

ITB (Invitation to Bid) Workflows

Procurement Tracker Workflow Procedures

Agency Instructions Only

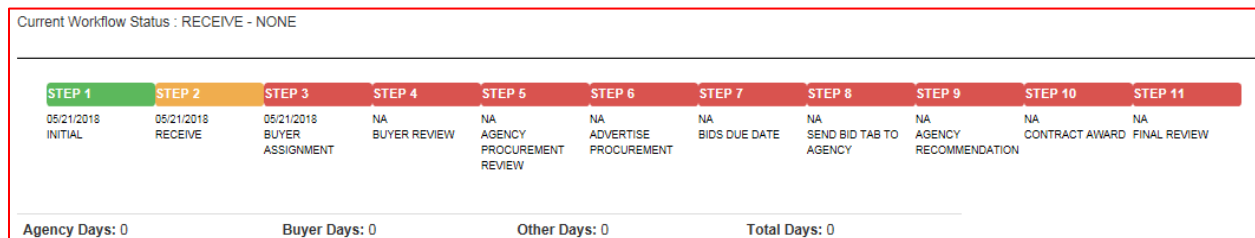
If you encounter an error during this process, or have an idea to make this process easier, please submit a request via this link: <https://www.generalservices.state.nm.us/statepurchasing/ask-for-help.aspx>

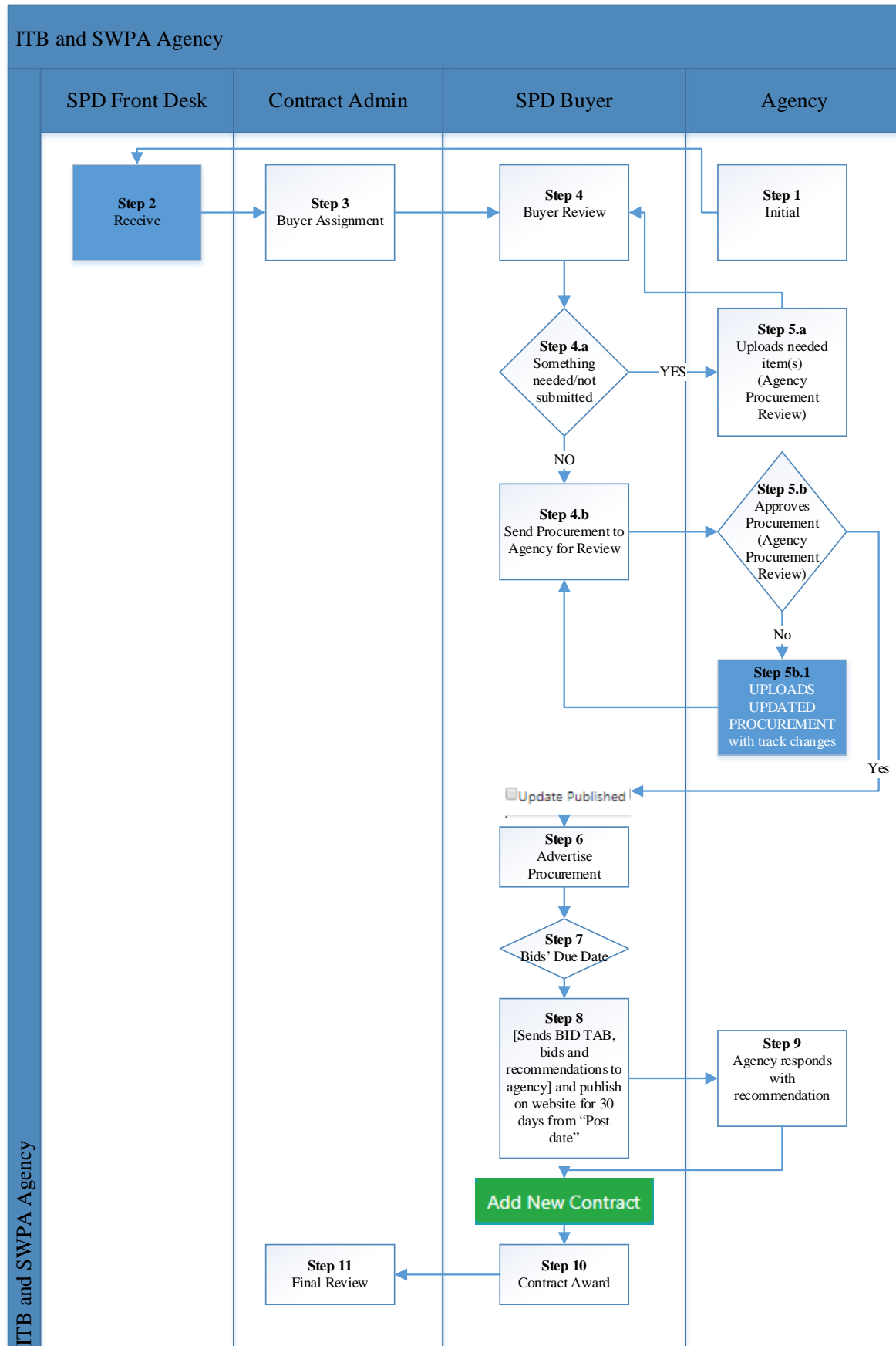
1.0 Invitation to Bid (ITB) Procurements – Overview

- 1.1 This procedure is used to process an Invitation to Bid (ITB) through Procurement Tracker. Based on the specific type of ITB, once the ITB is properly completed it should result in an award of either a Statewide Price Agreement (SWPA) or an Agency-Specific Contract, Price Agreement, or Purchase Request.
- 1.2 This procedure is NOT used to process ITBs for Facilities Management Division's (FMD's) Construction Projects. FMD Construction ITBs are covered in a specific procedure document that is titled "FMD Construction ITB Workflow Procedures".
- 1.3 Workflow Summary: The eleven ITB workflow steps for an ITB where SPD is working with an agency on an SWPA or to create an Agency-Specific ITB are as follows: Initial, Receive, Buyer Assignment, Buyer Review, Agency Procurement Review, Advertise Procurement, Bids Due Date, Send Bid Tab to Agency, Agency Recommendation, Contract Award, and Final Review.
- 1.4 These procedures guide you through the agency specific steps where SPD requires actions from the agency contact. These are the steps in which you will interact with the system: Initial, Agency Procurement Review, Advertise Procurement, Bids Due Date, Send Bid Tab to Agency, Agency Recommendation, Contract Award, and Final Review.

Agency Initiated (SPD working with an agency on an SWPA or an Agency-Specific) ITB

Here is the workflow from SPD's perspective:





2.0 ITB – General Information

- 2.1 An Invitation to Bid (ITB) is a formal procurement process that is intended to result in a contract/agreement, although that may not always occur depending upon customer needs and changing requirements and priorities. Any ITB is based upon a specific defined objective that requires certain items or services, which then becomes part of the contract between a vendor and their customer(s) (the agency or all government entities allowed by law).

- 2.2 ITB numbering follows a specific system, as shown below:

##-####-##-####

			<u>Last 5 digits of the Purchase Requisition used to request the procurement or auto numbering reset at the turn of each calendar year.</u>
			<u>Calendar year in which the procurement is initiated</u>
			<u>Procuring agency's Business Unit code or 5 zeroes (e.g., 35000; 42000; 80500; 00000)</u>
			<u>Current fiscal year (FY) followed by a zero (0) (e.g., FY19 = 90) (91 = rebid and 95 = supplemental)</u>

- 2.3 People who perform the actions in this procedure may perform one or more of the following roles:

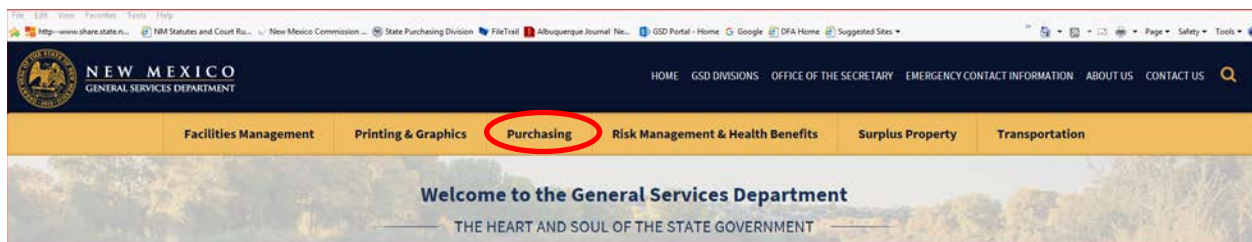
- Approver: individual responsible for approving a document either with a physical or digital signature; an approver might be from an agency external to SPD, could be a vendor or supplier, or might be in SPD, depending upon what specific document needs approval (e.g., a contract, a letter, a price list in an Excel spreadsheet).
- Buyer: individual at SPD who is responsible for processing the procurement in Procurement Tracker, in eProNM (also called the SciQuest or Jaggaer system), and as a physical file, and who coordinates all activities associated with the procurement through approval and subsequent amendment as it becomes a formal contractual document.
- Front Desk: individual at the SPD front desk responsible for ensuring File Tracker numbers are assigned to physical procurement files and that files of active procurements are found in the file room and pulled so an assigned buyer can begin processing an amendment or other activity for the procurement, or are appropriately filed in their short-term storage location.
- Requestor: individual requesting (initiating) the procurement; may be the responsible agency procurement buyer/manager or designee.

3.0 Workflow Procedures: ITB Procurements

- 3.1 Navigate to the General Services Department Home Page:

<http://www.generalservices.state.nm.us/default.aspx>


- 3.1.1 From the Home Page, click on the Purchasing heading to display a Mega menu.




- 3.1.2 In the pull-down menu, click on the type of procurement you wish to process in the Agency Online Forms column.

Facilities Management	Printing & Graphics	Purchasing	Risk Management & Health Benefits	Surp
Solicitations and Awards	For Suppliers	For Government Entities	Agency Online Forms	
Active Solicitations and Bid Tabulations	Vendor (Supplier) Resources	Debarment Notices	Submit Amendment	
Recent Awards	Online Bidding	RFP Documents and Templates	Submit Emergency	
Statewide Price Agreements	Vendor (Supplier) Login	Policies and Guidance Memos	Submit GSA	
Sole Source / Emergency Procurements	Vendor (Supplier) Registration	Procurement Reform Task Force	Submit ITB	
Vendor (Supplier) Preference Application	Vendor (Supplier) Preference List	Sample Contracts and Required Forms	Submit ITB Construction	
NIGP Commodity Codes	Helpful Links		Submit RFP	
			Submit Sole Source	
Rules and Regulations	Chief Procurement Officer	Training		

- 3.1.3 Choose Submit ITB to open the following to begin your ITB:



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GENERAL SERVICES DEPARTMENT


MENU

Submit ITB


Home > GSD State Purchasing > Submit Forms Online > Submit ITB

ITB Upload Checklist

Please obtain the following before you attempt to submit your ITB request:

1. Agency Contact Details. (The agency contact in charge of this ITB.)
2. ITB Title.
3. Will the Award be Agency Specific or Statewide Price Agreement?
4. Commodity Codes. [Search this spreadsheet for applicable codes.](#)
5. ITB Template. (Word)
6. The total number of items.
7. Items Excel spreadsheet. [Get Spreadsheet](#)
8. SHARE requisition number.
9. SHARE requisition document. (PDF)
10. Agency Memo. (PDF) (Explain to us why you need this ITB.)
11. Horizons Declination. (PDF) (If applicable.)
12. Services Determination. (PDF) (If applicable.)
13. Recommended Sources. (Excel) (If applicable.) [Get Spreadsheet](#)
14. Any other supporting documents.

[Start Submission](#)




About Us

Mailing Address
PO Box 6850
Santa Fe, NM 87502

Contact Us


- a. Note that this screen tells you the documents you will need for your procurement, as well as the type or format that must be uploaded.

- b. Use the links included on the page to retrieve templates or information required for your ITB submittal, such as current commodity codes.
- c. You may not need all the documents that are listed. As an example, if your ITB is for tangible goods, you will not require a services determination or a Horizons declination.
- d. You should prepare all of the documents that will be needed for the procurement before you begin the submittal, since Procurement Tracker does not allow you to stop and save your initial submission when you are part of the way through the submittal. If you have to get one signed and scanned, you will come back to Procurement Tracker and find this waiting for you:



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Your Session has been expired.

You have been brought here because your current user session has expired.

For security reasons we cannot keep the session open indefinitely, so, if you haven't made any changes for a while, you will automatically be logged out. Every time you perform a new action or load a new page your session is renewed. Therefore, as long as you are doing something, this should not happen.

[Go To Login](#)

[Go To State Purchasing Web Site](#)

Thank You.

- e. When you have all of your documents prepared and are ready to start your submittal, press the Start Submission button at the bottom left side of the screen.

3.2 Initial Step Workflow Procedures

Note: A **yellow highlight** is used to indicate the initiating action of a workflow step.

Note: The Initial step in the workflow is performed by an agency external to GSD/SPD. The person performing the Initial step is called the Requestor.

Workflow Step 1: **Initial** (Agency: submit forms online)

Current Workflow Status : RECEIVE - NONE										
STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6	STEP 7	STEP 8	STEP 9	STEP 10	STEP 11
05/21/2018 INITIAL	05/21/2018 RECEIVE	05/21/2018 BUYER ASSIGNMENT	NA BUYER REVIEW	NA AGENCY PROCUREMENT REVIEW	NA ADVERTISE PROCUREMENT	NA BIDS DUE DATE	NA SEND BID TAB TO AGENCY	NA AGENCY RECOMMENDATION	NA CONTRACT AWARD	NA FINAL REVIEW
Agency Days: 0		Buyer Days: 0		Other Days: 0		Total Days: 0				

- 3.2.1 Enter the required information into the following ITB Upload screens as directed via the online system wizard, beginning with the Contact Details screen:

ITB Upload

1 Contact Details 2 ITB Details 3 Requisition Details 4 Other Details 5 Finish

Contact Details 1/4

Enter the contact information for the person overseeing this procurement.

Agency * Start typing and select an option
35000 - GENERAL SERVICES DEPARTMENT

First Name * Kimberly

Last Name * Hunt-Brown

Email * Kimberly.Hunt-Brown@state.nm.us

Phone * 505-827-0474

☐ I'm not a robot reCAPTCHA Privacy - Terms

>> Submit

- To complete the Agency field:
 - Type the three-digit agency code for your agency and click on the correct choice from the menu items displayed, **or**
 - Click on the dropdown menu and scroll until you see your agency's name and click on the correct name.
- Enter the Contact Information **for the person overseeing this procurement.**
 - Select the name of the procuring agency from the dropdown menu options. Can also start to type the Agency name and the field will auto populate.
 - Enter a first name.
 - Enter a last name.
 - Enter the email address.
 - Enter a telephone number.
- Click the box to indicate you are a human being in the reCAPTCHA box.

☒ I'm not a robot reCAPTCHA Privacy - Terms

>> Submit

- Click the Submit button when you have finished entering information on this screen to move to the next screen.

3.2.2 Complete the ITB Details screen.

ITB Details 2/4

ITB Title, Commodity, ITB Document
ITB Title *

Will this be an Agency-Specific Award or Statewide? *
☒ AGENCY SPECIFIC
☐ STATEWIDE PRICE AGREEMENT

Commodity Codes *

Selected Commodity Codes

DRAFT ITB Document (MS Word Document) *
[ITB Contract Template](#)
[ITB Price Agreement Template](#)
[ITB Purchase Template](#)

Total number of items *

Items Upload (MS Excel Spreadsheet) * [Template download](#)

- a. Enter the details of the ITB procurement.
 - 1) Enter the title for the ITB in the ITB Title text box.
 - 2) Click the appropriate circle to choose whether the ITB is going to be an Agency-Specific Agreement or if it will be a Statewide Price Agreement.
 - When the SWPA option is chosen, Procurement Tracker will automatically generate an SWPA number to be used for the RFP and subsequent price agreement.
 - 3) When the Agency-Specific option is chosen, the SHARE Purchase Requisition number will be used in part to generate the number for the RFP.
 - 4) Enter one or more commodity codes as follows:
 - a) Use the smart search function by entering a descriptive term for the commodity code to retrieve a list of commodity codes that might apply to the procurement, then select any appropriate commodity codes by clicking on the

desired code and then clicking on the Add Commodity button. Add one code at a time.

- b) Alternatively, if you know the number for the commodity code, type that number in the field and click on the Add Commodity button.
- c) Add any and all the applicable choices, since the more choices you include, the larger the pool of vendors who will be notified by the system when your procurement is posted, and who can then respond to your solicitation.
- d) If you included a commodity code but then decide you do not want to include that code, click on the unwanted commodity code in the Selected Commodity Codes field to highlight it and then click the Remove Commodity button.

- b. Upload documents for the ITB to meet the following requirements:
 - 1) The required format for the document, such as Word, Excel, or PDF, is listed with the document.

- 2) Click on Choose file to access your files, then click on the appropriate file to upload.
 - a) If you have accidentally uploaded the wrong file, click remove, and then repeat the Choose file/upload process with the correct file.
 - b) If you try to upload a document in a format that is not allowed (MS Word instead of MS Excel, for example), you will receive an error message and will need to upload the document in the correct format.

- c) You must upload a file for each of the required documents [indicated with a red asterisk (*) on the screen]. If you press Submit and you did not upload all of the required documents, you will receive an error message telling you what is needed, and Procurement Tracker will not allow you to proceed.

Procurement Assignment Email or Memo (PDF Document) *

NASPO Assignment Memo.pdf (61 KB) ✕ Remove

- d) If you have uploaded the wrong document, click on the XRemove button, as shown in the example above, to delete that document from Procurement Tracker. Then follow the upload steps described previously and upload the correct document into Procurement Tracker.
- c. Upload the Draft ITB document.
 - 1) The Draft ITB must be a Word document.
 - 2) Use the appropriate template (link) to develop the draft ITB:
 - ITB Contract, for an Agency-Specific Contract
 - ITB Price Agreement, for an Agency-Specific Price Agreement
 - ITB Purchase Request, for a special one-time purchase

DRAFT ITB Document (MS Word Document) * ITB Contract Template | ITB Price Agreement Template | ITB Purchase Template

Spectacles for Cats.docx (12 KB) ✕ Remove

Items Upload (MS Excel Spreadsheet) * Template download

No file Choose file Upload

File type not accepted (.xlsx only).

>> Submit

State of New Mexico - General Services Department

- d. Upload the Items document.
 - 1) The Items document must be an Excel workbook using the eProNM format.
 - 2) Use the template link to develop the Excel Items spreadsheet. Download and use the spreadsheet from the website each time you create a new ITB.
 - e. When the correct files have been uploaded, press the Submit button to move to the next screen.
- 3.2.3 Complete the Requisition screen.

ITB Upload

Contact Details 1/4

ITB Details 2/4

Requisition 3/4

Requisition #, SHARE Req document
SHARE Requisition # * last 5 digits

Requisition Document (PDF Document) *

No file Choose file Upload

Agency Memo (PDF Document) *

No file Choose file Upload

>> Submit

State of New Mexico - General Services Department

- Enter the last 5 digits of the requisition number on the SHARE requisition being used to process the procurement request.
 - Upload the PDF copy of the SHARE requisition being used to process the procurement request.
 - Click the Submit button to move to the next screen.
- 3.2.4 Complete the Other screen.

Requisition 3/4

Other 4/4

R/S Upload, Other Upload

Horizons Declaration (PDF Document) (If Required)

No file Choose file Upload

Services Determination (PDF Document) (If Required)

No file Choose file Upload

Recommended Sources (MS Excel Spreadsheet) (If Required) [Template download](#)

No file Choose file Upload

Other Document (PDF Document) (If Required)

No file Choose file Upload

- Enter additional required or supplemental documents that are associated with the ITB and that will be needed to process the procurement.

- 1) If the ITB is for services, Horizons has the right of first refusal in accordance with the State Use Act the Agency must upload the Horizons Declination PDF document.
- 2) If the ITB includes services, a determination will need to be made as to whether those services will fall under the definition of a General Services or a Professional Services.
 - a) Obtain a written determination from spd.determination@state.nm.us that the work to be procured is General Services.
 - b) Upload the PDF of the Services Determination email.
- 3) Create a Recommended Sources list.
 - a) Download the template provided at the link, and develop the Recommended Sources list. We will notify your recommended sources via email only.
 - b) Upload the completed Recommended Sources spreadsheet.
- b. Upload any other required or supporting documents to be used with the ITB. These must be PDF documents.
- c. Press the Submit button to submit the initial ITB information.

The screenshot shows the 'ITB Upload' form in Procurement Tracker. The form is divided into four sections: 'Contact Details 1/4', 'ITB Details 2/4', 'Requisition 3/4', and 'Other 4/4'. The 'Other 4/4' section contains the following fields:

- R/S Upload, Other Upload**
 - Horizons Declination (PDF Document) (If Required)**
 - Horizons Declination Letter - Spectacles for Cats.pdf (58 KB) [Remove]
 - Services Determination (PDF Document) (If Required)**
 - Services Determination Letter - Spectacles for Cats.pdf (59 KB) [Remove]
 - Recommended Sources (MS Excel Spreadsheet) (If Required)** [Template download](#)
 - Excel_Form_Recommended Sources for Cat Glasses.xls (74 KB) [Remove]
 - Other Document (PDF Document) (If Required)**
 - No file [Choose file] [Upload]

At the bottom of the form is a blue button labeled '>> Submit'. The footer of the page reads 'State of New Mexico - General Services Department'.

- 3.2.5 Once the required uploads are done and all the necessary information has been captured, Procurement Tracker will display a Thank You screen similar to the following example:

The screenshot displays the New Mexico General Services Department (SPD) Procurement Tracker interface. At the top, there is a navigation bar with links for "Convert", "Select", "Back to SPD Web Site", "Active Bids and Proposals", and "Submit Forms Online". Below this, a blue banner reads: "Thank you for your submission. The procurement will be reviewed by one of our buyers." A "Print" button is located on the left. The main content area lists the following information:

Agency :	00000 - COMMISSION FOR THE BLIND
Procurement Number :	00-00000-10-55555
Commodities :	0542 - Magnifying Glasses and Magnifiers
	02020 - Eye Glasses including Sunglasses (including Frames Cases Parts etc)
Next Step :	Receive
Uploaded Files :	Agency Memo: Agency Memo - Spectacles for Cats.pdf (58 KB)
	Horizons Declaration: Horizons Declaration Letter - Spectacles for Cats.pdf (58 KB)
	Recommended Sources: Excel Form, Recommended Sources for Cat Glasses.xls (74 KB)
Completed date :	Monday, May 21, 2018 11:25 AM
Completed by :	kimberly.hunt-brown@state.nm.us

At the bottom left, there is a yellow sticky note graphic with the text "THANK YOU" written on it.

- a. Note that the information contained in this screen example shows the following:
 - The Agency that submitted the procurement
 - The assigned, automatically-generated procurement number, Agency-Specific or Statewide Price Agreement, which it will have within Procurement Tracker and that will be referenced on all associated documents for the procurement and resulting contract.
 - All Commodity Codes and their description
 - The next step in the workflow process
 - A list of all of the uploaded files, including their format and size
 - The date this procurement was initially submitted
 - The name of the person who completed and submitted the file
- b. The procurement is now processed for receipt by SPD's front desk and is now on Step 2, Receive.

Workflow Step 2: **Receive** (SPD: Front Desk)

3.3 SPD Front Desk personnel will receive and process the ITB request.

Workflow Step 3: **Buyer Assignment** (SPD CPM)

3.4 CPM will process assignments to buyers through Procurement Tracker.

Workflow Step 4: **Buyer Review** (SPD Buyer) → may loop to Agency (Workflow Step 5) and back to the SPD Buyer until the ITB is finalized

3.5 The SPD Buyer reviews and processes the procurement assignment.

3.5.1 Review the file to make sure that everything is both complete and correct.

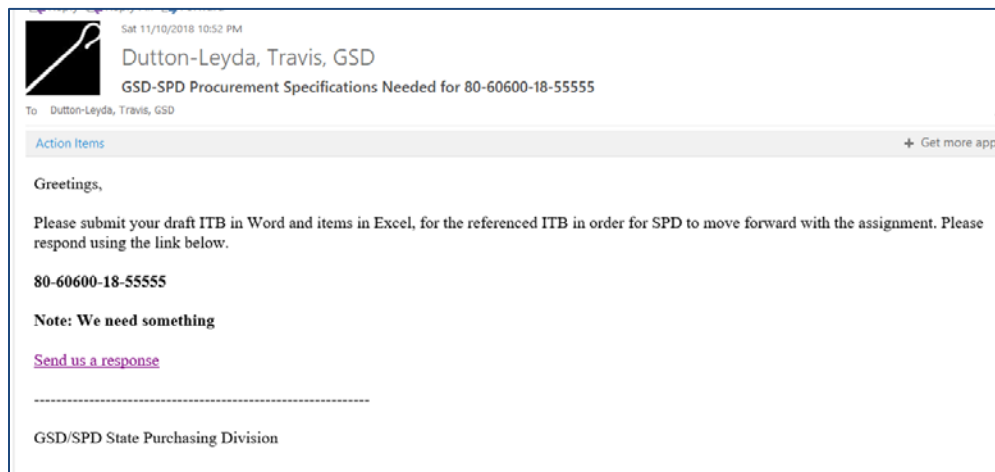
- a. Ensure all appropriate documents have been uploaded into Procurement Tracker.
 - 1) Verify that the soft specifications/ITB template (electronic files) have been received.
 - 2) Ensures the items spreadsheet is in the correct format.
 - 3) Verifies that any informal or supporting ITB documents that must be included with the ITB package have been uploaded.
- b. Request missing documents or updated documents, as necessary, from the Agency.

3.5.2 Finalize the procurement package through the agency then continue with Workflow Step 6: Advertising.

Workflow Step 5: **Agency Procurement Review** (Agency)

3.6 Procurement Tracker will send you an email stating that the Buyer needs the requested documents or other additional information, or that approval on the final ITB is needed.

3.6.1 The email will request that you send everything that is included in the comment box.



3.6.2 The note in the email will specify any additional information required by the buyer.

- a. Click the link in the email.
 - You will be prompted to verify your email address.

Agency access

Email address verification.

You are trying to access a secured page.
Please enter your valid email address

Enter Email Address

>> Submit

- b. You will then receive another email with a security code. Enter the code on this screen.

Agency access

Enter your verification code.

An email has been sent to the email address that is registered
have been moved there.

544066

>> Submit Code

Resend the code

- c. Then you will gain access to view the documents and send back the updated ITB template and/or items spreadsheet

- 3.6.3 You will either need to provide the correct draft ITB or items in Excel. Scroll all the way down to the bottom of the page to view all the documents.

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Please submit your soft specifications in Word and items in Excel, for the referenced procurement in order for SPD to move forward with the assignment.

80-60600-18-55555 Current Workflow Status : AGENCY SOFT SPECIFICATION

Procurement Number 80-60600-18-55555	Agency 00000 - COMMISSION FOR THE BLIND	Procurement Type ITB	Bureau IT
STATEWIDE Price Agreement (YES/NO) NO	Agreement Type CONTRACT	Buyer Travis Dutton-Leyda	
Procurement Description GLASSES FOR CATS			
Agency Buyer KIMBERLY HUNT-BROWN	Email TRAVIS.DUTTON-LEYDA@STATE.NM.US	Phone (505)555-5555	
Created By Kimberly Hunt-Brown	Created Date 5/21/2018 11:25:47 AM	Updated By Travis Dutton-Leyda	Updated Date 11/10/2018 10:51:53 PM

Please upload the ITB Template * Required

Choose file

Please upload your Items

Item Template Download

Choose file

Submit Soft Spec

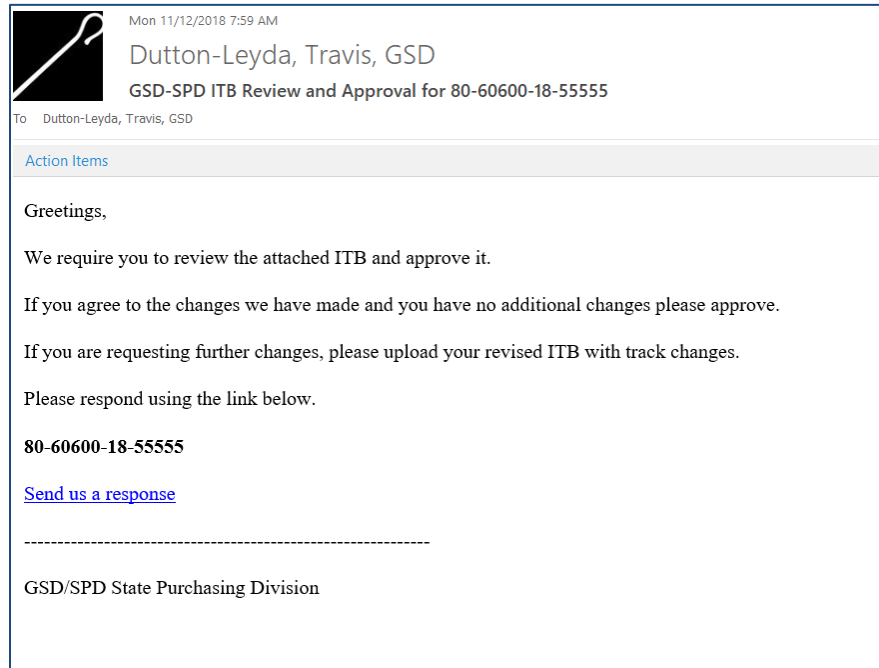
Clear

Files

Document Title	Document Type	Receipt Date	Operator	Size	Type	
NASPO_ValuePoint RFP Template_Final (12-13-17).docx	Procurement	08/06/2018 05:19:24 PM	Travis Dutton	168729	.DOCX	View
Excel_Form_Recommended Sources for Cat Glasses	Recommended Sources	05/21/2018 11:25:48 AM	Kami Brown	76288	.XLS	View
Horizons Declination Letter - Spectacles for Cats	Horizons Declination	05/21/2018 11:25:47 AM	Kami Brown	60176	.PDF	View
Agency Memo - Spectacles for Cats	Agency Memo	05/21/2018 11:25:47 AM	Kami Brown	59712	.PDF	View
Spectacles for Cats	SHARE Requisition	05/21/2018 11:25:47 AM	Kami Brown	27866	.PDF	View
Excel_Form_Records_Glasses	Items	05/21/2018 11:25:47 AM	Kami Brown	77824	.XLS	View
Spectacles for Cats	Draft ITB	05/21/2018 11:25:47 AM	Kami Brown	13062	.DOCX	View

NM State Purchasing Division: ITB Workflow Procedures – Agency Only

- a. Repeat this process by completing the step as many times as SPD requests and until you have finalized the draft ITB and approved it for advertisement.
 - b. You may not see the above screen if you submitted all required documents in the required format at the initial step.
- 3.6.4 Once the SPD buyer has reviewed the ITB and is ready for advertisement and public release, you will receive an email requesting final approval to go public.



- a. Review the finalized ITB and approve or reject the ITB with additional comments.

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We require you to review the attached RFP and approve it.
If you are requesting further changes, please upload the procurement using track changes.
If you agree to the changes we have made and you have no additional changes please approve.
Please respond using the link below.

Instructions

80-60600-18-55555 Current Workflow Status : AGENCY PROCUREMENT REVIEW

Procurement Number	Agency	Procurement Type	Bureau
80-60600-18-55555	60600 - COMMISSION FOR THE BLIND	ITB	IT

STATEWIDE Price Agreement (YES/NO)	Agreement Type	Buyer
NO	CONTRACT	Travis Dutton-Leyda

Procurement info

Procurement Description	Agency Buyer	Email	Phone
GLASSES FOR CATS	KIMBERLY HUNT-BROWN	TRAVIS.DUTTON-LEYDA@STATE.NM.US	(505)555-5555

Created Date	Created By	Updated Date	Updated By
11/12/2018 11:25:47 AM	Kimberly Hunt-Brown	11/12/2018 11:25:47 AM	Travis Dutton-Leyda

If you approve the ITB, the workflow will move to the advertise step.

If you reject the ITB, you be required to upload a new version that your agency approves. Use the document obtained from the library below and make sure all changes are tracked.

Files

Document Title	Document Type	Receipt Date	Operator	Size	Type
Computers.docx	Procurement	11/12/2018 07:59:10 AM	Travis Dutton-Leyda	55999	.DOCX View
NASPO_ValuePoint RFP Template_Final (12-13-17).docx	Procurement	09/06/2018 05:19:24 PM	Travis Dutton	168729	.DOCX View
Excel_Form_Recommended Sources for Cat Glasses	Recommended Sources	05/21/2018 11:25:46 AM	Kami Brown	76288	.XLS View
Horizons Declination Letter - Spectacles for Cats	Declination Letter	05/21/2018 11:25:46 AM	Kami Brown	60176	.PDF View
Agency Memo - Spectacles for Cats	Agency Memo	05/21/2018 11:25:46 AM	Kami Brown	58712	.PDF View
Spectacles for Cats	Items	05/21/2018 11:25:47 AM	Kami Brown	27866	.PDF View
Excel_Form_Records_Glasses	Records	05/21/2018 11:25:47 AM	Kami Brown	77824	.XLS View
Spectacles for Cats	Draft ITB	05/21/2018 11:25:47 AM	Kami Brown	13062	.DOCX View

Document library. click 'view' on the most recent procurement document to download and review the ITB.

- b. If you reject the ITB, you will continue to repeat the process described previously until the final version is approved.
- c. Once you approve the ITB, the SPD buyer will advertise and release it to the public.

Note: Procurements will **only** be advertised after steps 1 through 5 are complete. To expedite the process, respond immediately when SPD reaches out for additional info or approval.

Workflow Step: 6 [Advertise Procurement]

Note: According to Section 13-1-104, NMSA 1978, State Purchasing is required to advertise in three newspapers of general circulation; as a general rule, State Purchasing has chosen to advertise in the *Santa Fe New Mexican*, the *Albuquerque Journal*, and the *Las Cruces Sun-News*.

- 3.7 The SPD Buyer will take the necessary actions to post the approved ITB procurement package on the public-facing websites (GSD and eProNM), and to publish the ITB notice as required in the newspapers.

- 3.7.1 Once the ITB has been released, you will receive an email such as this. Currently you will wait until the due date unless you need to amend your ITB.



Note: Amendments to an ITB may be submitted while the ITB is published because of issues that arise, or from vendor questions about the ITB related to areas such as scope, schedule, or unique specifications.

- 3.7.2 During the time while the ITB is being advertised, and until the bid opening date, you may need to amend your ITB. Process ITB Amendments as follows:
 - a. An ITB Amendment may result from questions that are asked about the ITB during the advertising process. Questions and answers will be shared with all individuals who are interested in responding to the procurement by means of the public-facing SPD website.
 - b. If the question and answer change a material aspect of the procurement (e.g., scope of procurement, schedule for completion of procurement project, required human resource loading levels), an Amendment to the procurement document will be processed and published with the procurement that will include in detail all the specifics of the change.
 - c. Submit each ITB Amendment to SPD via the link in the email above.

Workflow Step: 7 [Bids Due Date] (SPD)

- 3.8 This step will auto-complete on the due date. (The due date can change if the ITB is amended.)

Workflow Step: 8 [Bid Tab Publish] (SPD)

- 3.9 SPD prepares the Bid Tabulation (Bid Tab) and will publish the results for a minimum of 30 days to the GSD website.

Workflow Step: 9 [Agency Recommendations] (Agency)

- 3.10 You will receive an email with a link to download the Bid Tab and supporting materials.

Greetings,

Use the link below to obtain the BID TAB. Below is the SPD recommendation for award. If you have additional or alternate recommendations you must upload a justification as to why it is in the best interest to the state. The justification must be on your department's letterhead and signed.

80-60600-18-55555

[Download BID TAB](#)

GSD/SPD State Purchasing Division

- Download the Bid Tab and supporting materials.
- Review the Bid Tab for accuracy against the bids and award recommendations in the notes in the email above.
- If you agree with the award recommendations, click approve.

80-60600-18-55555 Current Workflow Status : AGENCY RECOMMENDATION

Procurement Number 80-60600-18-55555	Agency 60600 - COMMISSION FOR THE BLIND	Procurement Type ITB	Bureau IT
STATEWIDE Price Agreement (YES/NO) NO	Agreement Type CONTRACT	Buyer Travis Dutton-Leyda	
Procurement Description GLASSES FOR CATS			
Agency Buyer KIMBERLY HUNT-BROWN	Email TRAVIS.DUTTON-LEYDA@STATE.NM.US	Phone (505)555-5555	
Created By Kimberly Hunt-Brown	Updated By Travis Dutton-Leyda	Updated Date 11/12/2018 12:52:35 PM	

Approve if you agree with the award recommendations.

Reject the award recommendations if your agency believes the award should be made differently. You will be required to provide a justification.

Please choose an option

Document Title	Document Type	Receipt Date	Operator	Size	Type	View
Computers.docx	BID(s) Supporting Material	11/12/2018 12:52:33 PM	Travis Dutton-Leyda	55999	.DOCX	View
Items_Template_Download_v3.xlsx	BID TAB	11/12/2018 12:52:33 PM	Travis Dutton-Leyda	33806	.XLSX	View
Computers.docx	BID(s) Supporting Material	11/12/2018 12:45:27 PM	Travis Dutton-Leyda	55999	.DOCX	View
SupplierImportErrorFile_12835908.xls	BID TAB	11/12/2018 12:45:27 PM	Travis Dutton-Leyda	41884	.XLS	View
Computers.docx	BID(s) Supporting Material	11/12/2018 11:42:24 AM	Travis Dutton-Leyda	55999	.DOCX	View
Computers.docx	BID(s) Supporting Material	11/12/2018 07:59:10 AM	Travis Dutton-Leyda	55999	.DOCX	View
NASPO_ValuePoint RFP Template_Final (12-13-2017).docx	BID(s) Supporting Material	08/06/2018 05:19:24 PM	Travis Dutton	168729	.DOCX	View

Download the Bid Tab and any supporting material by clicking the view button.

Workflow Step: 10 [Contract Award] (SPD)

- 3.11 SPD will create the award. After the award is finalized and signed by the SPA, Procurement Tracker will email a PDF of the executed award to you.

Workflow Step: 11 [Final Review] (SPD)

3.12 The SPD CPM will review the files to make certain that everything is complete and correct.

3.13 The process is complete.

Current Workflow Status : RECEIVE - NONE										
STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6	STEP 7	STEP 8	STEP 9	STEP 10	STEP 11
05/21/2018 INITIAL	05/21/2018 RECEIVE	05/21/2018 BUYER ASSIGNMENT	NA BUYER REVIEW	NA AGENCY PROCUREMENT REVIEW	NA ADVERTISE PROCUREMENT	NA BIDS DUE DATE	NA SEND BID TAB TO AGENCY	NA AGENCY RECOMMENDATION	NA CONTRACT AWARD	NA FINAL REVIEW
Agency Days: 0		Buyer Days: 0		Other Days: 0		Total Days: 0				