

Introduction

State Contract and Procurement Registration System (SCPRS)

Procurement Division, DGS

DATE

SCPRS Purpose

The purpose of the State Contract Procurement Registration System (SCPRS) is to identify, develop and distribute a State Contract and Procurement Registration System to facilitate the registration of contract information of state agencies for the Department of General Services (DGS). The primary business objectives for the SCPRS include:

- Collect information about contracting and procurement activities that will allow the state to more effectively manage the contracting and procurement processes for which DGS is responsible.
- Collect the appropriate type of contract and procurement information that allows DGS to perform its oversight functions.
- Provide a single repository for key information about state contracts and procurements, which can be sorted to provide information, which is timely, accurate and is of interest to state decision-makers, frequently requested in Public Records Act requests, and useful in providing reports regarding contract-related activities.
- Collect information that will allow the state to demonstrate visibility and accountability over contract and procurement activities.

The SCPRS allows authorized users to log on using a web-based interface and enter elements of information about state contracts and procurement activities. After entering the information, users are able to add amendment information and later retrieve information about their contracts. Authorized DGS users are able to retrieve various reports of summary information about state agencies.

SCPRS Background

The following excerpt from the Governor's Task Force on Contracting and Procurement Review Final Report released August 30, 2002 explains the events that led to the development of this new contracting system.

"On May 20, 2002, Governor Davis signed Executive Order D-55-02, directing a three-member task force to review the state's contracting and procurement procedures and recommend any statutory, regulatory or administrative changes necessary to "ensure that open and competitive bidding is utilized to the greatest extent possible" by state agencies. The Executive Order also directed the task force to include recommendations regarding any statutory or regulatory changes

necessary to ensure adequate oversight of the contracting and procurement authority utilized by state agencies.

In response to Executive Order D-55-02, the recommendations of the Task Force are designed to strengthen the contracting and procurement processes of the State of California by improving the quality and openness of the process and implementing a set of checks and balances to ensure its integrity.

For each of these guiding principles – higher quality, an open process, and carefully constructed checks and balances – the Task Force recommends a series of initiatives be undertaken. Recommendation #13 directs DGS to implement an integrated system to track transactions executed by state agencies and to capture important data related to those transactions on a near real-time basis. DGS should determine the feasibility of generating mandated reports from the system as well. As a minimum, the system should capture basic information from each transaction processed, including the following:

- Dates received from and transmitted to various entities
- Effective date(s) of the contract or purchase order;
- Dollar amount, including any amendments;
- State agency from which the transaction has been received, along with contact person information (e.g. address, telephone, etc.);
- Contract or procurement method (e.g. CMAS, Master Agreement, etc.);
- Contractor name, address, telephone and identification number; and
- Small business and disabled veteran business enterprise indicator."

The entire reform report and the steps leading to the task force that developed the report's reform initiatives can be found at the following web site:

<http://www.dof.ca.gov/HTML/PROCUREMENT/procurement.htm>

Software Requirements

All you need to access SCPRS is an Internet Browser. The following browsers work well with this system but other browsers may be used.

Microsoft Internet Explorer v5.5 or above

Netscape Navigator 4.7.2

Printing Information

Many of the screens include a link to a printer friendly version of the data that appears on the screen. This option is available to you to simply print the contract data without the frames, coloring and borders that are standard to State of California web sites.

When you click on [Printer Friendly Version](#) in blue text in the top right of the screen, a new window will open. At this time, click on the **Print** button that is part of the window's menu across the top of the window. (Contact your department's computer support or help desk staff if you need further assistance on your office's printing methods.)

If the new window opens part way on your screen and appears to sit on the SCPRS window already opened, you would click on the small 'X' in the far right upper corner of the new window to close it. (See **Reports** in Section 5 of the Users Guide for additional information.)

If the window opens all the way and covers the screen, you will need to click on the gray **Back** button on the top left corner of your Browser window. [**Careful:** If you click on the 'X' in this circumstance you will be closing the SCPRS since there is only one window open.]

Introduction Page

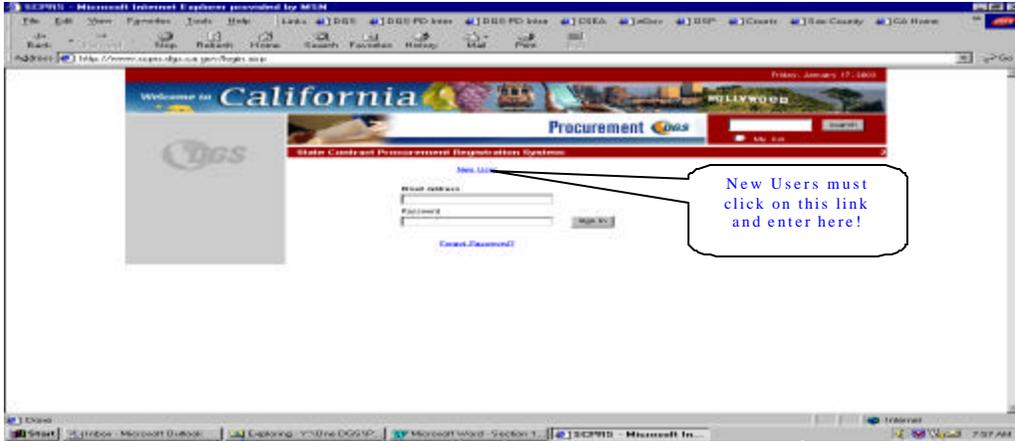
The SCPRS Introduction page will appear when a user types in the following address in their browser, <http://www.scprs.dgs.ca.gov>

The introduction screen shown below includes an introduction to SCPRS and links for the user to **Contact Us** or to **Log-In to SCPRS**.



Log-In Page

The log-in link on the introduction page takes the user to the screen shown below. This is the log-in screen that is the entry point for all users into the SCPRS system.



There is a box for the user to enter their email address and a box below that to enter their password. Please note that first-time users **must** click on the [New User](#) link above the email address box. **SCPRS assigns your first password.** Once you enter the system for the first time, the user can easily change their password to another of their choice.

Go to Section 1a to continue the **Introduction** part of the User Manual

Introduction (continued)

SCPRS

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New User Page

The screen below provides a box for the user to type in a **valid** State of California email address. This is the same one normally used during your daily work and the one assigned to you by your department. All email from the SCPRS uses this email address to communicate with the user. If a user has more than one email, please use the one where you wish to receive SCPRS emails.

Do not enter the password that you usually use at your office for your own department's automated systems - it will not work. You must request a new password from DGS that is generated by the SCPRS system. You can change it once you log-in.

This screen also provides a link to the [Email Administrator](#) that takes you to a blank email where you can send a message to the SCPRS administrator.

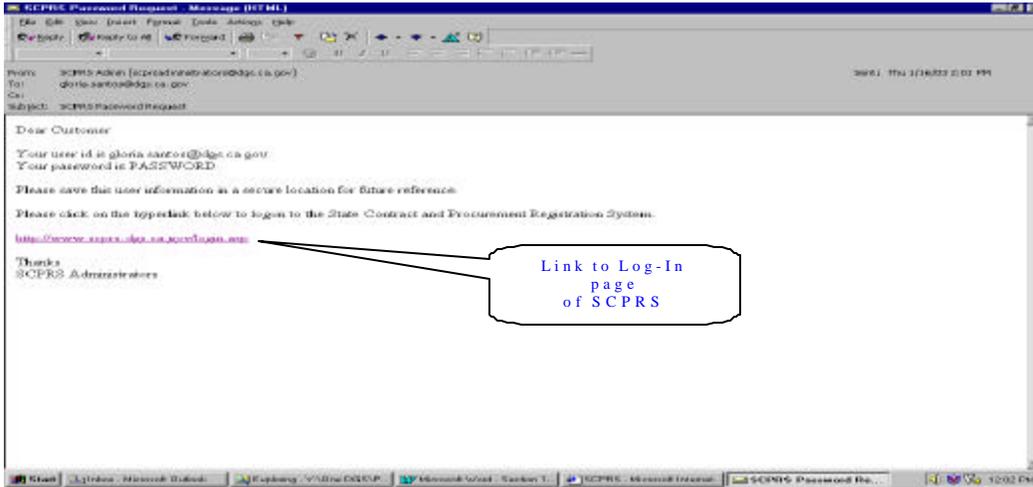
Initial Password link

After you have correctly entered your email address, click on the gray **Submit** button. Within seconds, you will receive a response in your usual email system, such as Outlook, GroupWise or Lotus Notes, from the SCPRS with your new first time password. All email sent to you from SCPRS arrives in your own email system based on the valid email address you supplied.

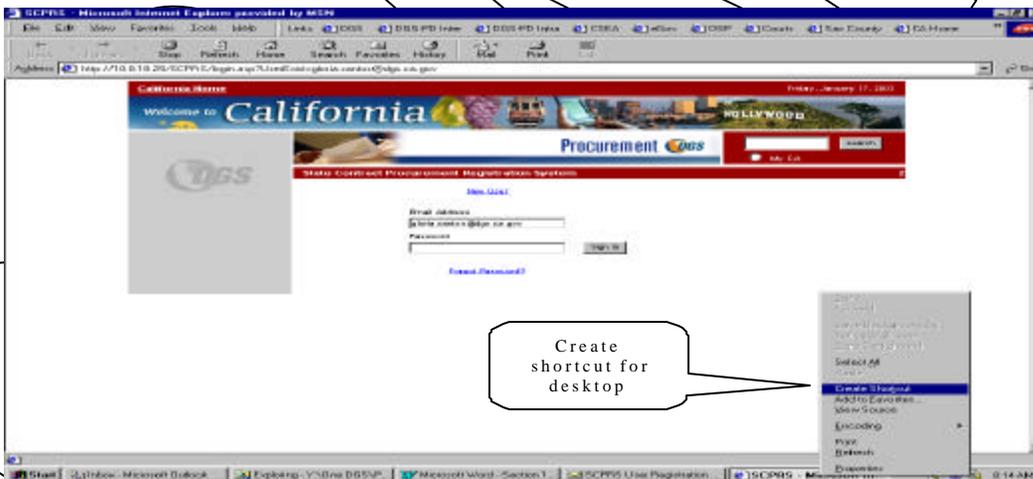


The first email received from SCPRS shown below includes the new password that allows you to log-in into the SCPRS. You may want to write down your password and save this email for future reference. The email also contains a link that leads you directly to the log-in screen of SCPRS (shown earlier in this document). Click on this link to take you to the SCPRS.

Note: Passwords are not case sensitive in the SCPRS.



For convenience, the user may want to add a shortcut on their desktop to provide a quick link to the SCPRS. At the log-in screen, click with the **right button** on top of your mouse. Select the **create shortcut** on the small menu that appears. A shortcut icon appears on your desktop screen and allows you to quickly return to the SCPRS system (see screen below for this menu that appears when you right-click your mouse). You can also add the SCPRS log-in page to your Favorites list on your browser. For specific training for your particular Browser software, please contact your department/agency's computer support or help desk staff.



Forget Password link

Another link on the log-in screen provides the user assistance if they forget their password. Click on the link to go to a screen that is similar to the 'Initial Password' screen. The user must enter the **same email address** used when they initially entered the system. Click on the gray **Submit** button and an email will be delivered to you with the last password you used.

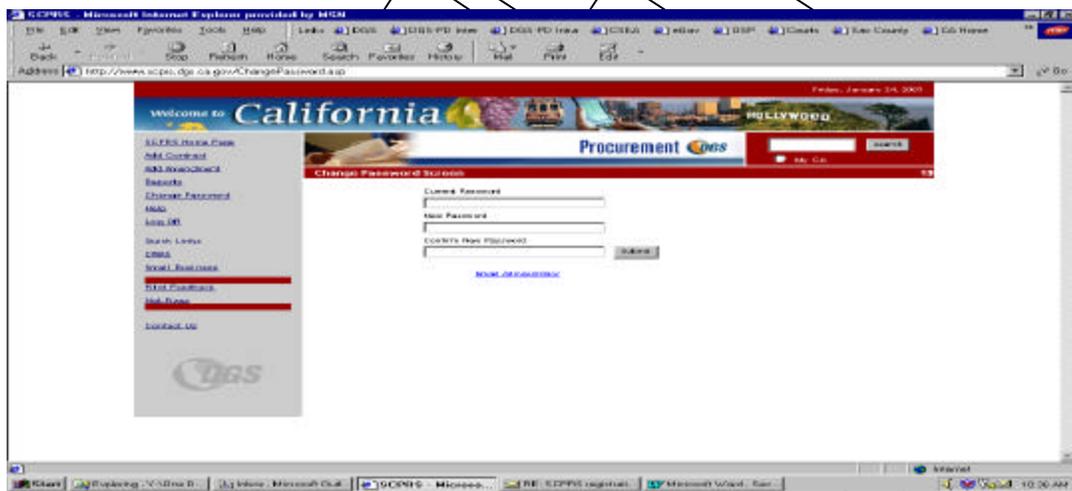
Note: If you do not remember your password, you must use this screen to receive assistance. Your password is inaccessible to SCPRS staff and this method provides a response from SCPRS in only seconds.

Log-In boxes

The first time you log-in SCPRS, enter your normal work email address and use the password that the SCPRS system sends you in your first email. Once in the system you can change your password.

Change Password

Click on the link for [Change Password](#) that is located in the left hand of the screen in the gray area. The following screen appears.



Type in your current password in the first box and your new password in the next two boxes. The new password must be at least 8 characters long. You may use all capital letters, all small letters, or a combination of both. You may also use a combination of numbers and letters. Do not use special characters such as # signs or % signs. Click on the gray **Submit** button. A *thank you* screen appears and states that your password has been changed and your new password has been emailed to you. This is confirmation that your password was changed.

Contact Us

The SCPRS provides a link called **Contact Us** that automatically opens a blank email message addressed to the SCPRS Administrator scprsadministrators@dgs.ca.gov. The **Contact Us** email link on the Introduction Page (and on the gray left side of each screen once logged into SCPRS) should be used for questions, concerns and requests for data changes. Enter information into the subject line, add your message, and include sufficient information for us to contact you. When you are finished entering your information, send your message to SCPRS as you would normally send any other email.

Sign-In and Welcome to SCPRS Page

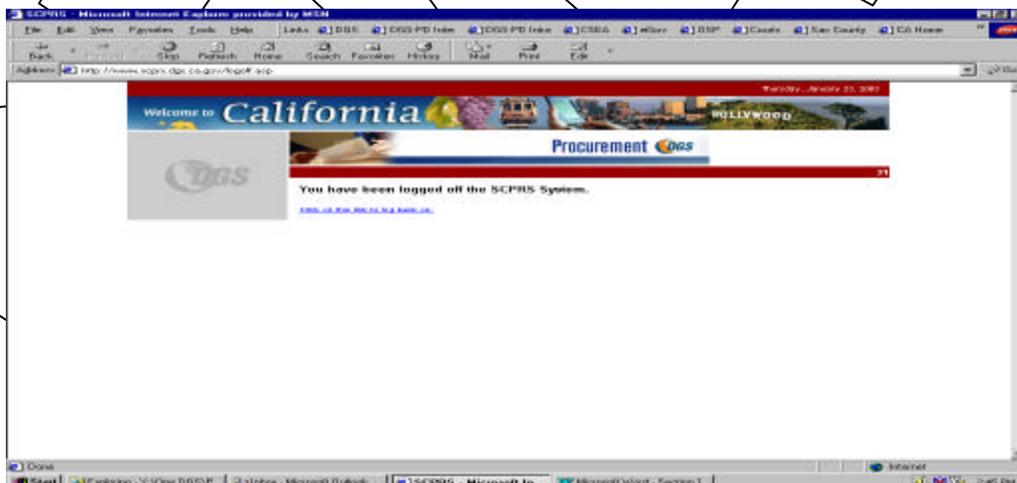
After a user successfully logs-in to the SCPRS by entering a valid email address and valid password, they will come to the first screen in the SCPRS as shown below. Information on this **Welcoming** page is contained in Section 2 of the Users Guide.



Note: *The system will automatically log you off after 20 minutes* if you have not actively been working in the system, i.e., if the system sits idle. When you do attempt to change a screen or add data, the system will inform you that you have been logged off and must log-in again (see screen below). Simply click on the [SCPRS Log-In](#) link and re-enter your ID and your password.

Log-Out

When you click on the log-out link located in the left gray area of the screen, you see the screen below.



Welcome SCPRS

Procurement Division, DGS

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Links on the Welcome Page

The first page you will see after successfully logging into the system is the Welcome screen shown below.



The gray area on the left of this screen and its links are available to the user throughout the SCPRS. From this gray area you can click on links to take you to a number of different places. Referring to the numbers in the comment boxes on the screen shown above, you can do the following from this first page:

1. The middle of the page provides links to allow the user to [Add Contract](#) or [Add Amendment](#) to a contract that has previously been entered into SCPRS. You can only add an amendment if the contract has already been entered into SCPRS. If the contract was never added, you will not be able to add an amendment. **You must first add a contract before you can add an amendment to that contract.** See Sections 3 and 4 for detailed information.
2. The left side of the page also contains links to add or amendment a contract. Additional links take you to the [Home Page](#) (this is the screen shown above), the [Reports](#) area, the [Change Password](#) screen, the [Help](#) manual and to [Log-Off](#).
3. *Quick Links* on the left side of the screen will take the user to Procurement's Division Internet pages for [CMAS](#) and [Small Business](#).
4. Also, there are links in the gray area to permit feedback from users to the SCPRS staff, to view announcements from SCPRS to the users; and to send an email to SCPRS staff with any questions, concerns, or comments.

Additional User Guide Sections

For additional information on the following links, go to the User Guide section indicated.

| | |
|-----------------|-----------|
| Add Contract | Section 3 |
| Add Amendment | Section 4 |
| Reports | Section 5 |
| Change Password | Section 1 |

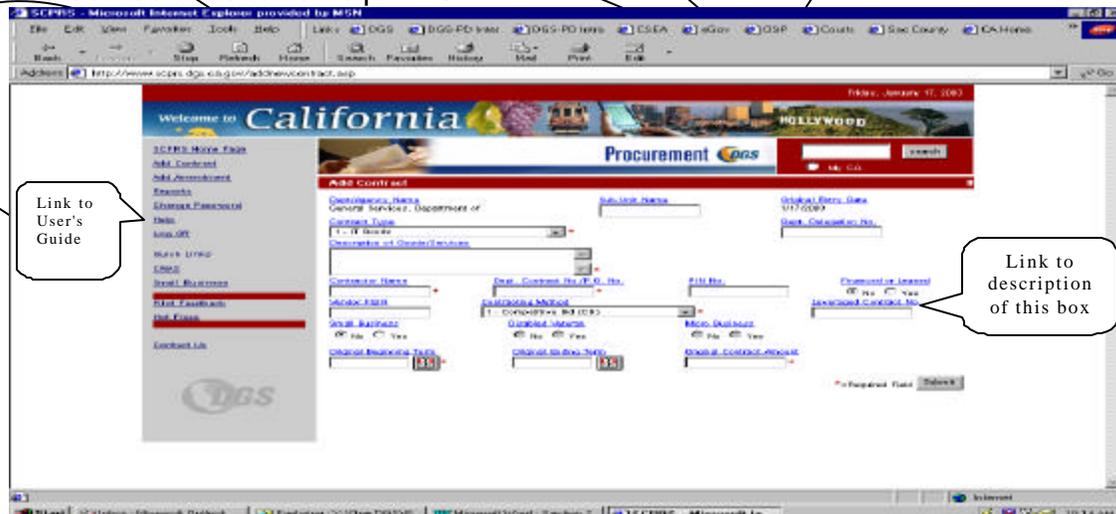
Help Assistance

There are a number of help sources in the SCPRS system to assist the user. If you have suggestions on improving the system, please send us an email. We welcome and encourage your input.

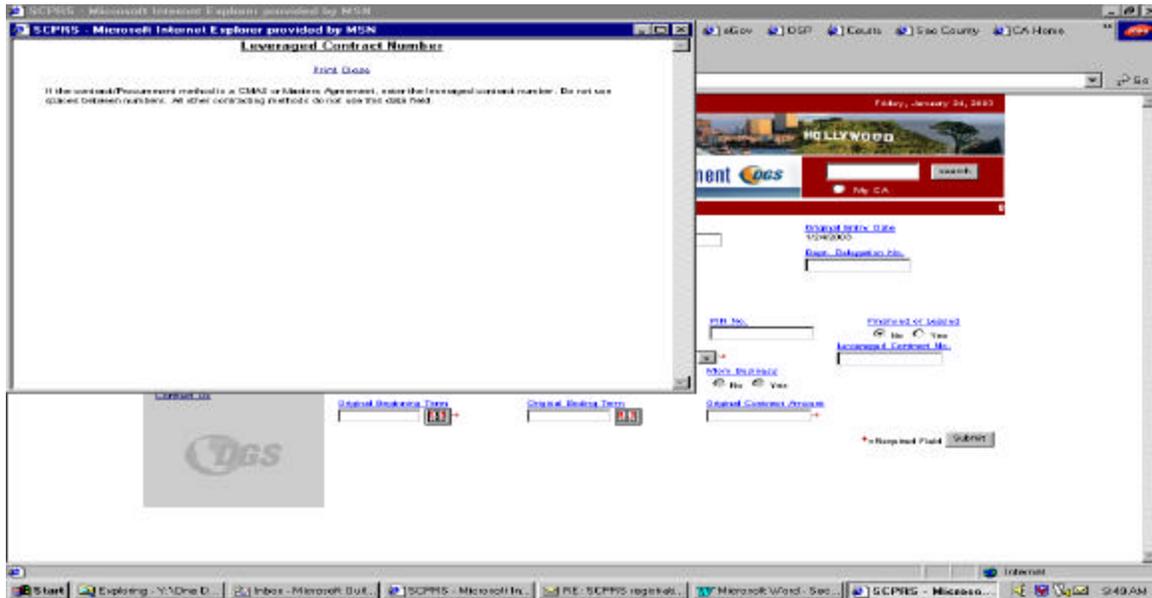
The user has the following help support options available.

- Links are provided in a number of different screens within SCPRS to allow the user to easily and quickly send an email to the SCPRS staff. There is also a [Contact Us](#) link in the gray area on the left of each screen throughout the system.
- *A User's Manual.* This manual can be viewed on screen in sections and can be printed in sections or in whole on your own printer. A click on the [Help](#) link will open a new page with the User's Manual table of contents. A click on any of the sections will open that section only. To print the manual, use your normal settings and method of printing from your Browser software. If you need further assistance, please contact your department/agency's computer support or Help Desk staff.
- Each screen will offer its own help information for each piece of data on that screen. There is a blue link directly above *each individual box* (see below). This link will open a window that contains a description of that box. Those boxes that include a drop down list of choices will also include a short description of each choice.

The screen below shows help links:



Below is an example of a description window for the **Leveraged Contract No.** box.



Note: To open a second help box in SCPMS, you must first click on the close this information window. If you do not close this window, you can still continue in the SCPMS screens, but the window remains open and may affect the performance of the system. Either click on the small 'X' in the far right top of the help window or click on the blue [Close](#) link near the top of the screen.

Go to Section 2a to continue the **Welcoming** part of the User Manual

Welcome (continued)

SCPRS

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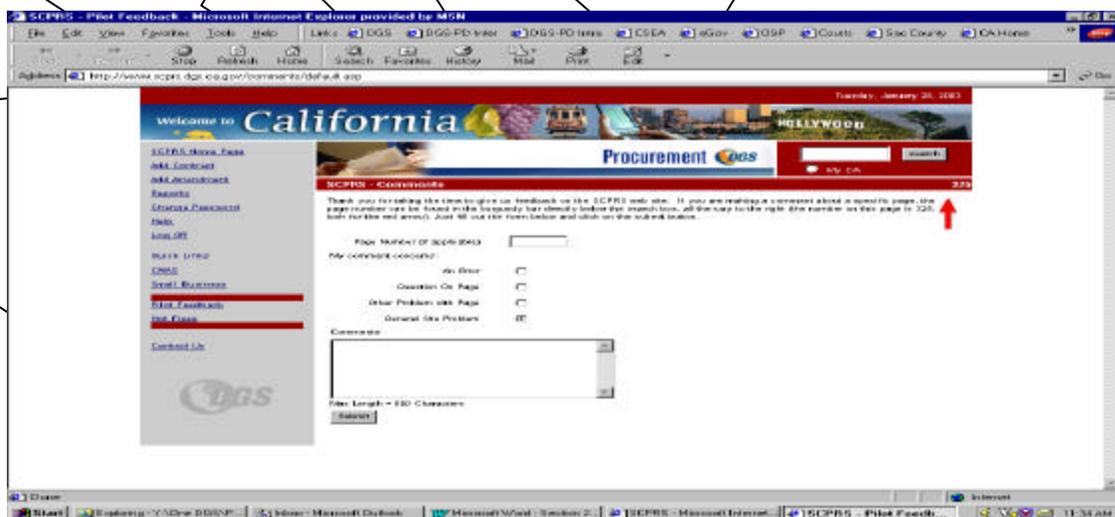
CMAS and Small Business links

If you click on the link for CMAS or Small Business in the gray area on the left side of the screen you will be taken to Procurement Division's separately maintained web site for these programs. You will not actually leave the SCPRS system, but the new web site will appear to sit on top of the SCPRS screen in a smaller window. This is to ensure that you do not have to log back into the SCPRS when you are done with these PD sites. Once at the CMAS or Small Business web sites, you can browse and search for any information that is normally available at those sites.

To return to SCPRS simply close the other window on top by clicking on the small 'X' in the gray square on the farthest top right corner in the blue area that borders the box. (Contact your department's computer support or Help Desk if you need further assistance with closing Browser windows.)

Feedback from Users - Change name?

The [Pilot Feedback](#) link on the left of the screen permits the user to submit easily and quickly, remarks, suggestions and difficulties to the SCPRS staff. The screen below provides a quick and easy means for the user to submit remarks, suggestion and problems to the SCPRS staff. Simply add a page number (if applicable); click on one of four topics; and type in your comments. Comments are limited to 500 characters, so be as concise as possible. Remember to click on the gray **Submit** button after you are done. A thank you screen will appear when your message was successfully sent. Click on the small 'X' in the top right corner to close this window. The SCPRS window sits underneath this feedback window.



Announcements (change name?)

This link will take you to a screen that displays announcements that are of interest to the user. Check this link often to stay informed on fixes, new features or important messages. To close this announcement window click on the gray **Back** button on the top left corner of the browser window. (Contact your department's computer support or Help Desk if you need further assistance with closing Browser windows.)



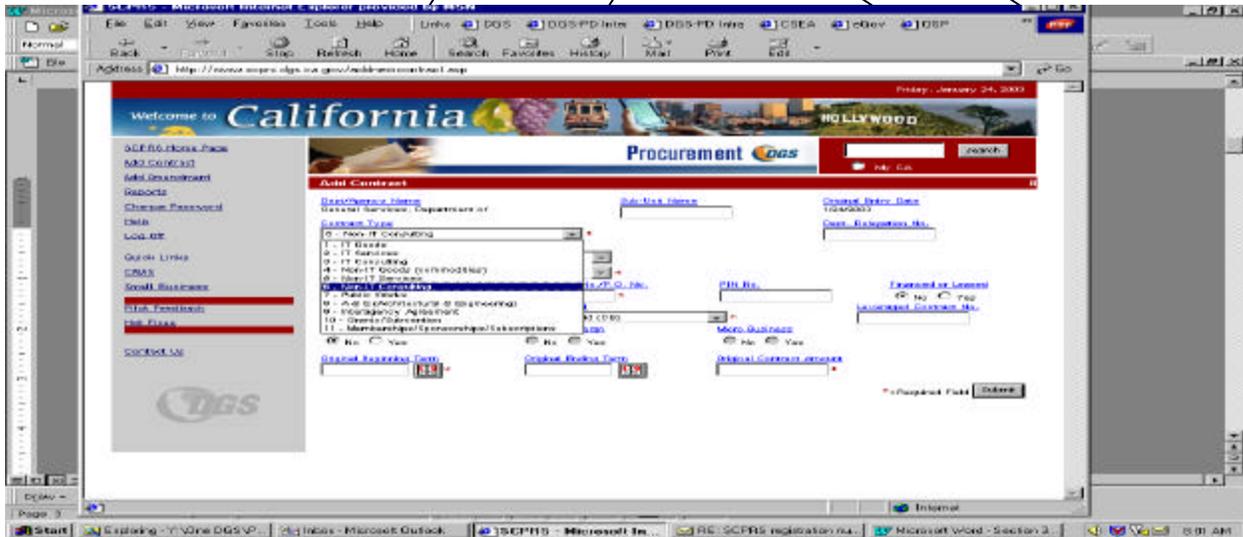
Original Entry Date - Defaults

Today's date is automatically entered for a new contract based on the SCPRS computer's system date. The data format is month, day, year order (MM/DD/YYYY). For example: 03/22/2003 is March 22, 2003.

Contract Type* - Required Field; pull-down box

This box permits the user to select from a list of choices for contract type. One of the choices **must** be selected. Unless a different type is selected from the drop down box, the default value of 1-IT Goods is automatically used for the Contract Type.

To select a different contract type than 1-IT Goods click on the small arrow in the gray box at the far right inside of the box to view a pull-down listing. The screen looks like that below. Move the mouse to the item to be selected and click on that item. The item should now appear in the Contract Type box.



A table of required fields for each Contract Type is included here and appears on the screen when the blue text [Contract Type](#) above the box is clicked.

| | Contract Types | Beginning Term | Ending Term | Delegation* |
|---|------------------------------------|-----------------------|--------------------|--------------------|
| 1 | IT Goods | Required | | Required |
| 2 | IT Services | Required | Required | Required |
| 3 | IT Consulting Services | Required | Required | Required |
| 4 | Non-IT Goods (Commodities) | Required | | Required |
| 5 | Non-IT Consulting Services | Required | Required | Required |
| 6 | Non-IT Services | Required | Required | Required |
| 7 | Public Works | Required | | Required |
| 8 | A & E (Architecture & Engineering) | Required** | | Required |
| 9 | Interagency Agreement | Required | Required | Required |

| | | | | |
|----|--|----------|----------|----------|
| 10 | Grants/Subvention Contract | Required | Required | Required |
| 11 | Memberships/Sponsorships/ Subscriptions | Required | Required | Required |

*All Contract Types require that something be entered into the Department Delegation Number field. If your department does not currently have a delegation number, simply enter the word - **Pilot**.

**Refer to the A&E definition below for information on Required Beginning Term.

Below is a detailed description of each item that is available for **Contract Type**. If further assistance is needed, please send an email to the SCPRS staff through the **Contact Us** link located in the gray area on the left of the screen.

Contract Type*

1 - IT Goods

Additional Required Fields: **Beginning Term; Delegation No.**

Is it a contract for the purchase of a Commodity or Goods? Does the contract have as its sole or main purpose the buying of some tangible items, such as equipment, parts, supplies, or other merchandise? If so, further consideration must be made to determine whether any services are being provided as well, and which has the predominant value to the contract; the items being purchased, or the services being rendered? The dollar value associated with the services provided, or the value of the goods being supplied, are factors that should be considered.

Example: A laptop computer would be considered an IT Goods whereas a copier would be considered a non-IT Good.

2 - IT Services

Additional Required Fields: **Beginning Term; Ending Term; Delegation No.**

As defined in GC 11702(e) "Information Technology" includes, but is not limited to, all electronic technology systems and services, automated information handling, system design and analysis, conversion of data, computer programming, information storage and retrieval, telecommunications which include voice, video, and data communications, requisite system controls, simulation, electronic commerce, and all related interactions between people and machines.

3 - IT Consulting

Additional Required Fields: **Beginning Term; Ending Term; Delegation No.**

With respect to Information Technology as described in the State Contracting Manual § 1.05:

Is it a Consulting Services Contract? Does the contract have as its sole or primary purpose some type of recommendation, or product of the mind? Are the

unique knowledge of the individual and intellectual abilities of critical importance to the success of the contract?

4 - Non-IT Goods (commodities)

Additional Required Fields: ***Beginning Term; Delegation No.***

As described in PCC § 10290 "Goods" means all types of tangible personal property, including material, supplies, and equipment.

As Described in the State Contracting Manual § 1.05:

Is it a contract for the purchase of a Commodity or Goods? Does the contract have as its sole or main purpose the buying of some tangible items, such as equipment, parts, supplies, or other merchandise? If so, further consideration must be made to determine whether any services are being provided as well, and which has the predominant value to the contract; the items being purchased, or the services being rendered? The dollar value associated with the services provided, or the value of the goods being supplied are factors that should be considered. Example: A contract for painting can include purchase of the paint, but the main value of the contract is for the application of the paint. This would be a services contract.

5 - Non-IT Services

Additional Required Fields: ***Beginning Term; Ending Term; Delegation No.***

As defined in the State Contracting Manual § 1.05:

Is it a Contract for non-I/T services? Does the contract have as its sole or primary purpose providing non-I/T services? Services contracts are those that have someone doing something. Many Service Contracts are easily identified, e.g. waste removal services, cleaning services, etc. However, some Services contracts are more difficult to determine, especially when they involve other disciplines as well. Example: A contract for carpeting may involve purchase of carpet (commodity) as well as removal of old carpet and pad (Service), and installation of new carpet and pad (Service). The determining factor should be what is the primary focus of the contract and expertise of the contractor.

Purchase of the item, or proper installation?

6 - Non-IT Consulting

Additional Required Fields: ***Beginning Term; Ending Term; Delegation No.***

As defined in Public Contracting Code: PCC§ 10335.5. (a) "Consulting services contract," as used in this article, means services that do all of the following:

- (1) Are of an advisory nature.
- (2) Provide a recommended course of action or personal expertise.
- (3) Have an end product that is basically a transmittal of information either written or verbal and that is related to the governmental functions of state agency administration and management and program management or innovation.

(4) Are obtained by awarding a contract, a grant, or any other payment of funds for services of the above type.

The product may include anything from answers to specific questions to design of a system or plan, and includes workshops, seminars, retreats, and conferences for which paid expertise is retained by contract.

7 - Public Works

Additional Required Field: **Beginning Term; Delegation No.**

An Agreement for the erection, construction, alteration, repair, or improvement of any public structure, building, road, or other public improvement of any kind in accordance with PCC 1101 and SCM, Chapter 10, et al. Public Works contracts may have both amendments for administrative changes to the contract and change orders for work and product specification changes. Both amendments and change orders should be entered into the system as an Amendment.

Note: Please refer to **Add Amendment** in Section 4 of the User Guide for instructions to enter Public Works Contracts Change Order information into the SCPRS system and *important information* on the numbering of amendments in the SCPRS for Public Work contracts.

8 - A & E (Architectural & Engineering)

Additional Required Fields: **Beginning Term; Delegation No.**

Note: Enter the original beginning term of this contract. For contracts with no beginning date, enter the date of execution. The date of execution is the date of Office of Legal Services approval (if required), or the date of signature by the authorizing State Agency (if Office of Legal Services approval is not required due to delegation).

A&E (Architect And Engineering) Contracts: Contracts for the professional services of an architectural, landscape architectural, engineering, environmental, or land surveying nature as well as incidental services that members of these professions and those in their employ may logically and justifiably perform. Also includes construction management services provided by a licensed architect, registered engineer or licensed general contractor which meet the requirements of Section 4529.5 for management and supervision of work performed on state construction projects. Section 4529.5 requirements include construction project design review and evaluation, construction mobilization and supervision, bid evaluation, project scheduling, cost-benefit analysis, claims review and negotiation and general management and administration of a construction project.

9 - Interagency Agreement

Additional Required Fields: **Beginning Term; Ending Term; Delegation No.**

As described in the State Contracting Manual § 3.03:

- A. An interagency agreement (I/A) is a contract between two or more state agencies. (GC § 11256)
1. A contract with a California State University campus is always an I/A.
 2. A contract with a University of California campus (UC) may be either an I/A or a standard agreement, but the contract must follow the requirements for whichever type of contract is used. For example, if the UC agrees to calculate cost based upon the provisions in SAM §8752, then it is an I/A. Otherwise, it will be considered a standard agreement.
 3. I/As may not be used for contracts with campus foundations, the federal government, local entities, or other states.
- B. Special provisions apply:
1. I/As are exempt from advertising in the CSCR.
 2. I/As are exempt from competitive bidding.

Note: If the entity performing the service is using subcontracts or purchasing goods, those services and goods should be competitively bid. (Depending on the nature of the goods or services, agencies may be required to get a sole source exemption if subcontracts are not bid.)

3. I/As are not required to meet DVBE participation goals if the entity performing the services is using its own personnel.
4. I/As may provide for advancing of funds (GC §§ 11257 through 11263 and SAM §8758.1)
5. I/A's do not require the Child Support Certification.

C. Requirements are as follows:

1. An Interagency Agreement STD 13 or STD 213 must be used.
Note: An interagency agreement with invoice STD 13A is used only for the renting of equipment and supportive services (SAM § 3522.1; GC § 11256).
2. I/As shall include a provision that the charges have been or will be computed in accordance with state requirements as noted in SAM §§ 8752, and 8752.1 unless there is a legal reason for not doing so. Such a reason might be the transfer of federal funds. The reason should be noted.
3. I/As involving the expenditure of public funds in excess of \$10,000 shall contain a provision that the agreement is subject to the examination and audit of the State Auditor for a period of three years after final payment under the agreement (GC §8546.7).

4. DGS approval is required for I/As of \$50,000 and over unless the agency has a higher delegated authority. Once cumulative amendments to the I/A equal or exceed \$50,000 or the agency's delegated authority, the I/A must be submitted to DGS/OLS for approval (GC § 11256).

10 - Grants/Subvention

Additional Required Fields: **Beginning Term; Ending Term; Delegation No.**

Grant: To bestow or confer a benefit on another, with or without consideration. Grants provided by state agencies must be authorized by the Legislature. [SCM Glossary]

Subvention/local assistance: A contract financed out of the local assistance portion of the budget; includes agreements providing assistance to local governments and aid to the public directly or through an intermediary, such as a nonprofit corporation organized for that purpose. [SCM Glossary]

11 - Memberships/Sponsorships/Subscriptions

Additional Required Fields: **Beginning Term; Ending Term; Delegation No.**

Membership: Departmental memberships in professional organizations are considered and processed as a services agreement. Memberships in professional organizations for represented employees are governed by bargaining agreements and payment is by way of reimbursement; memberships in professional organizations for non-represented employees are governed by DPA rules and payment is by way of reimbursement.

Subscription agreement: Standard agreement used by state agencies to obtain services from a Master Services Agreement. [SCM Glossary proposed]

Dept. Delegation No

The Delegation Number identifies the specific type of delegated purchasing authority for which the department has been given authorization to acquire goods and/or IT goods and services. This field can hold up to 20 characters. There are no restrictions in this field, therefore dashes, spaces, numbers, letters, etc. are acceptable.

Note: All Contract Types require that something be entered into the Department Delegation Number field. If your department does not currently have a delegation number, simply enter the word - **Pilot**. This word is not case sensitive.

Use a Delegation Number:

- Goods Base Delegation Number - For the acquisition of goods valued at \$100 - \$25,000, and/or for goods valued at \$5,000 - \$99,999.99 when acquired under GC Section 14838.5.
- Information Technology (IT) Base Delegation Number - For the acquisition of IT goods and services valued to \$500,000.

- Expanded, Special, and One-Time Delegation Number - For the acquisition of goods and IT goods or services which exceed the base delegation limits.

Do Not Use a Delegation Number: Acquisitions for non-IT services may not be acquired under the department's delegated purchasing authority; therefore if entering into a non-IT "service" contract, leave this field blank.

The delegation number signifies that the department has been granted delegated purchasing authority by DGS-PD to make purchases as applicable to the specific type of delegated authority granted.

All purchase orders prepared using delegated purchasing authority **must** be prepared using the Contract/Delegation Purchase Order (CDPO) (Std. 65). The delegation number is entered in the "Contract/Delegation Number" box on the Std. 65.

- **Goods Base Delegation Number** - (example: 9-02-1234) Issued for the acquisition of materials, supplies, and equipment up to \$25,000 per transaction, or the department's delegated purchasing authority limit as specified in the department's Delegation Authority Approval Memorandum. If acquiring a purchase under GC 14838.5, departments may make purchases up to \$99,999.99 under their Goods Base Delegated Purchasing Authority. See Delegation Guidelines for Goods.
- **Information Technology (IT) Base Delegation Number** - (example: IT-123) Issued for the acquisition of information technology and telecommunications goods and services up to \$500,000 per transaction, or the department's delegated purchasing authority limit as specified in the department's Delegation Authority Approval Memorandum. See Delegation Guidelines for Information Technology.
- **Expanded Delegation Number** - (example: 9-02-9123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limits. An expanded delegation is a general expansion of authority with no restrictions on the type of goods a department can acquire. See Delegation Guidelines for Expanded Delegations.
- **Special Delegation Number** - (example: 9-02-9123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limits. A special delegation is generally for a specific type of goods or group of identified goods. See Delegation Guidelines for Special Delegations.
- **One-Time Delegation Number** - (example: DO-123) Issued for the acquisition of goods, information technology or telecommunications goods and services that exceed the base delegation limit, but the department is not seeking a special or expanded delegation. Generally, a procurement conducted under this type of delegation is reviewed and approved by PD before the contract is issued.

Description of Goods/Services* - Required Field

Describe the goods and or services related to this contract/procurement, i.e., if the contract is for services, describe briefly the contractor deliverables. Be as concise as possible and include key words that might later be used to search by.

Contractor Name* - Required Field

Enter the complete name of the contractor. **Do not abbreviate or use acronyms. Do not enter the Contractor's address or telephone number.**

Dept. Contract No./P.O. No. * - Required Field

The Contract or Purchase Order number is a unique identifier based on the awarding authority's numbering scheme. This number is the one your department/agency assigns to this transaction.

PIN No.

The PIN Number is the Department of General Services Procurement Information Network (PIN) number assigned by the Procurement Division for a specific contract.

Note: If the contract does not have a PIN number leave this field blank.

Financed or Leased

Yes or No buttons. Click on the **Yes** or **No** button to indicate if this contract/procurement is financed or leased.

If the user selects "**Yes**", that means that the contract requires Financing **or** Leasing.

If the user selects "**No**", that means the contract is **neither** Financed nor Leased.

Vendor FEIN

Enter the entire Federal Employer Identification Number (FEIN) or the entire Tax Identification or Social Security Number. This number **must** be a 9 digit numeric value with no formatting such as dashes (-) or periods (.) between the numbers. If the number is more or less than 9 digits and contains characters other than numbers, you will see a message stating that it must be 9 numeric digits with no formatting. You will not be able to enter this contract unless data is entered into this FEIN field.

This number provided to you by the vendor is confidential information. The only time the user will be able to see the entire number on the screen is when they are adding a new contract or a new amendment. All other SCPRS views will contain only the last 4 digits of the FEIN with an 'X' substituted for all other numbers.

[Go to Section 3a to continue the Add Contract part of the User Manual](#)

1 - Competitive Bid (CB)

As described in the State Contracting Manual § 5.08:

- A. Three competitive bids or proposals are required unless one of the following applies:
1. Emergency. The work or service is for the immediate preservation of the public health or welfare, or the safety or protection of state property (PCC §§ 1102 and **10340**).
 2. **The contract is exempt from being competitively bid as listed in SCM 5.80.**
 3. Sole source exemption. The Director of DGS has approved exemption from competitive bidding because the state's best interests are better served by exemption (SCM 5).
 4. Governmental agency contract. The contract is with another state, local, or federal agency or with the University of California, the California State University, or a California community college or any of their auxiliary organizations (PCC § **10340**).

Note: These contracts or interagency agreements cannot be used to circumvent or bypass the state's bidding requirements, SCM 1 and 3.

5. Community Based Rehabilitation Program (CRP). The exemption applies for workshops conducted in accordance with W&I Code §19404.
6. Services for which the State has entered into a master contract.
7. When the agency awarding the contract has advertised the contract in CSCR and has solicited all potential contractors known to the agency but has received less than three bids or proposals.

2 - Non-Competitive Bid (NCB)

A good/service/supplier that is documented as being the **only** good/service/supplier able to meet the specified goods or IT goods and services needs of a State department.

Information is also available in Management Memo 02-19 found at the Procurement Division's web site <http://www.dgs.ca.gov/pd> and from your DGS representative.

3 - Master Agreements (MA)

As described in the State Contracting Manual § 3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

- A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.
1. Master Agreements take advantage of the state's large buying power.

Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.

2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.
4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed \$100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

4 - CMAS

California Multiple Award Schedule (CMAS) – Orders issued against DGS/PD developed CMAS agreements.

The CMAS contracts are established using products, services and prices from already existing competitively assessed and cost compared multiple award contracts. The products, services and prices are primarily from the federal General Services Administration (GSA) multiple award schedule program Federal General Services Administration (GSA) but not exclusively. To these products, services and prices, we add California contract terms and conditions and procurement codes and policies and establish a totally independent California contract.

The contracts are utilized statewide by both California State and local government agencies under delegated authority from the Department of General Services. Agencies make best value purchasing decisions according to their own business needs such as price, warranty, and supplier performance.

As defined in Public Contracting Code: PCC 10290(j) "Multiple award schedule" (MAS) is an agreement established between the General Services Administration of the United States and certain suppliers to do business under specific prices, terms, and conditions for specified goods, information technology, or services.

5 - Emergency

Emergency is defined in PCC §1102 as "a sudden, unexpected occurrence that poses a clear and imminent danger, requiring immediate action to prevent or mitigate the loss or impairment of life, health, property, or essential public services."

6 - Statutorily Exempt

Contract exempt by statute. As described in Management Memo 02-19 Rev3 January 21, 2003:

Contracts Exempt by Statute - Attachment C

The following contracts may be awarded without advertising or competitive bidding subject to the restrictions noted. These categories are exempt by statute (many of these were formerly referenced in State Administrative Manual § 1233 and State Contracting Manual § 5.80). However, contracting/delegated authority is not exempt. Therefore, contracts exceeding your authority must still be submitted for approval by DGS; acquisitions exceeding your delegated authority must still be awarded by DGS.

1. Emergency contracts which are necessary for the immediate preservation of life or state property. Contracts issued as a result of an emergency may be entered into immediately without completion of the required paperwork for the processes required herein. However, such contracts are subject to otherwise applicable statutory approval requirements and the reporting requirements of the Management Memo. For the purpose of this paragraph, reporting consists of submission of an approved copy of the Notice of Contract Award (NCA).
2. Contracts for the work or services of a state, local or federal agency, the University of California, the California State University, a California community college, a foundation or auxiliary organization incorporated to support the universities and colleges, or a Joint Powers Agency. Note: Contracts entered into under this exemption are also exempt from any of the other restrictions imposed by MM 02-19 or the attachments thereto.
3. Goods and services for which the state has entered into a master agreement. Note: This is limited to those master contracts which have been competitively bid or which have been determined to be required for essential services and which have been established by a methodology that assures the state of a reasonable price for the goods/services offered. See the DGS Procurement web page at www.dgs.ca.gov/pd for a list of approved exempt contracts.
4. Subvention contracts (non-discretionary grants) with a private or nonprofit entity or local agency for the purpose of providing services to the public or

segments thereof. This exception applies only when services are being provided to the public and not specifically to a state agency. Note: Contracts entered into under this exemption are also exempt from any of the other restrictions imposed by MM 02-19 or the attachments thereto.

5. Maintenance agreements for equipment that is under documented warranty, or where there is only one authorized or qualified representative, or where there is only one distributor in the area for parts and services. Note: This exception applies only in circumstances where services to be provided are less than \$250,000.00; for services in excess of this amount, the guidelines regarding non-competitive bid contracts for \$250,000.00 or more apply.
6. Proprietary software maintenance and/or upgrade contracts. Note: This applies only to the maintenance and/or upgrades of existing proprietary software up to \$250,000.00 and only in circumstances where a competitive bid is not feasible. For software maintenance and/or upgrades of \$250,000.00 or more, approval of the Department Director (only), DGS and the Department of Finance is required.

For acquisitions of new proprietary software over \$5,000 where a competitive bid is not feasible, or where maintenance and/or upgrades of existing proprietary software will exceed \$250,000.00 the guidelines for non-competitive bid contracts apply.

If the department does not hold an information technology delegation from DGS/PD, then the guidelines for non-competitive bid contracts apply for all acquisitions, whether maintenance of existing software or new software.

7. Contracts for which only per diem and travel expenses are paid and there is no payment for services rendered. Note: Shall not exceed \$5,000.
8. Contracts solely for the purpose of obtaining expert witnesses for litigation. Note: Contracts entered into under this exemption are also exempt from any of the other restrictions imposed by MM 02-19 or the attachments thereto.
9. Contracts for legal defense, legal advice, or legal services by an attorney or the attorney's staff. Note: Contracts entered into under this exemption are also exempt from any of the other restrictions imposed by MM 02-19 or the attachments thereto.
10. Contracts for which services are specifically exempt by statute from the competitive bidding process. Note: Contracts entered into under this exemption are also exempt from any of the other restrictions imposed by MM 02-19 or the attachments thereto.

7 - Categorically Exempt

Contracts exempt by DGS policy. As described in Management Memo 02-19 Rev3 January 21, 2003:

Contracts Exempt by Policy - Attachment D

The following contracts may be awarded without advertising or competitive bidding subject to the restrictions noted. These categories are exempt based on a determination by DGS that competitive bidding is not feasible (many of these were formerly referenced in State Administrative Manual Section 1233 and State

Contracting Manual Section 5.80). However, contracting/delegated authority is not exempt. Therefore, contracts exceeding your authority must still be submitted for approval by DGS; acquisitions exceeding your delegated authority must still be awarded by DGS.

1. Refuse and/or sewage disposal contracts where there is no competition because they are the authorized franchise dealers providing services to a specific geographical area.
2. Medical care services with physicians, local community hospitals, medical groups (related offsite laboratory services are not included), and 911 emergency ambulance service calls;
3. Contracts with health maintenance organizations (HMOs) through a cooperative agreement with the Centers for Medicare and Medicaid Services (CMS) to pay monthly premium payments for medical/Medicare eligible members, where services are essential or necessary for health and safety.
4. Public entertainment contracts for state-sponsored fairs and expositions.
5. Contracts with business entities operating Community Based Rehabilitation Programs (CRP), which meet the criteria established by Welfare and Institutions Code Section 19404. Note: Exception does not apply to contracts justified pursuant to Government Code 19130(a).
6. Amendments to existing contracts under the same terms and the same or lower rates, where a protest or other legal action delays the award of a new contract. These amendments should only last during the period the protest or legal action is pending and a new contract can be executed, but in no case shall this exemption extend beyond six months.
7. Amendments to existing contracts which were originally competitively bid subject to the following restrictions:
 - a. Competitively bid contracts for *both* information technology and non-information technology, which were evaluated and awarded with options to extend for time or time and money may be amended consistent with the terms of the original contract providing for such extension(s) if such options were evaluated during the bid process.
 - b. Competitively bid contracts for *non-information technology* services which do not include options to extend may be amended as follows:
 - Exemption shall only apply to the first amendment.
 - Amendment shall add time only, not to exceed one year, and/or add not more than 30% of the original contract value, not to exceed \$250,000.
 - The original contract must have permitted the amendment.
8. Contracts for conference or meeting facilities, including room accommodations for conference attendees. Note: This exception applies only in circumstances where facilities to be provided are less than \$250,000; for facilities exceeding this amount, the guidelines regarding non-competitive bid contracts for \$250,000 or more apply.
9. Contracts for services under the Health Insurance Portability and Accountability Act (HIPAA) MSA shall be exempt from compliance with the

restrictions imposed by the Executive Order and Management Memo subject to compliance with the following requirements and limitations:

- Agencies must prepare their Statement of Work (SOW).
- Office of HIPAA Implementation (OHI) reviews and approves all SOWs to ensure the agency complied with their HIPAA work plan.
- For contracts less than \$500,000, agencies must obtain a minimum of three (3) written offers, including one from a small business/DVBE if available, from the HIPAA MSA suppliers in a given category and award to the contractor achieving the best value to the state.
- For contracts greater than \$500,000, agencies must obtain a minimum of six (6) written offers, including one from a small business/DVBE if available, from the HIPAA MSA suppliers in a given category and award to the contractor achieving the best value to the state.
- Contracts/amendments providing for a contract value greater than \$50,000 for non-IT services are subject to review and approval by DGS.
- Contracts/amendments providing for a contract value between \$500,000 and \$5 million for non-IT services are reviewed by OHI and approved by DGS.
- Contracts/amendments providing for a contract value between \$500,000 and \$5 million for IT services are reviewed by OHI and approved by DGS.
- Contracts/amendments providing for a contract value greater than \$5 million are reviewed by OHI and DGS and approved by the Department of Finance.

10. Amendments to the California Integrated Information Network (CIIN) Agreement (CNT-001) to add products and services defined as mandatory per Management Memo 97-01 and DOIT Directive 1999-01. These mandatory services are defined as Lineside, Voice Network, Data Services, and Billing Services.

11. Categories of contracts for the purchase of goods or services necessary to achieve program objectives in a timely manner, where the Department of General Services has determined in advance, in writing, that for a specific type of category of goods or services there is no viable competition, or that due to critical time requirements such competition cannot be completed by the exercise of reasonable efforts prior to the time such goods or services are required. Any individual order placed against a specified contract pursuant to this exemption that exceeds \$250,000 shall also require the approval of the Department of General Services and the Department of Finance.

12. Proprietary pharmaceuticals and proprietary vaccines for which there are no generic equivalents and for which the Department of General Services will enter into contracts/price agreements with either the manufacturer or distributor. This commodity will be for the proprietary pharmaceuticals, proprietary vaccines purchased for public health programs by the Department of Health Services, Proprietary Vaccines used by state, local and public agency governmental entities, federal contracts as described in the 1990

Sharing Act, Botulism Immune Globulin Program, and pharmaceuticals outlined in Senate Bill 1315. There will be no dollar limit on these acquisitions; master agreements will be established only by the Department of General Services for purchasing by state and local entities.

Miscellaneous:

In determining whether the acquisitions of a particular state agency is exempt from this Management Memo, the funding source for the acquisition shall be determinative, notwithstanding the fact that DGS may be the procuring entity.

8 - CB-GC 14838.5

Competitive Bid (CB) – Government Code 14838.5 – Awards made to California-certified small business/Disabled Veteran Business Enterprise contractors pursuant to GC 14838.5.

14838.5. (a) Notwithstanding the advertising, bidding, and protest provisions of Chapter 6 (commencing with Section 14825) of this **code** and Chapter 2 (commencing with Section 10290) and Chapter 3 (commencing with Section 12100) of Part 2 of Division 2 of the Public Contract **Code**, a state agency may award a contract for the acquisition of goods, services, or information technology that has an estimated value of greater than five thousand dollars (\$5,000), but less than one hundred thousand dollars (\$100,000), to a certified small business, including a microbusiness, or to a disabled veteran business enterprise, as long as the agency obtains price quotations from two or more certified small businesses, including microbusinesses, or from disabled veterans business enterprises. (b) In carrying out subdivision (a), state agencies shall consider a responsive offer timely received from a responsible certified small business, including a microbusiness, or from a disabled veteran business enterprise. (c) If the estimated cost to the state is less than five thousand dollars (\$5,000) for the acquisition of goods, services, or information technology, or a greater amount as administratively established by the director, a state agency shall obtain at least two price quotations from responsible suppliers whenever there is reason to believe a response from a single source is not a fair and reasonable price.

9 - CB-Formal

CB - Formal – Formal competition, based on the following:

- IT Goods and Services -- >\$500,000
- Non-IT Goods (Commodities) -- >\$25,000
- Non-IT Services -- >\$50,000

As described in the California Acquisitions Manual § 3.2.2.b.5:

A written solicitation, including either Information Technology (IT) model contract language or General Provisions, or a combination of the two, developed in

accordance with established practices for relatively high dollar, highly complex procurements and in accordance with statutory requirements.

10 - CB-Informal

CB – Informal – Informal competition, based on the following:

- IT Goods and Services -- <\$500,000
- Non-IT Goods (Commodities) -- <\$25,000
- Non-IT Services -- <\$50,000

As described in the State Contracting Manual, § 5.95:

When services are required and the dollar amount is below (specified above) agencies should conduct a market survey of vendors and have them submit unsealed price quotes. There is no limit on the number of vendors that may be solicited. This process may be done by telephone, writing, or fax.

As described in California Acquisitions Manual § 3.2.2.b.6:

A type of solicitation that can be conducted verbally (by telephone) or in writing and used for the purchase of goods (including information technology) or information technology services of relatively low value and complexity in accordance with statutory requirements.

11 - CB-Request for Qualifications (A&E)

Selection for professional services of A&E consultants must be on the basis of demonstrated competence and on the professional qualifications necessary for the satisfactory performance of the services required at a fair and reasonable price. The Request for Qualifications (RFQ) is the solicitation document that sets out the criteria for determining the best qualified professional for the project. The RFQ process is followed in accordance with SCM 11.05 and 11.06.

12 - NCB-One-Time Transaction - Bob French/Sandy Russell to respond

This would be a one-time purchase submitted through a purchase estimate to Department of General Services, Procurement.

13 - MA Pre-Qualification Agreements

Master Agreements (MA) – Pre-Qualification Agreements – Pre-Qualification Agreements awarded only by DGS-PD

As described in Management Memo 02-19 Rev3 January 21, 2003 page 2:

6. Master agreements using a Pre-qualified list of suppliers: Competition must be achieved when awarding contracts to a pre-qualified list of suppliers. To ensure that competition is achieved to the fullest extent possible, pre-qualified bidders on the master agreement must have an opportunity to compete. The ceiling on information technology master agreements is \$500,000. However, departments may request an exemption to this ceiling. The ordering department must have prior approval of DGS for an exemption to the \$500,000 limit. The exemption request must address how the

department intends to ensure effective competition to the fullest extent possible.

14 - MA Statewide Commodity Contracts

MA – Statewide Commodity Contracts – Orders issued against Statewide Commodity Contracts established by DGS-PD

As defined in Public Contracting Code: PCC §10290 "Statewide contract" means a contract awarded by the Office of Procurement to one or more suppliers for the acquisition of specified goods for a period of time, at a price, and in an amount set forth in the contract.

15 - MA State Price Schedule

MA – Statewide Price Schedule – Orders issued against Statewide Price Schedules established by DGS-PD

As defined in Public Contracting Code: PCC § 10290:

"Price schedule" means an agreement between the Office of Procurement and a supplier under which the supplier agrees to accept orders from the office or a state agency for specified goods at set prices for a specified period of time but which does not obligate the office or state agencies to contract for the specified goods from the supplier.

16 - MA Master Service Agreement

MA – Master Service Agreement – Orders issued against Master Service Agreements established by DGS-PD

As described in the State Contracting Manual § 3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.

1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.
2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that

particular Master Agreement.

4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed \$100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

- B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

17 - MA Master Rental Agreement

MA – Master Rental Agreement – Orders issued against Master Rental Agreements established by DGS-PD

Same benefits of a Master Service Agreement (repeated below), however a Master Rental Agreement generally includes the product, lease term options (i.e. 12 months, 24, months...) maintenance service and warranty.

As described in the State Contracting Manual §3.04:

There are two types of generally acceptable master agreements; statewide and intra-agency.

- A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.
 1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.
 2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
 3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.

4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed \$100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

- B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

18 - MA Master Purchase Agreement

MA – Master Purchase Agreement – Orders issued against Master Purchase Agreements established by DGS-PD

As described in the State Contracting Manual § 3.04:

There are two types of generally acceptable master agreements: statewide and intra-agency.

- A. Statewide master agreements are contracts bid by DGS for services and consulting services that are used by many departments.

1. Master Agreements take advantage of the state's large buying power. Prices are often less than those a single agency could obtain on its own. Any state agency can use the statewide Master Agreements through the use of a subscription agreement, typically using a Standard Agreement Form.
2. Master Agreements take care of the bidding process and other administrative details. Depending on the particular agreement, Civil Service justification (GC §19130), and DVBE goals may or may not have been dealt with.
3. Master Agreements allow an agency to obtain needed services quickly and easily, avoiding the delay and uncertainty of the bid process. Some Master Agreements, especially those with multiple vendors, have User Guides that explain how the contracts are to be used. User Guides for different agreements have varying requirements. It is the responsibility of the using agency to follow the requirements in the User Guide for that particular Master Agreement.
4. Some subscription contracts to Master Agreements developed by the Department of Personnel Administration and the Procurement Division, DGS, cannot exceed \$100,000. Before developing a subscription contract, check with the Master Agreement Contract Manager.

Note: In rare instances DGS has given authority to another agency to bid and supervise a Master Agreement.

B. Intra-agency master agreements are contracts let by an agency for the use of the divisions of that agency. Intra-agency master agreements may differ from agency to agency, depending on program needs and statutory authority. Any agency wishing to enter into such a master agreement should discuss the agreement with its DGS/OLS attorney.

19 - A&E G.C. 4525

Qualification based contracts for Architectural and Engineering Services which are selected in accordance with the provisions of Govt. Code 4525 and State Contracting Manual, Chapter 11, et al. These services obtained through a Request for Qualification (RFQ) process to ensure the most qualified professional services are obtained by the State. The RFQ process is used to evaluate and select based upon qualifications and experience, then negotiate fees and scope of work in order to award the contract.

Leveraged Contract No.

If the **Contracting Method** is a **CMAS or Masters**, a leveraged contract number must be entered. All other contracting methods do not use a leveraged contract number. This field can hold up to 20 characters. Dashes, spaces, numbers, letters, etc. are acceptable.

Small Business

Yes or No button. Defaults to **No**. Use the **Yes** or **No** button to indicate if this is a **Certified Small Business** vendor.

Disabled Veteran (not available at this time)

Yes or No button.

Micro Business (not available at this time)

Yes or No button.

Original Beginning-Term* - Required Field; quick select calendar next to box
Enter the original beginning term of this contract. This date may differ from the Date of Entry of Original Contract.

Original Ending Term - Quick select calendar next to box
Enter the original ending term of the contract. This is not the date resulting from extensions due to amendments to the original contract. For certain contract types, no entry will be required in this data field.

Original Contract Amount* - Required Field

Enter the amount of the original contract. This should **not** include amounts resulting from amendments to the original contract.

It is not necessary to add a dollar sign. If cents are omitted, the SCPRS will assume 2 digit zeros. If cents are included in the amount, they must be preceded with a dot, for example 2500.56. **(include instructions on Tax issue)**

The user **must** click on the gray **Submit** button in order for the data to be entered into the system and for the generation of a SCPRS Registration Number for this contract. You **must** have a registration number for each contract.

Note: If you were in the process of adding contract or amendment information and had not clicked on the gray **Submit** button before you logged out of the system, the data was not saved and needs to be re-entered.

Once the required information is submitted, the system issues a SCPRS registration number. The user is notified by a web receipt on the screen and by an email receipt. The SCPRS registration number has the following format:

4 digit numeric organizational number from Department of Finance plus a
2 digit numeric Contract Type plus a
4 digit numeric date in the order of Month Day Year plus a
Sequential Number assigned by SCPRS.

The 4 digit numeric organization codes are assigned and maintained by the Department of Finance (DOF). Further information about the DOF codes and their uses are available at <http://www.dof.ca.gov/html/calstars/ucm.htm>. The second bullet near the bottom of the DOF page provides a link to alphabetical, numerically, or structural listings of the organization codes.

Example: 1770**10**0902**100** (bold type is not present in real number)
1770 - DGS' organization code
10 - Contract Type (the system will use the same contract type number that was selected earlier by the user for the Contract Type field)
0902 - September 2002
Sequential Number - **100**

Once a contract has been registered, the user can add amendments to the parent contract. Each contract amendment is issued a number. A period and the amendment number will be added to the parent contract number. Example of amendment 1 for the above contract: 1770100902100.1

This SCPRS registration number is a very important identifier for this contract and should be noted by the user for future use.

Add Amendment SCPRS

Procurement Division, DGS
DATE

When you click on the link identified as **Add Amendment** you see the Add Amendment Menu screen shown below. *Please be aware that you are only allowed to view and work on your own department/agency's contracts.*



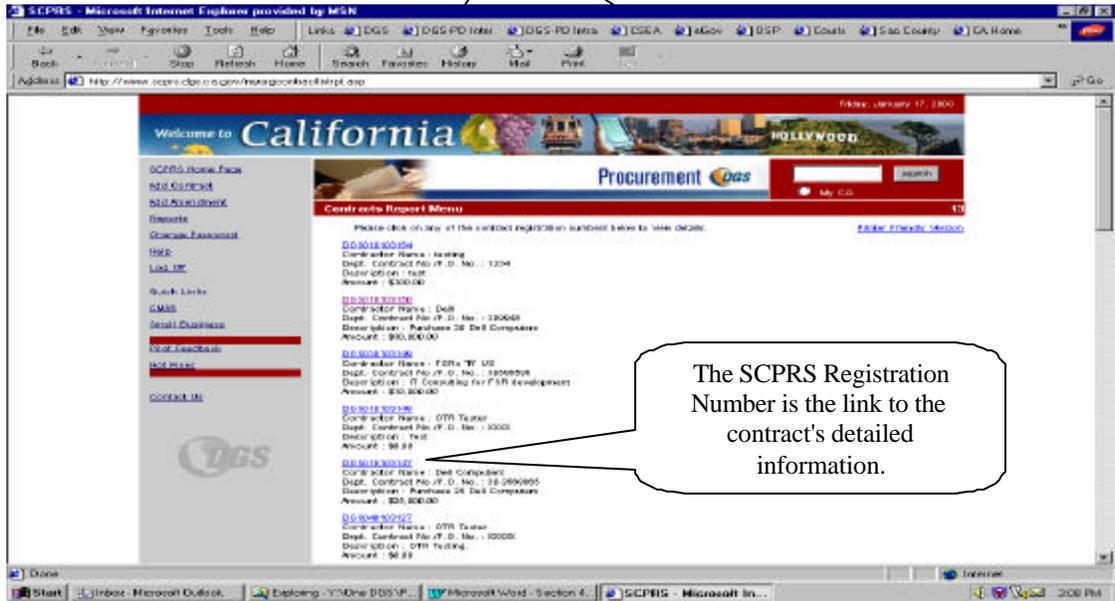
Searching for Contracts

There are number of ways to retrieve a previously entered contract.

1. Enter any part of the SCPRS Contract Registration Number into the box. Click on the gray **Search** button below the box. This is the unique number assigned by the SCPRS when a contract is first entered. Any part of the number, such as 4-digit organization number, type or date will return those contracts that match your entry. (See Section 3 of the Users Guide for more information on the SCPRS registration number.) If the number is invalid, the SCPRS will ask you to enter another number.
2. Enter description, vendor name or word that might be found in the description box of the original contract. Click on the gray **Search** button below the box. If the search term was not found, the SCPRS tells you to enter a valid search term.
3. Select one of the items on the drop down box for Contract Type. Click on the gray **Search** button on the right of the box.
4. Select one of the items on the drop down box for Contracting Method. Click on the gray **Search** button below the box.

- Click on **List all for my Organization** gray button at the bottom of the page and the following screen appears with all your department/agency's contracts in order of their SCPRS registration number.

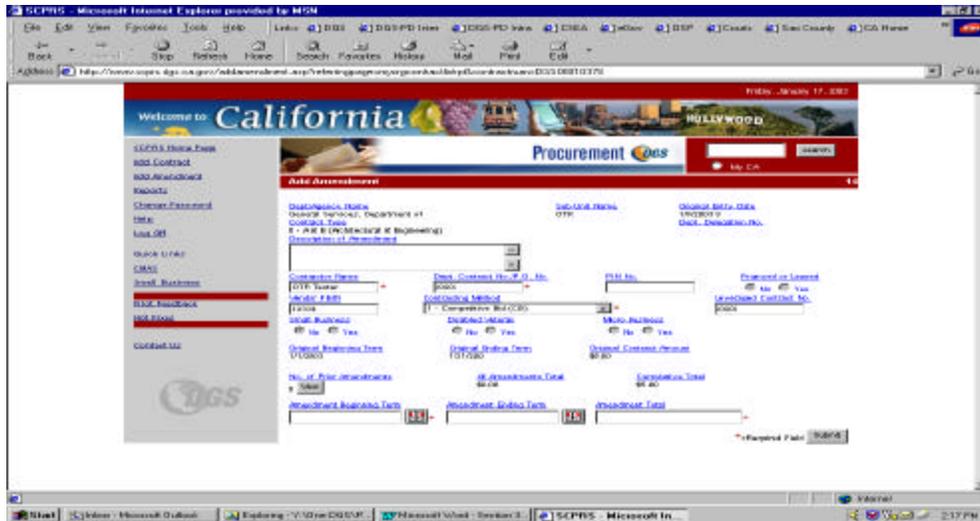
If your search identified contracts in the system, the screen below appears and lists pertinent information for each match.



Each contract listed on the screen above includes the following pieces of information:

- SCPRS Registration No.:** Generated by SCPRS and created when the contract is first entered into SCPRS.
- Contract Name:** Provided by the user.
- Dept. Contract No./P.O. No.:** Provided by the user.
- Description:** Provided by the user.
- Amount:** **This is the Initial contract amount and does NOT include any amended dollars.**

Once you have identified the contract to be amended, click on the registration number (in blue) on the first line of contract information (see screen above). This link takes you to the **Add Amendment** page for that contract (see below).



Note: Searching for contract information through the **Add Amendment** page gives you a different screen than if you searched for the same contract in the **Reports** page. See Section 5 of the Users Guide for details on reporting.

Changing Previously Entered Data

Many of the boxes on the **Add Amendment** page already contain information entered when the original contract was added to the system. Some of the boxes allow changes to this earlier data and some do not. If you need to edit or change data of a previously entered contract or earlier amendment and the screen does not permit you to change that item, you **must contact SCPRS staff** who will do it for you.

When data previously entered with the original contract is changed in an amendment, the original contract data will not change. Only the data of that particular amendment will show the changed information. When additional amendments are added, the default data for this new amendment will always be that initial contract's data.

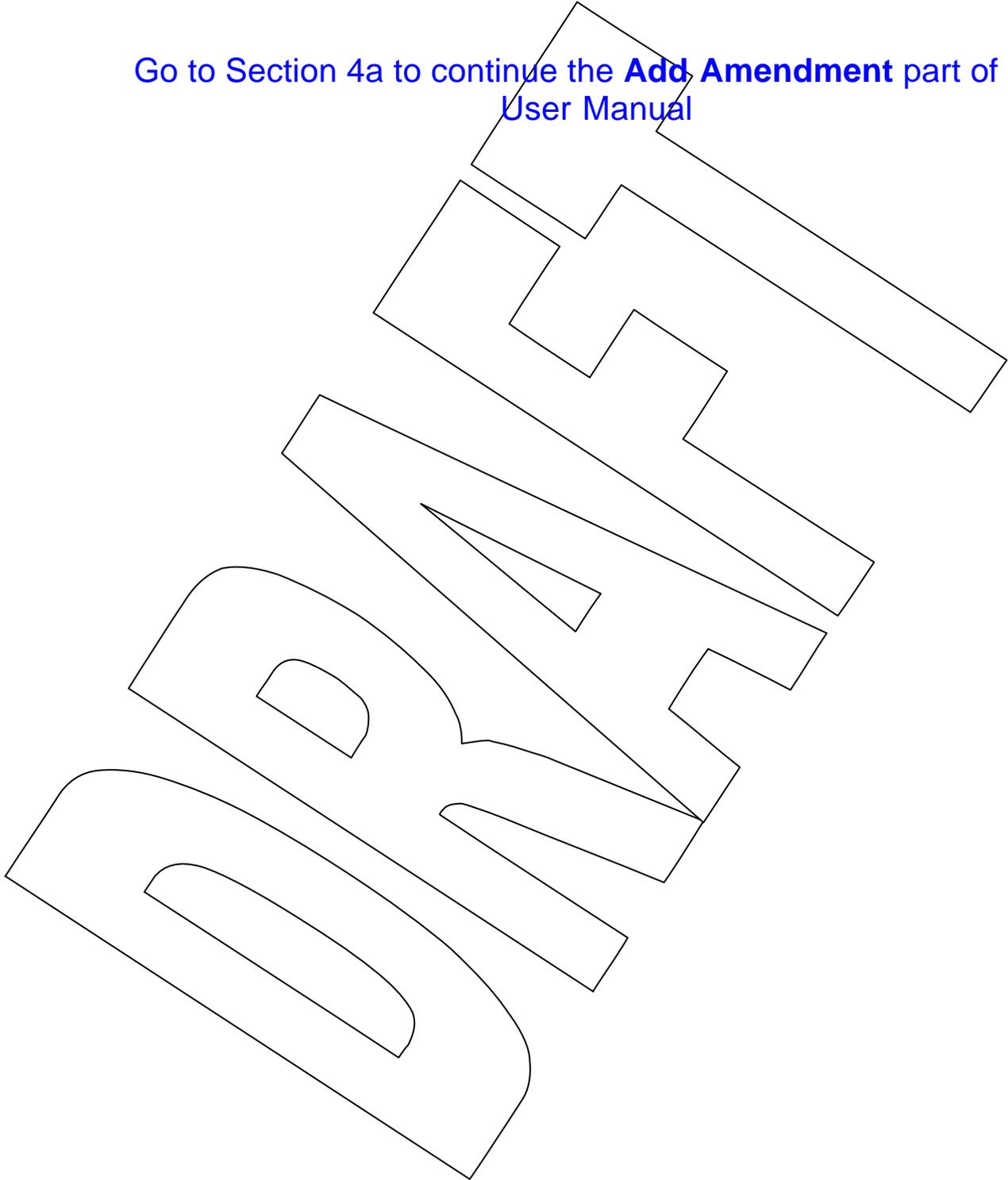
Public Works Contract Type and Change Orders

A Change Order is a written order issued by the State which is used to determine adjustments in the contract based on 1) a change in the work, 2) the amount of the adjustment in the Contract amount, and 3) the extent of the adjustment in contract time. All information that is changed as a result of Change Orders should be reflected in SCPRS. Due to the nature and number of Change Orders, they may be put in batches and entered into the system with cumulative and/or final changes to reflect the current status of the contract at the time of entry. Batched means that more than one Change Order may be combined together and entered into the SCPRS as a single amendment.

Note: Change Orders may be batched and entered weekly/monthly/quarterly at the discretion of the entry State Agency. Each batch entry made into the system must reflect the numbering sequence or other identifiers of each Change Order in the **Description of Goods/Services** field.

The SCPRS **amendment number for Public Works contracts will not reflect** the numbers on change orders and amendments. The primary purpose in this version of the SCPRS is to capture significant information, such as dollars, scope or schedule adjustments, for change orders and amendments. More specific numbering will be addressed in future versions of the system.

[Go to Section 4a to continue the **Add Amendment** part of the User Manual](#)



Add Amendment (continued)

SCPRS

DATE

Add Amendment Fields

The following pages in the User's Guide address each box on the **Add Amendment** page. For those boxes that already contain data, detailed instructions and descriptions are available in the **Add Contract** Section 3 of the User's Manual and are not repeated here. The boxes discussed below are listed as they appear on the screen, starting at the top of the screen and going from left to right.

Boxes that have a red asterisk to their right are required fields and **must** contain data. If a required field does not contain data, you will get a message and the system will not allow you to continue when the gray **Submit** button on the bottom of the screen is clicked.

The first fields listed below show the data that was entered in the original contract and cannot be changed on this SCPRS screen by the user. *If any of this data needs to be changed, contact SCPRS.*

Dept/Agency Name

Sub-Unit Name

Original Entry Date

Contract Type

Dept. Delegation No.

Description of Amendment* - This field must contain new information relevant to the new amendment being added.

Note: If the amendment is a batch of Public Works Change Orders, indicate Amendment or Change Order Number(s) in this box - For Example, enter "Change Order Numbers 1-33".

Contractor Name* - Defaults to original contract value. Any changes are reflected only in the new amendment and not in the initial contract data.

Dept. Contract No./P.O. No. * - Defaults to original contract number. Any changes are reflected only in the new amendment and not in the initial contract data. If your department uses a numbering convention that identifies amendments, enter it in this box. This is your department's number. Subsequent amendments will still default to the original number entered with the original contract.

Note: The SCPRS registration number assigned by SCPRS identifies the amendment according to the SCPRS convention (see the end of Section 3, **Add Contract**). The SCPRS registration number is a different number than the **Dept.**

Contract No./P.O. No. In the SCPRS a period and the amendment number are added to the parent contract number for each contract amendment.

PIN No. - Defaults to original contract value. Any changes are reflected only in the new amendment and not in the initial contract data.

Financed or Leased - Defaults to original contract value. *If any of this data needs to be changed, contact SCPRS.*

Vendor FEIN - Defaults to original contract value. Any changes are reflected only in the new amendment and not in the initial contract data.

Contracting Method* - Defaults to original contract value. Any changes are reflected only in the new amendment and not in the initial contract data.

Leveraged Contract No. - Defaults to original contract value. Any changes are reflected only in the new amendment and not in the initial contract data.

Small Business - Defaults to original contract value. *If any of this data needs to be changed, contact SCPRS.*

Disabled Veteran - [Not available at this time.](#)

Micro Business - [Not available at this time.](#)

Original Beginning Term - Defaults to original contract value. *If any of this data needs to be changed, contact SCPRS.*

Original Ending Term - Defaults to original contract value. *If any of this data needs to be changed, contact SCPRS.*

Original Contract Amount - Defaults to original contract value. *If any of this data needs to be changed, contact SCPRS.*

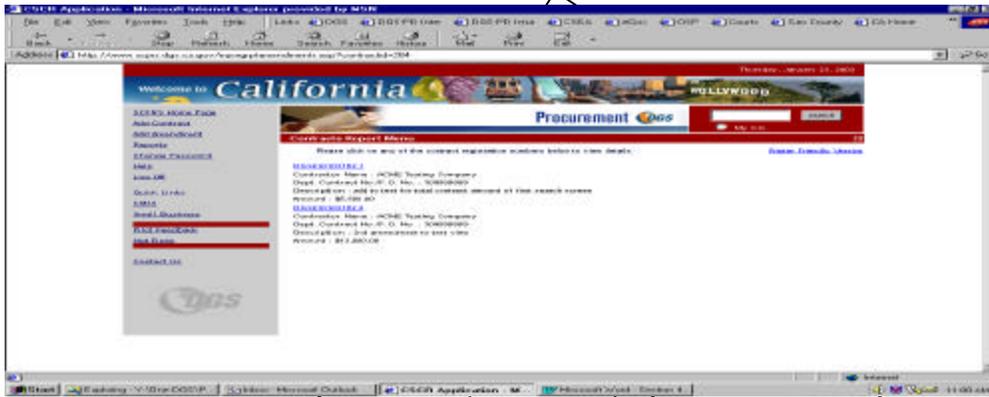
No. of Prior Amendments

The number of prior amendments that is calculated by SCPRS has a small gray button to its right called **View**. Click on the **View** button to see amendments previously added to this contract. The screen below appears. The example shows that there have been 2 different amendments added to this contract. Note that the last digit of the SCPRS registration number indicates the number of the amendment.

You may also click on the blue text on the right titled '[Printer Friendly Version](#)'. A window opens on top of the SCPRS screen with the same five lines of amendment information, but without the additional colored frames, background text or pictures. To print this view, click on the gray **Print** button on the menu on the top of the newly opened window. (If needed, please contact your department's computer services or

help desk staff for assistance with printing.) Click on the small 'X' in the far right top corner of this window to close the printer friendly version view.

Click on the blue SCPRS registration number on the first line of information of one of the amendments to select an individual amendment to view.



Once an amendment is selected to view, the screen below appears. This page is a 'read-only' view of the amendment information. You are not allowed to change any information yourself once the contract or amendment has been submitted to SCPRS, but must contact SCPRS staff to do the changes.



Note: To leave the amendment view screen shown above, click on the Browser's gray **Back** button that is in the upper left corner of your screen. If you click on the gray **View** button on the amendment view screen, you also return to the amendment summary listing. Click on the **Back** button again to return to the **Add Amendments** page.

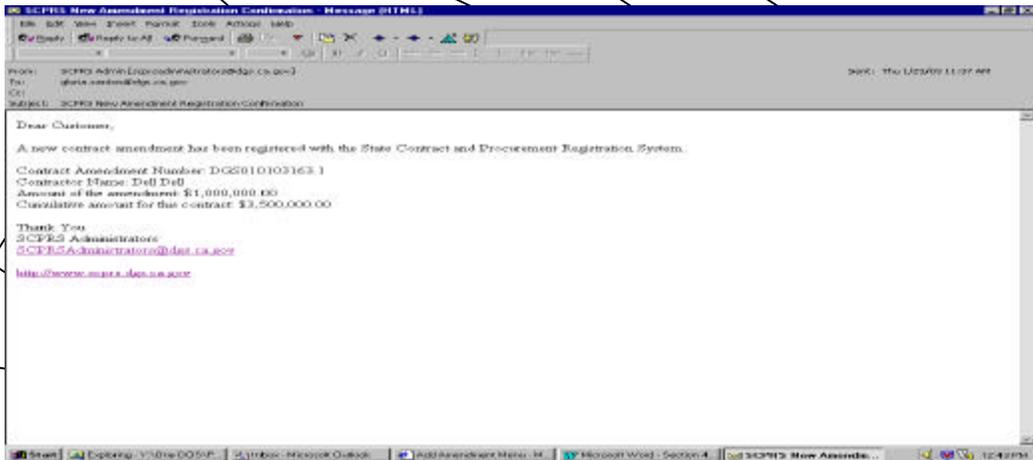
All Amendments Total - This total is automatically calculated by SCPRS based on all previously entered amendments. This total does **NOT include** initial contract dollar value.

Note: You **must** click on the **OK** button in the small box in order for the error message box to disappear and to be able to enter the missing data.

Once the data is successfully submitted, the screen below appears.



In addition the SCPRS sends you an email confirmation of the new amendment such as shown below.



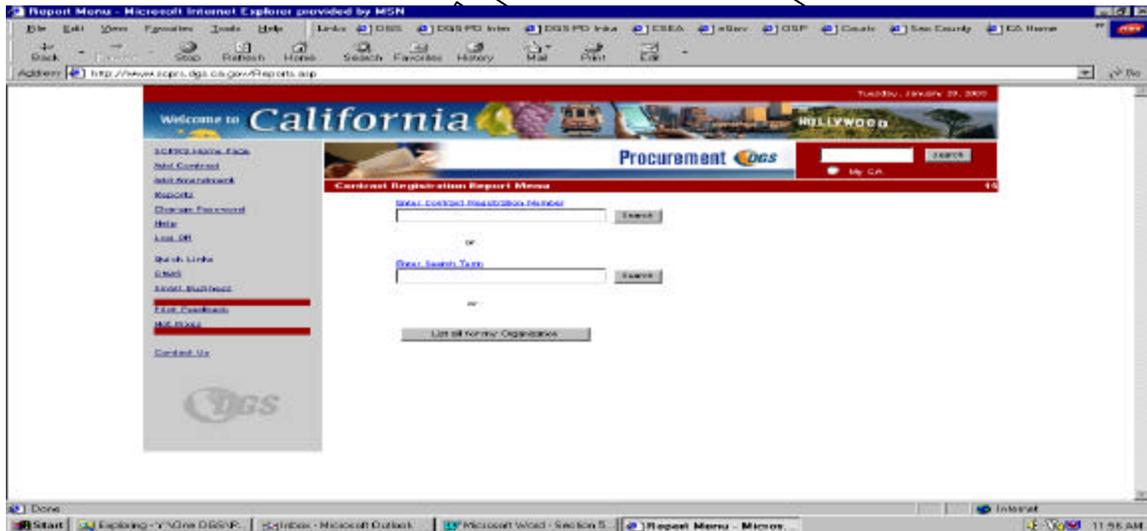
Note: If you were in the process of adding contract or amendment information and do not click on the gray **Submit** button **before** you log-out of the system or for any other reason, the data will not be saved and will need to be re-entered.

Reports SCPRS

Procurement Division, DGS

Date

When you click on the link identified as [Reports](#) you will see the Contract Registration Reports Menu screen shown below. *Please be aware that you will only be allowed to view and work on your own department/agency's contracts.*

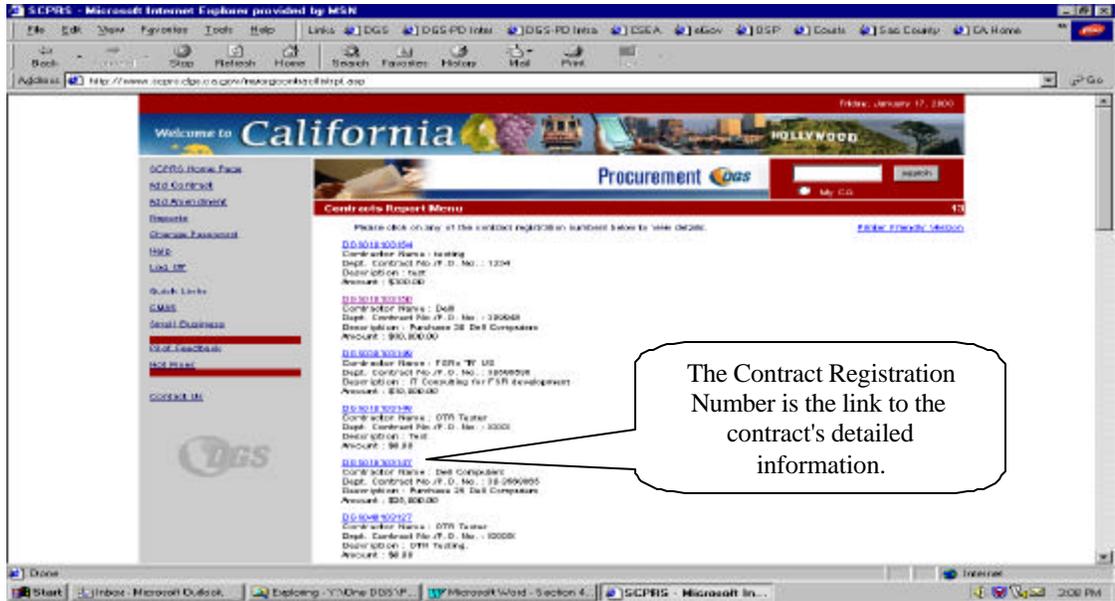


Searching for Contracts

The three ways to retrieve a previously entered contract are:

1. Enter any part of the SCPRS Contract Registration Number into the box. Click on the gray **Search** button below the box. This is the unique number assigned by the SCPRS when a contract is first entered. Any part of the number, such as 4-digit organization number, type or date will return those contracts that match your entry. (See Users Guide Section 3a for more information on the SCPRS registration number.) If the number is invalid, the SCPRS will ask you to enter another number. If a match is made with your search term, the screen below will appear that lists pertinent information for all contracts that match.
2. Enter description, vendor name or word used that might be found in the description box of the original contract. Click on the gray **Search** button below the box. If the search term was not found, the SCPRS will tell you to enter a valid search term. If a match is made with your search term, the screen below will appear that lists pertinent information for all contracts that match.
3. Click on **List all for my Organization** gray button at the bottom of the page and the following screen will appear with all your department/agency's contracts in order of their SCPRS registration number.

If your search identified contracts in the system, the screen below will appear that lists pertinent information for all those contracts.



Each contract listed on the screen above includes the following pieces of information:

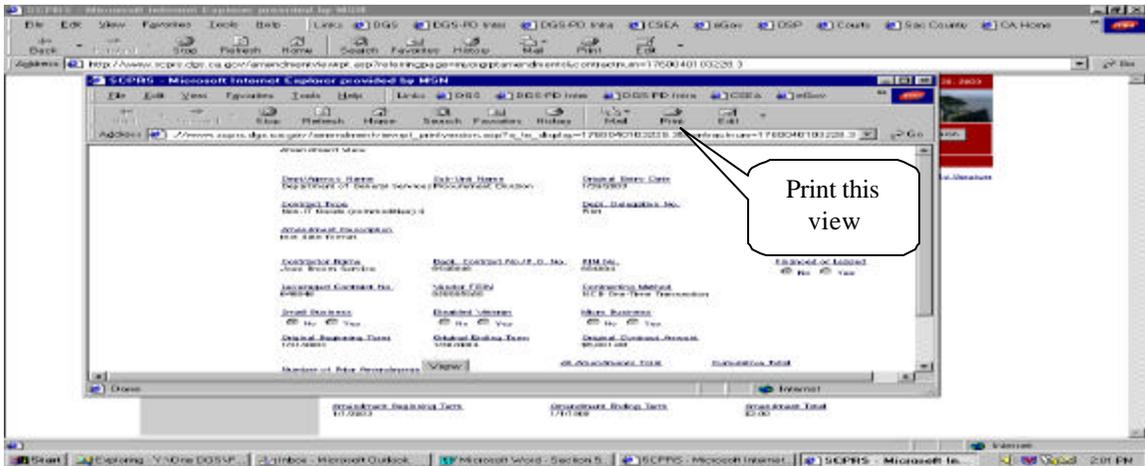
- SCPRS Registration No.: Generated by SCPRS and created when the contract is first entered into SCPRS.
- Contract Name: Provided by the user.
- Dept. Contract No./P.O. No.: Provided by the user.
- Description: Provided by the user.
- Amount: **This is the Initial contract amount and does NOT include any amended dollars.**

Once you have identified the contract to be amended, click on the registration number (in blue) on the first line of contract information (see screen above).

Finding and viewing contract or amendment information will be the same as that used in the **Add Amendment** section. Either click on the top blue line of the Registration Number of the contract's 5-line summary or click on a gray **View** button. A number of screens throughout the SCPRS will have a blue link that states [Printer Friendly Version](#) in the upper right side of the screen.

Printer Friendly Version

If you click on the blue link for the Printer Friendly Version, a new window will open that does not include the colors and additional text that is part of the state's web page standard. See below.



To print this view, click on the gray **Print** browser button that is on the top of the inside new window. (You can also use the print selection on the File Menu on the inside window.)

[Go to Section 5a to continue the Reports part of the User Manual](#)

Reports (continued) SCPRS DATE

In the **Reports** area of the SCPRS, you can print the following information. Note the [Printer Friendly Version](#) link on each screen discussed earlier.

1. A summary of all contracts that matched your search (*Contracts Report Menu*)



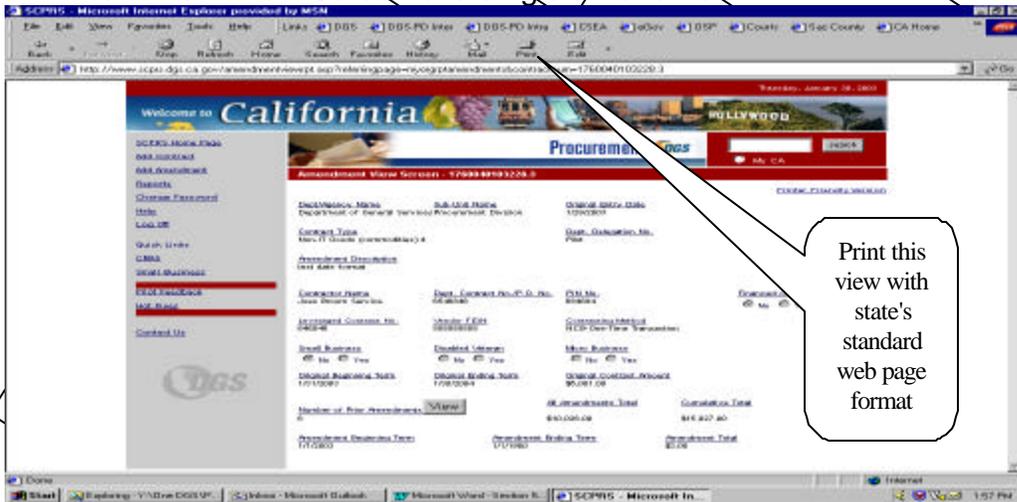
2. A *Contract View Screen* of a single Contract



3. A summary of all the amendments for that single Contract



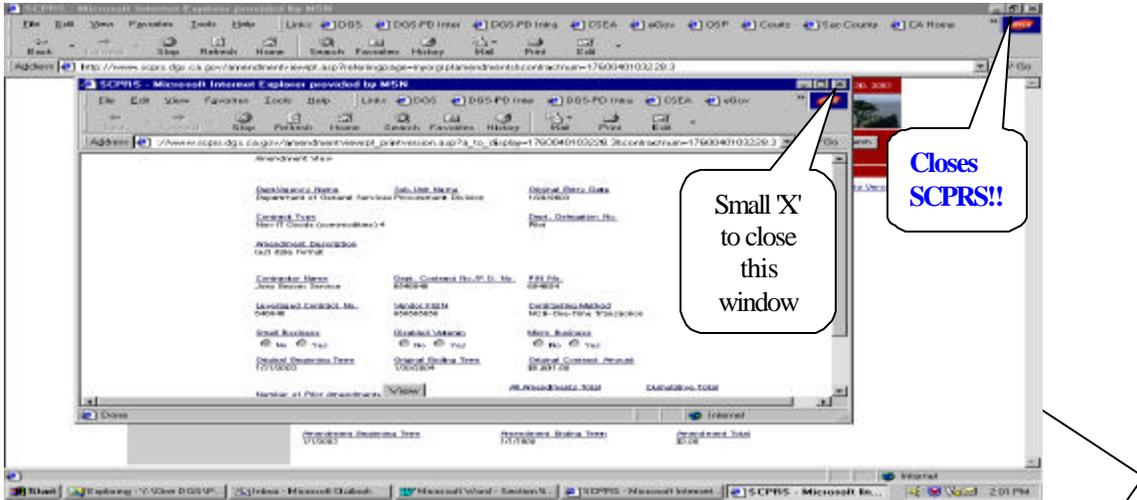
4. An Amendment View Screen of a single amendment



Print this view with state's standard web page format

Any of the above screens can be printed to your local printer by using your Browser's gray **Print** icon at the top of the window. The printed copy includes the text that is part of the State's standards for web pages

To close this screen, click on the small 'X' in the top right corner of the **inside** window. (You can also use the close selection on the File Menu on the inside window.) If you click on the 'X' in the outside window, you will close the SCPRS system and need to log-in again. See below.



(If you need further assistance in printing from your Browser contact your departments help desk staff.)

STOP