTER-03	SHI INTERN-001	Approved	Computer Hardware/Periph/Svcs	11/23/201
SHARE	0000004111	5050UA-R19-162058-06	SHI INTERN-001	Approved	(blank)	10/24/201
SHARE	0000004111	455DMS-M21-1198-01	SHI INTERN-001	Approved	HP&IBM Extended Server Support	08/07/202

Managing a Requisition

Procurement Center

Announcements No Announcements	**STAR Approvals** 0	**STAR Inquiry**
Reporting Tools	**Procurement Workcenter**	**Requisitions**
		Purchase Orders
PCARD Center	**Receiving**	**Transactional Contracts**
		Strategic Sourcing

Manage Requisitions

Manage Requisitions

| Requisition Search | Keyword Search |

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	50500	Requisition Name	FY22 Laptop Computer SHI
Requisition ID	0000009647	Request State	All but Complete
Date From	10/15/2021	Date To	10/22/2021
Requester		Entered By	

Budget Status [   ]

PO ID [   ]

| Search | Clear | Show Advanced Search |

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▼ 0000009647	FY22 Laptop Computer SHI	50500	10/21/2021	Pending		100.00 USD	[Select Action] Go

Requester Lund, Ashley K
Pre-Encumbrance Balance

Entered By Lund, Ashley K
0.00 USD

Priority Medium

Requisition   Approvals   Inventory   Purchase Orders   Change Request   Receiving   Returns   Invoice   Payment

Request Lifespan:

Line Information

Personalize | Find | | | First ◄ 1 of 1 ► Last

Line		Description	Status	Price	Currency	Quantity	UOM	Supplier	
1		Laptop Computer	Pending	100.00	USD	1	EA	SHI International Corp.	✗

Create New Requisition   Review Change Request   Review Change Tracking   Manage Receipts   Requisition Report

Manage Requisitions

Process Requisitions

Manage Requisitions

Requisition Entry

Manage Requisition Approvals

Requester's Workbench

Expedite Requisitions

Sourcing Workbench

View Supplier Info

Source Requisitions

Review Requisitions

Requisition Search	Keyword Search

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	50500	Requisition Name	FY22 Laptop Computer SHI
Requisition ID	0000009647	Request State	All but Complete
			Budget Status
Date From	10/15/2021	Date To	10/22/2021
Requester		Entered By	PO ID

Search	Clear	Show Advanced Search

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▼ 0000009647	FY22 Laptop Computer SHI	50500	10/21/2021	PO(s) Dispatched	Valid	100.00 USD	[Select Action] ▼ Go
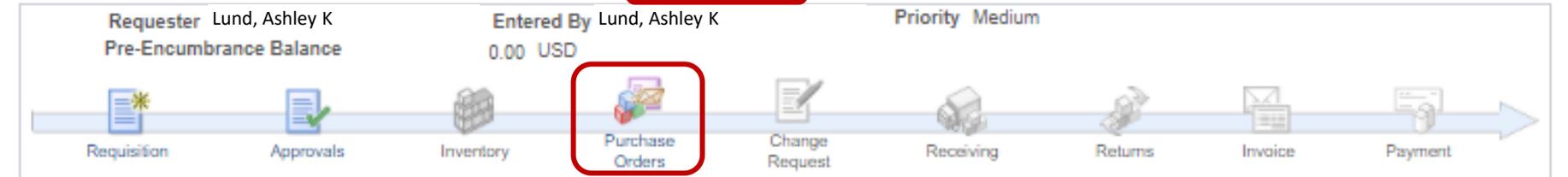
Requester Lund, Ashley K	Entered By Lund, Ashley K	Priority Medium
Pre-Encumbrance Balance	0.00 USD	

Requisition — Approvals — Inventory — **Purchase Orders** — Change Request — Receiving — Returns — Invoice — Payment

Request Lifespan:

Line Information

Personalize | Find | 📋 | 🔢   First ◀ 1 of 1 ▶ Last

Line		Description	Status	Price	Currency	Quantity	UOM	Supplier	
1		Laptop Computer	PO Dispatched	100.00	USD	1	EA	SHI International Corp.	✕

Create New Requisition   Review Change Request   Review Change Tracking   Manage Receipts   Requisition Report

Change Orders

Change Order - Purchase Order Process

Triggers Approval Routing

- Increase or Decrease Amount or Item Price

- Increase or Decrease Quantity

- Add Amount Only Checkbox

- Adding an Item Line

- Updating Chart Fields

Does Not Trigger Approval Routing

- Change the PO Type

- Supplier Location

- Updating Item Description

Questions?

Thanks for attending
Partnering with CAPS: Req to Check!